RESOURCING DANCE

AN ANALYSIS OF THE SUBSIDISED AUSTRALIAN DANCE SECTOR

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Other information supplemental to this report, including appendices, has been archived in the Australia Council library. To access this information, contact the Librarian: call 02 9215 9000 or 1800 226 912.

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Preface

The analysis

The objectives of this analysis are to gather and analyse information to provide:

- a clearer understanding of the subsidised dance sector in Australia
- a clearer understanding of the Australia Council's Dance Board's role and importance in the funding and policy landscape
- guidance to the Board to assist it in setting its priorities for expenditure and policy development over the next 3–5 years.

The sector

The infrastructure of the subsidised dance sector comprises primarily:

1. Funded companies
2. Independent choreographers and dancers
3. A small number of producers
4. The Ausdance network
5. Physical facilities—rehearsal and performance space

For this Analysis, combining data from the Australia Council with that from state and territory arts departments, a total of 58 funded dance companies have been identified.

Excluding the Major Performing Arts Board (MPAB) companies, the analysis includes 21 companies which enjoy sustained or regular funding from the Australia Council or a state government, supplemented by 32 companies which exist on a project basis—that is, they may be brought into existence temporarily to deliver specific projects.

Based on a combination of ABS figures and other sources, Professor David Throsby has estimated a total of approximately 1250 dancers and choreographers were practising professionals in Australia in 2002. There are likely to be a further 2500–3000 individuals employed as dance teachers.

Recommendations

The 25 recommendations are clustered in four themes:

1. Promoting individual talent
2. Maintaining a healthy dance ecology
3. Building audiences now and in the future
4. Encouraging cooperation and providing leadership

Many of the recommendations would require additional government funding. Detailed costings have not been prepared as part of this report; however, it is estimated that between $3 million and $5 million would be required from government sources to address the recommendations.

The report concludes with a commentary on the options which may be available if additional funding cannot be secured.

1. Brief and scope

The objectives of this analysis are to gather and analyse information to provide:

- a clearer understanding of the subsidised dance sector in Australia
- a clearer understanding of the Australia Council's Dance Board's role and importance in the funding and policy landscape
- guidance to the Board to assist it in setting its priorities for expenditure and policy development over the next 3–5 years.

The analysis addresses the role and effectiveness of the Dance Board of the Australia Council in the sector and its options for future action. The analysis is national in focus but limited to the subsidised dance sector. This is defined as those companies and individuals who have received at least one grant from the Australia Council or a state or territory arts funding agency in the last 10 years. A copy of the Terms of Reference for the Analysis is included at Appendix 1.

This report contains the following sections:

- Outline methodology
- An overview of the dance sector
- The life of a dancer: employment, training and career paths
- Selected dance company outputs and results
- Dance producers
- Funding for dance
- Dance funding and structures in other countries
- Summary of findings
- Recommendations

2. Outline methodology

Following initial briefing, the following steps were implemented:

1. Interviews and data collection from an agreed 12 consistently-funded companies, with financial and artistic outputs data gathered for the five years to 2001. Selected supplementary data was subsequently gathered for 2002. These companies were selected because of their consistent Australia Council funding during this period, enabling reliable comparison to be made, and because the companies represent a significant component of the Australian dance 'infrastructure' alongside the Major Performing Arts Board-funded (MPAB) dance companies.

2. Interviews and data collection from a broader sample of 13 project- or state-funded companies (and two producing venues), with financial and output data confined to 2001.

3. Interviews with 25 choreographers and dancers, straddling a range of experience from young/emerging artists to individuals with 20+ years' experience.

4. Interviews and funding data collection from each of the state and territory arts departments.

5. Interviews with selected key professionals in the dance sector.

6. Interviews with selected producers with experience of the dance sector.

7. Interviews with tertiary education sector representatives to gather data on programs, student numbers and trends.

8. Collection of Australia Council dance funding data for the last decade from the Dance Board, Aboriginal and Torres Strait Islander Board (ATSIAB), Major Performing Arts Board (MPAB), New Media Arts Board, Community Cultural Development Board (CCDB), and from the Audience and Market Development Division (AMD).

9. Review of ABS data on selected dance organisations.

10. Review of selected results from a recent survey of practising professional artists, undertaken by Professor David Throsby and Virginia Hollister, Macquarie University, for the Australia Council.

11. Information solicited from funding agencies in other selected countries.

12. Preparation of an interim report, collating data secured.

13. Preparation of a draft final report, and subsequently this final report.

Note: Throughout this report changes in the value of funding have been calculated in relation to prices at the start of the period under consideration. For example, based on a comparison of spending in 1993 and 2002, if Dance Board funding had increased in line with inflation the Board would have distributed $1.22 million more in 2002 (at 1993 prices).

2.1 Glossary

ABS	Australian Bureau of Statistics
AMD	Audience and Market Development Division of the Australia Council
ATSIAB	Aboriginal and Torres Strait Islander Board of the Australia Council
Audience development	Development of new audiences, or increased frequency of attendance, through strategic use of elements of the 'marketing mix': product, price, place and promotion
CCDB	Community Cultural Development Board of the Australia Council
Contemporary dance	Dance which is 'of our time' and 'of relevance to society today', either because of the ideas presented or because of the exploration of new forms and means of expression
DCITA	Department of Communications, Information Technology and the Arts
Emerging artists	Professional practising artists who are in the early stages of their career[1]
Independent choreographers and dancers	Artists choosing to work outside the framework of traditional company structures
MPAB	Major Performing Arts Board of the Australia Council
Playing Australia	Australian Government scheme to support national/inter-state touring of the performing arts, administered through DCITA
Producer	individual or organisation whose business supports the production and touring of dance, through administrative and promotional services (and sometimes in other ways)

[1] In most cases this will mean in the first five years of their practice. However, in dance, this may include artists who are extending their professional practise to other creative roles, e.g. choreography, at a later stage. 'Young and Emerging Artist' denotes that the artist is also aged up to and including 26 years.

3. Overview of sector

3.1 Introduction

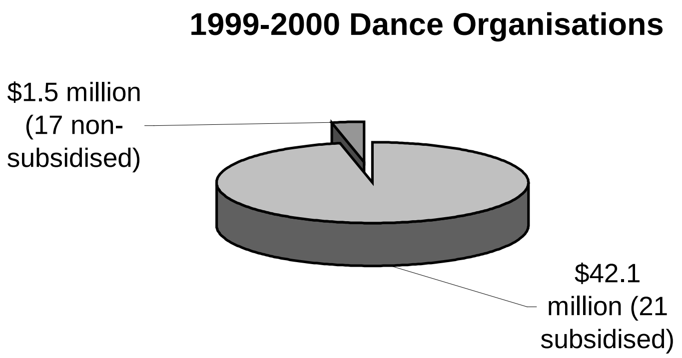
The infrastructure of the subsidised dance sector comprises primarily:

1. Funded companies
2. Independent choreographers and dancers
3. A small number of producers
4. The Ausdance network
5. Physical facilities—rehearsal and performance space

3.2 The funded companies

An ABS survey of performing arts in 1999-2000 included 21 subsidised (funded) and 17 non-subsidised producing dance organisations. Combined income of the subsidised organisations was reported at $42.1 million and of the non-subsidised organisations $1.5 million:

Chart 3.2a Subsidised vs. non-subsidised dance companies 1999-2000



Total employment in the subsidised organisations was 530, and in the non-subsidised organisations 90 (i.e. 85% of employment occurred in the subsidised organisations).

The dance sector is small and its activity is largely generated by subsidised organisations. Unlike some other sectors within the performing arts (music, film, publishing, and occasionally theatre) there are very few opportunities for dance companies and dance practitioners to exploit successful work on a commercial basis. There is no commercial ‘paradigm’ for dance as there is in popular music or film.

For this Analysis, combining data from the Australia Council with that from state and territory arts departments, a total of 58 funded dance companies have been identified.

The five MPAB dance companies are funded by both Australia Council and the states. They include:

- Australian Ballet
- Sydney Dance Company
- Bangarra Dance Theatre
- Queensland Ballet
- Western Australian Ballet.

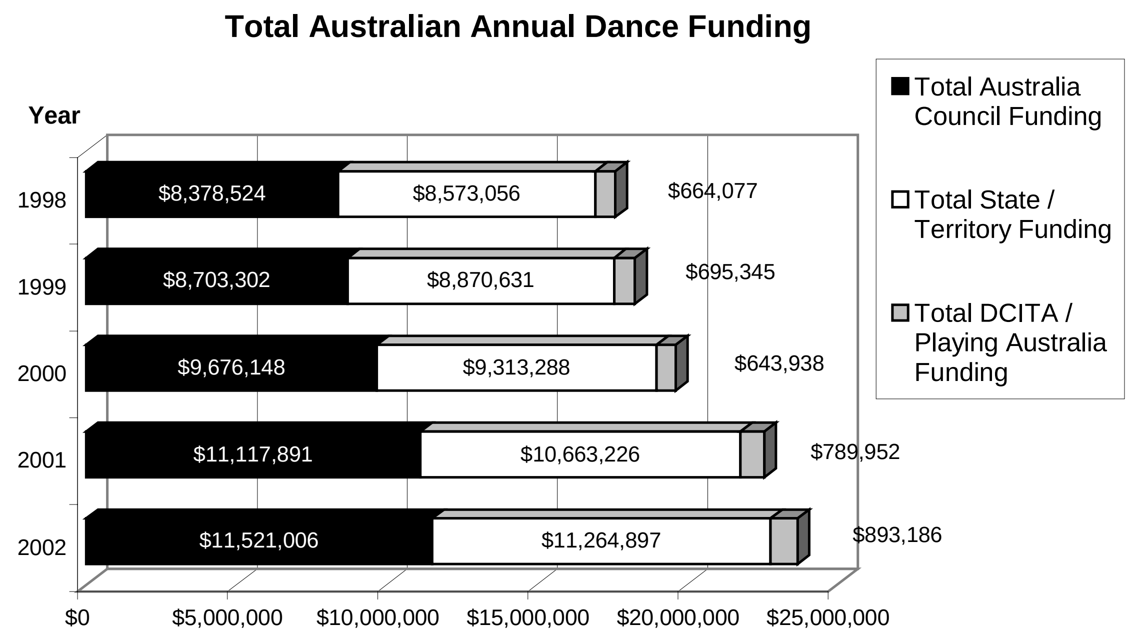
Of the remaining 53 dance companies:

- 12 were consistently funded by the Australia Council and state governments during the five years to 2001
- 9 dance companies received annual funding from their state
- 32 dance companies have been funded by their state or by the Australia Council for part of the five year period to 2001 for specific time-limited projects.

In summary, excluding the MPAB companies, the analysis includes 21 companies[2] which enjoy sustained or regular funding, supplemented by 32 companies which exist on a project basis—that is, they may be brought into existence temporarily to deliver specific projects.

The Australia Council's overall support for dance in 2002 represented approximately 49% of total federal, state and territory dance funding:

Chart 3.2b Total Australian Annual Dance Funding 1998–2002



While the Australia Council's Dance Board is the 'specialist' body concerned with support for the dance sector, its grant distribution represents only a small proportion of the Australia Council's total funding for dance:

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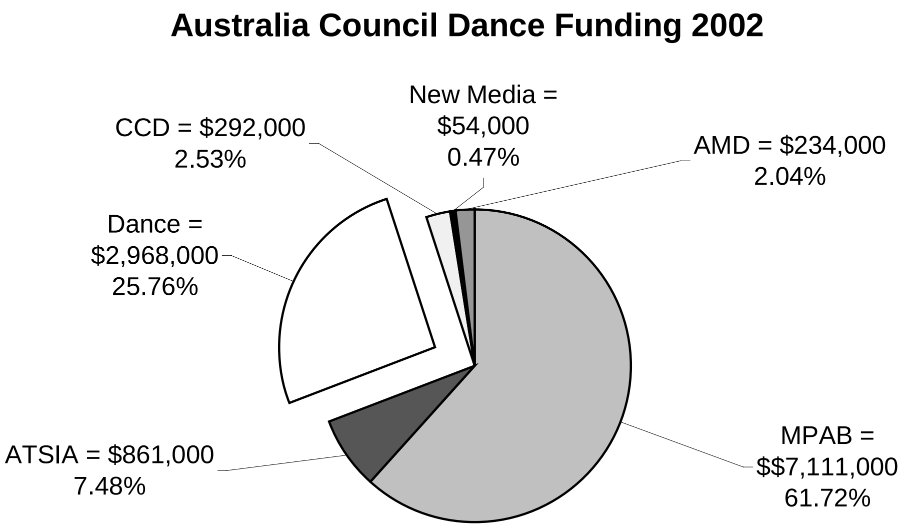
[2] Excluding both Ausdance National and the Australian Choreographic Centre, which supports dance production, but is not a producing company

Chart 3.c Total Australia Council Dance Funding 2002



This study focuses on work funded by the Dance Board. For this reason, while no primary research has been undertaken with the MPAB companies for this report, earlier data from the Major Performing Arts Inquiry has been reviewed, alongside subsequent data gathered by the Australia Council.

Partly because of the scale of the work, the presentation of classical ballet is largely undertaken by the MPAB companies, supplemented by occasional visits from international companies. Most of the other small-to-medium scale companies subsidised by either Australia Council or state governments are engaged in the production of contemporary dance, and this therefore forms a primary (but not exclusive) focus of this analysis. The sector, however, includes a number of other types of practice:

- youth dance
- community dance
- Indigenous dance
- folkloric dance.

There are dance practices which cannot be adequately described by these shorthand terms, including cross-artform work which embraces new media and other means of expression, and work rooted in specific folkloric traditions but adapted through contemporary interpretation.

Regarding Indigenous dance, it is worth noting that, while organisations such as Woomera Aboriginal Corporation (Mornington Island Dancers) and the Kimberley Aboriginal Law and Culture Centre maintain and present traditional Aboriginal dance, Bangarra Dance Theatre is the only consistently funded company which fuses Indigenous culture with contemporary practice—this is different from theatre, where there are several contemporary Indigenous companies operating around the country[3].

The Dance Board of the Australia Council has a focus on supporting contemporary practice, interpreted across a range of genres.

[3] Contemporary Indigenous dance work has occurred on a project basis, e.g. though links between Dance North and Mornington Island Dancers

3.2.1 Choreographers and dancers

Based on a combination of ABS figures and other sources, Professor David Throsby has estimated a total of approximately 1250 dancers and choreographers were practising professionals in Australia in 2002. There are likely to be a further 2500–3000 individuals employed as dance teachers.

3.2.2 Producers

The term ‘producers’ tends to disguise the range of models and practice represented by even the small number of individuals interviewed, for example:

1. Strut (Gabrielle Sullivan)—an artist-led cooperative initiative in Perth, which has grown as a response to the lack of infrastructure support for independent practitioners

2. Performing Lines (Wendy Blacklock)—a leading agency engaged with touring performing arts work, but also providing development support for its ‘stable’ of artists

3. Keep Breathing (Jennifer Barry)—entrepreneuring a series of commissioned dance works, as well as providing advice and support to a number of independent dance artists and companies

4. One Extra (Amanda Card)—now focusing on support for a handful of experienced NSW artists, as well as supporting Reeldance, a film festival. One Extra is also extending from support confined to the development process to continuing support for touring, and extending the life of the work produced

3.2.3 Ausdance

Ausdance grew out of a 1977 conference in Melbourne, a response to a vision for a strong, diverse dance community, with an united voice on common concerns. A national committee was formed with representatives from each Australian state and territory.

After eight years of voluntary work to establish Ausdance, the Australia Council funded the national office in 1985, by then established in Canberra, and the same year Ausdance Victoria received the first state funding. Other state and territory funding followed over the next decade.

Ausdance National’s mission is to ‘facilitate, educate and inspire the dance community to reach its potential as a dynamic force within local, national and international communities‘. Ausdance has a national office in the ACT, with a network of offices in each state and territory, except Tasmania. Each of the Ausdance offices receives financial support from their state or territory.

Ausdance National’s current aims include, among others:

- To provide a national voice in the development of dance and dance education in Australia.

- To establish a forum for exchange of information, ideas, expertise and resources in all areas of dance.

- To assist in the identification and promotion of all dance traditions which exist in Australia, in recognition of their cultural importance.

- To encourage awareness of, access to, and understanding of dance in communities throughout Australia.

- To relate with other organisations working in the arts, education and the communities.

- To establish opportunities for every child to have experience of dance.

- To work towards the development of curricula which would establish dance in the total arts program in education institutions.

- To promote and support tertiary dance programs.

- To promote and support programs providing for the certification of dancers and dance teachers intending to work in education institutions and related fields.

