

**Submission  
No 205**

**INQUIRY INTO THE MUSIC AND ARTS ECONOMY IN  
NEW SOUTH WALES**

**Organisation:** Sydney Opera House

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## Sydney Opera House submission to NSW Government's inquiry into music and arts economy

The Sydney Opera House plays an important role in Australia's music and arts ecosystem, supporting and nurturing local artists at key points in their career, promoting and presenting world-class local and international artists, and strengthening and inspiring the community through cultural participation.

This submission considers the following:

- The economic, cultural and social value of a vibrant, accessible music and arts scene, as evidenced by the value of the Opera House to the community and its significant role in the NSW music/cultural sector and economy, including as:
  - Programmer, through its annual contemporary music, theatre and talks events and the presentation of world orchestras and leading classical musicians;
  - Home to seven flagship performing arts companies – Australian Chamber Orchestra, Bangarra Dance Theatre, Bell Shakespeare, Opera Australia, Sydney Symphony Orchestra, Sydney Theatre Company and The Australian Ballet – all of which make significant contributions to the music and arts ecosystem and Sydney's night-time economy; and
  - Venue for hire by major music promoters and presenters.
- The need to support all aspects of the contemporary music and arts ecosystem, including artists at different stages of their careers, venues of varying sizes, promoters and broadcasters.
- A holistic approach to the patron experience at entertainment and music events, including transport, wayfinding, a density of activity, diversity of artistic genres, development of cultural precincts and infrastructure, and food and beverage offerings.
- The importance of developing and promoting night-time experiences.
- Investment in existing cultural infrastructure and the development of cultural precincts, as well as the identification of new spaces for creative expression, development and performance, with a particular focus on night-time activities.

### NSW policy foundation

The NSW Government's support of diverse, vibrant and sustainable music and arts industries is crucial to these sectors' growth and their contribution to Australia's economy and cultural life. *Create in NSW: the NSW Arts and Cultural Policy Framework* and the *Cultural Infrastructure Strategy* have established a strong policy framework, and the Opera House looks forward to contributing to *Arts 2025*.

Additionally, the *Creative Industries Action Plan*, *Visitor Economy Action Plan* and *Sydney Night-time Economy Action Plan* identify different, but aligned, policy objectives, strategies and actions. Strong governance and understanding of the relationships between these plans, identification of responsible agencies/parties and a central coordination approach would maximise the benefit of their implementation, avoid duplication and ensure initiatives and policy priorities are clear, integrated and achievable.

## **The Opera House's role in the NSW music/cultural sector and economy**

The Opera House contributes \$775 million in value added to the national economy each year, with its social asset value to Australia estimated at \$4.6 billion by Deloitte Access Economics in 2013.

One of the world's busiest performing arts centres, the Opera House staged almost 1,800 performances in 2016-17 for a total audience of 1.5 million. The Opera House plays a central role in the artistic and cultural development of NSW and Australia as the home of seven flagship performing arts companies and through its internal programming arm, Sydney Opera House Presents (SOHP).

In 2016-17, SOHP presented 700 performances to 385,000 people across the following programming streams: Contemporary Music; Talks & Ideas; Children, Families and Creative Learning; First Nations; and Contemporary Performance. The Opera House's resident companies presented 780 performances to 800,000 people. In addition, more than 260,000 people attended 280 events staged by other presenters.

In addition to being a performing arts venue, the Opera House is the symbol of modern Australia and the nation's premier tourist attraction, welcoming 8.2 million people to the precinct each year, with more than 500,000 visitors taking a paid guided tour. In 2016-17, there were more than 2.6 million food and beverage transactions at its seven dining venues and bars. The Opera House also has a growing reputation as a food destination, thanks to its relationship with hatted chefs, Peter Gilmore (Bennelong) and Matt Moran (Opera Bar and Aria Catering).

## **Supporting contemporary music and arts ecosystem**

Since 2009, the Opera House has presented its own annual contemporary music program, showcasing critically and commercially acclaimed artists that reflect the vibrancy and diversity of contemporary music culture. In doing so, the program brings the world's best contemporary music to Sydney, contributing to the broader arts ecology. Additionally, the Opera House is a sought-after venue for major local and international artists presented by commercial promoters such as Live Nation, Chugg Entertainment and Frontier Touring. The contemporary music genre faces regulatory challenges due to changes to liquor laws and the effects of mixed residential and commercial zoning.

In 2016-17, contemporary music programming by the Opera House and third-party commercial promoters drew more than 183,000 people to the Opera House. Fifty-one per cent of these patrons had not previously attended an Opera House event, demonstrating the importance of contemporary music programming as a gateway for cultural participation and enjoyment of the State's most significant cultural asset.

The Opera House provides a platform for artists throughout their careers, with local emerging artists becoming advocates for Australia on the world's biggest stages. For example, Grammy Award-winning Australian artists Gotye and Flume performed in the Opera House's smallest venues at the early, critical stages of their careers and returned in ensuing years for larger concerts at the height of their popularity. ARIA Hall-of-Famer Paul Kelly, Tame Impala

and Nick Murphy (formerly known as Chet Faker) have celebrated career-defining moments on the outdoor Forecourt stage that have been broadcast around the country and received international acclaim. These events are a global artistic postcard for Sydney and Australian talent at one of the world's most recognisable locations.

