



PAC Australia Submission to the National Cultural Policy Review 2026

About PAC Australia

Live performance spaces are anchor institutions in their communities. They are places of gathering, storytelling, artistic practice and dreaming — the physical and cultural nodes through which communities access, participate in and are shaped by the performing arts. The health and capacity of these organisations to support and create space, both physically and strategically, is critical to the longevity of the entire performing arts ecosystem.

PAC Australia is the national voice for these spaces.

PAC Australia is the national peak body for Australia's live performance presenting ecology. We are a trusted voice, enabler and champion for our 270+ members — performing arts centres, independent producers, presenting companies, festivals, agencies and other service organisations across metropolitan, regional and remote Australia.

Our members are critical nodes in the cultural ecosystem of their communities. They sit at the intersection of community, professional and commercial live performance — on any given week a presenting venue hosts the local dance academy, delivers artistic development programs, presents a national touring production and stages a commercial hire. No other type of organisation in the performing arts ecosystem operates across this full spectrum simultaneously. Annually, our members present in excess of 70,000 performances and events attracting over 13.5 million audience attendances — making the presenting network one of the most significant points of cultural contact between Australian artists and Australian communities.

In addition to representation of our members, PAC Australia:

- initiated and delivers the annual Australian Performing Arts Exchange (APAX) — the national market and professional development event connecting presenters to producers and artists,
- manages the international export-focused Australian Performing Arts Market (APAM), an initiative of Creative Australia,
- deliver the Presenter Training Program and Tour Producer Training Program, and
- undertake ongoing sector research including the biennial National Presenter Benchmarking Study and annual National Presenter Outlook and ad hoc, sector responsive research such as the Compelling Employment Offer (2024)¹.

In 2023, PAC Australia developed and published the Australian National Touring Charter — an industry-led, principles-driven framework setting standard expectations and responsibilities for all parties engaged in touring. It is a voluntary instrument of sector self-governance and the foundation on which stronger policy and funding settings for touring could be built.

While this submission identifies areas where increased and new investment would be transformative, it also highlights where reform of existing funding practices would shift the dial significantly. Several recommendations identify where government could develop new frameworks and settings that are not entirely funding-reliant but would change the conditions under which the sector operates.

The Current Landscape

PAC Australia's 2026 National Presenter Outlook² presents a picture of a presenting ecology navigating significant structural challenges while demonstrating continued resilience, innovation and community impact.

The scale of the sector's contribution is substantial. In 2025, PAC Australia members presented over 70,000 performances and events attracting over 13.5 million audiences. Presenters collectively spent over \$55 million in show fees — a direct investment in touring companies and artists. 28% of all work presented at our member venues was touring work, underlining the dependence of the national touring ecology on presenting venues.

The presenting model is diversifying: 25% of presenters now program for a local festival, and 28% program activity outside their venue walls — in parks, public spaces and community locations. 50% of presenters are actively increasing investment in audience

¹ <https://paca.org.au/projects/advisory-board-for-the-arts/>

² <https://paca.org.au/projects/presenteroutlook/>

and community engagement. These represent genuine innovation within the sector, and deserve recognition in funding frameworks that have historically been designed around indoor, seated performance.

The commercial sector plays a critical and often overlooked role in sustaining the presenting ecology. Commercial hirers cross-subsidise curated programming activity (44% of presenters report that they are increasingly having to rely on commercial operators to deliver programmatic outcomes in their annual season). This interdependence between the commercial and subsidised sectors extends to audience development, workforce development and retention. Critically, commercial activity in performing arts centres generates the revenue that enables presenters to fund touring programs. The sector cannot be understood or supported without recognising this relationship – in March 2026, signals of commercial hire cancellations were emerging, driven by fuel cost increases and reduced audience confidence. If commercial hirers pull back, the revenue that has been quietly underwriting programmed work disappears — a dynamic that is largely invisible in policy discussions but whose failure would be felt immediately across the ecology.

Against this backdrop, significant cost and revenue pressures are intensifying. 77% of venues have indicated a necessity to reduce operating costs. The proportion of presenters who can budget to make a programming loss — the financial mechanism that underwrites risk-taking in Australian touring — has fallen from 80% pre COVID to 58% today. 89% of presenters are funding touring costs on top of presenter fees, 69% because funding applications were unsuccessful. 44% reported fees increased between confirmation and presentation of a work, indicating the rapid nature of cost increases to produce and deliver performing arts work.

Acknowledgement of the role of Local Government

Local government is Australia's single largest investor in performing arts programming and cultural infrastructure yet is absent as a named partner in the National Cultural Policy. When local government programming budgets contract, the effects cascade immediately: fewer tours are booked, fewer artists employed, fewer audiences reached. Rate-capping has constrained revenue growth even as costs have risen well beyond CPI. The capacity to absorb programming risk — the financial mechanism that has always underwritten touring diversity — is eroding rapidly. The federal government's role is to create the conditions under which local government can continue its investment, not to replicate it.

Yet local government operates almost entirely outside the architecture of the National Cultural Policy. This submission argues that this omission is a structural risk to the entire performing arts ecology.

