

AUSTRALIAN MAJOR PERFORMING ARTS GROUP



AUSTRALIAN ENTERTAINMENT INDUSTRY ASSOCIATION

AEIA Ticket Attendance and Revenue Survey
Live Entertainment Industry in Australia

2004 REPORT

ABN 43 095 907 857

Our thanks to the participating companies who gave permission for their logos to appear on the cover of this Report.

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Introduction

The Australian Entertainment Industry Association (AEIA) is pleased to present the first Report of the AEIA Ticket Attendance and Revenue Survey. The Survey has been developed over a number of years, and is the first measurement of its kind of the size of the Australian Live Entertainment Industry. The report contains quarterly and annual totals of revenue and attendance across 10 event categories. Trends for each event category are identified, as well as overall industry trends in 2004.



The 2004 results (total gross revenue of \$689.6 million, 12.5 million tickets sold) paint the Australian Live Entertainment Industry in a very positive light in comparison with existing research. To date, the only ticket attendance and revenue data available has been produced by the Australian Bureau of Statistics (ABS). The ABS's survey of employing music and theatre production organisations has reported that box office income was \$233.1 million in 1999/2000 and \$331.6 million in 2002/2003, around half of the gross ticketing revenue measured by the AEIA Ticket Attendance and Revenue Survey.

Accordingly, the AEIA's work suggests that the ABS may have seriously underestimated the scope of the Australian Live Entertainment Industry, at least in terms of box office revenue.

Another interesting comparison is drawn from the work of The League of American Theatres and Producers Inc, which summarises the Broadway audience in the United States. The key findings of its most recent work reveals that Broadway shows sold 11.4 million tickets during the 2002/2003 season.

The focus of AEIA is on arming the live entertainment industry with the knowledge base and business practices to engage government, the private sector and the Australian people. The contrasts which can be drawn between the AEIA Ticket Attendance and Revenue Survey results and the research available to date demonstrate the importance of our industry gathering its own data. If we do not take responsibility for this task, we risk seriously underselling our value to those we seek to influence.

The value of the AEIA Ticket Attendance and Revenue Survey will grow with each continuing year, when comparisons can be drawn between the same quarter over a number of years and stronger trends identified. It is also hoped that participation in the Survey will be expanded, ensuring that as much industry data is captured as possible.

Lastly, we take this opportunity to thank the participating companies and the Survey Consultants— Professor Tom O'Regan, School of English, Media Studies and Art History, University of Queensland and Dr Stephen Cox. Your cooperation and effort are essential to the ongoing success of the Survey and are greatly appreciated.

Brendan Schwab
Chief Executive

Ticket Attendance and Revenue 2004

This Report presents the results of the AEIA Ticket Attendance and Revenue Survey: Live Entertainment Industry of Australia for 2004. It is based on data collected under the auspices of the Australian Entertainment Industry Association (AEIA). This Survey reports on paid attendance and associated revenue data.

The Ticket Attendance and Revenue Survey Report for 2004 is presented in two sections. The first section presents the attendance and revenue data aggregated across 2004 and each of the 10 event categories. The second section of the Report presents data as trends across each quarter. These trends are then discussed for each of the 10 event categories.

I. Total Revenue and Attendance for 2004

Total Revenue and Attendance at the 10 event categories for live entertainment events held within Australia in 2004 are provided below. A total of 12,508,461 people paid for tickets to attend an event, there were a total of 968,770 complimentary, sponsor and zero priced tickets, 13,477,231 tickets overall, generating total revenue of \$689,599,070.

