

Australian Live Performance Export Alliance

National Cultural Policy Submission

Live Performance Export: Turning Global Demand into Sustainable Cultural Value

SUBMISSION SUMMARY

This is a policy position developed by the Australian Live Performance Export Alliance for the National Cultural Policy refresh. The Australian Live Performance Export Alliance is an informal alignment of organisations and artists with direct experience navigating international touring, exchange and export systems.

Our experience is that Australia does not lack international demand for live performance. It lacks the systems needed to convert that demand into feasible and sustainable international activity. This impacts long-term audience development, wider international cultural relationships and workforce sustainability.

Across the sector, organisations and individual artists are identifying the same structural barriers:

- rising touring costs
- fragmented government support
- limited contingency funding
- escalating global disruption
- under-supported producer capacity
- the widening gap between international demand and touring feasibility
- increasing competition from global peers with reliable export subsidy

Painstakingly built international networks, developed over decades, are now at risk of collapse because we lack coordinated support to convert demand into viable touring. For small-to-medium companies and First Nations-led companies - who are some of Australia's strongest performers overseas - the financial and workforce risk is increasingly unsustainable.

The submission draws on our experience to advocate for stronger long-term structures for support that allow Australian live performance to expand partnerships and travel ethically, sustainably and strategically.

Live performance export and international cultural engagement are not peripheral activities.

They are critical to the careers of Australian artists, the reputation of Australia overseas and the long-term viability of the performing arts ecology.

As such, international touring, exchange and market development must operate as cross-cutting principles across all five pillars of the next National Cultural Policy.

This includes support for:

- First Nations-led work and Indigenous-to-Indigenous exchange
- independent and small-to-medium practice
- emerging exporters
- producer and touring capacity
- long-term international relationship development
- culturally grounded exchange and market development models

Different international regions require different engagement models, including touring, residency, co-development, exchange, cultural diplomacy and long-term relationship building.

Headline asks

1. Name live performance export and international cultural engagement as strategic priorities within the next National Cultural Policy.	2. Establish an ongoing dedicated live performance export fund for tour-ready artists, producers and organisations with demonstrated international demand.
3. Pilot a presenter-fee matched funding model, such as 30% matched support against guaranteed international presenter fees, to convert confirmed demand into viable touring.	4. Establish a quick-response international disruption and resilience fund and require realistic contingency in all publicly supported international touring budgets.
5. Establish a cross-government International Cultural Relations coordination mechanism linking arts, foreign affairs, trade, tourism, migration, state agencies, Creative Australia, overseas posts and the live performance sector.	6. Establish dedicated First Nations-led international exchange, Indigenous diplomacy and market development infrastructure, including culturally grounded investment models and implementation support for existing Indigenous-to-Indigenous exchange strategies.

Australian Live Performance Export Alliance

Darcy Grant Artistic Director Gravity & Other Myths	Antony Hamilton Artistic Director and co-CEO Chunky Move	Lucy Guerin AO Artistic Director and CEO Lucy Guerin Inc	Stephanie Lake Artistic Director Stephanie Lake Company
Fez Faanana Director and co-founder Briefs Factory International	Ally Harvey Executive Director and co-CEO Polyglot Theatre	Cat Sewell Artistic Director and co-CEO Polyglot Theatre	Geoff Cobham Artistic Director Patch Theatre
Penny Camens General Manager Patch Theatre	Joel Bray Artistic Director Joel Bray Dance	Merindah Donnelly Co-CEO and Executive Producer BlakDance	Joshua Thomson Artistic Director Legs On The Wall

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Impact of Live Performance Export

Impact

Australian live performance export is both an economic and cultural engine, sustaining employment domestically while building international relationships, cultural exchange and diplomatic connections that underpin a resilient and globally connected society.

Australian creative industries contribute more than \$120 billion annually to the national economy, while international cultural engagement supports employment, tourism, trade relationships and Australia's global cultural reputation.