Current System Risk - Funding Supply Without Supporting Demand

The architecture of public investment in the performing arts is oriented almost entirely toward supply — toward the creation of work — while the demand side of the equation, the presentation of that work to audiences, is left to individual presenting organisations to navigate with diminishing budgets and no dedicated national framework. At the point where all of that investment needs to be converted into an audience experience, the pipeline is left to presenting venues to manage alone.

To draw a comparison, the current situation is akin to a government that invested billions in agricultural research and farming capability but provided nothing for the roads, warehouses or marketing systems to get that food to consumers. The resulting impact would be empty supermarket shelves while grain sat rotting in silos.

Where there is evidence of audience, government funding should act as a catalyst — concentrating investment on work and organisations that can grow, generate income and contribute to long-term sector health.

TOURING AND PRESENTING

Touring and presenting is the primary mechanism through which Australians — particularly those in regional and remote communities — access live performance. It is also a part of the sector under immense and compounding financial stress.

The Issues

Playing Australia has not received a real funding uplift since 2004. Touring costs have risen approximately 30-50% since the pandemic while touring funding has remained static — effectively creating a 30-50% cut in real resources available to tour.

Further, the program has also drifted from its founding demand-driven design: its original purpose was that funding follows presenter-identified audience demand. A regional presenter's decision to program a work — backed by their own financial commitment and knowledge of their community — is itself the evidence of demand. Playing Australia was designed to de-risk that

commitment and creating the same level of financial access to a performance as our regional presenter's capital city counterparts.

In practice, Playing Australia currently emphasises artistic or strategic priorities unrelated to the needs of the organisations funding the actual performances, rather than where demand for work exists. The structure also warrants review: the trend toward awarding large grants exceeding \$700,000 for single projects means fewer tours overall.

First Nations performing arts — spanning dance, theatre, ceremony, storytelling, music and hybrid forms — deserve particular attention. There is no shortage of artistic excellence or demonstrated national and international demand. What exists is a structural failure to resource the systems that sustain this work. Touring First Nations work requires funding that explicitly recognises the additional time and resourcing needed to operate within First Nations cultural governance, ICIP frameworks and culturally safe practice — requirements that current funding structures treat as a variation on the standard model rather than as distinct obligations.

The Risks and Their Impact

- 20% of presenters have confirmed they will present less work in 2027 due to rising costs, including the cost-shifting of touring expenses onto presenters when Playing Australia has failed to deliver on its remit or lacks the funds to support demand. These markets will continue to recede until effective intervention from the federal government is applied.
- Fewer works programmed means fewer artists and arts workers employed
- Touring increases the life-cycle of a work and recession of this activity diminishes the return on government's initial investment.
- Touring also plays an increasingly important role in social cohesion and community resilience — investment in the touring ecology is a social infrastructure investment with measurable community wellbeing outcomes.

Solutions / Recommendations

RECOMMENDATION 1: Playing Australia Reform and Funding Uplift

- Restore Playing Australia to its founding demand-driven design principle: funding follows presenter-identified audience demand, not panel determinations of artistic merit. A regional presenter's financial commitment and community knowledge is the primary evidence of demand the program should support.
- Double Playing Australia investment to at least \$18 million per annum to address the 30-50% real-terms funding cut from static funding against dramatically rising costs. This uplift directly extends the life of work that already exists, much of it already government-funded, and leverages the investment local government makes in paying presenter fees (collectively over \$55 million in show fees³).
- Review grant caps and round structure to maximise tours funded, by reinstating funding caps. Remove the requirement for all touring to be confirmed prior to seeking funding. Include intrastate touring in certain circumstances. Extend eligibility to commercial companies.
- Harmonise federal and state touring funding timelines to eliminate the misalignment that causes whole tours to be abandoned.
- Develop a National Touring Strategy establishing supply and demand principles, supporting regional equity, and creating a pipeline from creation through to community presentation.
- Embed environmental sustainability criteria to incentivise low-carbon touring models including no-freight/no-flight approaches, suitcase touring and local casting.

RECOMMENDATION 2: National Presenting Fund and First Nations Commissioning

Government has already made substantial investments in the creation of much performing arts work. A National Presenting Fund — modelled on the co-investment logic of the Major Festivals Initiative but oriented toward presentation in non-festival venues — would leverage this existing investment by supporting the next stage of a work's lifecycle. The vast majority of Australia's presenting venues — performing arts centres, regional halls, community venues — have no equivalent mechanism. The Fund would provide co-investment to non-festival presenting organisations to program Australian works that have demonstrated audience success, extending the life of work, increasing community access, and generating a measurable return on existing sunk costs.

Recommendation:

³ <https://paca.org.au/projects/presenteroutlook/>

- Establish a National Presenting Fund modelled on the MFI's co-investment logic, oriented toward presentation in non-festival venues.
- Provide co-investment to performing arts centres, regional venues and community presenting organisations to program Australian works that have demonstrated audience success and are designed or adaptable for the touring context.
- Eligibility criteria should reflect diversity, First Nations, regional equity and artform breadth.
- The Fund extends the life of existing government-funded work, converting sunk costs in cultural production into ongoing economic, social and cultural returns.
- Establish consistent commissioning pathways for First Nations artists and companies across the presenting sector, embedding expectations for regular First Nations commissioning within publicly funded organisations and festivals.