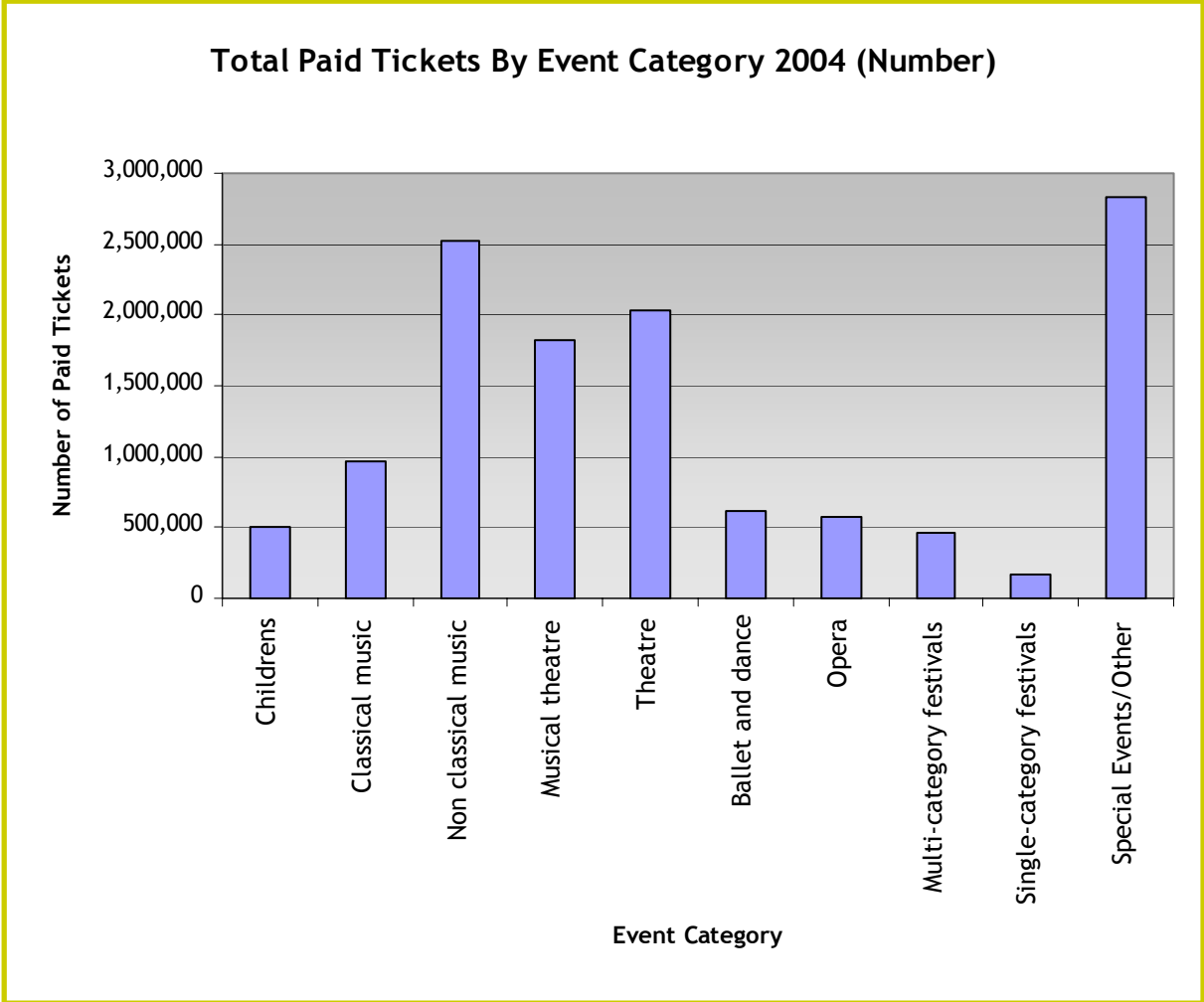
Figure 1, Total Revenue and Attendance for 2004

Category Description	Total Tickets (No.)	Total Tickets (%)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (%)
Children's	515,276	3.8	505,224	10,737,662	1.6
Classical music	1,062,071	7.9	969,076	41,875,659	6.1
Non classical music	2,737,873	20.3	2,530,118	195,058,791	28.3
Musical theatre	1,847,505	13.7	1,817,052	138,718,880	20.1
Theatre	2,202,812	16.3	2,038,150	89,417,616	13.0
Ballet and dance	682,755	5.1	612,367	30,664,060	4.4
Opera	629,808	4.7	574,582	62,562,433	9.1
Multi-category festivals	483,858	3.6	460,020	14,842,476	2.2
Single-category festivals	190,260	1.4	164,826	9,015,128	1.3
Special Events/ Other	3,125,013	23.2	2,837,046	96,706,366	14.0
Total National	13,477,231	100.0	12,508,461	\$689,599,070	100