3.2.4 Spaces and presenters

Although Dancehouse in Melbourne and the Australian Choreographic Centre in Canberra have customised dance spaces there is no fully-resourced theatre space dedicated to and specifically designed for dance in Australia. The major performing arts centres include dance in their programs. The contribution of the MPAB companies to those programs was mapped during the Major Performing Arts Inquiry.

There are a number of other contemporary performing arts centres which have established a track record for presenting dance. These include:

- PICA, Perth
- The Performance Space, Sydney
- Sydney Opera House Studio
- Brisbane Powerhouse.

4. The market for dance

4.1 Introduction

The audience for contemporary dance is relatively small. While the market size for all forms of dance is similar to that for classical music, the dance audience is characterised by lower earning levels, with a significant proportion of purchasers eligible for concessionary ticket prices. Contemporary dance audiences appear keen to experience new work, but there is significant scope for raising their awareness of the work on offer.

The demise of the Australian Government touring scheme, Made to Move, has left a gap in coordinated touring arrangements for dance. The smaller performing arts centres which are committed to presenting dance have very limited resources for programming and marketing; some of the larger arts centres are also very supportive of dance presentation, but have focused primarily on the major companies. There are many presenting venues which consider dance to be a 'high risk' promotion compared with other types of event.

International market development for dance has been supported through the biennial Australian Performing Arts Market. Further strategies for supporting Australian dance in the international market are being considered jointly by the Dance Board and AMD.

The visual appeal of dance makes it especially suitable for reaching out to new audiences through film and broadcast media, as well as to international markets. There are some positive examples of dance/film and dance/broadcast initiatives, but much scope for future development.

Contemporary dance commands loyalty and interest amongst its audience. Its physicality appeals to young audiences. Its specialised appeal presents some significant marketing challenges, but also opportunities for market development.

4.2 The current audience for contemporary dance

The current market for dance in Australia is relatively small. The Australian Bureau of Statistics has estimated that 9% of the population attends dance performances. This compares with 16.5% for theatre, 16.3% for opera or musicals and 8.8% for classical music performances [4]. However, the audience for *contemporary* dance, which forms the primary focus of the companies covered in this analysis, has been estimated in other research as closer to 6% [5]. At this level, the potential adult (15+) audience for contemporary dance would be approximately 840,000 across Australia.

A study of box office results of six capital city-based presenters (1997–99) showed paid attendances at contemporary dance performances had been between 230 and 350 per performance (105–118 performances in total). By comparison, the average attendance of 12 consistently-funded companies included in the present analysis over the four years to 2001 was 228 per performance. It is worth noting that the contemporary work of the major dance companies accounts for a significant proportion of the overall contemporary dance audience.

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[4] Australian Bureau of Statistics, *Attendance at Selected Cultural Venues*, April 1999.

[5] The Dramatic Group report on Regional Performing Arts showed that in 1998 contemporary dance attracted 6.7% of purchasers and 5.4% of ticket sales. Roy Morgan Research has also indicated contemporary dance audiences at 6% of the population.

4.3 The audience profile for contemporary dance

Perhaps the most detailed recent profiling of contemporary dance audiences was provided by a national research project conducted by Judith James Consultancy and Positive Solutions in 2000 for Made to Move, a group of venues presenting contemporary dance across Australia[6].

The Made to Move audience was predominantly:

- from an English-speaking background (98%) and female (75%)
- two thirds earned under $50,000 a year
- 41% had attended once a year or less.

The low proportion of audience members from non-English speaking backgrounds suggests that there may be significant opportunity for audience growth amongst these sections of the community. The 2001 census indicates that the proportion of Australians for whom English was the only language spoken at home had declined to 79.1% of the population, from 81.4% in 1996[7].

Less than half the respondents had bought a full price ticket (23% were subscribers). This corresponded with a three-year survey of box office results at Made to Move venues, which showed that full price tickets rarely accounted for more than one third of all tickets sold. This reflects the profile of the audience—student (10%) and others with a reliance on promotional discounts. This is a clearly distinguishing feature from the audience for classical music.

Visual interest, reputation of the company and the music used in the production were the top three motivators for attendance, although venues' promotional materials rarely mentioned the music used in a production, which can be a strong selling point. Younger audiences tended to prefer less formal venues.

Contemporary dance audiences were receptive to abstract work—but negative perceptions expressed by some interviewees included that it would be dark, slow moving and minimalist. They liked the freedom of expression, the energy and the relevance of contemporary dance to today.

Interest in seeing a company corresponded with awareness of a company. There was very little knowledge of what was happening nationally. Contemporary dance for many began and ended with Sydney Dance Company's Graeme Murphy.

The audience had a thirst for 'the new' and were very interested in low price access to see works by less familiar choreographers—but many did not know how to access such work.

4.4 Venue demand for dance

Both the small-scale contemporary-focused venues listed above, and the major performing arts centres, have shown a commitment to support the presentation of dance. However, the former lack resources, (and in some cases physical infrastructure) to regularly present contemporary dance; and in many cases regional venues are reluctant to take the risks associated with product which they believe will not generate a good response at the box office.

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[6] A self-completion survey was conducted from May to November 2000, at dance performances given by seven companies at 10 venues in every state and territory, except the Northern Territory. The sample size was 2,146. It should be noted that many of the venues were major performing arts centres, and as such, did not represent audiences for independent contemporary dance performances at more alternative venues. Qualitative research was also conducted with 116 people in seven locations.

[7] The census also indicated that 71.8% of the population were Australian born, down from 73.9% in 1996.

Made to Move was a dance-presenting consortium of the major performing arts centres, enjoying support from Playing Australia. The consortium has now been disbanded because of growing perceptions that it was not succeeding in growing the audience as intended. An alternative circuit or promotional structure has not yet been established, although a report has recently been submitted to Playing Australia for consideration.

4.5 Major festivals

There is no dedicated dance festival in Australia, as there are in some other countries[8]. The major Australian festivals include dance within their broader program, and the Melbourne International Festival of the Arts is including a strong focus on dance in 2003, including conference activities through a link with Ausdance Victoria. The presence of dance (including Australian companies) at the major festivals is summarised here:

Table 4.5a Dance Companies in Australian Festival Programs

Festival	Number of Dance Companies									
	1998		1999		2000		2001		2002	
	Aus	Int'l	Aus	Int'l	Aus	Int'l	Aus	Int'l	Aust	Int'l
Adelaide Festival	3	6			3	6			4	2
Brisbane Festival	1	4			4	1			5	1
Melbourne International Festival of the Arts	1	4	0	5	2	3	0	4	No dance program	
Perth International Arts Festival	N/A	N/A	2	4	1	2	2	1	1	2
Sydney Festival	0	3	1	2	0	3	0	2	1	1
TOTAL	**5**	**17**	**3**	**11**	**10**	**15**	**2**	**7**	**11**	**6**

Allowing for the fact that the Adelaide Festival and Brisbane Festival are biennial, it appears that there has been a trend towards decreasing the proportion of international dance being programmed, and that Australian dance may have benefited from this. However, from the interviews held with festivals no specific rationale for dance programming or artistic policy framework affecting the choice of dance could be determined. Potentially, the festivals would be open to policy initiatives which provide incentives to support dance more consistently.

4.6 International market development

The small scale of the dance market in Australia highlights the need for active development of overseas markets to maintain the viability of dance companies and individual artists.

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[8] Dance Umbrella in the UK has played a significant role in building the popularity of dance during the last decade; other dance-specific festivals include Vancouver's Dancing on the Edge, and the Canada Dance Festival

4.6.1 Australian Performing Arts Market

The biennial APAM is a key means by which the Australia Council supports the export of Australian performing arts. Since 1996 dance has regularly been presented through Spotlight presentations during the biennial APAM, to encourage international tour bookings. In 1996 three dance companies were profiled in this way, but in subsequent Markets there were eight, seven and nine dance companies presented. Subsequent to their presence at the 1998 APAM, three of the dance companies secured international tours, and a further three subsequent to the 2000 APAM. Generally it has been the larger companies which have benefited.

4.6.2 Future strategy for dance

The Dance Board and AMD are currently in discussion regarding an international market development strategy for dance, to be pursued following the conclusion of the present Analysis. It is possible that a similar initiative to Playing the World may emerge to support international development for Australian dance as part of this strategy.

Playing the World is a joint initiative of the Theatre Board and the Audience and Market Development Division, aiming to assist Australian theatre artists to develop international markets and reach new audiences overseas. It does this by supporting international tours of innovative Australian theatre productions as well as other international market development opportunities.

4.7 Dance and film

Dance and film have enjoyed a symbiotic relationship since the birth of cinema. Australian film directors and producers continue to collaborate with choreographers and performers to create documentaries, narrative, experimental shorts, feature films and moving music videos.

Until recently, there were limited local opportunities for Australian dance film/video makers to present their work. In 2000, One Extra launched Reeldance, Australia's biennial International Dance on Screen festival. Since its inception, Reeldance has recorded a significant increase in attendance and submission of films for their Digital Picture Awards. Reeldance aims to expose Australian artists and audiences to international dance film. The festival plays an active role in audience development and aims to improve the standard of dance film in Australia.

The recent opening of the Australian Centre for Moving Image (ACMI) in Melbourne provides a forum for critical dialogue about contemporary dance film/video and a sophisticated platform to present and collect works. ACMI's geographical location attracts a diverse range of people to the Centre. In January 2003, over 67,800 people experienced *Close Up* by Chunky Move.

IMZ Dance Screen Festival is a leading international forum and festivals for dance films, and a potential marketplace for the distribution and promotion of Australian dance films. IMZ provides a platform for broadcasters, producers, directors, publishers, dance film makers and agents from around the world to build networks by presenting their work in competition and pitching new ideas. A number of artists and programmers have been supported by the Australia Council to attend this festival.

Other mainstream avenues for dance film and video are the ABC and SBS. The ABC broadcast of *Wet* by Chunky Move (classified MA) in a prime-time slot reached a national audience of over 700,000. In addition, the most extensive broadcast of contemporary dance on the ABC was a six part series *Dance Now*, broadcast in the late 1990s during summer (low season). The producer could not imagine this opportunity arising again in the current funding climate, as the ABC does not currently program contemporary dance film. A representative stated this is a result of issues involving management, programming and funding.

As a portable medium, dance film/video is an affordable vehicle to capture the essence of Australian dance and communicate it to national and international presenters and markets. Currently there are 12 dance film festivals worldwide dedicated to the presentation of dance film. These include well established and long running Festival International de Video Danza, Argentina; Moving Picture Festival, Canada; TTV Festival - Performing Arts on screen, Italy; Dance on Camera, USA; and Dance on Screen, UK.

Dance film is a collaborative process between dance and film professionals. With any collaboration, roles and responsibilities of people involved need to be defined, and in some cases redefined to accommodate the development of the practice.

5. The life of a dancer: Employment, training and career paths

5.1 Introduction

Without the talent, training and dedication of individual dancers and choreographers there would be no dance, and no dance companies.

Compared with other artists, dancers' earnings are low. Even experienced practitioners undertake a substantial amount of work for which they receive no remuneration.

Many independent dancers and choreographers need assistance with administration and marketing, areas for which they have not been trained. The time and skills needed to negotiate the grant application process is a burden which is keenly felt by independent practitioners—some have given up applying for support because of the low overall success ratio of applications to grants awarded. Following their initial training dancers have to maintain a demanding regime of exercise and 'class' to retain their skill and fitness. The addition of administrative responsibilities seems to be considered unreasonable and difficult to sustain.

There is a widespread frustration among choreographers that the high level of personal time invested in producing work often results in very short seasons and limited exposure of the work.

More positively, the support provided by the Dance Board to make rehearsal space more affordable (Project Workspace) was highly valued, and suggests that similar initiatives should be considered in the future.

Because of the limited employment opportunities in Australia there has been some loss of talent overseas. Realistically, this is not a reversible trend, given the small scale of the Australian market; and there are undoubtedly benefits both in carrying a positive image of Australia abroad, and in dancers and choreographers benefiting from exposure to international best practice. There may be opportunities to increase productive interchange between those whose careers have taken them abroad and those who remain Australia-based.

Regarding training, there appears to be a high degree of cooperation between tertiary educators, although there are opportunities for greater coordination between the tertiary sector and the Australia Council.

Despite a wide network of programs, choreographic training has not yet been adequately addressed.

Some of the institutions offer graduates the option to periodically rejoin practical classes, and endeavour to provide continuing support. There may be more which they could offer to the sector. However, most dance education sector interviewees referred to having to continually achieve more with less resources and with little or no administrative support, leading to long, exhausting hours of work.

5.2 Interviews with dancers and choreographers

This section of the report presents findings from research undertaken with individual dance practitioners and with leaders in the dance training sector. The Dance Board provides project funding, fellowships and other support for individual dancers and choreographers, further analysed in section eight of this report.

5.2.1 Sample profile

Twenty-five individuals were interviewed, with representation from each of the states and territories. Of these, 17 were female, 11 were aged between 26–35, half were choreographers and half were performers. Only three of the interviewees were ensemble company performers, with the remaining individuals comprising freelance dancers and independent choreographers. Their level of experience ranged from three years to over 30 years, but the majority were mid-career, with experience ranging between 10–20 years.

Just over half of the interviewees had received funding from the Dance Board, some under the Project Workspace Initiative or the Young and Emerging Artists Initiative, and two in the form of fellowships.

Of the 25, seven individuals had received two or more grants from the Dance Board and 11 of the more experienced individuals had applied to the Dance Board more than twice. Fourteen individuals had received state funding and four performers had received funding from other areas of the Australia Council, such as Audience and Market Development, New Media and CCDB.

5.2.2 Issues identified

5.2.2.1 Income

The majority of dancers and choreographers stated that they usually undertake unpaid dance development work during the research and development stage of a project, especially at the beginning of their careers. Several of the more experienced individuals referred to continuing low levels of pay, well into their careers:

> *You achieve a point where you are considered one of the best—and you still struggle financially*

The earnings mentioned by interviewees were consistent with levels indicated (below) in research recently undertaken by Professor David Throsby and Virginia Hollister of Macquarie University:

> *I spent my first five years unpaid—huge investment in my career*

> *I currently earn about $16,000 per year and it is very difficult to survive*

On extended or major projects it appeared to be common that only a very small proportion of the time invested was remunerated. One interview indicated, for example, that a project had involved three months' preparation, but it was only the conclusion of the project that attracted payment, of $700. Another referred to a major work, involving dancers, a Symphony Orchestra, a film-maker and a partnership with a major corporate sponsor—the choreographer leading the project worked on it for a period of a year, but was paid for just six weeks work. It was only by putting in such substantial amounts of unpaid time that many projects could be brought to fruition.

Rosalind Crisp

Based in Sydney, Rosalind has over 12 years experience as a professional independent dancer and choreographer. She trained and performed in Australia, Europe and Canada until the early 1990s, and then established her own studio-based dance practice. She has received project funding from both the Dance Board and from the NSW Ministry for the Arts. She was a recipient of a two year fellowship from the Australia Council in 2001–02.

As part of her independent practice she has consistently developed partnerships with elements of the Australian dance infrastructure that are supportive of her artistic intentions. In particular she has an ongoing and vibrant relationship with Performance Space in Sydney. Since 2000 she has also been developing partnerships with European Dance Organisations (notably Monty, Antwerp and TanzFabrik Berlin) which have led to her receiving commissions for new work from the Biennale de Danse du Val-de-Marne (Paris) in 2002–03.

As an artist who has chosen to work outside the company-based infrastructure in Australia she regards her practice as based on value-adding to tightly constrained grants with in-kind support from partnerships, and substantial unpaid administrative work by herself and her husband (who is also a performer).

Rosalind is primarily interested in pursuing her artistic agenda as a choreographer. Broadening her market to include both Australia and Europe is the only economically and artistically viable method of maintaining her practice.

Since she started to receive funding in 1987 she believes that funding in Australia has become increasingly competitive as more artists seek the independent path, while funding levels for this sector have not increased. As a mature artist Rosalind increasingly receives invitations to create and present her work and, while this is exciting, it has also increased the amount of volunteer labour she contributes to levels which she believes unsustainable, especially while operating in both Europe and Australia. Finding and developing a professional, streamlined and cost-effective administrative base is of the highest priority for her professional development.

5.2.2.2 Skills, resources and quality

Many of the interviewees referred to the need for practical support with administration and marketing. This included the need for support in project delivery, and support in navigating the funding system. A very common concern was the range of administration demands made upon the time-poor independent practitioner, whose skills lie in creative development and leadership, but who has to be successful in meeting the accountability requirements of government funding systems to maintain their practice. Many felt over-stretched, referring to an unreasonable degree of multi-skilling required.