RECOMMENDATION 3: Presenter Programming Incentive

- Introduce a Building New Audiences incentive — a fixed percentage subsidy or guarantee against loss — to encourage presenters to program riskier work and absorb losses incurred while new audiences are built.
- Embed dedicated support within touring and presenting funding for First Nations performance work, with funding parameters that explicitly account for the additional time and cost required to operate within First Nations cultural governance and ICIP frameworks.

RECOMMENDATION 4: Local Government as a Named Partner

- Formally recognise local government as the primary investor in Australian touring presentation within the National Cultural Policy — as a named partner with a distinct and foundational role, not a beneficiary of trickle-down settings.
- Reform Playing Australia and other touring support programs to explicitly account for cost burdens carried by local government presenting venues, with the program's demand-driven design restored so local government venues are the primary determinants of what work receives support.
- Commission research quantifying the economic, social and cultural return on local government investment in performing arts, to support advocacy within council budget processes.
- Establish a tripartite federal, state and local government engagement mechanism specifically related to touring and presentation of performing arts and ensure national policy settings are calibrated to the realities of the presenters taking significant financial risk as cultural curators in communities throughout Australia.

RECOMMENDATION 5: 40% Live Performance Production Incentive

- Introduce a 40% Live Performance Production Incentive for both commercial and not-for-profit producers — applied as an offset for taxpaying entities and as a rebate for not-for-profit entities.
- A 2024 Ernst & Young analysis found a 40% offset would generate 4,151 new FTE jobs, support 168 new productions annually, deliver \$1,505 million in industry output and achieve a net positive tax position of \$24.3 million.
- Film, TV and digital games already benefit from federal tax offsets of 30-40%. Live performance requires equivalent treatment to compete for investment in a global market.
- The Art of Tax Reform Summit, convened by the NSW and Victorian Governments at the Sydney Opera House (26 September 2025), identified this as a transformative, high-impact proposal with cross-jurisdictional support.
- PAC Australia endorses the detailed proposal advanced by Live Performance Australia in its 2026-27 Pre-Budget Submission.

AUDIENCES

Australia has built a world-class cultural production system. It has not built an equivalent participation system. The result is a structural imbalance: strong supply-side investment with fragmented, under-resourced demand infrastructure.

The Issues

There is no coordinated national strategy for growing cultural participation. Tourism Australia provides a three-tier demand architecture — federal brand leadership, state-level conversion campaigns and regional activation — contributing approximately \$158 billion in economic activity and 700,000 jobs nationally. The cultural sector has no equivalent system. Individual organisations carry the full burden of demand generation in a highly competitive experience and attention economy.

There is a further systemic risk: cultural policy has historically concentrated investment on the supply side. Some of the greatest fragility in the system sits with those taking the risk on presenting performances, and that risk is becoming increasingly unsustainable. A mature cultural policy must address demand as structurally as it addresses supply.

Children and young people represent a distinct audience priority. Only one in five Australian children aged 0-8 attends live theatre in any given year, with access shaped by postcode and family income rather than need. Multi-year operational funding for Youth Arts has fallen from 21 companies in 2007 to nine beyond 2026 — of which only six are theatre companies creating work for children. The 2024 Australian Early Development Census records the largest decline in emotional maturity of all five developmental domains, with one in four children entering school developmentally vulnerable or at risk. Norway's Cultural Rucksack guarantees every child arts experiences through schooling. A national strategy for children's cultural participation — including cross-portfolio investment through the Early Years Strategy 2024-2034 — would address this gap directly.

The Risks and Their Impact

Without coordinated demand infrastructure, declining attendance becomes self-reinforcing: as audiences shrink, presenters reduce risk and program less (with declining diversity), which further narrows the audiences the sector can reach. The communities most affected are those already underserved — First Nations audiences in remote communities, CaRM communities, regional audiences, children from low-income families, and people with disability for whom physical and financial barriers have not been systematically removed.

Solutions / Recommendations

RECOMMENDATION 6: National Cultural Participation Framework

- Establish a National Cultural Participation Framework — a coordinated, long-term demand infrastructure to complement existing supply-side investment.
- Develop a 10-year national participation strategy with shared audience intelligence, coordinated demand campaigns and shared marketing capability.
- Commission an independent feasibility study and economic modelling to develop the architecture, informed by Tourism Australia's three-tier model.

RECOMMENDATION 7: National Audience Intelligence Platform

- Fund a shared national audience intelligence platform connecting aggregated ticketing and CRM data with attitudinal research to provide continuous, actionable insight across the sector.
- Prioritise accessibility for smaller and regional presenters who cannot develop this capability independently.
- Design the platform to connect with, rather than duplicate, the broader national performing arts data framework (Recommendation 15).