Total Paid Tickets 2004

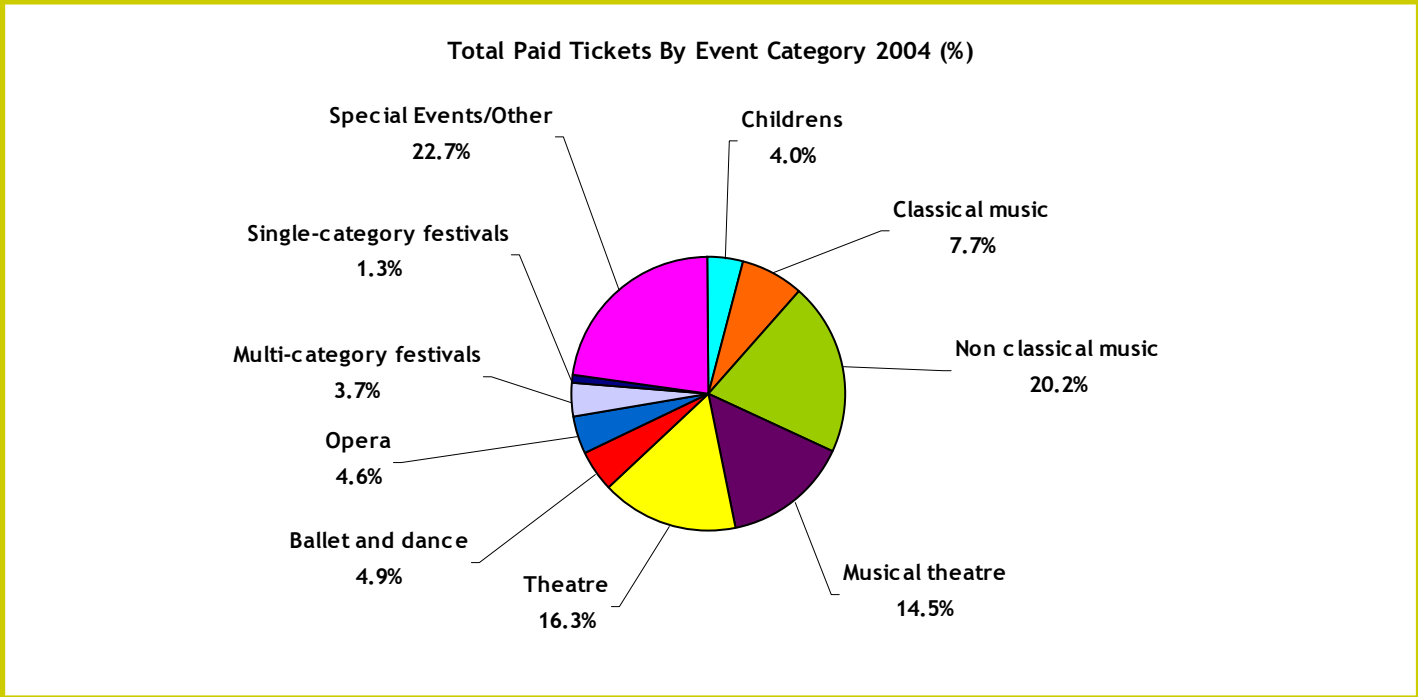
The following graph presents the total number of paid tickets in each event category for the calendar year of 2004. The event categories with the largest attendance were Non-Classical Music, Theatre, Musical Theatre and Special Events/Other.

Figure 2, Total Paid Tickets by Event Category 2004 (Number)



Together, these four categories accounted for 73.5% of all tickets sold in 2004, as shown in Figure 3, which presents the same data but with each event category reported as a percentage of the total number of paid tickets.