A small number mentioned the need for administration and management training, not only to meet short-term project requirements, but looking further ahead to a transition to dance administration as a necessary career-shift once they were unable to continue as dancers. Other resource needs mentioned included rehearsal and development space, suitable performance spaces, development time, travel and interaction with other artists.

The Dance Board’s recent Project Workspace initiative (providing a large number of artists with access to modest grants to cover short-term space hire) was very highly regarded. Similarly, the Board’ s investment in Mobile States (a presentation initiative with PICA and Performance Space) was mentioned positively by several of the interviewees.

Some felt that inexperienced choreographers were being fast-tracked into producing work before they were fully ready to do so, largely because of the lack of alternative opportunities for them. This created a danger of lower-quality work being exposed to the public.

Maintaining performance skills requires a high level of investment—a significant difference from most other artforms (other than circus and physical theatre).

It takes long hours to keep in shape. I am required to do three hours a day of maintenance, and then develop new work—it leaves little time for marketing and all the other demands

Tim Brown

Tim is an emerging choreographer based in Brisbane Queensland who has been practising for three years. Upon graduating as a dancer he received a Young and Emerging Choreographers Grant from the Dance Board to create works for members of Queensland Ballet's Professional Year (i.e. emerging dancers). This initiative assisted Tim to secure ongoing employment with the Queensland Ballet.

If Tim had been unsuccessful in securing the grant he would have ventured into something more independent, such as working as a freelance dancer rather than in a company. He believes working in a company is the best way for a young aspiring choreographer to learn. However, in the future he would take the opportunity to be more independent and to self-generate projects.

Tim also stated that independent practitioners can be more experimental and are able to 'push the boundaries' particularly if they have the opportunity to work with a project funded company and festivals.

Tim faces a number of key issues as an emerging practitioner. These include employment security, touring opportunities, maintenance, access to information on grant programs, and funds for research into new works.

5.2.2.3 Extending the work

The independent practitioners were proud of the fact that much innovative work is generated by individuals and small companies in the dance sector. However, many of the independent choreographers referred to the frustration of investing a high level of time and effort into the development of a project, which then enjoyed only a handful of performances:

It is very frustrating to work hard for long periods of time, when your work is on for only three nights

Several indicated there is a need for more producers and production houses to provide an interface between the work being produced and the venues, presenters and audiences. This could extend the life of the work generated, but was also seen by some as a way in which the independent practitioners might access administration and marketing skills, and secure advice and support through the funding process.

The majority of the individuals interviewed wanted more opportunities to collaborate with other artform practitioners and the opportunity to exchange ideas and network with dancers and choreographers from interstate and larger companies.

The majority also wanted increased exposure of their work through touring circuits, and the opportunity to benefit from logistical support from small to medium companies or the major companies to achieve this.

5.2.2.4 The scope and definition of dance

The type of work being produced has changed to accommodate a multi-disciplinary, collaborative approach. Contemporary dance has also expanded to incorporate a range of practices such as translating dance into film or interactive screen productions.

A concern expressed by several of the interviewees was their perception that the Dance Board worked to a narrow definition of dance. At a time when dance practice was fluid and changing, becoming more inter-disciplinary, and hybrid dance forms were emerging, it was felt that greater flexibility was needed in the range of dance supported. Some addressed this issue by approaching other areas of the Australia Council for funding.

5.2.2.5 Career sustainability

> *Last year I was on the verge of resigning from dance. I think about my future and it is frightening. There is a lack of opportunity. There are no examples of sustainable careers*.

There was a predominant feeling of exhaustion and malaise. A significant number of those interviewed were either contemplating resigning or retraining, or had relocated overseas for extensive periods due to a lack of opportunity and lack of financial security in Australia. They expressed concern at the limited number of commissions, and the decline of small to medium companies.

There were very few examples or role models for emerging practitioners of a sustainable long-term career, and although mentors and established practitioners provided honest advice about the future, it was often negative and disheartening.

All perceived companies as a training ground and some suggested that it was easier to find employment if you have worked with a company. Because of a reduction in full-time contracts with companies[9], there are limited potential employment opportunities for dancers.

Several of the experienced practitioners who had established regular work in Europe expressed ambivalence towards this. They valued the connection with dance practitioners elsewhere, and the exchange of ideas and skills. But they regretted the fact that they were unable to maintain a professional career in Australia, and felt that the need to work abroad exacted a price in personal quality of life and stability.

More experienced dancers especially were concerned about the dangers of injury. Good maintenance practice was an essential preventative measure. Universally, the older dancers were acutely aware of their vulnerability, of their ‘sell-by date‘ as performers.

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[9] This change in employment patterns is considered further in Section 6 of the report

Delia Silvan

Until recently Delia was a company performer based in Adelaide. She is 35 and has over 14 years of experience as a professional dancer, winning a top Australian dance award in 1999. Two years ago she made a decision to change from a company performer with a medium-sized company to an independent dancer/choreographer. Delia felt this was a necessary step in her growth as an artist—to move into finding her own creative voice through making work, and to further challenge her performing and interpretive abilities by working with a diversity of choreographers and choreographic styles.

In the transition from a company performer to an independent, she has faced a number of difficulties, primarily the reality of needing to gain choreographic experience with limited resources—how to find dancers/collaborating artists willing to work with little or no funds, performance avenues and opportunities, studio space, finances, etc. Simple things such as taking class to maintain professional technique standards can cost $60 per week, and studio space at its absolute cheapest rate can be $150 per week for 15 hours work time.

She feels that in order to get launched on the independent market she needs to have her work performed, which means finding solutions to the above problems, or winning lotto! In particular, Delia recognises that ongoing support is critical for the learning process, which by its nature includes hits and misses that are part of any creative experimentation and development.

Every day she faces challenges as she seeks to both survive and develop as an artist—an independent artist.

5.2.2.6 Audience development

A quarter of the interviewees felt that there was a lack of audience understanding of contemporary dance, and that it was difficult for contemporary dance to compete with other entertainment sectors. Some found it extremely difficult to gain media exposure, and felt that critics were hindering the sector through a lack of knowledge or interest in contemporary dance. There was a substantial job to do to raise audience awareness and appreciation—but the nature of the sector (fragmented, micro-businesses, over-stretched) hindered this type of coordinated effort.

5.2.2.7 Funding

Over the last 10 years there was considered to have been an increase in the number of independents and as a result, a more competitive funding pool. There was praise for the Australia Council's endeavours to provide most or all of the funding requested, but also a recognition that the limited resources of Council prevented it meeting the needs of the sector effectively.

The majority of interviewees who were not working within a company structure referred to the problem of budgeting for administration, marketing, agents, production managers. Project funding was poorly-geared to providing any of the supporting infrastructure necessary for a project to be delivered effectively.

Over half felt that the response times between application and receiving notification were too long, which made planning and applying for other grants very difficult. State and federal funding time-lines could usefully be coordinated. Suggested improvements to funding systems also included quick response grants, more assistance with grantsmanship, and a streamlined application process.

5.3 Dance training

Interviews were undertaken with nine tertiary education sector representatives, all members of the Tertiary Dance Council of Australia (TDCA).

5.3.1 Strengths and weaknesses of training infrastructure

Almost all interviewees commented on the strong relationship between Tertiary Dance Council of Australia (TDCA) members, and the fact that several members of the TDCA have brought with them a high level of experience through their managerial work with professional dance companies. Cooperation between tertiary institutes is advocated where possible, e.g. in the form of student and teacher exchange programs, and accreditation.

Almost all interviewees mentioned the funding difficulties being faced by both the dance and tertiary sectors, requiring the dance education sector to continually achieve more with less resources and with little or no administrative support, leading to long, exhausting hours.

While the Australian Ballet School is planning to add an Advanced Diploma of Dance Choreographic Studies, at present many young choreographers are required to learn in an unstructured way through their work with companies.

5.3.2 Student numbers

The following tables summarise the combined student intake figures for the past five years[10].

Table 5.3.2a Tertiary Dance Undergraduate Student Intake Numbers

Institute	1999	2000	2001	2002	2003
Total Undergraduate Student Intake	189	230	249	304	224

Table 5.3.2b Tertiary Dance Postgraduate Student Numbers

Institute	1999	2000	2001	2002	2003
Total Postgraduate Students	43	62	51	71	42

5.3.3 Trends in training content

The tertiary dance sector was reported to have become both more holistic in program content (e.g. more emphasis on health and injury prevention and management, including Pilates or other techniques) and more inter-disciplinary (several courses require students to take subjects from other disciplines such as drama, visual arts, media; e.g. QUT has a new unit in dance and technology), and with an increased emphasis on digital technology. Reasons for this shift in focus are to offer students more rounded career prospects to counteract fewer traditional employment opportunities, and for students to be positioned to manage ‘portfolio careers‘.

Some of the institutions assist students in terms of professional placements and career diversity, and all encourage students to stay in touch and keep the institution informed of their career path development. Some of the institutions offer graduates the option to periodically rejoin practical classes free of charge to assist them to keep in shape, with perceived benefits for current students through contact with graduates. Some have formalised contact with professional dance companies

[10] With exception of the Australian Ballet School where total student intake is calculated by dividing the total number of students equally across the years, where intake figures were unavailable for a year they have been counted as zero.

such as Leigh Warren and Dancers, Australian Dance Theatre, Expressions (and the Australian Ballet School with the Australian Ballet), through which students can gain valuable experience. Some concern was expressed about the lack of structured support for choreographers in their early years.

Several interviewees noted another trend being a shift away from duplication in Australian tertiary institutions. Some programs have been shut down or are being redesigned, with universities being under pressure to find a point of difference for their courses. The Wesley Institute, for example, has a strong focus on Dance Therapy as one of only three tertiary institutions in Australia that offer this course, and has strong affiliations with the professional dance therapy sector in both New South Wales and Victoria. The Australian Ballet School, which is a separate entity from the tertiary Institutions and is considered to be Australia's national training school for ballet, has placed an emphasis on injury prevention and dance psychology research. This includes providing information sessions, and sending their consultants interstate to share strategies for disseminating information on dance related areas such as psychology, nutrition, physical therapy and Pilates.

5.3.3.1 Co-operation possibilities

With regard to future needs of the sector, one opportunity mentioned was more cooperation between Australia Council and the tertiary sector, particularly with respect to the issue of research students who undertake projects as part of a tertiary course being excluded Australia Council funding. Another opportunity mentioned was a potential link with the professional sector through hire of facilities such as studios when not in use for teaching purposes.

5.3.3.2 Career transitions

The Western Australian Academy of Performing Arts and the Wesley Institute both have graduate dance companies; the third year of the VCA has a graduate dance company while the Australian Ballet graduates undertake professional work with the Australian Ballet before joining professional companies.

A perceived trend is that students are branching into dance education—mainly high school and primary school dance education—as there are more career prospects for qualified school teachers.

5.4 Career pathways and earnings

During 2002 Professor David Throsby and Virginia Hollister of Macquarie University conducted a survey of professional practising artists, following up a similar research projects carried out in the 1980s and 1990s[11]. The survey included a sample of 51 dancers and 24 choreographers, and provided a detailed profile of their career including education, training, factors influencing their professional development, employment experience, and their current and future financial situation.

During 2001 over 49% of those surveyed had been employed on a full or part-time basis for a salary or wage, and 47% had worked on a freelance basis. Half of the individuals surveyed had been unemployed within the last five years (nearly 60% of dancers surveyed), and 35% had been unemployed for more than a year out of the last five years.

Dancers' and choreographers' gross income from creative work during the 2001 financial year was a median of $12,900 and a mean of $16,700. Total median income from all sources was $26,000 and total mean income was $26,900.

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[11] The first study was published in 1983 with the title *The Artist in Australia Today*. The second, *When Are You Going to Get a Real Job?*, was published in 1989. The third, *But what do you do for a living? A new economic study of Australian artists,* was published in 1994. Each of these was published by the Australia Council. The most recent study was not available at the time of writing, but selected results were kindly made available by Professor Throsby.

Regarding superannuation, 73% of respondents did not have a personal superannuation scheme (79% of dancers) but 59% were with an employers superannuation scheme (53% of dancers). 16% did not have any arrangements for their long-term financial security (18% of dancers). Only 11 respondents (18%) thought they had made adequate arrangements for their financial future.

71% of dancers had no (personal) insurance for accident or illness.

The highest factor inhibiting the professional development of those surveyed was the lack of work opportunities (65%) closely followed by lack of financial return from their creative practice (63%, slightly higher for choreographers than dancers) and time pressures due to other responsibilities (49%, but markedly higher for choreographers than dancers). 31 individuals (41%) stated that a lack of access to funding or financial assistance inhibited their professional development.

6. Dance company outputs and results

6.1 Introduction

This study focuses on 12 dance companies which have been consistently funded by the Dance Board of the Australia Council in recent years, supplemented by analysis of 13 additional, project-funded, companies.

Alongside the MPAB companies, the consistently-funded companies provide a significant proportion of Australia's professional dance activity.[12.] Although most of the companies aim to maintain ensembles, full ensemble working is the exception, primarily for financial reasons, but in some cases for artistic reasons.

Only two of the companies have full-time dedicated marketing positions, and there appears to be a high turnover of general managers—one third having been in post less than a year, and more than a half for less than three years. While time invested in rehearsal and creative development has grown in recent years audiences have declined significantly. Excluding Chunky Move, box office income has declined by 2% for the remaining companies—after allowing for inflation this represents a 'real' decline of 21% over seven years. Investment in production costs has declined by 19% in the last seven years; by 37% when Chunky Move is excluded—and by 56% after allowing for inflation.

The companies achieved a small accumulated surplus over the last six years, but this represents only 1% of consolidated expenditure; several of the companies are in a vulnerable financial position. Given their very limited human and financial resource base it is difficult to see how the recent decline in audience numbers can be reversed without additional investment in the companies' infrastructure and marketing activities, and a sustained approach to audience development which is coordinated with venue-partners and funding agencies.

The dance companies' analysis was extended to a further group of 13 companies which have secured project funding from either the Australia Council or states and territories. These project-based companies represent another significant component of Australia's dance ecology, are highly flexible, and some are especially active as artistic innovators, exploring new dance forms.

Only two of the project-funded dance companies had paid full or part-time employment positions. Seven of the companies were being operated from a home base, although eight of the 13 had been engaged in international touring. The overseas market was seen as essential to maintain viability, given the limited scale of the Australian market.

Interviewees were concerned at an increasing range of non-artistic pressures and demands, and especially on the time and effort that was involved in the process of applying for funding, when there was a low success ratio. These views reflected closely the concerns expressed by the choreographers interviewed.

While all the project-funded companies reported small surpluses (for 2001), the companies are heavily subsidised by free time given by their artistic directors. Interviewees commented on the lack of affordable venues for rehearsal and performance as a significant barrier to realising their work, and on the need for support and advice in marketing and administration.

The degree of discontent expressed and pressure felt by both the project-based companies and the (overlapping) field of independent choreographers raises serious questions over the sustainability of

[12] The Dance Board has also provided consistent funding to Ausdance National and to the Australian Choreographic Centre (ACC). However, these are not producing dance companies, although active contributors to professional dance activity.

the present situation in Australian dance. While there may continue to be a supply of willing young industry entrants prepared to invest extraordinary effort for very modest returns, if a significant proportion of Australia's more experienced dance talent quits the sector or works largely overseas, there is a danger that the quality of new work in Australia will progressively decline. Conversely, it may take relatively little investment to address the causes of these sectoral pressures.

6.2 Companies consistently funded by the Dance Board

The 12 companies in the 'consistently-funded' sample were:

- Australian Dance Theatre
- Buzz Dance Theatre
- Chunky Move
- Dance Exchange
- Dance North
- Dance Works
- Expressions Dance Company
- Leigh Warren and Dancers (LWD)
- One Extra Dance Company
- Restless Dance Company
- TasDance
- Tracks Inc.

While the companies include a diverse range of practice, including contemporary dance and youth dance, there are no Indigenous dance companies funded by the Dance Board operating at this level[13].

The inclusion of these 12 companies was partly because collectively they constitute a significant proportion of the dance provision in Australia, alongside the MPAB companies; but also because it was possible to secure consistent financial data (audited accounts) for these companies over a seven-year period from 1996–2002, enabling reliable comparisons to be made and trends to be noted. Artistic and employment data was secured by means of a survey and telephone interview, covering a five-year period from 1997–2001. However, as it was not possible to secure such data from Dance Exchange, the (non-financial) results reported below include 11 of the 12 companies where noted.

6.2.1 Profile of sample[14]

6.2.1.1 Shared characteristics

All the companies have operated for a minimum of seven years in their current form. The majority have operated more than 10 years. All (with the exception of One Extra who received one annual program grant in the five year period) have received multi-year Key Organisation program grants from the Australia Council during the sample period (1997–2001) and all have operated on a continuous basis.