Despite this, live performance export (in particular dance, contemporary dance, circus, contemporary circus, theatre and theatre for young people genres) remains structurally under-supported relative to its cultural, diplomatic and economic value.

National Cultural Policy relevance

International cultural engagement is not an optional extension of Australia's performing arts ecology. It is core cultural infrastructure that sustains:

- artists and arts workers
- employment and workforce development
- audience growth
- diplomatic relationships
- cultural exchange
- Australia's global cultural presence

International touring, exchange and market development must operate as cross-cutting principles across all five pillars of the next National Cultural Policy.

The problem

Australia does not lack international demand for live performance. It lacks the systems needed to convert that demand into sustainable cultural, artistic and economic value.

Disruption is now the normal operating environment for international touring. Travel, freight, accommodation, wages, visas, insurance, remounting and contingency costs have escalated sharply, while presenter fees have not kept pace. As a result, Australian artists and companies are increasingly unable to accept international invitations, even when audiences, presenters and festivals clearly want the work.

This is particularly acute for the small-to-medium and independent companies that carry a disproportionate share of Australia's live performance reputation overseas. These organisations are internationally agile and artistically distinctive, but are least able to absorb losses when tours are cancelled, delayed or underfunded.

The problem is not demand. The problem is feasibility.

The opportunity is not simply to meet demand. It is to protect decades of relationship-building, sustain artists and arts workers, support producer and technical workforce development, grow international audiences for Australian culture, strengthen diplomatic and cultural relationships, and ensure the breadth of Australian live performance, including First Nations-led work and independent practice, can be seen and understood globally.

Identified problems and solutions

1. Converting live export demand to viable touring

Problem Australian live performance continues to attract international demand, particularly in Europe, North America and North Asia. However, previously viable tours now frequently require significant subsidy. Presenter fees have not kept pace with the real cost of touring from Australia. Currency volatility, freight, remounting, accommodation, insurance, access, visas and contingency can make confirmed invitations financially impossible. This disproportionately impacts:

- small-to-medium organisations
- independent artists and producers
- First Nations-led touring and exchange
- intercultural and community-based practice

where additional cultural governance, reciprocity and Indigenous Cultural and Intellectual Property responsibilities are rarely recognised within standard export models.

Solution The next National Cultural Policy must prioritise the feasibility and sustainability of live performance export, not simply identify international engagement as an aspiration.

Policy Mechanism Establish an ongoing dedicated live performance export fund for tour-ready artists, producers and organisations with demonstrated international demand.

- This should include:
- dedicated First Nations-led streams
- culturally grounded investment models
- producer and touring capacity support
- remount and adaptation support

Suggested Model Pilot a presenter-fee matched funding model. Federal and state partners could match a percentage of guaranteed presenter fees for eligible international engagements, creating an agile mechanism that unlocks markets already demonstrating demand.

- The model is elastic:
- where demand grows, support grows
- where bookings reduce, subsidy reduces

This rewards demand, delivery and quality without requiring organisations to carry unmanageable risk.

Relevant Pillars First Nations First, Centrality of the Artist, Strong Cultural Infrastructure, Engaging the Audience

2. Disruption is no longer exceptional; it is part of the operating environment

Problem Global conflict, climate events, health disruptions, freight delays, visa instability, presenter collapse and escalating operational costs are now routine features of international touring. Current funding systems continue to treat disruption as exceptional rather than structural. This transfers disproportionate risk onto artists, producers and organisations, particularly within the small-to-medium and independent ecology. This pressure is intensified for First Nations organisations and artists who often carry additional cultural, diplomatic and governance responsibilities without dedicated infrastructure support.

Solution The policy framework must acknowledge disruption as a permanent operating condition and fund accordingly.

Policy Mechanism Establish a quick-response international disruption and resilience fund supporting confirmed international activity affected by:

- climate events
- global conflict
- health events
- freight failure
- visa barriers
- presenter collapse
- unforeseen disruptions

Additional Mechanism Require realistic contingency within all publicly supported international touring budgets. Contingency is no longer optional budget padding. It is a core cost of ethical and deliverable touring.