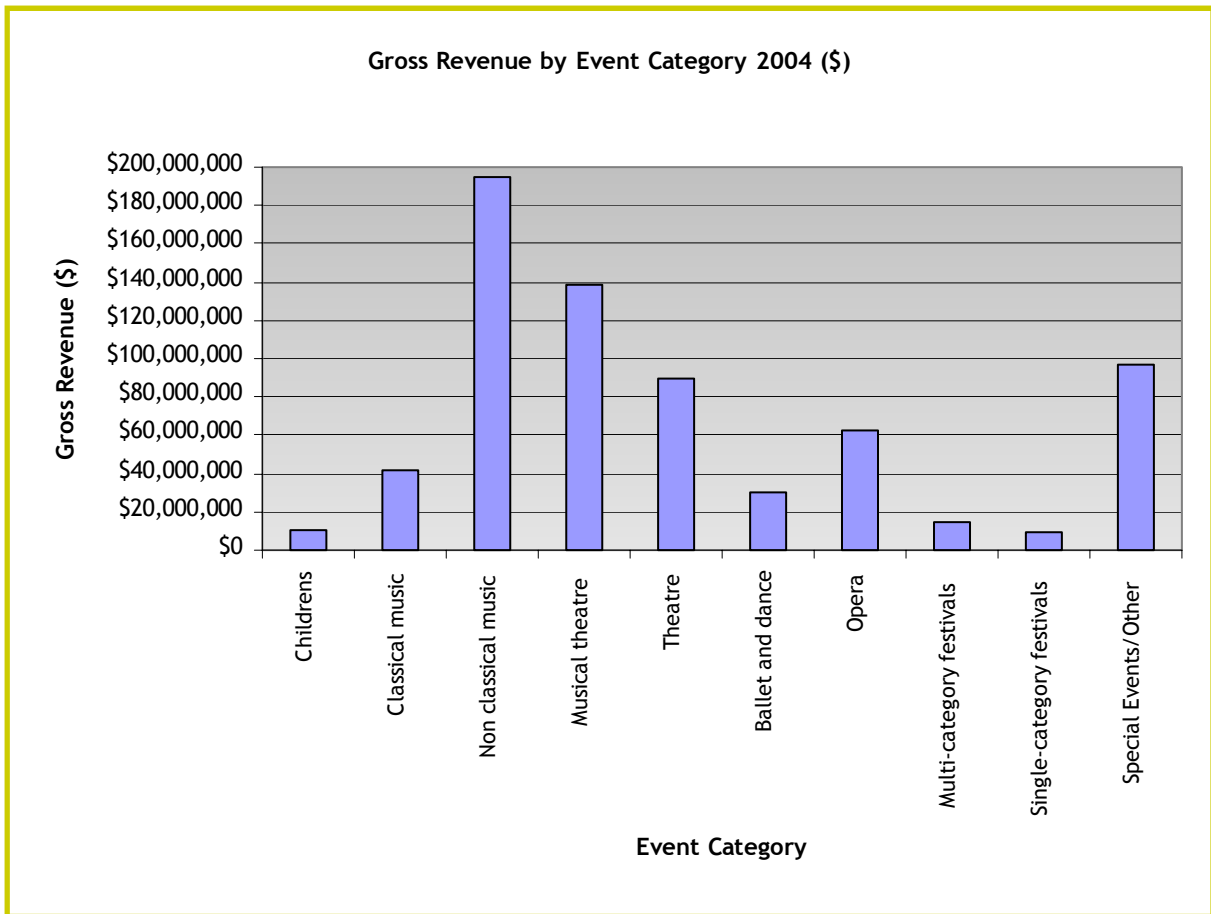
Figure 3, Total Paid Tickets by Event Category 2004 (%)