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[13] The traditional Mornington Island dancers receive triennial funding from the ATSIA Board of the Australia Council

[14] If not stated then figures apply to 2001 sample year

All are professional full-time dance companies with at least 1.5 'full time equivalent' (FTE) permanent positions. All have at least 0.8 FTE artistic director, and 10 of the 12 have at least 0.8 position for general manager or administrator (the exceptions being One Extra and Dance Exchange).

6.2.1.2 Scale

The companies range in annual turnover from less than $100,000 to $1.7m[15] with:

- paid annual audience numbers (2001) ranging from 1006 to 18,303
- numbers of performances ranging from 20 to 193
- FTE permanent staff (non dancers) ranging from 1.5 to 8.5

6.2.1.3 Organisational model

Seven companies stated that they maintained ensembles: ADT, Buzz, Dance North, Dance Works, Expressions, Leigh Warren & Dancers, TasDance. However, of these seven:

- only one (ADT) maintained year round employment for dancers
- only three provided over 40 weeks p.a (ADT and two in Queensland)
- two provided less than six months employment p.a.(TasDance and Dance Works). It is questionable if the term 'ensemble' is appropriate for this operating model.

Of the five non-ensemble companies, three were producing dance companies with a consistent group of dancers but a commitment to a project-style structure—these companies still maintained structures to encourage consistency and allegiance among their preferred dancers. One had varying dancers depending on the communities involved and encouraged change. One focused on production house relationships with varying choreographers, who brought their own creative teams.

6.2.1.4 Physical infrastructure

Most (with the exception of Restless and One Extra) have access to dedicated rehearsal space, and most have dedicated office space. Only two companies noted severe shortage of suitable space/infrastructure for current level of activity—Restless and Dance Works.

Several of the companies have benefited from substantial recent premises upgrades or provision of new premises. Chunky Move, ADT, Expressions and Tracks have all recently been provided with new premises. Dance Works and Buzz were provided with new premises a few years ago; and Dance North recently completed a long-term program of premises improvements.

More than half noted that whilst they have adequate space, they did not have adequate annual maintenance and assets management budgets.

6.2.2 Artistic outputs

The following charts provide a snapshot of the combined total for selected artistic outputs for 11 of the 12 consistently-funded companies for the period 1997–2001.[16]

6.2.2.1 Performances and Performance Weeks

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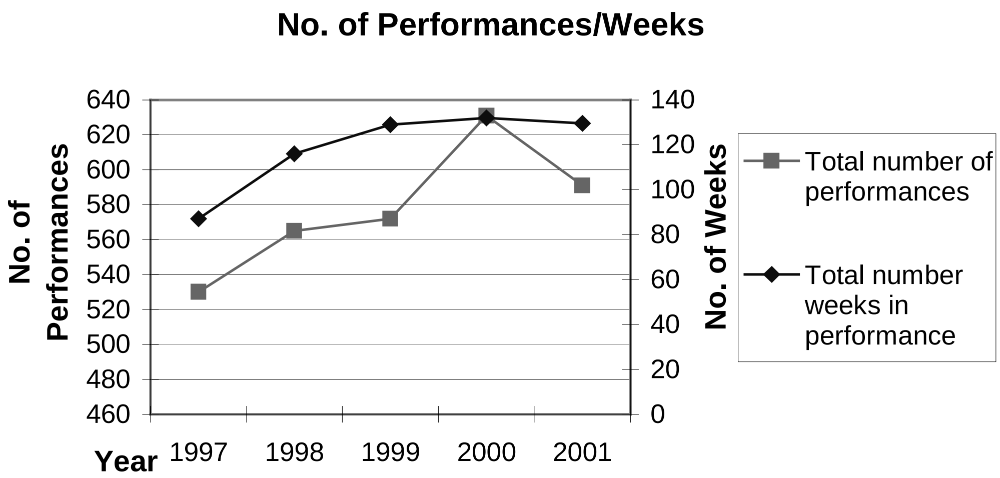
[15] Dance Exchange's turnover was less than $100,000 for two of the five years analysed; ADT's turnover was over $1.5 million for four of the five years

[16] Data not secured from Dance Exchange

The total number of individual performances delivered by the consistently-funded companies peaked at 631 in 2000, and declined to 591 in 2001. The average number of performances per company (per year) throughout the period was 53.

The total number of performance weeks delivered by the consistently-funded companies peaked at 132 in 2000. The average number of performance weeks per company (per year) throughout the period was 11.

Chart 6.2.2.1a Number of performances and performance weeks



n = 11

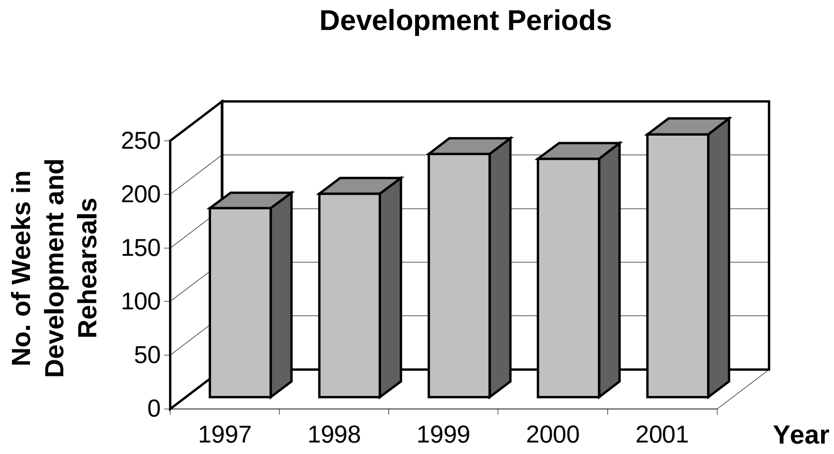
The trend with regard to overall level of performance output was not consistent across all the companies. Buzz, TasDance and Dance North, for example, experienced a particular decline in output towards the end of the period, and it is understood that this trend continued in 2002. Restless, however, increased its overall performance output to a peak in 2001.

6.2.2.2 Creative development

The total number of weeks engaged in rehearsal or creative development rose throughout the period from 176 to 245, a rise of 39%[17].

[17] Data was not available for Dance Works for 1997, but if Dance Works had undertaken a similar amount of creative development in 1997 to subsequent years, the consolidated pattern would be unchanged

Chart 6.2.2.2a Rehearsal and development periods



n = 11

Despite this increase in number of weeks devoted to rehearsal and development, the companies commented on the effect of working in discontinuous blocks—affecting the sophistication of choreography, and resulting in ‘generic’ works that can accommodate different dancers in and out over long gaps of time during creative development.

6.2.2.3 Touring

Venue caution was reported to have led to an increasing shifting of risk onto companies through sliding co-presentation arrangements. No companies felt confident to take the majority of financial risk on touring nationally, as they did not know the markets. A few mentioned that a touring producer service of some kind was necessary, whether based in a private sector or through a circuit of venues.

Most companies commented that they have to subsidise touring activity from core funding. Expressions, ADT and Chunky Move needed the budget to keep international representation, networking and business development happening, but indicated that international fees covered only the remount and most of the direct touring costs. Expressions, Dance North, Tracks, TasDance, Buzz and Leigh Warren & Dancers noted national and regional touring were not paying their way.

Three companies noted that regional and some capital city touring would benefit from ‘packages’ of workshops/forums/videos/teachers packs/residencies in institutions. TasDance, Tracks and ADT all noted that it was much easier to get touring bookings and better fees if this kind of ‘value add’ was offered. Several companies considered greater penetration of the education market as an important audience growth opportunity.

6.2.2.4 Partnership arrangements

Links with independent choreographers tend to follow one of two models:

1. Production House: six companies stated that they have or are intending to auspice grants and provide in-kind production house support for independent and/or young and emerging choreographers to generate work using the company’s infrastructure. The most developed example is MAXIMISE from Chunky Move.

2. Commissions: a larger number noted that they occasionally commissioned works from independent and/or young and emerging choreographers to add to their program.

A small number of companies mentioned that the works from project-based companies and independent practitioners are often not as developed or as professional as they should be, and they partially attributed the changing attitudes of audiences and venue away from contemporary dance to the prevalence of works of this kind.

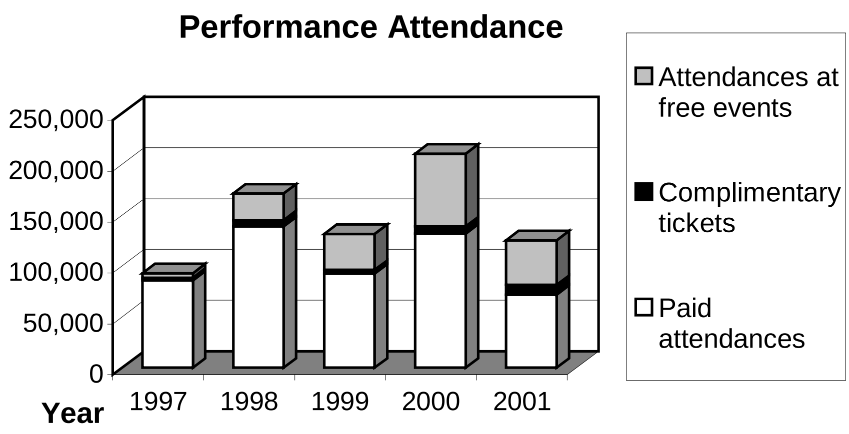
Ten out of the 12 companies mentioned better links between companies and independent practitioners as a priority issue.

6.2.3 Audience development

6.2.3.1 Declining attendances

Despite the increase in number of works and performances, the 10 companies providing audience data reported a decrease in paid attendances of 48% over the four years from 1998, from 138,888 to 71,746. The decrease in paid attendances is further evidenced by the small growth in box office income and contracting fees over the period.

Chart 6.2.3.1a Audience attendances



n = 11

In the case of Buzz and Dance North there has been a significant shift from paid attendances to attendances at free events, reflecting a change in performance patterns rather than a decline in popularity.

For the 11 companies providing data, there was a decline in *average* attendance per performance from 303 to 212 from 1998 to 2001[18]. More notably, during the same period there was a decline in average *paid* attendances per performance from 246 to 121.

Table 6.2.3.1b Average audience attendances

	1998	1999	2000	2001
Average audience per work	3804	1253	2104	1489
Average audience per performance	303	230	333	212
Average paid attendance per performance	246	162	209	121

[18] Audience data not available for Chunky Move for 1997

6.2.3.2 Audience development strategies

Most of the companies felt inadequately resourced to initiate audience development activities beyond their routine publicity and promotions, and several felt unreasonably ‘pressured’ by the Australia Council to respond to a policy which required greater resources.

All the companies referred to programming strategies as a primary way to address audience development. It was assumed that the engagement of new or young artists would enhance the appeal to new audiences, although this was an unproven assumption.

The educational market was seen by many as the most important untapped audience, and development of ‘packages’ was seen as the best tool to access this market. Other potential audience development strategies noted by several companies included:

- Lengthening/deepening audience points of contact with work, through forums, showings
- More audience-friendly venues—bars, music in interval, not formal theatre style
- shorter works
- Open Classes/Open rehearsals, listed by many as both audience and artists development strategy.

The study was not able explore the demographic composition of the audiences of individual dance companies. Given the earlier comments on the evidently low proportion of non-English speaking background (NESB) audience members for contemporary dance overall, this is an area which merits further consideration, and may represent an opportunity for both product and audience development. This would be consistent with the Australia Council’s policy goal in relation to Arts in a Multicultural Australia.

Three companies mentioned rising expectations of professionalism in marketing by both audiences and the industry, but an inability for the companies to afford a proper response to this.

6.2.4 Human resources

In 2001, the companies reported full time employment positions of 55, part-time positions making up 21 ‘full time equivalent’ (FTE) positions, with 297 individuals engaged on a contract basis[19]. For the previous four years the same companies reported 52 or 53 full time positions, although part-time positions ranged from 9 to 11 during this period—that is, there had been a significant increase in part-time employment during 2001. In simple terms, there was an average per company of six to seven full time positions (or FTE positions) for the five years to 2001.

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[19] Excluding Dance Exchange, for which data was not available

It appears that with the steady rise in salaries and on-costs, companies are attempting to save monies by increasingly contracting workers as needed and not committing to more permanent employment:

Table 6.2.4a Employment data

Employment Data	1997	1998	1999	2000	2001
No. of full-time employment positions	53	52	53	53	55
No. of part-time employment FTE positions	9	11	11	10	21
No. of FTE employment	**62**	**63**	**64**	**63**	**76**
Total Contracted (no. of individuals)	172	214	245	365	297

n = 11

Artistic directors range in tenure in current post from 1–18, but only two have been in post for more than seven years, and half have been in post between 5–7 years.

General managers range in tenure from one month (at the time of interview) to 18 years. However, only two have been in post for more than five years, and one third have been in post less than 12 months.

Less than half of the consistently-funded companies have a part-time publicist, and only two (Chunky Move and ADT, the two best-resourced companies) have dedicated marketing positions. In view of the audience development challenges facing contemporary dance, this would appear to be an area which requires higher priority for investment.

Four companies have Rehearsal Directors or equivalent. All support trainees, most at least three secondments per year.

Ensemble working creates unique management demands for dance, compared with other performing arts organisations. There is often the same basic staff structure in office/production as a theatre company, but with up to 10 FTE personnel more to manage. This is perhaps why all consistently-funded dance companies interviewed, including two non-ensemble, emphasised that the position of rehearsal director or assistant director is so important (but difficult to fund).

6.2.4.1 Artist/Professional development

All companies responded to questions on professional development primarily by noting strategies and outcomes that took place within class and rehearsal. The two or three larger companies had strategies outside that context. The most common response was to note the diversity of class experience, and that class was generally provided above award requirements, i.e. more classes, more diverse, including diverse teachers, diverse physical training styles.

Only one company had formalised an ongoing mid-career professional development program; one other offered masterclass or choreographic labs intermittently depending on special funding. One Extra indicated that they had recently committed their next three year phase of operation primarily to supporting selected mid-career dancers through producing those dancers' work. Two companies mentioned they were increasingly unable to afford to employ mid-career dancers as they were too expensive under the Award, and that funding levels did not allow for that.

6.2.5 Financial Results

The following is based on an analysis of the consolidated results of the 12 dance companies over seven years from 1996 to 2002.

6.2.5.1 Income

Some elements of the combined income and expenditure analysis are somewhat skewed by the establishment of Chunky Move as a major Melbourne-based company part way through the period analysed (with its state funding, for example, rising from c.$13,000 to $800,000 between 1996 and 1998).

Total income for the 12 companies increased 36% over the seven years from 1996 to 2002, largely due to an increase of 41% in total government funding, representing around 75% of total income. However, when Chunky Move's income is excluded, the income of the remaining 11 companies only increased 15% over the seven years to 2002 representing an inflation-adjusted decrease in income of 4%.

The companies' combined *earned* income (the remaining 25% of total income) increased 19% over the period to 2002—after adjusting for inflation this represents a standstill in earned income. Excluding the results of Chunky Move, the remaining companies reported a 4% increase in earned income—after adjusting for inflation, a real decline of 15%.

While sponsorship and philanthropy income increased 30% (in real terms) over the period, it continues to represent only around 4% of total income (compared with 11–12% for the MPAB companies). Sponsorship was regarded by most companies (with the exception of Chunky Move) as not worth the investment of time and resources. It is difficult to assess whether this negative view of sponsorship is a result of lack of expertise (or time) having produced poor results, which in turn has convinced the companies not to pursue sponsorship further; or whether some of the companies have made a concerted, professional effort, but still not achieved a good return.

There has been a decrease in funding by the Australia Council of the 12 companies over the seven years. This has been largely offset by an increase in state government funding, although a substantial proportion of this is attributable to Victoria's funding for Chunky Move. Of total funding received by the 12 companies over the seven years to 2002, 32% was funded by the Australian Government and 65% from the state governments. After inflation is taken into account, there has been a 23% real decrease in Australian Government funding and a 63% real increase in state government funding for the 12 companies. With the exception of Chunky Move, the remaining 11 companies have reported a real decrease of 1% in overall funding over the seven years—that is, the funding increases over the period have not kept up with inflation.

6.2.5.2 Expenditure

Consolidated expenditure increased 35% over the seven years to 2002 largely due to an overall increase of 46% in salaries and wages and, specifically, the significant increase in expenditure by Chunky Move from 1998. Excluding Chunky Move, the remaining companies consolidated expenditure only increased 13% over the same period—in fact negative growth of 7% after taking into account inflation over the period.