Relevant Pillars First Nations First, Centrality of the Artist, Strong Cultural Infrastructure

3. The small-to-medium sector carries outsized export value and outsized risk

Problem Many of Australia's most internationally recognised and mobile live performance organisations sit within the small-to-medium and independent ecology. This is particularly relevant to the dance, contemporary dance, circus, contemporary circus, theatre and theatre for young people genres. These organisations are:

- artistically agile
- internationally respected
- comparatively cost-effective
- but also least able to absorb financial losses.

This includes many First Nations-led organisations and intercultural practices operating through long-term community and cultural exchange models. When these organisations decline international invitations due to financial risk, Australia loses:

- artistic momentum
- employment
- international reputation
- reciprocal relationships
- future producer and artist pathways

Solution Export policy must reflect the operational realities of the small-to-medium and independent sector, not solely institutions with large reserves or dedicated international departments.

Policy Mechanism Create targeted support for small-to-medium and independent organisations with demonstrated international demand, including:

- multi-year export capacity funding
- producer and touring workforce support
- remount support
- culturally grounded touring support for First Nations-led exchange models
- relationship maintenance investment between touring cycles

Relevant Pillars First Nations First, Centrality of the Artist, A Place for Every Story, Strong Cultural Infrastructure

4. Different international contexts require different investment logics

Problem International cultural engagement operates differently across different markets and geopolitical contexts. In mature markets such as Europe, North America and North Asia, the challenge is export feasibility. In emerging or priority relationship markets such as ASEAN, the Pacific and South Asia, the challenge is long-term audience and market development requiring:

- sustained relationship-building
- reciprocal exchange
- diplomatic engagement
- sector-led cultural knowledge

First Nations international engagement operates through another distinct logic again, often grounded in:

- Indigenous diplomacy
- long-term exchange
- reciprocal relationships between Indigenous communities globally

This work cannot be reduced to transactional export models. There is already substantial leadership in this area. The Tri-Nations Indigenous-to-Indigenous transnational exchange platform between Indigenous artists and organisations across Australia, Canada and Aotearoa New Zealand has developed a robust international exchange, export and commissioning strategy over more than twenty years. This existing framework supports:

- reciprocal cultural exchange
- commissioning
- touring
- market development
- Indigenous diplomacy

The strategy already exists. What is now required is implementation, coordination and long-term resourcing.

Solution The next National Cultural Policy must distinguish between:

- export investment
- artform and producer development investment
- audience and market development investment
- First Nations international exchange and Indigenous diplomacy investment

Policy Mechanism Develop separate but connected funding settings for:

- mature-market export
- emerging-market development
- artform and producer capacity
- First Nations-led exchange and reciprocal market development

This must include:

- implementation and resourcing of the Tri-Nations strategy
- dedicated First Nations market development leadership within Creative Australia
- support for Indigenous-to-Indigenous exchange
- long-term producer and cultural brokerage investment

Relevant Pillars First Nations First, Engaging the Audience, A Place for Every Story, Strong Cultural Infrastructure

5. International activity needs greater coordination across government

Problem International live performance activity intersects across:

- arts
- foreign affairs
- trade
- tourism
- migration
- state government
- federal government
- overseas posts
- presenters and festivals

Yet the support architecture remains fragmented. Misaligned timelines between grant rounds, presenter decision-making cycles, state and federal priorities and international festival calendars create unnecessary barriers to touring. Companies are often expected to navigate disconnected systems while carrying the financial and logistical risk of delivery. First Nations leadership and cultural governance are also frequently absent from international policy and export coordination structures.