Gross Revenue 2004

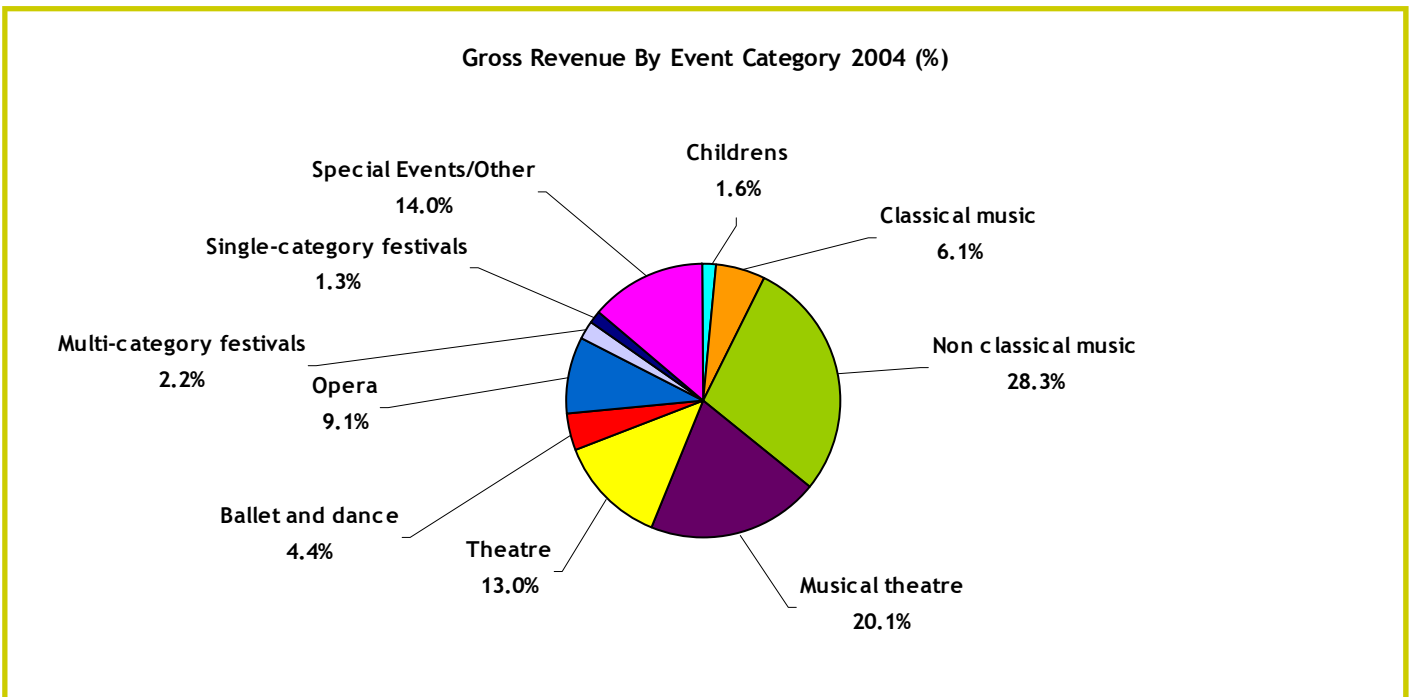
The following graph presents the Gross Revenue generated by each event category for the calendar year of 2004. Across the year, the majority of Gross Revenue was generated from four event categories: Non-Classical Music, Musical Theatre, Theatre and Special Events/Other.

Figure 4, Gross Revenue by Event Category 2004 (\$)



Together, these four categories accounted for 75.4% of total Gross Revenue across all event categories, as shown in Figure 5 below, which presents the same data as above but with each event category reported as a percentage of the gross revenue generated across all categories.