Of total expenditure, 64% was spent on salaries and wages in 2002—a steady increase over the period from 59% of total expenditure in 1996. This increase can largely be attributed to the increase in dancers' awards over the period and the superannuation levy guarantee increase (from 6% in 1996 to 9% in 2002).

Production costs have decreased 19% over the period representing around 15% of total expenditure in 2002—a decline from representing around 25% of total expenditure in 1996. When excluding Chunky Move production expenditure, the remaining companies have reduced their production costs by a substantial 37%. That is, after inflation, 11 of the companies experienced a real decrease of 56% in production expenditure over seven years.

While marketing and promotional costs have increased 67% over the period, such expenditure comprises only around 5–7% of total expenditure. Administration costs have increased 86% over the period (67% after adjusting for inflation) and generally comprise 11–13% of total expenditure. Significant increases in public liability insurance premiums over the past few years may have contributed to the increase in administration costs since 1996.

6.2.5.3 Current financial position

For the 2002 fiscal year, the companies achieved a combined operating surplus of $203,000. For two of the previous six years the companies had generated net operating deficits.

The cumulative operating surplus for the 12 companies over the seven years to 2002 represented 1% of consolidated income. Most of the companies have managed minor operating surpluses that, in many cases, have offset a couple of years of minor operating deficits.

At the end of 2002, consolidated cash reserves of the 12 companies amounted to around $910,000 representing 12% of total income or expenditure. The measure of the percentage of cash reserves held against annual expenditure illustrates the very tight ‘margins for error’ the companies are operating under. This is more acute in the light of the fact that about 90% of the cash reserves are held by three of the companies.

Three of the companies are currently in a healthy financial position, four are in an acceptable position with no immediate danger, but a further four are in a weak or very vulnerable financial position.

6.3 Other funded companies

Alongside the MPAB and other consistently-funded companies, there is a range of project-funded companies, typically constructed around the talent of a key creative individual. This broader group of companies also makes a significant contribution to professional dance activity in Australia. A group of 13 of the companies, all of which have received some funding, were interviewed, including:

- Balletlab
- Bonemap
- Canberra Dance Theatre
- De Quincey Company
- Diana Reyes Flamenco
- Igneous Inc.
- Janganpa
- Kage Physical Theatre
- Lingalayam Dance Company
- Lucy Guerin Inc.
- Stompin Youth Dance Company
- World Dance Company
- Wu Lin Dance Company

Also included were two organisations closely involved in supporting dance: Dancehouse in Melbourne, and PICA in Perth.

6.3.1 Profile of sample

The companies interviewed comprised companies and venues based in Victoria (5), NSW (3), Queensland (3), WA (1), Tasmania (1), ACT (1) and NT (1). Of the 13 producing dance companies, eight were established less than seven years ago with the remaining five companies having a history of over 10 years [20].

The work performed by the companies is largely contemporary with a number of companies including more hybrid works and arts practices (e.g. multimedia and physical theatre). The work of four of the dance companies' is based on traditional dance practices including flamenco, Indian, and Indigenous.

The dance companies interviewed were smaller companies operating on project funding, some with modest state annual funding, and with full-time but unpaid artistic directors. Only two of the dance companies had paid full or part-time employment positions. In all cases, the artistic director was interviewed, largely comprising more experienced performers and choreographers who have worked nationally and internationally.

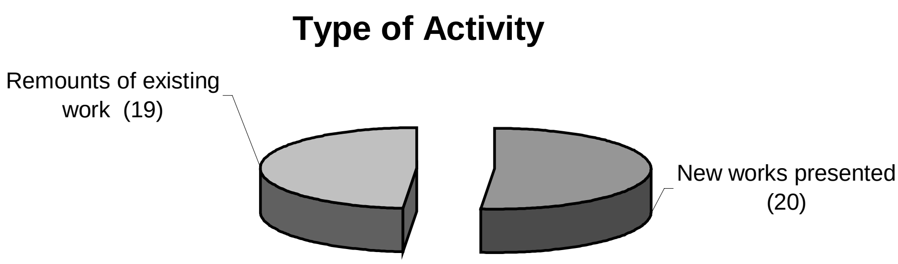
Seven of the 13 companies were being operated from a home base, although eight of the 13 had been engaged in international touring.

6.3.2 Artistic outputs

Financial and artistic data was gathered for the 2001 year only, primarily in recognition of the burden which additional data gathering would place on the unpaid company leaders. The following charts highlight key outputs of the companies during 2001.

There was an almost equal division between new work and remounts of existing work:

Chart 6.3.2a Remounts and new work



n = 10

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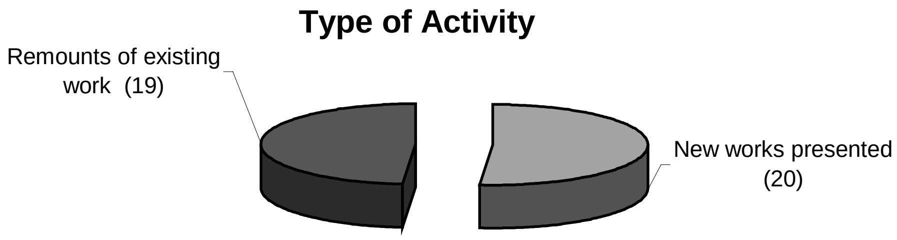
[20] During 2001 the artistic director of World Dance Company spent time travelling internationally with the benefit of an Australia Council Fellowship. No project funding was secured that year, and the company's activities were dormant. Income and expenditure data and other outputs for World Dance Company are therefore missing from the analysis below. Additionally, Lucy Guerin's work was commissioned and presented by other dance companies.

However, the proportion of existing work was boosted by Janganpa's output. Excluding this, the remaining companies reported that 83% of their output was new work.

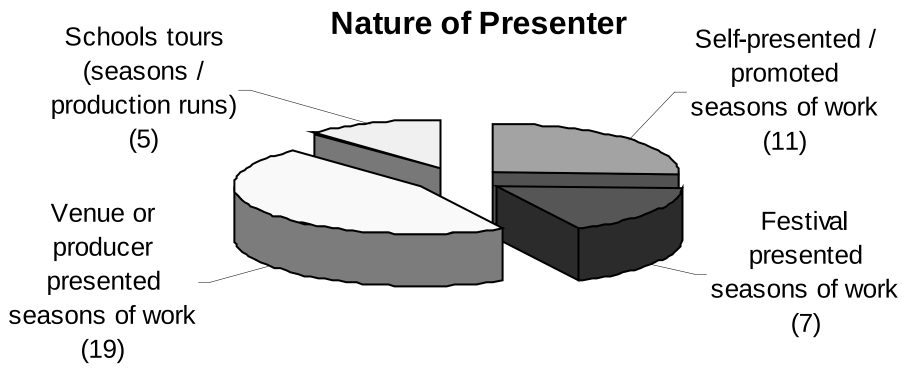
Chart 6.3.2b Remounts and new work



n = 9

25% of the work was self-presented, with the remainder being presented by venues, festivals, other presenters, or in a schools context:

Chart 6.3.2c Nature of presenter

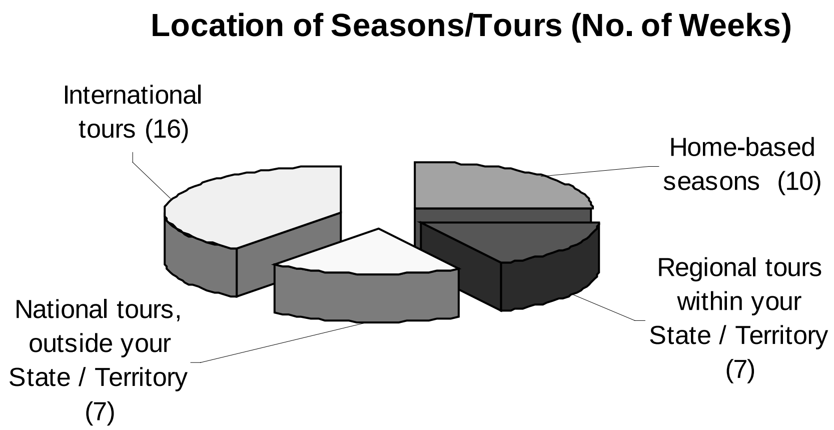


n = 10

Again, the high proportion of venue-presented work reported by Janganpa influences this result. Excluding Janganpa, the remaining companies reported only nine seasons of venue or producer-presented seasons.

Seven of the companies recorded overseas touring during the year—as many as produced home-based seasons. The total number of weeks presenting work abroad was 16 weeks, compared with 24 weeks presenting work in Australia:

Chart 6.3.2d Nature and duration of seasons



n = 10

The total number of performances in 2001 was 98[21], with an average of 10 for each of the 10 companies which provided data. The total number of weeks in performance in 2001 was 40 with an average of four for each of the 10 companies.

6.3.2.1 Development periods

The number of weeks in creative development and rehearsals in 2001 was 85, although this figure was for seven companies only, with an average of 12 weeks for each company.

Interviewees commented on the lack of development support (that is, finance) resulting in less quality dance work being produced—not allowing the work's full potential to evolve; on the lack of professional training and development of artists (including 'classes'); and on less development time being funded with expectations on companies to produce quick 'hits'. Overall, there was a perception that they have less time now for creative development—whether funded or not—and that there are increasing non-artistic pressures and demands.

6.3.3 Human resources

Interviewees commented on the sense of professional isolation which characterised work with smaller, project-based companies, and on the fact that the artistic directors were 'drowning' in multi-tasking.

> *Creative work suffers from a lot of role-playing—where the artistic director also has to manage, market and administrate.*

Only one paid full-time member of staff was recorded by the dance companies, with 159 contract staff (95 performers) and 93 unpaid staff (58 performers)[22]. Concern was expressed that dancers were only contracted on a project basis, when the companies were able to afford

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[21] Excluding performances of Lucy Guerin's work by other companies which had commissioned her

[22] Dancehouse and PICA recorded 2.8 and 6 full-time respectively

it, with very little full-time or continuing part-time employment. The lack of employment opportunities for choreographers, dancers and other arts workers was believed to be leading to a loss of talent overseas.

The absence of long-term training, mentoring and development of young dancers and arts workers was articulated.

6.3.4 Distribution and audiences

Venue caution: the companies felt there was a lack of affordable venues for rehearsal and performance, and a lack of festivals and contexts to showcase work, especially in Sydney. Presenting venues were believed to be reluctant to take risks, and were able to provide little support with audience development.

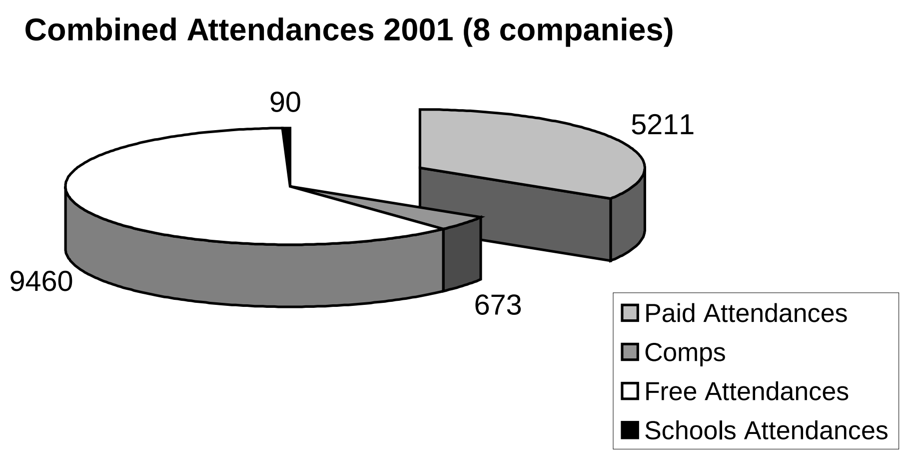
Greater opportunities needed to sell works: the companies commented on the lack of producers in the dance sector; and on the lack of resources and 'power' to seek and secure partnerships with other sectors, including business, local government, venues and festivals.

Lack of support for touring: a national touring circuit or network was needed for smaller dance companies, and enhanced support for international touring. The overseas market was seen as essential to maintain the viability of dance.

Small audiences: poor audience development was attributed to lack of expertise and resources. Greater investment was needed to develop markets and to stimulate consumer interest in the sector. This should be supplemented by developing quality dance education programs and materials.

A total of 15,434 attendances were recorded by eight companies able to provide data, with 5211 being paid attendances. This represents an average attendance level of 241 per performance, and paid attendances of 81 per performance[23].

Chart 6.3.4a Audience attenders: project companies



n = 10

[23] The audience results exclude Balletlab and World Dance (no 2001 during activity), Lucy Guerin (work presented by other companies during 2001) and Janganpa (no data available), and are therefore understated.

6.3.5 Financial data

Financial details were not complete for three of the companies which were not maintaining full financial statements, as they tracked their finances by projects[24].

- The companies are primarily reliant on project funding. In 2001, only four of the dance companies received core funding and only one of those from the Australia Council Dance Board (Stompin Youth Dance Company)
- As a number of companies do not record contra or in-kind goods and services, total 'revenue', sponsorship revenue and total expenditure are expected to be understated. One company indicated an in-kind sponsorship valued at c.$80,000.
- Earned income at 25% of total income includes significant performance fees and commissions for two of the dance companies: Janganpa and Lucy Guerin. Without these, earned income declines to 14% of total income for the remaining companies.
- While all dance companies recorded small surpluses in 2001 these results do not reflect the fact that 'expenditure' is significantly understated as none of the artistic directors of the 13 dance companies are paid on a full-time basis. Generally, the artistic directors receive irregular performer fees for projects and other activities such as classes.
- The highest level of cash reserves was $25,000, but most of the companies held less than $10,000 in cash reserves.

Despite the constraints of this single year 'snapshot', it is clear that the expenditure and income results are undervalued due to the unpaid labour contributed by the artistic directors and the receipt of in-kind goods and services not accounted for. That is, while all companies have reported small surpluses suggesting a positive financial result, the reality is that the dance companies are heavily subsidised by their artistic directors and, probably to a lesser degree, by others.

Combined operating results for the dance companies, and for the two venues, were:

Table 6.3.5a Summary 2001 financial performance

2001 Financial performance	12 Dance Companies	% of total income	Total of 14 Companies	% of total income
Earned income	$194,239	25%	$355,365	20%
Sponsorship	$18,065	2%	$152,354	9%
Core funding	$137,039	18%	$624,039	36%
Project funding	$422,490	55%	$615,654	35%
Total income	**$771,833**	**100%**	**$1,747,412**	**100%**
Expenditure	($730,069)	95%	($1,718,841)	98%
Surplus (Deficit)	**$41,764**	**5%**	**$28,571**	**2%**

6.3.6 Funding

More than any other issue, the interviewees in the 'broader' sample commented on the scarcity of funding, on the time and effort that was involved in the process of applying for

[24] 2001 was cited as a 'quiet year' by a number of the companies, for a variety of reasons

funding, and on the de-motivating awareness that there was only a one in five chance of securing support (as they perceived it). Comments included:

- stagnant funding but increasing costs and competition
- artistic directors exposed to unreasonable personal financial risk
- effective lobbying and advocacy not possible because of the diverse and scattered nature of dance companies
- different application process for state and Australian Government, for the same project—too time-consuming

It is the lack of continuity in funding that completely disables and has the capacity to destroy the extensive potential built up over many years.

Regular funding was believed to be necessary to ensure adequate infrastructure, long-term development, retention of performers/arts workers, mentoring and training for young performers and arts workers, and audience development.

7. Dance producers

The term ‘producers’ covers a range of models and practice including, in this analysis:

- an artist-led cooperative initiative which is a response to the lack of infrastructure support for independent practitioners
- agencies engaged with touring performing arts work, but also providing development support and advice for a ‘stable’ of artists
- entrepreneuring of commissioned dance works
- an agency which is focusing on support for a handful of experienced NSW artists, and extending from support confined to the development process to continuing assistance with touring, and extending the life of the work produced.

Producers cited the great diversity in the dance sector as a strength, along with the number of young people involved in training. The relative strength of the independent sector in Victoria was commented upon.

The need for small-scale performance spaces, with support facilities for dancers (such as adequate showers) was mentioned, partly because many of the venues which comprised current touring circuits were increasingly hesitant to take the risk in promoting contemporary dance.

The importance of rehearsal and development space to sustain independent choreographers was mentioned, along with the need for the independent choreographers and smaller companies to access administration and marketing support and advice. A couple of producers referred to the desirability of a ‘dance access centre’ in each state.

Longevity of works produced, and continuity of working for the practitioners, were cause for concern:

> *Mature dancers get money one year, not the next, so there’s no consistent support—and this is for the most experienced artists*

> *So much work seems to be done once, and never has longer life. So much support for new work, but not for supporting the work having a longer shelf life—it’s disproportionate*

There was a recognition of the problem of small audiences for contemporary dance, a major issue for the sector as a whole.