Solution Australia requires a coordinated International Cultural Relations framework connecting:

- cultural policy
- export strategy
- diplomatic priorities

- First Nations cultural leadership
- practical touring realities

Policy Mechanism Establish a Government Advisory Panel for International Cultural Relations chaired jointly by the Office for the Arts and DFAT. This mechanism should coordinate:

- Creative Australia
- Austrade
- state governments
- tourism
- migration
- overseas posts
- Cultural and creative sector
- First Nations cultural leadership

First Nations governance and leadership must be embedded from the outset.

Additional Mechanism Support stronger collaboration between Australian artists, producers, organisations and overseas Australian government missions, particularly within the Asia-Pacific region.

Relevant Pillars First Nations First, Strong Cultural Infrastructure, Engaging the Audience, A Place for Every Story

6. First Nations international exchange requires culturally grounded investment models

Problem First Nations international touring and exchange operates differently to standard export models. For many First Nations artists and organisations, international activity is also:

- cultural exchange
- Indigenous diplomacy
- relationship building
- community accountability across Nations

This work carries responsibilities relating to:

- cultural governance
- Indigenous Cultural and Intellectual Property
- protocol
- reciprocity
- long-term relationship development

Despite this, there has not been sustained dedicated First Nations-led international market development capacity within Creative Australia or its predecessor agencies. Since the departure of the last dedicated bridging role between First Nations arts and market development in 2014, there has been no ongoing structural mechanism supporting this work in a coordinated way.

Solution The next National Cultural Policy must recognise First Nations international touring and exchange as essential:

- cultural infrastructure
- diplomatic infrastructure
- international cultural relations infrastructure

Policy Mechanism Establish dedicated First Nations international exchange and touring investment streams supporting:

- cultural governance and ICIP
- long-term relationship development
- Indigenous-led exchange and reciprocity
- producer and cultural brokerage capacity
- on Country and community-connected engagement frameworks
- international market development for First Nations-led work

Additional Mechanism Establish dedicated First Nations-led international market development capacity within Creative Australia and embed First Nations leadership within all international policy, touring and export advisory structures.

Relevant Pillars First Nations First, A Place for Every Story, Strong Cultural Infrastructure, Engaging the Audience

Evidence

Evidence map: post-pandemic international touring costs.

The post-pandemic touring environment has created a structural gap between international demand for Australian work and the capacity of Australian companies to supply it. The cost base for touring has shifted dramatically: sector evidence points to 30-50% increases in tour and concert costs, with some operators reporting 30-60% increases in operating expenses. Freight, insurance, travel, wages, accommodation and currency exposure have all moved against touring companies at the same time. These are not discretionary costs. They are the core mechanics of touring: moving people, equipment, sets, instruments, technical staff and risk across borders. Without targeted support, Australian live performance risks losing international markets not because demand has fallen, but because the cost of reaching that demand has become prohibitive.

Evidence point	What it supports	Reference
Economic contribution of cultural activity	Cultural and creative activity contributes materially to the national economy, supporting the case for export as part of a larger economic sector.	Australian Government cultural and creative activity research
Live performance audience reach	LPA's 2024 data shows strong audience and revenue recovery, demonstrating the scale and public reach of live performance.	Live Performance Australia 2024 Attendance and Revenue Report
Post-pandemic touring cost pressures	Parliamentary evidence records 30-50% increases in tour/concert costs and 30-60% operating expense increases.	Parliament of Australia live music inquiry
Insurance escalation and risk	The same inquiry identifies insurance, cancellation and disruption risk as major viability pressures for live events.	Parliament of Australia live music inquiry
Freight, travel and geography	Freight, flights, accommodation, travel time and market size are recognised barriers; these intensify for international touring from Australia.	Parliament of Australia live music inquiry
Currency exposure	Exchange-rate movements affect imported costs, international payments and tour budgeting in AUD against USD, EUR or GBP exposure.	RBA exchange-rate explainer and live music inquiry
Public diplomacy and people-to-people value	DFAT defines public diplomacy as activity that builds people-to-people links and sustains international relationships beyond formal government channels.	DFAT public diplomacy
Asia-Pacific and Southeast Asia engagement logic	Creative industries can build understanding, rapport, exchange and cultural diplomacy through regional networks.	DFAT Southeast Asia Economic Strategy 2040
Tourism and First Nations cultural demand	Tourism data supports the relevance of cultural demand and First Nations experience in international engagement.	Tourism Australia / TRA
Cross-government comparator: sport	Australia's sport diplomacy framework links cultural visibility, Indo-Pacific engagement, trade, tourism, investment and international leadership.	DFAT Sports Diplomacy Strategy 2032+
Market development and international mobility	APAM's submission records the role of market development, international presenters, touring, collaboration and capacity building.	APAM submission