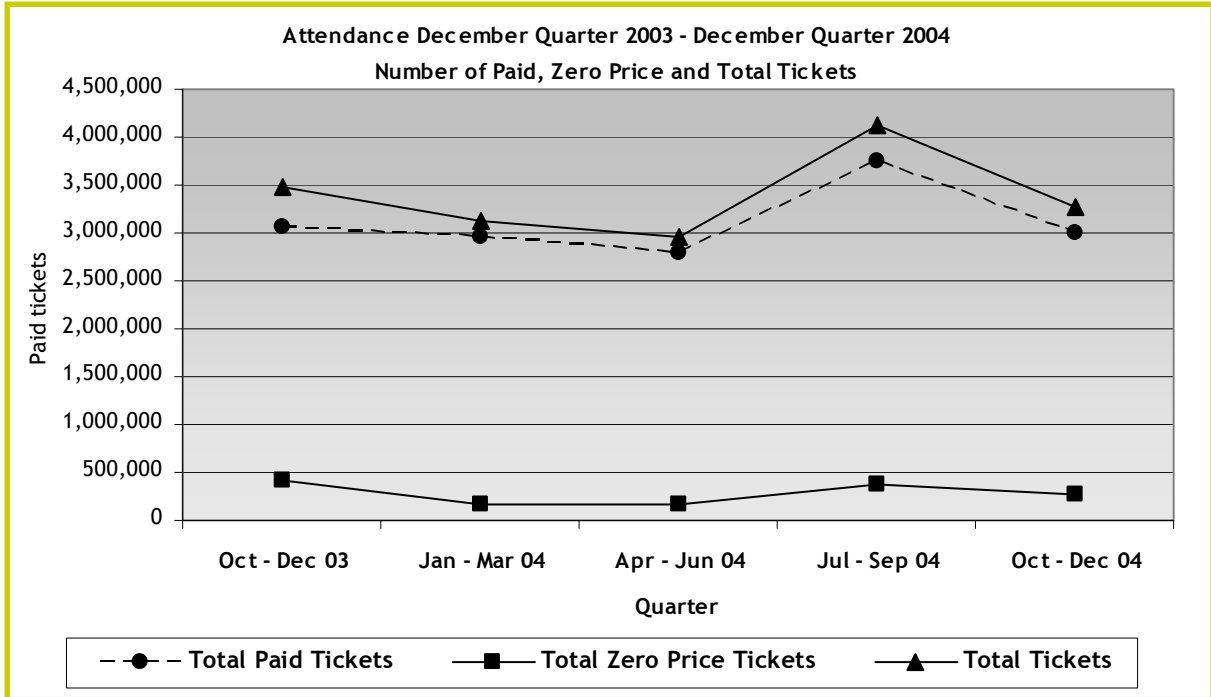
Figure 5, Gross Revenue by Event Category 2004 (%)



2. Trends in Attendance and Revenue for 2004

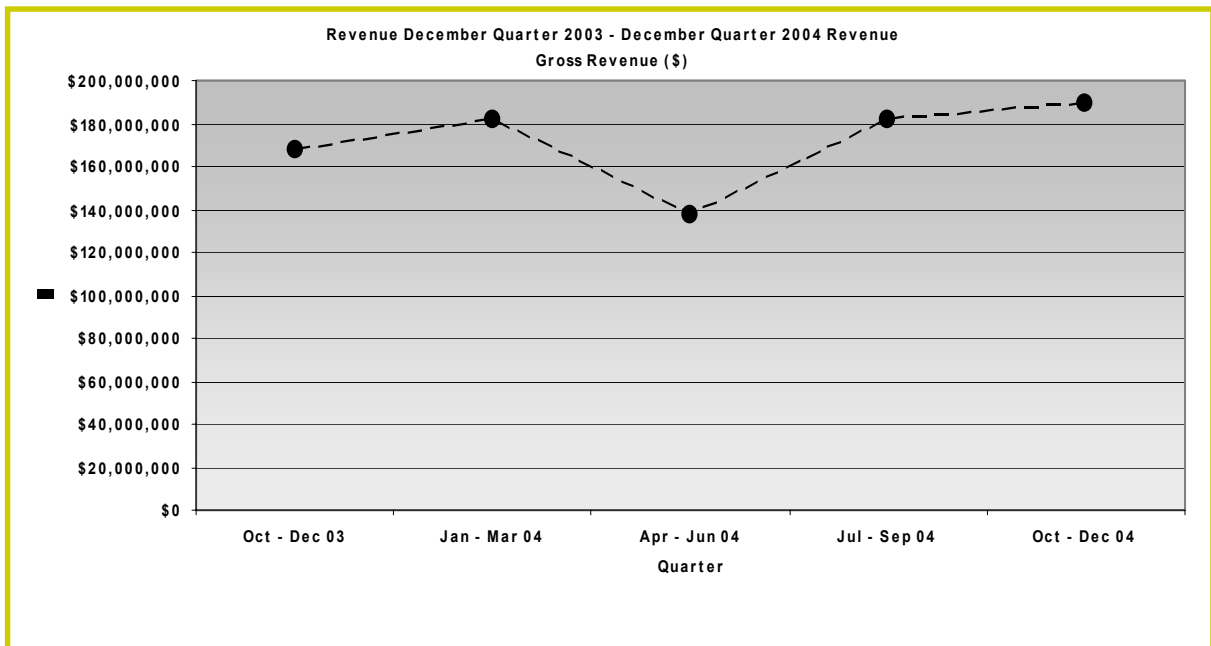
The following graph presents the number of Paid, Zero Price and Total tickets for each quarter that the survey has been conducted, beginning in the December 2003 quarter. The number of tickets bought across all events was approximately 3 million in each quarter. The exception was the September 2004 quarter, which evidenced a much higher number of tickets bought—approximately 0.75 million more tickets were sold in this quarter compared to the other quarters, taking the total number of tickets sold in the September quarter to approximately 3.75 million tickets.