The success of contemporary music programming at the Opera House is dependent on the wider activity and output in the commercial and not-for-profit music sectors, including small to mid-sized live entertainment venues, bars and night clubs, show promoters, record labels, independent radio broadcasters and music retail outlets. A sensitivity to these stakeholders' priorities is crucial for local artistic communities to flourish, including standardising live-music regulatory processes to ensure liquor laws enable a safe night-time culture while fostering vibrancy and careful urban planning in mixed residential and commercial areas.

### **Holistic consideration of patron experience**

As a multi-purpose building and precinct, the Opera House understands that locals and tourists want a holistic entertainment experience that includes performance, food and beverage and other cultural experiences. The support and expansion of NSW's music and arts industries should consider all elements relevant to a person's outing, including the range of entertainment offerings, food and beverage and transport options.

Creative and effective marketing and promotion of cultural activities and events, individually by artists and organisations, and collectively by cultural precincts, local and state institutions and agencies are key to building Sydney's reputation as a vibrant city, day and night.

### **Coordinated activity between cultural organisations and precincts**

The Opera House sees merit in leveraging and maximising the activities of cultural organisations to create greater connectivity and awareness about the diversity and density of activity across the city and state. Collaboration between organisations, whether on a digital app, creative project or marketing initiative, can be challenging, as it requires agreement about resources, ownership and organisational priorities. However, organisations and institutions close to each other (such as those included in the 'Cultural Ribbon') could achieve significant attendance, economic and cultural benefits from developing and promoting walking and transport routes between them, as well as platforms to communicate their programs and activities in a coordinated way. This approach would not require that organisations be thematically aligned or collectively curated (though in some cases this could be beneficial) and is therefore a cost-effective way of promoting cultural experiences while retaining each organisation's curatorial independence.

Homeground, the Opera House's annual, free First Nations multi-arts festival, could become a collective activity across metropolitan Sydney. Leveraging an existing program and loyal audience is far easier than establishing and growing a new festival. Curated by the Opera House's Head of First Nations Programming, Rhoda Roberts AO, Homeground celebrates the power of contemporary artists and ancient customs in a free, outdoor weekend festival for all ages. It is packed with live music, dance, workshops, markets, the Dance Rites competition and other activities. In November 2017, the Opera House trialled moving the festival from the Western Broadwalk to the Forecourt. This significantly increased the visibility and scale of the festival. Audience numbers grew from 10,000 in previous years to

more than 25,000 attendees, demonstrating the demand for curated cultural experiences and festivals. The trial was possible due to the sharing of infrastructure with a contemporary music series on the Forecourt. Without similar cost-sharing, additional funding would be needed in future years.

There would be significant participation and cultural benefits if other venues were to program Aboriginal and Torres Strait Islander activities on the same weekend under the Homeground banner. With continued strategic project and marketing development, Homeground has the potential to become the 'must do' First Nations centrepiece of Sydney's cultural calendar.

### **Developing night-time experiences**

In response to growing demand from locals and tourists for accessible night activities, in June 2017 the Opera House launched Badu Gili – 'water light' in the language of the site's traditional custodians, the Gadigal people. This new year-round experience lights the eastern Bennelong sails every evening to celebrate the rich history and contemporary vibrancy of Australia's First Nations cultures. The experience has proved popular with locals and tourists, with about 550 people attending each night. More than 40 per cent of attendees surveyed cited Badu Gili as the reason for their visit. The interest generated by Badu Gili confirms visitors' appetite for free arts experiences in the evening. With external financial support, Badu Gili could be expanded to include a live performance element and other cultural experiences in the precinct.

Both the summer period and Vivid Sydney (May-June) excel in terms of night-time experiences, due to the density of creative activities, the involvement of many venues and organisations, and the careful curation and communication of the event/period. However, it is financially challenging for venues to open later into the night outside of these periods. Given Vivid Sydney appears to be reaching capacity limits, with heavy congestion at activations and transport options, there is a need to examine the feasibility of another arts and culture festival in Sydney, or potentially a number of smaller seasonal night festivals. They could be presented in the second half of the year, when there are fewer curated night-time cultural experiences and high visitation periods for international tourists. For example, July is a popular time for European visitors on their summer holidays and October for Asian visitors on Golden Week breaks. In reference to the exponential growth in Asian visitors, Tourism Australia has noted the visitors' preference for and expectation of more evening experiences.

Another focus area for research should be the needs of young people who are more likely to be seeking night-time activities and have the required disposable income.

### **Investment in cultural infrastructure**

The Opera House supports continued investment in the State's existing cultural infrastructure, including the Opera House. The NSW Government has committed \$228 million to the Opera House's Renewal to ensure the Opera House is secured for future generations of artists, audiences and visitors. The program includes major upgrades to the Opera House's two biggest venues, the Joan Sutherland Theatre and Concert Hall, to replace equipment that has reached the end of its operational life, improve accessibility, acoustics and functionality. This investment acknowledges the contribution made by the

Opera House and its resident companies to the music and arts sector and the broader community.

Construction on the Concert Hall upgrade is expected to commence in early 2020, with the venue closed for two artistic seasons. This closure period will require the Opera House to be innovative in its programming and precinct activations to ensure the precinct continues to be vibrant and welcoming to visitors. The closure of the largest internal venue will also require the most effective and sensitive use of external spaces to sustain its function as a world-class performing arts centre and major tourist destination.