RECOMMENDATION 8: Audience Development Capability

- Establish a National Audience Development Agency to build formal capability pathways for audience and marketing professionals, reduce knowledge fragmentation and provide peer learning across organisations of all scales.
- Commission an annual National Audience Summit as a focal point for audience development and related disciplines.

RECOMMENDATION 9: Children and Young People's Cultural Participation

- Develop and resource a 10-year national arts strategy for children and young people, in line with the Children's Theatre Alliance recommendations.
- Commit to two theatre experiences for every Australian child by age eight by 2030.
- Establish cross-portfolio investment across Arts, Social Services, Health and Education through the Early Years Strategy 2024-2034.
- Recognise children's theatre as both cultural and social infrastructure.

WORKFORCE

Australia's performing arts technical workforce is experiencing a national crisis with immediate consequences for workplace safety, programming capacity and the viability of touring.

The Issues

Workplace incidents and near-miss reporting — both official and unrecorded — are on the rise, in many instances directly tied to the effects of a depleted workforce.

- Sector resilience at its limits: rising expectations and diminishing structural support are pushing the system beyond capacity.
- An eroding safety margin: near-misses, widespread fatigue and inconsistent practices are heightening concern about the frequency and severity of incidents.
- A fragile workforce pipeline: regional shortages, outdated training and limited progression pathways are weakening the workforce faster than it can be replenished.
- Ambition outpacing capacity: programming expectations — including KPIs placed on venues — have grown significantly while staffing levels and planning time have not.
- Unsustainable presentation and touring models: cost-driven schedules with tight turnarounds have transferred significant risk onto technical teams who often inherit challenges created earlier in the production chain.

The Risks and Their Impact

Without supported national coordination, workforce depletion will continue to outrun replenishment. Regional venues in particular face deepening inequity as small teams struggle to meet production and compliance demands. The 'show must go on' culture will continue to mask systemic risk until a serious incident forces regulatory intervention. The cost of inaction in human, financial and reputational terms will far exceed the cost of coordinated action.

Solutions / Recommendations**RECOMMENDATION 10: National Safety Standards for High-Risk Working Environments**

- Fund access to sector-specific national standards and accreditation requirements and set clear competency expectations for high-risk systems as an urgent priority. Standards should be scalable to the size, location and resourcing limits of independents and organisations, however should be overlaid in the design of all systems and frameworks that support the delivery of live performance.

RECOMMENDATION 11: Arts as a Profession and Leadership Pipeline

- Formally recognise the arts as a profession by government — including through Centrelink and the ATO. The nature of arts employment (independent, portfolio-based, employed by multiple tiers of government) means many arts workers are not captured in sector data and cannot access industrial relations mechanisms available to peers in comparable professions. This results in inaccurate workforce data, limits workers' ability to access entitlements, and understates the sector's true economic contribution.
- Harmonise income averaging arrangements for independent practitioners.
- Establish paid observer roles on arts boards, advisory groups and governance bodies to support leadership development specifically for First Nations, culturally and racially marginalised, and Deaf and disabled practitioners.

CULTURAL INFRASTRUCTURE

Beyond the physical building, performing arts centres function as cultural nodes for their communities — anchors of social connection, creative life, economic activity and place-based identity. Their role as community institutions extends well beyond the performances they present, encompassing education programs, community development, mental health and wellbeing support, First Nations cultural activity and local employment. Policy and investment settings must recognise and fund both dimensions: the physical asset and the community function it enables.

4a. Physical Infrastructure

Performing arts infrastructure is not simply the house in which cultural activity happens. It is a generator of that activity. When it is lost or devalued, the cultural outcomes for communities are immediately and significantly diminished.

The Issues

Australia's network of performing arts centres is one of the largest in the world relative to population, and the majority sits within local government ownership and management. These venues are simultaneously the primary presenting infrastructure for touring work, the primary employers of the performing arts technical workforce, and the primary relationship-holders with audiences in their communities.

A significant proportion of this infrastructure was built during the boom of arts centre development in the 1970s and 1980s. Many of these buildings are now reaching or approaching end of life, or require major capital works to maintain safety standards, audience expectations and operational viability. This is a predictable and significant financial challenge that government must begin preparing to address now — not in response to crisis, but through coordinated long-term planning.

This infrastructure is ageing, underfunded for capital maintenance and sustainability upgrades, and under-resourced relative to the programming expectations placed upon it. Venues owned by local government rarely receive matched capital support from state or federal funders. Infrastructure Australia and Regional Development Australia do not systematically incorporate cultural infrastructure into their planning frameworks. When venues close, the loss is immediate: a critical node of community life disappears, artists lose employment, and audiences in that community lose access to live performance.

The Risks and Their Impact

Ageing and under-invested infrastructure creates compounding risks: safety risks for technical workers, elevated energy costs that further squeeze programming budgets, and a growing experience gap for audiences. Without proactive investment, the sector faces accelerating venue closures, a retraction in the presentation of artist's work, and the loss of community cultural nodes that cannot be replaced.