Figure 6, Attendance December Quarter 2003—December Quarter 2004



Interestingly, gross revenue did not match this trend. As shown in the next graph, which presents Gross Revenue for each quarter, approximately \$180 million was generated in each quarter. The exception to this was for the June 2004 quarter, during which lower revenue generated, at \$140 million. The decrement in June revenues was in part due to a smaller number of ticket sales in Non-Classical Music and associated revenues in that quarter and the September quarter.

Figure 7, Revenue December Quarter 2003—December Quarter 2004 Revenue



Trends for Each Event Category

The data for each event category are presented separately next. Each Table provides the data for that event category for the five quarters of data collected thus far (December 2003 to December 2004), plus the total for the 2004 calendar year. After the descriptions of the data for each category, two graphs are presented which show these totals for each event category across the five quarters. While it is possible to make comparisons between the two repeated quarters (December 2003 and December 2004), it is inadvisable to draw conclusions about upward or downward trends with only two directly comparable quarters.

Children's Events

Children's events were a small category in 2004, accounting for just 3.8% of total ticket sales in 2004, and generating only 1.6% of gross revenue in 2004. The majority of ticket sales and gross revenue within this category were generated in the September and December quarters in 2004.

Figure 8, Children's

Children's					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	315,589	9.1	312,579	8,951,785.03	5.3
Jan-Mar 04	65,796	2.1	64,490	1,596,263.10	0.9
Apr-June 04	63,456	2.1	60,682	994,206.00	0.7
Jul-Sep 04	167,950	4.1	165,216	3,914,058.00	2.1
Oct-Dec 04	218,074	6.7	214,836	4,233,135.00	2.2
2004 Total	515,276		505,224	\$6,504,527.10	

Classical Music

While accounting for only 7.9% of ticket sales, Classical Music was the fifth largest category in terms of ticket sales and the sixth largest in terms of gross revenue for 2004. Although quite stable across the year, both ticket sales and gross revenue peaked in the September quarter, with the lowest ticket sales and revenues generated in the March quarter.

Figure 9, Classical Music

Classical Music					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	248,722	7.1	226,988	8,256,217.81	4.9
Jan-Mar 04	203,215	6.5	185,470	8,085,740.41	4.5
Apr-June 04	282,554	9.6	260,095	11,090,957.00	8.1
Jul-Sep 04	332,479	8.1	300,907	14,058,831.00	7.7
Oct-Dec 04	242,768	7.4	221,621	8,693,567.00	4.6
2004 Total	1,061,016		968,093	\$41,929,095.41	

Non—Classical Music

Non—classical music was the largest gross revenue generator in 2004, and was the second largest event category in terms of number of paid tickets. Across 2004, the highest number of paid tickets and the highest revenue was generated in the first and fourth quarters. In the middle two quarters both ticket sales and revenue were much lower.

Figure 10, Non—Classical Music

Non classical Music					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	951,882	27.3	861,665	65,604,673.54	39.1
Jan-Mar 04	919,237	29.4	864,657	73,153,244.36	40.3
Apr-June 04	478,984	16.2	430,673	30,951,847.00	22.6
Jul-Sep 04	495,445	12.0	467,089	24,534,696.00	13.4
Oct-Dec 04	844,207	25.8	767,699	66,419,003.00	35.2
2004 Total	2,737,873		2,530,118	\$195,058,790.36	

Musical Theatre

Musical Theatre generated the second largest gross revenue in 2004, and was the fourth largest event category in terms of ticket sales. Across the year, both gross revenue and ticket sales were quite stable, accounting for approximately 20% of gross revenue for the industry in most quarters.