Some producers referred to a crisis of confidence in the sector, with low morale and high levels of frustration. There was a perception that the Dance Board has less and less money to support the sector. Most of the resources were seen to be supporting a small network of companies, with very little left to support individual artists and independent work. Even the most experienced and accomplished dancers were struggling to secure backing for their projects.

Greater coordination between states and the Australia Council was regarded as a necessary foundation for strengthening the sector, including coordinated support for specific projects. Within the Australia Council itself, greater interaction between the boards was thought to be needed, to keep pace with increasingly interdisciplinary arts practice. There were also observations on fragmentation within the dance sector, with companies not cooperating with each other as much as they could. Possibly more frequent forums, including some initiated by the Dance Board, could help to break down these barriers.

A small network of committed venues, and strategic support for key practitioners were common messages, along with the need to support one or two experienced producers who could, in turn, provide support for a range of project-based companies and independent practitioners:

We need a Producing Bank, for independent dancers and choreographers to gain access to support and expertise

Although not reported by producers, it was noted by others that there are very few producer-organisations operating in the international field, that is, representing and promoting Australian dance abroad.

8. Funding for dance

8.1 Introduction

National dance funding comprises support from several areas of the Australia Council, from Australian Government through Playing Australia, and from each of the states and territories.

Excluding funding of MPAB companies, Australia Council funding for other dance declined in real terms by $1.95 million between 1993 and 2002, and funding provided through the Dance Board declined in real terms by $1.22 million during the same period[25].

Over the 10 years to 2002 the average ratio of grants distributed to grants requested for individuals by the Dance Board was 29%, but for five of the 10 years ranged from 20% to 25%.

During the five years to 2002, there was a trend towards Playing Australia funding being allocated increasingly to the MPAB dance companies.

State and territory funding for non-MPAB dance companies and individuals rose from $5.43 million to $7.08 million in the five years to 2002. However, since 2000, while total federal and state dance funding rose from $19.64 million to $23.68 million, funding for non-MPAB companies (and individuals) increased from $11.64 million to $11.82 million, a cash increase of $180,000, and an inflation-adjusted *decline* of $1.14 million.[26]

Recent state and territory arts policy reviews may provide opportunities for enhanced dialogue between them and the Australia Council on shared priorities.

8.2 Australia Council consolidated funding

Australia Council support for dance includes funding from several of the boards:

- Dance (and formerly Performing Arts) Board
- Major Performing Arts Board
- Aboriginal and Torres Strait Islander Arts Board
- Community Cultural Development Board
- New Media Board

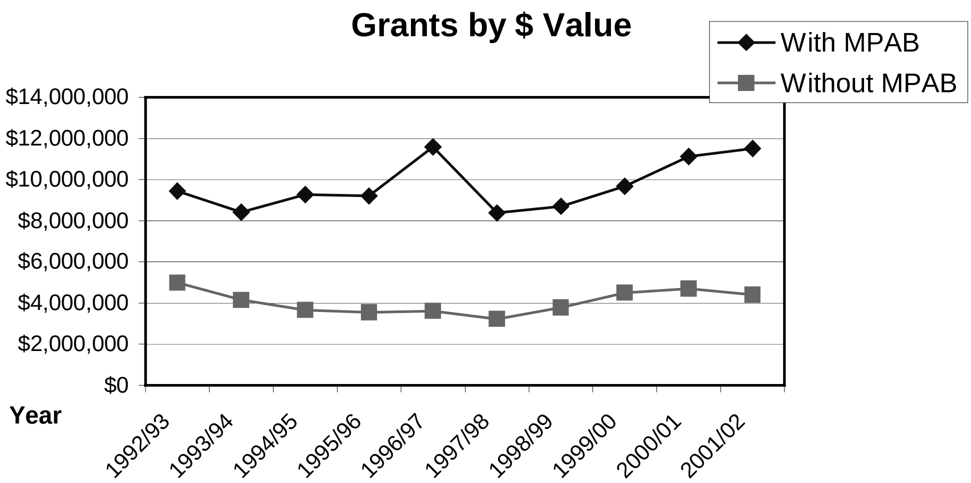
as well as from the Audience and Market Development Division.

[25] CPI in December 1992 107.9; CPI in December 2001 135.4. Throughout this report changes in the value of funding have been calculated in relation to prices at the start of the period under consideration. In this instance, if Dance Board funding had increased in line with inflation the Board would have distributed $1.22 million more in 2002 (at 1993 prices)

[26] CPI in December 1999 124.1; CPI in December 2001 135.4

Over the 10 years to 2001/02, the combined funding for dance from all areas of the Council was:

Chart 8.2a Consolidated Australia Council Dance Funding 1992/93—2001/02



In 1992–93 overall funding for dance (including MPAB) stood at $9.44 million. By 2001–02 this had risen to $11.52 million. Allowing for inflation, however, this represents a decline in real terms of $516,000 between 1993 and 2001–02.

Excluding funding of MPAB companies, funding for other dance stood at $4.98 million in 1992–93, and at $4.4 million in 2001–02. After adjusting for inflation this represents a decline in real terms of $1.95 million between 1993 and 2002.

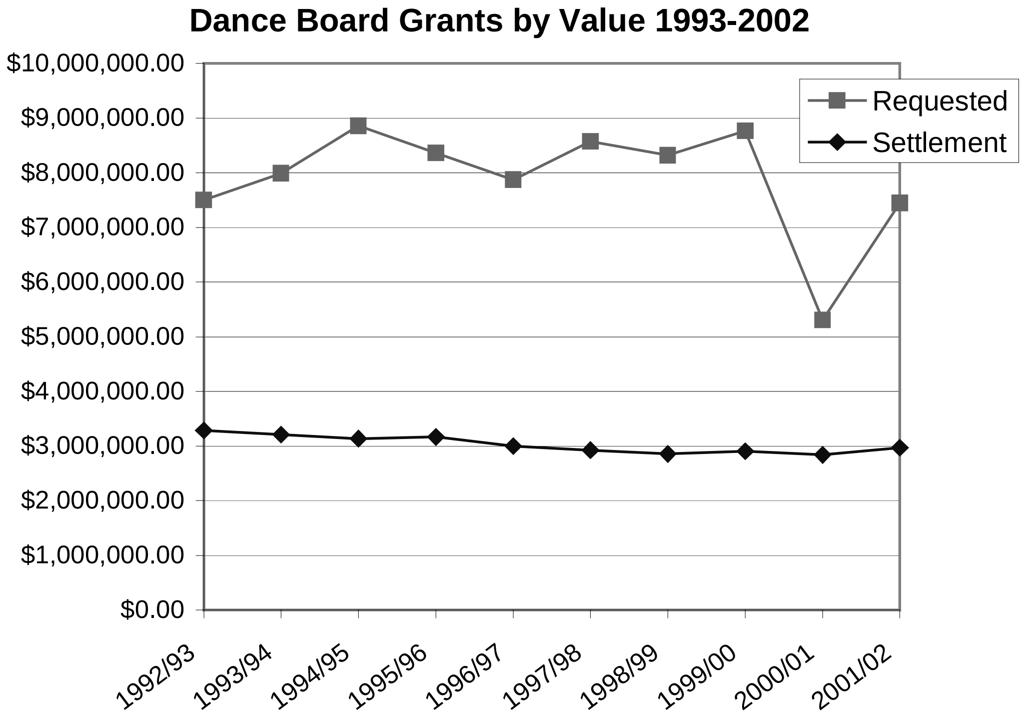
The lion's share of funding to dance is currently distributed through MPAB, and this has been significantly enhanced by additional funding subsequent to the Major Performing Arts Inquiry. The Dance Board currently distributes approximately one quarter of the Council's funding to dance.

The spread of dance funding, especially between the Dance, ATSIA and CCD Boards, raises the question of whether more institutionalised and frequent communications might be established between these boards to ensure they are working with common direction, where this is appropriate and advantageous to the sector.

8.3 Dance Board funding

Excluding funding provided to MPAB companies during the early 1990s, for the past 10 years funding available through the Dance Board has ranged from $3.29 million (1992–93) to $2.97 million (2001–02). After adjusting for inflation this represents a decline in real terms of $1.22 million.

Chart 8.3a Dance Board Grants By Value



For nine of the 10 years, the ratio of funds distributed (grants paid) to funds requested by dollar value ranged from 33% to 44%. The increase to a 54% ‘success’ rate in 2001–02 reflected a significant drop in the number of applications, which is understood to have been a reaction by applicants to the very low grants-to-applications ratio in the preceding years.

The number of grants distributed to individuals has ranged from 14 (1995–96) to an exceptional 68 in 1993–94. In most years the number of grants has been between 15 and 30. Over the 10 year period the average ratio of grants distributed to grants requested (for individuals) has been 29%, but for five of the 10 years has ranged from 20% to 25%.

The number of grants distributed to organisations has ranged from 33 (2001–02) to 52 (1992–93). Over the 10 year period the average ratio of grants distributed to grants requested (for organisations) was 46%.

In 1994 there was a reduction in the amount of funding granted to companies via the Dance Board, as major companies’ funding was transferred elsewhere within the Council. For consistency, the preceding analysis excludes major companies’ funding from the beginning of the period.

Thirteen organisations have enjoyed support from the Dance Board throughout the 10 year period, of which four are not producing dance companies; and three organisations have received funding in the last few years only—Chunky Move, Restless Dance Company, and Tracks.

8.3.1 Grant success ratios

Many of the individual practitioners (and project company leaders) interviewed have commented on the time and effort taken to apply for funding; and a significant number indicated that they were now discouraged from applying because of the one-in-five chance of success (more or less borne out by this retrospective analysis). Most of these practitioners do not have access to an administrator, and may be constrained in their ability to spend time contacting and exploring possibilities with Australia Council officers. They are largely disheartened by the process, even if that process has been established to ensure equitability and prevent resources being monopolised by a small group.

8.3.2 Program strands

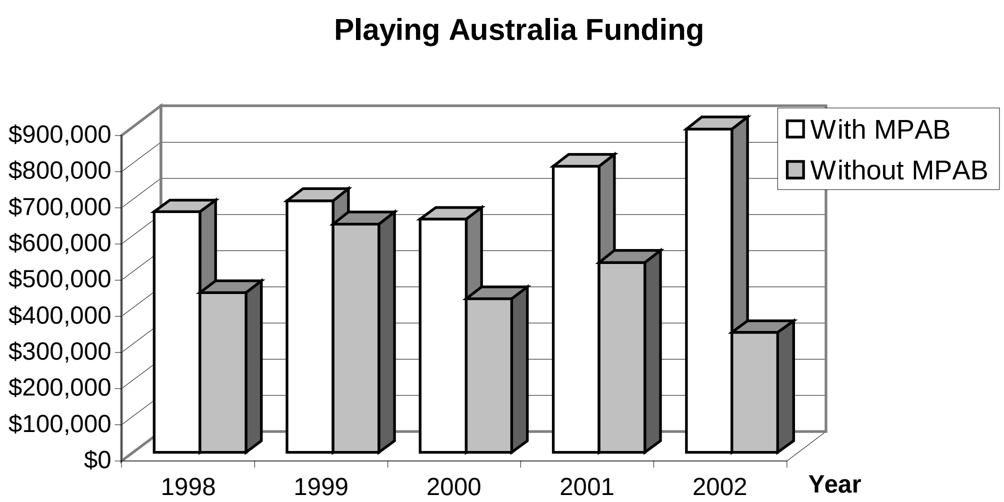
Over the last 10 years, different funding programs have been introduced (or terminated) by the Dance Board, in order to try to respond to the needs of the sector. A description of each of the funding programs and the years to which they applied is included at Appendix 2, along with a full analysis of funding by program.

The success ratio of grants to applications was lowest for New Work (23%) and Development (32%), and highest for triennial funding (94%), annual funding (76%) and special initiatives (74%). In the last five years, the success ratio for New Work has averaged 18%.

8.4 Playing Australia

The Australian Government also supports dance through Playing Australia, to assist with the costs of dance touring across the country. During the last five years, Playing Australia dance funding has ranged from $643,000 to $895,000. In the same period (to 2002) there was a trend towards Playing Australia funding being allocated increasingly to the MPAB dance companies, with a decreasing proportion of funding being allocated to other dance companies. The table below is a summary of Playing Australia funding (a full analysis is included at Appendix 3).

Chart 8.4a Playing Australia Funding



8.5 State and territory government funding

Funding data for dance for a five-year period was gathered from each of the state and territory arts departments:

Table 8.5a State and Territory Dance Funding

	1998	1999	2000	2001	2002
NSW Ministry for the Arts	1,287,000	1,324,000	1,422,070	1,831,784	1,802,107
Arts Victoria	1,483,490	1,965,038	2,010,603	2,377,876	2,068,844
Arts Queensland	2,248,923	2,207,365	2,317,754	2,392,812	2,290,817
Arts SA	1,216,794	1,159,175	1,253,300	1,474,155	1,486,038
Arts WA [27]	$1,300,000	1,443,565	1,510,700	1,792,948	2,643,402
Arts Tasmania	245,038	322,427	325,246	298,071	293,185
Dept of Community Development, Sport & Cultural Affairs (NT)	181,900	166,470	198,615	182,053	193,326
Arts ACT	409,911	282,591	275,000	313,527	487,178
Total	**8,573,056**	**8,870,631**	**9,313,288**	**10,663,226**	**11,264,897**

The following table shows state and territory funding data for dance over the same five-year period with MPAB figures removed:

Table 8.5b State and Territory Dance Funding, Excluding MPAB Companies

	1998	1999	2000	2001	2002
NSW Ministry for the Arts	622,000	609,000	697,070	689,445	710,000
Arts Victoria	1,483,490	1,965,038	2,010,603	2,377,876	2,068,844
Arts Queensland	1,098,445	1,056,887	1,026,494	1,101,552	999,557
Arts SA	1,216,794	1,159,175	1,253,300	1,474,155	1,486,038
Arts Tasmania	245,038	322,427	325,246	298,071	293,185
Arts WA	168,265	343,565	610,700	589,783	837,629
Dept of Community Development, Sport & Cultural Affairs (NT)	181,900	166,470	198,615	182,053	193,326
Arts ACT	409,911	282,591	275,000	313,527	487,178
Total State / Territory Funding	**5,425,843**	**5,905,153**	**6,397,028**	**7,026,462**	**7,075,757**

[27] 1998 and 1999 Arts WA figures are taken from estimates provided but not confirmed

Combined state and territory funding for non-MPAB dance companies and individuals has risen 30% during this period. After allowing for inflation this represents an increase in real terms of 15%[28].

With the exception of NSW, the states and territories do not have artform-specific programs. Dance is supported in the context of policy objectives set across artforms and, in some cases, across broader government priorities than the arts alone.

Recent changes in government in several states and territories have led to policy reviews, not all of which have been completed. This applies in Victoria, Northern Territory, ACT and WA. Detail of the program structures and priorities of states and territories is provided in Appendix 4.