4b. Environmental Sustainability and Regeneration

The investment needed to address ageing infrastructure also presents a significant opportunity: to develop and redevelop Australia's performing arts infrastructure in ways that are not merely energy-efficient but genuinely regenerative — making arts centres active contributors to ecological and social renewal in the communities they serve.

The shift from net-zero thinking (minimising harm) to regenerative thinking (actively restoring) is already emerging in the design and built environment sectors. For performing arts centres, this means moving beyond LED lighting and solar panels — though these remain important — to consider how venues can be designed within their broader ecosystem: integrating biodiverse planting rather than ornamental landscaping, creating spaces that support other species as well as human audiences, and designing indoor-outdoor connections that maintain peoples' relationship with the natural environment.

First Nations cultural knowledge systems offer a profound framework for this shift. Where colonial land management has treated nature as something to be preserved at a distance, First Nations approaches emphasise that the land wants to be culturally managed — that proper regeneration requires active, knowledgeable stewardship informed by generations of ecological relationship. Arts precincts that engage meaningfully with local First Nations Elders as the knowledge-holders of local biodiversity and ecological history are not only meeting their cultural obligations — they are accessing the most sophisticated regenerative knowledge available for their specific place.

Environmental sustainability also intersects with regional equity and community resilience. Climate-related cancellations are now a routine risk for regional touring — flooding, fire and extreme heat regularly disrupt planned seasons, with income losses

absorbed by both producers and presenters. Arts on Tour's Green Touring Toolkit provides practical frameworks; low-carbon touring models including no-freight/no-flight approaches, suitcase productions and local casting are not only environmentally responsible but frequently more financially viable. These models deserve active investment and policy incentivisation.

The Risks and Their Impact

Without proactive sustainability investment, performing arts infrastructure will continue to carry a significant and growing environmental footprint, increasing operational costs and exposing organisations to stranded asset risk as energy costs rise and regulatory requirements tighten. The opportunity to lead on environmental regeneration — to make arts centres visible, place-based examples of what is possible — will be lost as investment is delayed.

Solutions / Recommendations

RECOMMENDATION 12: Sustainable Performing Arts Infrastructure Fund

- Establish a dedicated Sustainable Performing Arts Infrastructure Fund with matched capital investment across all three tiers of government.
- Ensure eligibility extends to privately owned independent spaces that function as community cultural infrastructure.

RECOMMENDATION 13: Environmental Sustainability and Regenerative Infrastructure

- Embed environmental sustainability criteria across all touring and arts funding programs — incentivising low-carbon touring models and investing in the expansion of tools such as Arts on Tour's Green Touring Toolkit.
- Fund the development and redevelopment of performing arts infrastructure to regenerative design standards: transitioning to renewable energy, integrating biodiverse landscaping, creating nature-connected spaces, and designing for ecological contribution as well as human use.
- Prioritise energy efficiency upgrades (LED, solar, renewable energy transition), safety compliance, climate resilience and accessibility improvements — with new builds required to meet a minimum 4-star Green Rating and incorporate regenerative design principles.
- Recognise the role of live arts experiences in building community resilience and supporting recovery in climate-affected communities. Provide dedicated disaster-response funding to artists and presenting organisations in climate-affected areas.
- Align Australia's cultural export ambitions with global expectations on climate responsibility.

Further recommendations related to Strong Cultural Infrastructure

RECOMMENDATION 14: Reserves Rebuild Fund

- Deliver a Reserves Rebuild Fund of \$25 million over two years — with matched state and territory investment to total \$50 million — to enable performing arts organisations to rebuild financial reserves to sustainable levels.
- Companies with healthy reserves have greater capacity to take artistic and operational risks, withstand disruption and deliver programs that contribute to industry development, community engagement and diversity.
- Threshold requirements for matched funding should be flexible and commensurate with organisational income, ensuring accessibility for organisations of all scales.
- PAC Australia endorses this recommendation as advanced by Live Performance Australia in its 2026-27 Pre-Budget Submission.

RECOMMENDATION 15: National Performing Arts Data Framework

- Establish a National Performing Arts Data Framework that enables live, consistent and comparable data collection across all three tiers of government — replacing retrospective and disjointed reporting that is often limited to a selected subset of funded organisations.

- This framework should enable aggregate, real-time claims about the sector's economic contribution, equity outcomes, workforce and infrastructure utilisation.
- Modelled on Tourism Research Australia's approach, the framework requires: agreement on common definitions for performances, attendances, participation, employment and economic contribution across federal, state and local government; extension of reporting into local government; and a dedicated analytical function within Creative Australia or a successor body.
- Enable data sharing about touring outcomes — if Arts Market Managers had access to touring funding awarded and outcomes reported by producers, more demand-driven, data-driven insights could inform market planning, reducing inefficiency and improving outcomes.
- Ensure all government-funded arts organisations contribute to and can access this framework, with data collection requirements proportionate to organisational scale.