International Presenter Statement in Support of Australian Live Performance Touring

We, the undersigned international presenters, programmers, festival directors, venues and cultural organisations, affirm our support for Australian live performance and its continued presence on international stages.

Australian artists and companies have built strong international reputations through work that is distinctive, ambitious, rigorous and deeply valued by our audiences.

International partners recognise Australian live performance as highly innovative, agile and cost-effective. Australian companies are often lean, resourceful and exceptionally skilled at creating work of international quality with limited resources.

The demand for this work remains strong.

What has changed is the ability to meet that demand. The geographic distance between Australia and international markets has always been a defining challenge for touring Australian work. In the current post-COVID, high-cost environment, that challenge is more acute than ever.

Rising costs, increased financial risk and the complexity of international touring now make it harder for Australian companies and international presenters to realise opportunities that already exist.

This is not a question of artistic relevance, efficiency or international demand. It is a question of coordination, risk and support.

We support the call for a stronger, clearer and better resourced international touring framework for Australian live performance, one that recognises the cultural and international value already created by Australian artists and their global partners.

Australian work is wanted. The relationships are real. The audiences are ready.

What is needed now is the support to let the work travel.

Signed,

Confirmed international presenter signatories

Amy Cassello Artistic Director BAM / Brooklyn Academy of Music United States	Chiao-hsin Chen Project Manager National Theater & Concert Hall Taiwan	Mikael Aaltonen Programme Manager Dance House Helsinki Finland
Ron Berry Artistic Director Fusebox Festival United States	Kylie Walters General and Artistic Director Theatre Sevelin 36 Switzerland	Ratri Anindyajati Festival Director Indonesian Dance Festival Indonesia
Katharine Carol, MA Artistic & Executive Director Vancouver International Children's Festival Canada	Jens Frimann Hansen Artistic Director Helsingør Teater Passage Festival Denmark	Paul Tam Executive Director, Performing Arts West Kowloon Cultural District Authority Hong Kong, China
Chaehwan Oh Team Manager / Producer National Asian Culture Center Foundation Republic of Korea	Ella Jheng Independent producer Independent Taiwan	Tiago Rodrigues Director Festival d'Avignon France

Confirmed international presenter signatories

Joe Bates Chief Executive Dance Consortium United Kingdom	Raydun Bolk Program Coordinator Noorderzon Festival of Performing Arts & Society The Netherlands	Matthias Pees Director / Intendant Berliner Festspiele with Gropius Bau Germany
Olga Drygas Curator / Dramaturg auawirleben Theaterfestival Bern Switzerland	Antonin Coutouly Managing Director Kinetic France	Iris Nemani McMurtry Family Director Stanford Live United States
Adjima Na Patalung Festival Director Imagine United Kingdom	Janelle Bish Artistic Director Nelson Arts Festival Aotearoa New Zealand	Liyun Lin Programming Associate National Performing Arts Center - National Taichung Theater Taiwan
LAI Ying-Hsien Programming Associate National Taichung Theater Taiwan, R.O.C.	CHIU Mei-fang Associate Manager, Programming & Planning Department National Taichung Theater Taiwan, R.O.C.	Keni K. Soeriaatmadja Coordinator / Director Indonesian Ministry of Culture / Sasikirana KoreoLAB & Dance Camp Indonesia