State and territory arts officers made a number of suggestions on possible future actions by the Australia Council or the states and territories to strengthen the sector. These included:

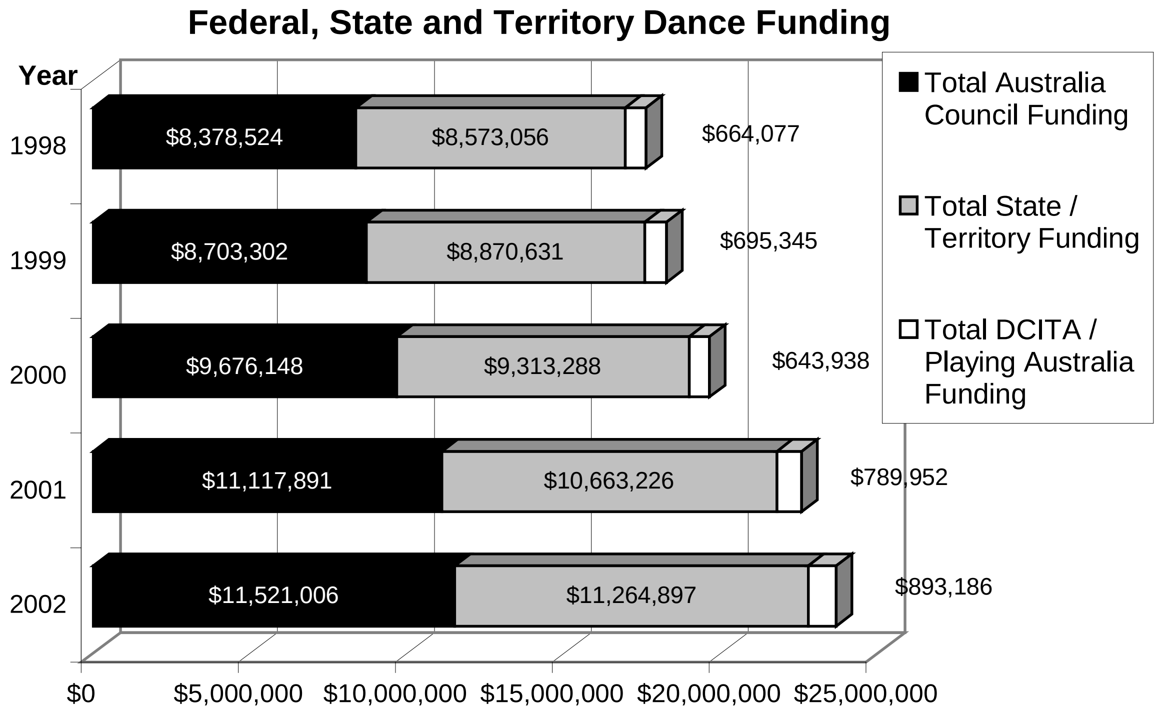
- furthering the common frameworks agreed as a result of the Small and Medium Performing Arts Review, such as common business planning processes, aligned application procedures or timing, and possibly common reporting procedures
- funding fewer companies, but with clear touring obligations in return for a higher level of investment into the remaining companies
- closer consultation between Australia Council and states
- adoption of joint funding agreements for key dance organisations
- adoption of joint/combined programs with individual states
- focusing more strongly on audience development
- establishing a second tier Indigenous company.

[28] CPI December 1996 120.3; CPI December 2001 135.4

8.6 Total Australian funding for dance

The combined Australia Council, Playing Australia, and state and territory funding for dance during the five years to 2002 was:

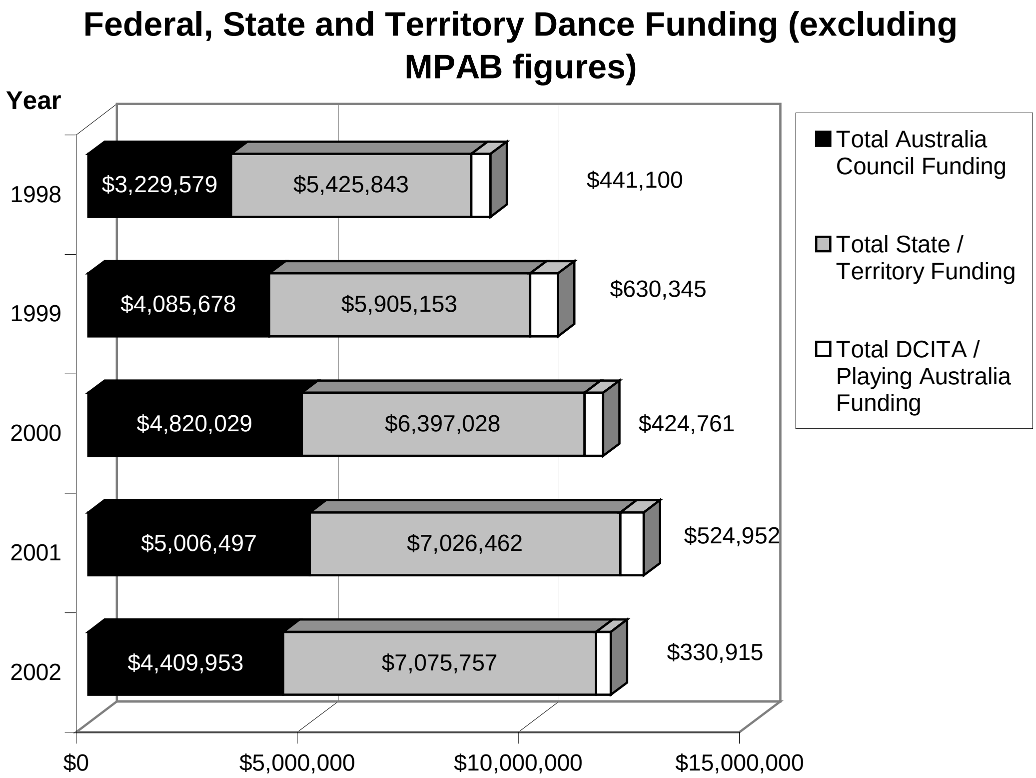
Chart 8.6a Consolidated Federal, State and Territory Dance Funding 1998 - 2002



Consolidated dance funding from the Australia Council, states and territories and Playing Australia grew from $17.61 million to $23.68 million in the five years to 2002, a cash increase of 34%, and an inflation-adjusted increase of 19.3%.

When funding to MPAB companies is removed, combined dance funding is seen to have risen from $9.1 million to $11.4 million, a cash increase of 25%, and inflation-adjusted increase of 10.1% during this five-year period. However, since 2000 while total dance funding rose from $19.64 million to $23.68 million, funding for non-MPAB companies (and individuals) increased from $11.64 million to just $11.82 million, a cash increase of $180,000, and an-inflation-adjusted *decline* of $1.14 million[29]:

Chart 8.6b Consolidated Federal, State and Territory Dance Funding 1998 - 2002, excluding MPAB Companies



[29] CPI 126.2 in 2000, and 137.6 in 2002

9. Dance funding and structures internationally

A brief overview of dance development in other countries was undertaken, with a particular focus on interventions which have been made by funding agencies.

The key funding agencies in England, Scotland and New Zealand have each adopted policies or strategies specific to the dance sector in recent years. In Wales, a draft Dance Action Plan has also been produced. Many of the challenges identified during this analysis of the dance sector in Australia were echoed in the debates taking place in those countries:

- the need to provide continuing professional development beyond initial, pre-entry training for dancers
- the need to support proven choreographic and performance talent
- the importance of providing affordable accessible space for rehearsal and development
- the challenge of building and sustaining touring networks, including support for ‘safe houses’ which regularly present dance
- the problem of low remuneration for dance practitioners, and career insecurity.

In New Zealand in 2000 the newly-elected government announced a Cultural Recovery Package which included net additional funding of $17.78 million for Creative NZ spread over three financial years 2000. A large part of Creative NZ’s additional funding ($11.08 million to June 30, 2002) has been directed towards stabilising arts infrastructure, including increased funding levels for several dance companies and the provision of recurrent funding for a contemporary dance company, Black Grace Dance Company.

The Canada Council has recently announced the piloting of a funding initiative intended to encourage the presentation of dance, through creation-based partnerships between presenters and artists. The program aims to put resources into the hands of presenters in order to:

- enhance creation and visibility opportunities for professional Canadian dance artists and companies in Canada
- contribute to long-term relationships between artists and presenters and their public
- improve the conditions for creating dance by allowing artists more time in a single community, allowing them to reduce travel costs, develop in-depth relationships with a community, and focus on their work or share the intent of their work with a larger community
- recognise the costs to presenters of providing facilities to artists
- recognise and support the educational costs of in-depth outreach work associated with creation-based residency initiatives.

This holistic approach, evidently an antidote or alternative to the lack of impact and audience development which can result from a pattern of split-week touring, endeavours both to forge a partnership between the presenters and the producing companies, and to encourage longer-term commitments to audience development.

In other countries, the structure of funding and support for dance is often very different from that in Australia. In Germany, for example, some of the leading dance companies (including leading contemporary companies) are tied in with the finances and corporate structure of Germany's unique network of opera houses.

In France, in the early 1980s, the Ministry of Culture determined that dance should be more equitably spread through the country, rather than being so heavily focused in Paris. To achieve this, the Government selected a range of the country's most dynamic young choreographers, and relocated them to regional centres, with generous funding, to enable them to establish companies, and to build both artistic and audience followings over time. This had the ancillary merit of attracting local and regional funding to supplement central funding. Appropriately dubbed 'D'implantation' this very directive policy is considered by many to have been successful in growing the audience and the industry infrastructure for dance. It is questionable whether such a top-down policy would be feasible in Australia.

Despite the structural differences, the scan of dance development and funding elsewhere did highlight some productive initiatives which merit consideration in an Australian context, including the current Canadian creative-partnerships model (as yet only a pilot) and several elements of the UK's dance infrastructure.

Stepping Forward was a seminal report on dance, published by the Arts Council of England in 1989. It informed the development of the dance sector in England throughout the 1990s and continues to provide the foundation for current dance infrastructure.

In setting the scene, the report's author, Graham Devlin referred to:

> *… a deeply demoralised and nervous profession. The concerns thus articulated resonate through every scale and almost every style of work—the belief that there is a creative crisis in British dance, for example, or that much contemporary work has lost contact with its audience*

Faced with a daunting range of problems, Devlin drew attention to the concerted, long-term efforts that had been made in some other countries (France, the US, Holland, for example), and encouraged a broad-ranging approach to development of the sector, from education and training, through support for new work, to touring and other distribution. Among other things, the report recommended:

1. the establishment of a network of national dance agencies—nine of which were established and continue to operate[30]
2. that the Dance Panel of the Arts Council of England adopt a more strategic role
3. that stronger emphasis be placed on an audience rather than artist-centred approach to resource allocation
4. that additional resources be secured to fund companies more appropriately; and in the absence of this, that one or two companies be defunded to fund the remaining companies more generously[31]
5. that substantial funding be provided to a Black Dance company (i.e. African dance)

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[30] There are now a total of 24 national, regional and county dance agencies. Each varies in the precise range of services, but typically they provide support resources for professional dancers, present regular workshops for the community, run projects linking into the education system and, in some cases, entrepreneur professional performances.

[31] A political firestorm followed, with the principal threatened company, Northern Ballet, generating a record quantity of lobbying correspondence to the Arts Council and the Minister, and forcing a 'retreat' from this recommendation

6. that non-Western dance be nurtured through the proposed regional dance agencies, and through dance training providers
7. that dialogue with the Department of Education should be advanced ‘to clarify the parameters of educational policy from both sides’

Much of the report was adopted and implemented, and the sector is now undeniably stronger, healthier, and in audience terms more popular, than it was 15 years ago[32]. A glance at the dance infrastructure in London alone gives a hint at what has been achieved. In London, there are now:

- more than 30 venues regularly presenting dance
- four ballet companies, 39 contemporary dance companies (at all levels of operation), six South Asian dance companies, seven African dance companies, 16 physical theatre companies, and seven student dance companies
- 16 organisations offering studio/rehearsal space
- 13 dance management organisations
- 31 organisations offering support or advice to the dance sector.

This is a long way from the ‘creative crisis’ which Devlin described earlier. Of course, not all the problems have been solved. A 2001 Arts Council of England report tells us:

> *Salaries, salary progression, working conditions and continuous professional development are major issues across dance. For an industry that is entirely dependent on people, the lack of regular, structural investment in its people is remarkable*

The Report also refers to ‘a critical shortage of male dancers’, following years of under-investment in dance in schools and in vocational training provision.

Perhaps not all the problems can be solved. But what we can learn from this positive UK experience is that despite dance’s small audiences, and despite its reliance on public funding, with the right level of political will and administrative cooperation it is possible to affect very significant change for the better. That is the challenge.

[32] A discussion paper prepared by Peter Alexander for the 1991 National Dance Summit (Directions for the Future of Dance in Australia), written shortly after Devlin’s report, highlighted a familiar list of concerns and issues for the dance sector: the need for stronger promotion, the benefits of residencies and animateurs, the need for dance development centres to support experimental work, and concerns about the adequacy of training provision.

10. Summary of findings

The purpose of this section is to reiterate briefly those findings from the research which have most strongly influenced our recommendations.

10.1 The sector

The dance sector is small and its activity is largely generated by subsidised organisations. There is no commercial ‘paradigm’ for dance as there is in popular music or film, leaving dance more heavily dependent upon government subsidy than some other areas of artistic activity.

Australian dance and dancers are respected internationally. Demand is evidenced by the engagement of individual dancers, and by international touring of small and medium-scale companies, as well as by the MPAB companies as reported in the earlier Major Performing Arts Inquiry.

In addition to the programs of the major performing arts centres, there are a small number of contemporary performing arts centres which have established a track record for presenting dance. They lack resources, and in some cases physical infrastructure, to sustain a regular, well-promoted program. With the termination of the Australian Government’s Made to Move initiative, touring arrangements for dance are currently uncertain, with no alternative mechanism or circuit having been agreed.

Conclusion: strategic support for dance presenters is necessary to sustain and build the domestic market for contemporary dance.

10.2 The dancers and choreographers

A recent survey by Macquarie University indicated that dancers’ gross income from creative work during the 2001 financial year was a median of $12,900 and a mean of $16,700. Only 15% of those consulted thought they had made adequate arrangements for their financial future.

During interviews carried out for the present study, the majority of dancers and choreographers stated that they usually undertake unpaid work during the research and development stage of a project. On extended or major projects it appeared to be common that only a very small proportion of the time invested was remunerated. Several of the more experienced individuals referred to continuing low levels of pay, well into their careers.

Many of the interviewees referred to the need for practical support with administration and marketing. They felt over-stretched, referring to an unreasonable degree of multi-skilling required. Maintaining performance skills required a high level of investment—a significant difference from most other artforms (other than circus and physical theatre).

Independent choreographers referred to the frustration of investing a high level of time and effort into the development of a project, which then enjoyed only a handful of performances. Several indicated there is a need for more producers and production houses to provide an interface between the work being produced and the venues, presenters and audiences.

A significant number of those interviewed were either contemplating resigning or retraining, or had relocated overseas for extensive periods due to a lack of opportunity and lack of financial security in Australia.

More positively, the Dance Board's recent Project Workspace initiative (providing a large number of artists with access to modest grants to cover short-term space hire) was very positively regarded.

Conclusion 1: financial support for dance producers could address some of the administrative support needs of the independent choreographers, and create stronger linkages between the work and the presenters—potentially extending the life of the work.

Conclusion 2: modest financial encouragement could stimulate more frequent involvement in domestic dance creation by Australian dancers who have forged a career abroad.

Conclusion 3: Project Workspace and similar targeted initiatives are worth continuing or initiating in the future.

10.3 Dance training

The tertiary dance sector was reported to have become both more holistic in program content and more inter-disciplinary. Some concern was expressed about the lack of structured support for choreographers in their early years.

Some of the institutions offer graduates the option to periodically rejoin practical classes free of charge to assist them to keep in shape, with perceived benefits for current students through contact with graduates.

Several interviewees noted a shift away from duplication in Australian tertiary institutions. Some programs have been shut down or are being redesigned, with universities being under pressure to find a point of difference for their courses.

Greater cooperation between Australia Council and the tertiary sector was thought desirable. Another opportunity mentioned was a potential link with the professional sector through hire of facilities such as studios when not in use for teaching purposes.

Conclusion: more regular interaction between the Australia Council, the tertiary sector and the producing companies could benefit each of these parties and the sector as a whole.

10.4 The consistently-funded companies

Of 12 companies which have enjoyed consistent funding from the Australia Council in recent years, seven stated that they maintained ensembles. Of these, only one maintained year round employment for dancers. A traditional ensemble is currently the exception not the rule for these companies.

Production costs have decreased 19% over the period representing around 15% of total expenditure in 2002. When Chunky Move production expenditure is excluded, the remaining companies have reduced their production expenditure by a substantial 37%. It appears that reduced investment in production costs is being used to avert operating deficits.

64% was spent on salaries and wages in 2001— a steady increase over the period from 59% of total expenditure in 1996. This increase can largely be attributed to the increase in dancers' awards over the period and the superannuation levy guarantee increase (from 6% in 1996 to 9% in 2002).

While marketing and promotional costs have increased substantially in recent years such expenditure still comprises only 5–7% of total expenditure. Less than half of these companies have a part-time publicist, and only two have dedicated marketing positions. Three companies mentioned rising expectations of professionalism in marketing by both audiences and industry, but an inability for the companies to afford a proper response to this.

The tenure of general managers ranges from one month (at the time of interview) to 18 years, but if Expressions and Leigh Warren are excluded the maximum tenure reduces to five years. One third of general managers have been in post less than 12 months, and more than half for less than three years.

Despite the increase in number of works and performances, the 10 companies providing consistent audience data reported a decrease in paid attendances of 49% over the four years from 1998.

On a consolidated basis, the companies achieved a cumulative minor operating surplus over the seven years to 2002. However, the amount of the consolidated surplus only represents 1% of consolidated income, and several of the companies are in a very vulnerable financial position.

After inflation is taken into account, there has been a 23% real decrease in Australian Government funding and a 63% real increase in state government funding for the 12 companies during the seven years to 2002. With the exception of Chunky Move, the remaining 11 companies have reported a real decrease in overall funding over the seven years to 2002.