RECOMMENDATION 16: Alignment with Infrastructure Planning

- Align the National Cultural Policy with Infrastructure Australia and Regional Development Australia to incorporate cultural infrastructure into national planning frameworks.
- Develop a National Cultural Infrastructure Strategy mapping current assets, identifying gaps — including venues reaching end of life — and guiding long-term investment, particularly for underserved regions.
- Extend voluntary planning agreement mechanisms to require cultural spaces in new commercial developments and mixed-use precincts.

RECOMMENDATION 17: Venue Access and Space for Artists

- Introduce rental subsidy schemes for artists use of cultural spaces, particularly in regional areas where alternatives are limited.
- Invest in affordable residential accommodation linked to cultural residencies or touring in regional contexts.

RECOMMENDATION 18: Philanthropy Reform for Arts Organisations

- Introduce a Gift Aid-style model for arts organisations with DGR status — the government directly contributes an additional percentage for every donation received, boosting impact and incentivising giving at all levels.
- Increase tax-deductible donation claims to 1.5 times the amount of the gift, following the successful Singapore model.
- Expand and properly resource Creative Australia matched funding programs — Plus1, MATCH Lab, AustArt Day and ACF Boost — to reduce administrative burden and maximise participation.
- Extend Commonwealth FBT concessions to arts and culture not-for-profit organisations, as currently available to Public Benevolent Institutions, to improve effective wages and reduce the talent disadvantage arts organisations face.

RECOMMENDATION 19: Cultural Ministers Council

- Elevate the existing meeting of Cultural Ministers to a formalised Ministerial Council reporting annually to National Cabinet.
- Task this Council with developing an intergovernmental, non-partisan plan for long-term cross-portfolio collaboration on cultural investment.
- Specifically develop coordinated investment frameworks that allow cultural policy outcomes — in health, education, social cohesion, regional development and community resilience — to be pursued through relevant portfolio budgets, not only through arts funding streams.

RECOMMENDATION 20: AI Capability for Arts Organisations

First and foremost, artists' rights must be protected. AI should never be used to appropriate the work of artists without their consent and fair remuneration, and should never be used to replace artists or arts workers. Policy settings protecting artists' rights — including through intellectual property reform and platform accountability — must accompany any capability investment.

AI presents a direct opportunity to bridge the capacity gap facing arts organisations: staff burnout, workforce attrition across both individual organisations and the broader sector, and the inability of organisations operating in conditions of financial precarity to manage their ambitions and outputs.

- Fund AI literacy and capability-building programs accessible to organisations of all scales, including small and regional presenters who cannot fund specialist expertise. AI tools applied to data analysis, audience development, accessibility and administrative efficiency can release significant capacity for organisations that currently cannot meet their own ambitions.
- Only 30% of organisations know how to implement ethical and responsible AI — Provision of capability building mechanisms to support organisations to develop frameworks for the ethical use of AI appropriate to their own context and values. Government support should enable this at an individual and organisational level.

MARKET DEVELOPMENT

Performing arts markets are the single most efficient mechanism for building the relationships, tours and sector activity that connect artists with audiences across Australia and internationally. They are critically under-funded and currently not recognised in the National Cultural Policy.

5a. Arts Markets as Cultural Infrastructure

Arts markets — including APAX, APAM, WA Showcase, Q Showcase, Salon, SA Showcase, Showcase Victoria and the Honey Pot marketplace — are the infrastructure that enables artists and producers to build touring networks and extend the lifecycle of works beyond a premiere season. They are a form of cultural infrastructure.

Data from Australian arts market programs between 2015 and March 2026 documents the system-level value: 1,301 different organisations pitched 1,327 productions across 2,207 appearances. Markets are not a ladder to be climbed once — they are an ongoing ecosystem that organisations move through repeatedly. For APAX 2025, 74% of producers and presenters were likely or very likely to deliver future presentations as a result of participation, with delegates estimating an average of three presentations per organisation. 89% of presenters plan to attend a market in some capacity this year — even in a financially constrained environment.

The eight organisations that collectively manage Australia and New Zealand's performing arts markets — PAC Australia, Arts on Tour, CircuitWest, Stage Queensland, SAPA, VAPAC, Adelaide Fringe and Performing Arts Network New Zealand — meet regularly to strategically align events and respond collectively to sector priorities. This coordination infrastructure already exists and is ready to be a genuine government partner at scale. What it lacks is the funding security to plan beyond the immediate cycle.

Despite this evidence, most arts markets are either unfunded, significantly under-funded or lack multi-year commitments. APAX — the only platform supporting national market development for the performing arts — competes for funding in the same environment as the very artists they are serving. Specific, focussed, and non-competitive market development funding is required to deliver these critical outcomes for artists and the audiences who are the ultimate beneficiaries of the work of the markets.

5b. National Market Development

PAC Australia's own strategic planning for market development maps the transformation that structural investment would make possible — from a market ecosystem shaped by scarcity, exclusivity and short-term transactionalism, to one that is evolved, inclusive, diverse and genuinely thriving. The table below articulates what the following recommendations are designed to achieve.