Confirmed international presenter signatories

Michael Caldwell Artistic Director SummerWorks Canada	Peter Glanville International programmer Farnham Maltings United Kingdom	Michael Stevens Producer & Co-Managing Director Roast Productions United Kingdom
Kate Cross Director The Egg, Theatre Royal Bath United Kingdom	Shona McCullagh MNZM Creative Producer / International Arts Consultant Independent Aotearoa New Zealand	Kyu Choi Artistic Director Seoul Performing Arts Festival Republic of Korea
Thomas O. Kriegsmann President ArKtype / Under the Radar United States / Austria	Nicole McLuckie Co-Executive Director The Cultch Canada	Ani Piki Tuari Festival Director Te Tairāwhiti Arts Festival Aotearoa New Zealand
Cindy Leung Siu Kwan Presenter / cultural producer Musica Viva Hong Kong Hong Kong	Petra Jane Tauscher Artistic Director Creative Youth / FUSE International / FUSEBOX United Kingdom	Martha Hincapié Ch Arts leader / programmer Independent Country not supplied

Other individuals and organisations endorsing this submission

Simon Hinton Artistic Director / CEO Merrigong Theatre Company Included the ALPEA short endorsement wording in Merrigong's NCP submission.	Simon Wellington Executive Producer Performing Lines Included endorsement for the Alliance recommendations in Performing Lines' submission.	Kate Britton Executive Director Performance Space Added reference to the ALPEA submission in Performance Space's submission.
Belinda Kelly Executive Producer / CEO Terrapin Confirmed Terrapin is happy to endorse.	Sam Routledge Artistic Director Terrapin Confirmed Terrapin endorses the submission.	Guy Boyce General Manager Marrugeku Confirmed Marrugeku would be delighted to become a signatory.
Gavin Webber Co-Artistic Director The Farm Confirmed support by reply.	Shaun Parker Artistic Director Shaun Parker & Company Asked for Shaun Parker & Company and himself to be included as signatories.	Katy Green Loughrey Executive Director Sydney Dance Company Confirmed action and support by reply.
David Clarkson Artistic Director Stalker Theatre / Box of Birds Confirmed he was happy to put his name to the submission.	Geoff Cobham Artistic Director Patch Theatre Asked for his name to be added to the submission.	Penny Camens General Manager Patch Theatre Coordinated and supplied international letters of support.

Other individuals and organisations endorsing this submission

Libby Klysz Producer / educator / director / performer Independent Confirmed she would endorse the recommendations as an industry colleague.	Luka Lesson Artist / educator Independent Confirmed support by reply.	Kevin du Preez Executive Director Monkey Baa Theatre Company Confirmed Children's Theatre Alliance included this in a joint submission and asked to add Monkey Baa.
Linda Catalano Creative Director / Executive Producer Quiet Riot Endorsed and supported the submission in full.	Erica McCallum Acting Head of Programming Darwin Festival Confirmed support by reply.	Ruth Oakley Arts leader / academic Monash University Performing Arts Centres Wholeheartedly extended support for ALPEA.
Frank Madrid Irazabal Executive Producer Australia Latin America Foundation Asked for his name to be added.	Ian Pidd Artistic Director Wanderer Festival Confirmed support and asked to be listed as Artistic Director of Wanderer Festival.	Kevin du Preez / Children's Theatre Alliance Executive Director / sector group reference Monkey Baa Theatre Company / Children's Theatre Alliance Confirmed the Children's Theatre Alliance included this in its joint submission.
Shaun Comerford Executive Director Circa Provided aligned circus and international touring policy points.	Jennifer Greer Holmes Executive Director Vitalstatistix Confirmed intention to incorporate relevant material into their submission.	Katy Green Loughrey / Sydney Dance Company Sector colleague / organisation reference Sydney Dance Company Confirmed action and support by reply.