Conclusion 1: most of the companies need to rebuild their investment in production costs to maintain high standards; and need the resources and advice to strengthen their marketing and audience development function. Both of these developments should occur in the context of an agreed development plan for each company.

Conclusion 2: training and greater networking should be considered to support the executive staff and, in some cases, encourage longer tenure.

10.5 Other funded companies

These comprised a group of 13 companies, and two other organisations, which have received some funding from federal or state government during the last five years. Seven of these companies were being operated from a home base, yet eight of the 13 had been engaged in international touring. In addition to a relatively high level of international touring (16 international seasons, compared with 24 domestic seasons) the following were noted from a summary of the companies' 2001 activities:

- a low number of performances per company (average 9 over the year)
- a low number of performances per season (between 2 and 3)
- total audiences (including unpaid attendance, for eight companies) of 15,434 for the year, or 1,929 per company. One third of the audiences are accounted for by paid attendances.

Small audiences were attributed to a lack of expertise and resources. Greater investment was needed in marketing to stimulate consumer interest in the sector.

While all companies reported small surpluses, the reality is that these companies are heavily subsidised by their artistic directors. Only one full-time paid member of staff was recorded, with 159 contract staff (95 performers) and 93 unpaid staff (58 performers).

More than any other issue, the interviewees in this ‘project-based’ sample commented on the scarcity of funding, on the time and effort that was involved in the process of applying for funding, and on the de-motivating awareness that there was only a one-in-five chance of securing support.

Other concerns were the lack of affordable venues for rehearsal and performance, and a lack of festivals and contexts to showcase work, especially in Sydney. Presenting venues were reluctant to take risks, and able to provide little support with audience development.

The companies commented on the lack of producers in the dance sector; and on the lack of resources and ‘power’ to seek and secure partnerships with other sectors, including business, local government, venues, and festivals.

A national touring circuit or network was needed for smaller dance companies, and enhanced support for international touring. The overseas market was seen as essential to maintain the viability of dance.

Conclusion 1: the producer role mentioned with regard to independent choreographers would be of equal assistance to the small companies, both in marketing their work, in administration and in managing the funding application process.

Conclusion 2: greater continuity of funding would enable specific companies to develop their infrastructure, work and audiences. This may require more selective targeting of resources.

10.6 Producers

Producers echoed several of the concerns articulated by others, although rehearsal and performance venues, and supporting infrastructure were issues particularly mentioned by producers:

- the great diversity in the dance sector was cited as a strength, along with the number of young people involved in training
- the need for small-scale performance spaces, with support facilities for dancers (such as adequate showers)—because many of the venues which comprised current touring circuits were increasingly hesitant to take the risk in promoting contemporary dance
- the importance of rehearsal and development space to sustain independent choreographers
- the need for the independents to access administration and marketing support and advice.

Longevity of works produced, and continuity of working for the practitioners, were cause for concern.

Some producers referred to a crisis of confidence in the sector, with low morale and high levels of frustration. There was a perception that the Dance Board has less and less money to support the sector. Even the most experienced and accomplished dancers were struggling to secure backing for their projects.

Greater coordination between states, territories and the Australia Council was regarded as a necessary foundation for strengthening the sector, including coordinated support for specific projects. Within the Australia Council itself, greater interaction was needed between the boards, to keep pace with increasingly interdisciplinary arts practice.

Conclusion: producers have the potential to play a vital linking role, and to compensate for the low levels of administrative and marketing infrastructure in the micro-businesses which characterise the dance sector.

10.7 Dance funding

10.7.1 Australia Council

In 1992–93 overall Australia Council funding for dance (including MPAB) stood at $9.44 million. By 2001–02 this had risen to $11.52 million. Excluding funding of MPAB companies, funding for other dance stood at $4.98 million in 1992–93, and at $4.4 million in 2001–02. After adjusting for inflation this represents a decline in real terms of $1.95 million between 1993 and 2002.

The Dance Board provides 26% of overall Council funding to the dance sector. 62% is routed through MPAB to the major companies, with the remainder routed through ATSIAB, AMD, CCDB and New Media Arts. The spread of dance funding, especially between the Dance, ATSIA and CCD Boards, raises the question of whether more institutionalised and frequent communications should be established between these boards to ensure they are working with common direction, where this is appropriate and advantageous to the sector.

The proportion of unsuccessful applications to the Dance Board by individuals is of concern. Many of the individual practitioners interviewed commented on the time and effort taken to apply for funding—and a significant number indicated that they were now discouraged from applying because of the poor chances of success. Most of these practitioners do not have access to an administrator, and may be constrained in their ability to spend time contacting and exploring possibilities with Australia Council officers.

Conclusion 1: with Dance Board funding representing a minority of Australia Council dance funding there is a need to enhance discussion on common directions and priorities between different areas of the Council to maximise the organisation’s overall impact on the dance sector.

Conclusion 2: systems should be reviewed to identify whether the administrative burden of the application process can be simplified, especially for individual dancers and choreographers.

10.7.2 Playing Australia

The Australian Government also supports dance through Playing Australia, to assist with the costs of dance touring across the country. During the last five years, there has been a trend towards Playing Australia funding being allocated increasingly to the MPAB dance companies, with a decreasing proportion of funding being allocated to other dance companies.

10.7.3 Combined national funding

Consolidated dance funding from the Australia Council, states and territories and Playing Australia grew from $17.61 million to $23.68 million in the five years to 2002, a cash increase of 34%, and an inflation-adjusted increase of 19.3%.

When funding to MPAB companies is removed, combined dance funding is seen to have risen from $9.1 million to $11.4 million, a cash increase of 25%, and inflation-adjusted increase of 10.1% during this five-year period. However, since 2000 while total dance funding rose from

$19.64 million to $23.68 million, funding for non-MPAB companies (and individuals) increased from $11.64 million to just $11.82 million, a cash increase of $180,000, and an inflation-adjusted *decline* of $1.14 million[33]:

Conclusion 1: with Australia Council funding of dance comprising approximately 50% of all federal, state and territory funding, there will be value in exploring common ground and common priorities between the Council and other funding agencies to identify areas where joint or coordinated action could benefit the dance sector.

Conclusion 2: there is a case for increasing investment in the non-MPAB dance companies, both within the Australia Council and more broadly, in order to address recent decline in real-terms funding, and to address specific needs identified in this report.

[33] CPI 126.2 in 2000, and 137.6 in 2002

11. Recommendations

Our recommendations are clustered within four themes:

1. Promoting individual talent
2. Maintaining a healthy dance ecology
3. Building audiences now and in the future
4. Encouraging cooperation and providing leadership

The recommendations are presented on the assumption that additional investment can be secured for the dance sector. Given the decline in inflation-adjusted funding for non-MPAB dance in recent years, the range of issues which need to be addressed, and the lack of commercial opportunities in dance, it is questionable whether much can be achieved to strengthen the sector and build on its talents and successes without an uplift in funding.

Detailed costings have not been prepared as part of this report. However, it is estimated that between $3 million and $5 million would be required from government sources to address the recommendations. In the event that it does not prove possible to secure additional resources, a series of 'fall-back' actions is subsequently presented.

11.1 Promoting individual talent

In response to the needs identified by individual dancers and choreographers, tertiary training institutions, and small-scale project-based companies, it is **recommended** that:

11.1.a The Dance Board adopt a proactive and strategic approach to supporting a small number of key practitioners for the long term, rather than focusing only on relatively short-term support, such as young and emerging artist initiatives or fellowships. Support for such individuals needs to be integrated with support for the production and presentation of their work—that is, there needs to be an holistic approach to support through the value-chain of dance development and production. This implies a higher proportion of resources going to a relatively small constituency—but we take the view that it is better to nurture a few of the country's finest, than to spread the resources equitably thinly, to no-one's evident satisfaction. Such 'elitism' would pass as common-sense in Australian sport.

11.1.b Financial resources be allocated to encourage the growth of dance producers and dance management organisations; selected producers might be identified to play specific roles in the marketing and administration of independent dance workers, and in the support of international touring of small and medium-scale dance companies.

11.1.c Resources be allocated to encourage experienced ex-pat dancers and choreographers to return to Australia periodically, to initiate projects and to take project leadership roles with existing companies (ranging from MPAB companies to project-based organisations).

11.1.d The Dance Board, and other boards, use policy drivers and ear-marked resources to encourage both MPAB companies and other funded dance companies to engage with independent practitioners and project-based companies. Chunky Move's Maximise program provides one model, but there are a range of possible ways in which the resources of the funded companies could be made to benefit the 'project' sector (space, artistic and managerial and marketing support and advice, contacts), and ways in which the independents could enrich the funded companies (program input, new approaches, professional development contributions).

11.1.e The Dance Board repeat and sustain the recent Project Workspace initiative, providing affordable access to rehearsal and development space for independent practitioners.

11.1.f The Dance Board and Council consider ways in which the grant application process for individuals, and project-based companies, may be streamlined to reduce the burden on the applicant. This might entail the adoption of a two phase process—enabling applicants to submit a short outline proposal for initial assessment, prior to submission of a fuller application, subject to such a process being sufficiently timely. If this proves impractical, a simplified one-stage process might be instituted for projects up to an agreed value.

11.2 Maintaining a healthy dance ecology

In the light of the identified needs of the sector, it is **recommended** that:

11.2.a Funding levels for triennially-funded companies be uplifted to offset the recent effects of increased costs, enhance their infrastructure, and strengthen the companies' balance sheets, within an agreed stabilisation program.

11.2.b The Dance Board negotiate joint funding agreements with the states and territories for triennially-funded companies. Such agreements to be linked to development and stabilisation plans, and agreed outputs, for each company. In some areas, the use of such increased investment might be ring-fenced, e.g. for expenditure on marketing infrastructure. Much of the expertise and research to inform such a program already exists within MPAB, although some variations on its procedures with the major organisations may be necessary.[34]

11.2.c An assessment of key project-based and state-only funded companies be undertaken to identify whether any should be offered recurrent/triennial funding to increase the range of companies able to plan from a more stable base.

11.2.d The Council (through Dance Board and ATSIAB) take a lead role in the establishment of a second-tier contemporary Indigenous dance company, following consultation with Bangarra Dance Theatre, small and medium-scale indigenous theatre companies, and a full feasibility into the appropriate policies, protocols and structural arrangements for such a company.

11.2.e Training initiatives resulting from the Small and Medium Performing Arts Review be harnessed to the benefit of both consistently-funded and project-based companies; and, in particular, training and advice in marketing, development/fund-raising, touring (including export-readiness) be addressed; and networking support for the general managers of dance companies be prioritised—the latter might be along the lines of the UK Dance Manager's Group.

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[34] It is assumed that initiatives currently being undertaken following the Small and Medium Performing Arts Review can be harnessed to the benefit of the dance sector and, in some cases, may preclude the need for separate Australia Council interventions identified here

11.2.f The role of 'dance animateur' be piloted in two metro and two regional locations—providing a bridge between dance participation, education, and appreciation. Ideally, these will be co-funded by Australia Council and local and state partners.

11.2.g Alternative models of support agencies (such as the UK's National Dance Agencies and the French regional model) be investigated in greater detail to determine whether piloting a support system in state and territory capitals and major regional centres would be merited and, if so, what role would be played by the Australia Choreographic Centre, Melbourne's Dancehouse and other existing dance support agencies in Australia.[35]

11.2.h The Dance Board and Ausdance National consider the parameters of Ausdance's role in supporting the dance community. Widely respected and admired, Ausdance currently endeavours to fill roles undertaken by several agencies in other countries (education, advice, lobbying, promotion); it is possible that either additional agencies or a better-resourced (and differently structured) Ausdance may be necessary for the long-term health of the sector.

11.3 Building audiences now and in the future

Several of the preceding recommendations will contribute to audience development, including:

- support for dance producers
- investment in marketing infrastructure for triennially-funded companies
- the establishment of a second-tier Indigenous dance company
- dance companies-in-residence
- the investigation of dance agencies and dance animateurs.

Additionally, we would **recommend** that:

11.3.a Support be provided for a small circuit of contemporary arts centres to program and promote dance, and build the dance audience, taking further the Dance Board's recent Mobile States initiative—possibly in conjunction with AMD or DCITA/Playing Australia. Such support might include dance companies-in-residence at sympathetic promoting venues, and might reasonably be extended to the major performing arts centres for specific program strands and audience development initiatives.

11.3.b The Dance Board continue to work in close liaison with AMD on the development of both domestic and international markets, and finalise its development of a jointly-approved medium-term audience development strategy for dance; such a strategy to embrace not only the cultivation of domestic audiences, but also broadcast exposure of dance, and international touring.

11.3.c Resources be allocated to regular audience research, and dissemination of research results throughout the dance community. Identification of market growth opportunities are of particular interest—the education sector and NESB audiences have been mentioned as possible areas for development in this study.

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[35] A review of the UK agencies has recently been completed and may be available via the Arts Council of England

11.3.d The feasibility be investigated of establishing a major annual dance festival, or working with one or more of the existing major festivals to regularly profile Australian dance.

11.3.e Discussion be initiated between the Council/DCITA and federal and state education representatives on the means by which dance can be further integrated into the curriculum at primary and secondary levels.

11.4 Encouraging cooperation and providing leadership

In order to harness resources within the Australia Council, DCITA, and the states and territories, to greatest effect, it **recommended** that:

11.4.a The Australia Council develop a medium-term Dance Action Plan which provides a framework for all the boards (including MPAB), in order to align support and maximise the impact of Council funding, and consider arrangements for greater coordination of dance funding across boards; this might include a single gateway for applicants other than MPAB organisations, and protocols for joint initiatives between boards or areas of Council.

11.4.b The Dance Board negotiate a joint dance action plan with each of the states and territories—subject on both sides to available resources—to ensure a coordinated approach to addressing agreed key issues, recognising that these will vary from place to place.

11.4.c Discussion be initiated between the Council and DCITA on coordinated arrangements for supporting those aspects of dance distribution and audience development which may be of common concern—venues regularly presenting dance, companies in residence, off-setting touring costs, international touring.

11.4.d The Dance Board facilitate interaction between the Tertiary Dance Council, MPAB companies, and other funded dance companies, including a biennial forum (which might be managed by Ausdance or another agency).

11.4.e The Dance Board convene an annual round-table or joint meeting with members of the Tertiary Dance Council of Australia to advance issues of common concern, and address areas of joint policy development and implementation. In particular, joint consideration be given to improving the provision of choreographic training, and to the merits of post-tertiary support and training for Australia’s leading young dance talent, along similar lines to the Australian National Academy of Music.

11.4.f Through Ausdance or another suitable organisation, a web-based national interchange of issues, strategies and professional expertise be facilitated, similar to Fuel4Arts, or Dance Technology Zone (www.art.net/~dtz).

12. Options in the event of static funding

In the event that Australia Council funding for the dance sector remained at current levels, a number of the actions recommended above would not be feasible. In those circumstances it is **recommended** that:

1. The Dance Board urgently review its commitment to supporting all 12 of the consistently-funded companies—this would appear to be unsustainable in the light of the financial decline of some of the companies, the overall reduction in paid attendances in recent years, and the range of other sectoral issues which need to be addressed. Funding fewer (and diverting resources to other strengthening or stabilising initiatives identified here) appears to be the only realistic option, but would also need to be accompanied by negotiating increased investment by the states and territories for those remaining. It is worth reiterating, however, that the states and territories have substantially enhanced their support for dance in recent years

2. The continuation of funding for the remaining companies be subject to the Board's normal evaluation procedures.

Some of the earlier recommendations would continue to stand, including:

- using policy drivers and ear-marked resources to encourage both MPAB companies and other funded dance companies to engage with independent practitioners and project-based companies

- the Dance Board adopting a proactive and strategic approach to supporting a small number of key practitioners for the long term, rather than focusing only on relatively short-term support

- the Dance Board and the Council considering ways in which the grant application process for individuals and project-based companies may be streamlined to reduce the burden on the applicant

- the Dance Board negotiating joint funding agreements with the states and territories for triennially-funded companies

- the Dance Board continuing to work in close liaison with AMD on the development of both domestic and international markets, and develop a jointly-approved medium-term audience development strategy for dance

- training initiatives resulting from the Small and Medium Performing Arts Review being harnessed to the benefit of both consistently-funded and project-based companies

- discussion being initiated between the Council/DCITA and federal and state education representatives on the means by which dance can be further integrated into the curriculum

- the Australia Council developing a medium-term Dance Action Plan which provides a framework for all the boards (including MPAB), in order to align support and maximise the impact of Council funding

- the Dance Board facilitating interaction between the Tertiary Dance Council, MPAB companies, and other funded dance companies.