WHERE WE WANT TO BE: MARKET DEVELOPMENT

WHO	FROM (the current state)	TO: EVOLVED, INCLUSIVE, DIVERSE & THRIVING MARKET ECOSYSTEM
Arts Markets	Annual strategy (uncertainty of funding)	Long term market development strategy (multi-year funding)
	Singular purpose gatherings	Layered opportunities for convening the industry
	Passive engagement — participants receive information	Active engagement in dialogue and discussion; counter-points encouraged
	Siloed markets	Integrated and aligned system of arts markets (state, national, international)
	Filtered and structured; focus on company and production	Expansive opportunities with a variety of entry points
Producers and Programmers	Privilege rises to the top; participants are those who are financially and socially resourced	Industry norms consistently examined and challenged; action on diversity, inclusion and equity
	Focus on who can be in the room	Financial and other resources made available for participation (see also multi-year funding)
	Input/output, budget-focussed, transactional (supply/demand)	Relationships, connectivity — transformational; risk-balanced, strategic, equitable
	Large/long tours; excellence as primary criterion	The right work to the right audience; breadth, relevance and impact
	One size fits all, tours built to fit structures	Nuanced demand (risk; bold programming choices)
Audience	Programming driven by logistics and feasibility	Presenters are resourced to prioritise audience and artistic outcomes
	Long lead programming; limited shelf-life of initial project investment	Sustainable careers (long term); longevity of work; leverage investments
	Short term, "to" audiences, one-offs	Long term partnerships; "with" audiences; creating artistic exchange
	Audience development — marketing	Audience development — diversification, human development, audience retention; work is by, from and to the regions

Multi-year funding security is the single most important lever: without it, markets remain trapped in annual strategy cycles that prevent the long-term relationship-building, diversity investment and risk-balanced programming that the sector needs.

5c. International Market Development

As the manager of APAM⁴ — Australia's only international performing arts export platform — PAC Australia has direct and evidenced understanding of the significant opportunity cost when there is insufficient funding to support the demand for Australian work. International presenters attending APAM demonstrate strong and consistent demand for Australian performance. The gap between demand expressed and engagements that can be confirmed and resourced is widening dangerously. The reputational risk — to Australian arts workers, to Creative Australia, and to Australia's standing as a creative nation — of not being able to get artists into the world is severe and increasing.

Sharp increases in international touring costs — freight, flights, travel, visas and insurance — have made many engagements impossible to confirm. Painstakingly built international networks, developed over decades, are at risk of collapse. This is dramatically affecting the ability of Australian artists and companies to build sustainable international careers. PAC Australia endorses the submission of the Australian Live Performance Export Alliance in identifying these structural barriers and their proposed interventions.

⁴ The Australian Performing Arts Market is an initiative of Creative Australia. PAC Australia are the contracted managers until 2030.

5d. First Nations Market Development

First Nations performing arts represent a particular and urgent gap in Australia's international market development architecture. Despite First Nations arts and international cultural engagement both being identified as national priorities in Revive, there has been no sustained First Nations-led market development infrastructure embedded yet within Creative Australia's systems. From an international perspective, this work is not simply export activity — it functions as Indigenous diplomacy, reciprocal cultural exchange and long-term international relationship-building. The Tri-Nations Indigenous-to-Indigenous transnational exchange, export and commissioning strategy provides an existing framework that could be implemented and resourced as part of the next policy iteration, but doing so requires dedicated producer and cultural brokerage capacity that does not currently exist at scale.

The Risks and Their Impact

- Without secure, multi-year investment in arts markets and genuine commitments to fund the outcomes they generate, the pipeline from creation to national and international touring opportunities will continue to fracture.
- For small-to-medium companies and First Nations-led organisations — who are among Australia's strongest international performers — the financial risk is becoming unsustainable.

Solutions / Recommendations

RECOMMENDATION 21: Secure Multi-Year Funding for Arts Markets

- Provide dedicated, multi-year strategic funding to Australian performing arts markets - including APAX and state markets - outside of competitive artist funding streams.
- This will allow markets to plan strategically over 3-5 year periods, reduce participation costs for artists and delegates, increase diversity of representation, and develop post-market mechanisms to convert market relationships into touring outcomes.

RECOMMENDATION 22: International Touring Investment and Brokerage

- Increase investment and dedicated streams in international market development and international touring for tour-ready artists and organisations with demonstrated international demand, alongside a quick-response international disruption fund.
- Pilot a presenter-fee matched funding model to convert confirmed international demand into viable touring engagements.
- This fund directly addresses the structural deficit in export of Australian cultural product and is essential to maintaining Australia's international creative reputation and the sustainability of artists and companies who have invested in building international networks.
- Leverage the international brokering program initiated by PAC Australia through APAM by investing in year-round brokering services, connecting Australian artists and producers (with clearly articulated market development strategies) to presenters and other platforms for international engagement. (see also Recommendation 24).

RECOMMENDATION 23: First Nations International Market Development Infrastructure

- Establish dedicated First Nations-led international market development and touring infrastructure — including investment in producer and cultural brokerage capacity.
- Recognise First Nations international exchange as Indigenous diplomacy and reciprocal relationship-building, not export activity.
- Support the implementation of the Tri-Nations Indigenous-to-Indigenous transnational exchange, export and commissioning strategy.
- Embed First Nations international cultural relations as a core function of any cross-government international coordination mechanism.

RECOMMENDATION 24: International Cultural Export Strategy

- Develop a coordinated International Cultural Export Strategy that amplifies Australia's artistic voice on the world stage, showcases Australian stories and First Nations cultures, and positions Australia as a leader in creativity and innovation.

- Establish a cross-government International Cultural Relations coordination mechanism linking arts, foreign affairs, trade, tourism, migration, state agencies, Creative Australia and overseas posts.
- Australia is the only nation among the top 15 economies in the world without a single institution to lead its international cultural relations. This is an immediate structural gap.

RECOMMENDATION 25: Post-Market and Year-Round Development Platforms

- Fund mechanisms to support artists, producers and presenters to convert market relationships into confirmed touring outcomes, including industry development grants and a centralised, multi-platform production register.
- Establish a dedicated presenter attendance program supporting presenting organisations to attend showcases and festivals and access works most relevant to their audiences.
- Invest in cultural tourism programs that build the sector's capacity to capitalise on this significant and growing area.

OTHER RECOMMENDATIONS

RECOMMENDATION 26: Census Data Collection Reform for Gig and Portfolio Workers

- Review and modernise Australian Bureau of Statistics census data collection to enable gig workers and those with portfolio careers to report more than their primary job during census week.
- The current model produces a significant undercount of people working in the arts and creative industries and fails to capture the reality of portfolio employment that characterises the sector. This inaccuracy flows through to workforce policy, funding decisions and advocacy.
- Complementary reform of ATO income averaging arrangements for independent practitioners would further improve the accuracy of arts workforce data and reduce financial precarity for artists.

SUMMARY OF RECOMMENDATIONS

No.	Recommendation	Theme	Five Pillars
1	Playing Australia Reform and Funding Uplift	Touring & Presenting	P2, P4, P5
2	National Presenting Fund and First Nations Commissioning	Touring & Presenting	P2, P4, P5
3	Presenter Programming Incentive	Touring & Presenting	P1, P2, P5
4	Local Government as a Named Partner	Touring & Presenting	P4, P5
5	40% Live Performance Production Incentive	Touring & Presenting	P3, P4
6	National Cultural Participation Framework	Audiences	P2, P5
7	National Audience Intelligence Platform	Audiences	P4, P5
8	Audience Development Capability	Audiences	P3, P5
9	Children and Young People's Cultural Participation	Audiences	P1, P2, P5
10	National Safety Standards for High-Risk Working Environments	Workforce	P3, P4
11	Arts as a Profession and Leadership Pipeline	Workforce	P3, P2
12	Sustainable Performing Arts Infrastructure Fund	Cultural Infrastructure	P4, P5
13	Environmental Sustainability and Regenerative Infrastructure	Cultural Infrastructure	P4, P1
14	Reserves Rebuild Fund	Cultural Infrastructure	P4
15	National Performing Arts Data Framework	Cultural Infrastructure	P4, P5
16	Alignment with Infrastructure Planning	Cultural Infrastructure	P4
17	Venue Access and Space for Artists	Cultural Infrastructure	P3, P4
18	Philanthropy Reform for Arts Organisations	Cultural Infrastructure	P4, P3
19	Cultural Ministers Council	Cultural Infrastructure	P4
20	Digital and AI Capability for Arts Organisations	Cultural Infrastructure	P3, P4
21	Secure Multi-Year Funding for Arts Markets	Market Development	P4, P5
22	International Touring Investment	Market Development	P2, P1, P5
23	First Nations International Market Development Infrastructure	Market Development	P1, P2
24	International Cultural Export Strategy	Market Development	P2, P1, P5
25	Post-Market and Year-Round Development Platforms	Market Development	P4, P5
26	Census Data Collection Reform for Gig and Portfolio Workers	Other	P3, P4

PAC Australia stands ready to work with the federal government and Creative Australia to progress these priorities. We bring the lived experience of our 270+ members, the data of our national research programs and the evidence of our market development infrastructure.

The performing arts ecology is one of Australia's most distributed and community-embedded cultural systems. When it thrives, it delivers outcomes across health and wellbeing, social cohesion, economic activity and cultural identity to communities from remote Australia to the largest cities. When it fractures, it does so quietly — one cancelled tour and one closed venue at a time — until the loss becomes irreversible.

The next National Cultural Policy is the opportunity to build the architecture that matches Australia's ambition for its cultural life with the investment, coordination and settings that make it real.

For further information:

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PAC Australia are members of the PAPA (Performing Arts Presenter Associations) Network.

The Performing Arts Presenter Associations (PAPA) are a network of membership organisations representing the presenting ecology in Australia with memberships including presenters, venues and producers. A network of peer organisations, PAPA works to provide a collaborative and coordinated approach to identifying and addressing shared strategic priorities and advocacy, in support of their memberships and the performing arts sector nationwide.

We endorse the submissions made by the organisations in this network, and acknowledge our collective work in workforce safety reform as outlined in this submission.