Figure 11, Musical Theatre

Musical Theatre					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	452,636	13.0	449,474	34,236,173.90	20.4
Jan-Mar 04	496,973	15.9	492,425	38,851,636.30	21.4
Apr-June 04	411,904	14.0	399,581	30,518,671.00	22.2
Jul-Sep 04	520,209	12.6	514,631	38,465,338.00	21.1
Oct-Dec 04	418,419	12.8	410,415	30,883,235.00	16.4
2004 Total	1,847,505		1,817,052	\$138,718,880.30	

Theatre

Theatre had the third largest number of paid tickets and was the fourth largest in terms of gross revenue generated in 2004. Across the quarters, ticket sales and revenues were comparatively stable with a slight peak in the September 2004 quarter.

Figure 12, Theatre

Theatre					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	517,787	14.9	480,581	21,921,307.34	13.1
Jan-Mar 04	526,390	16.8	491,890	18,132,804.11	10.0
Apr-June 04	544,608	18.4	503,126	24,928,114.00	18.2
Jul-Sep 04	653,250	15.8	597,957	26,916,299.00	14.7
Oct-Dec 04	478,564	14.6	445,177	19,464,060.00	10.3
2004 Total	2,242,035		2,073,554	\$91,898,524.45	

Ballet and Dance

Ballet and Dance accounted for 5.1% of tickets sold in 2004, which represented 4.4% of gross revenue, making this category the sixth and seventh largest category in terms of ticket sales and revenue respectively. The second and third quarters of the year generated the majority of ticket sales and revenue, with approximately 65% of tickets and revenue generated for this category in these two quarters.

Figure 13, Ballet and Dance

Ballet and dance					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	134,580	3.9	120,449	5,554,040.99	3.3
Jan-Mar 04	107,440	3.4	100,036	4,727,304.66	2.6
Apr-June 04	200,135	6.8	181,601	10,218,472.00	7.4
Jul-Sep 04	244,873	5.9	215,294	10,001,945.00	5.5
Oct-Dec 04	130,307	4.0	115,436	5,972,377.00	3.2
2004 Total	682,755		612,367	\$30,920,098.66	

Opera

Opera was the fourth smallest category by ticket sales, accounting for 4.7% of ticket sales for the year, but the fifth largest in terms of gross revenue, accounting for 9.1% of revenue across the year. Ticket sales and gross revenue for Opera was highest in the September quarter and smallest in the March quarter.

Figure 14, Opera

Opera					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	183,210	5.3	132,830	11,440,029.10	6.8
Jan-Mar 04	83,680	2.7	73,527	6,093,671.58	3.4
Apr-June 04	139,513	4.7	127,984	8,912,909.00	6.5
Jul-Sep 04	247,165	6.0	225,901	28,085,534.00	15.4
Oct-Dec 04	159,450	4.9	147,170	19,718,779.00	10.4
2004 Total	629,808		560,242	\$62,810,893.58	

Festivals

Multi-category and single-category festivals accounted for the smallest numbers of ticket sales (3.6% and 1.4% respectively) in 2004. There was a peak in the number of paid tickets and gross revenue for multi-category festivals in the March quarter.

Figure 15, Festivals: Multi-Category Festivals

Multi-Category Festivals					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	21,525	0.6	15,599	502,119.30	0.3
Jan-Mar 04	420,301	13.4	400,138	12,704,013.85	7.0
Apr-June 04	24,706	0.8	24,706	447,281.00	0.3
Jul-Sep 04	21,352	0.5	20,915	1,085,432.00	0.6
Oct-Dec 04	17,499	0.5	14,261	605,748.00	0.3
2004 Total	483,858		461,358	\$14,842,474.85	

Figure 16, Festivals: Single—Category Festivals

Single-Category Festivals					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	125,082	3.6	109,771	4,355,936.20	2.6
Jan-Mar 04	42,139	1.3	36,408	2,972,071.90	1.6
Apr-June 04	63,402	2.1	62,148	2,240,276.00	1.6
Jul-Sep 04	12,604	0.3	12,604	1,077,420.00	0.6
Oct-Dec 04	72,115	2.2	53,666	2,725,360.00	1.4
2004 Total	190,260		220,931	\$9,015,127.90	

Special Events/Other

The Special Events/Other category contains events that are unique presentations which do not fall into any other category. This means that the category is not homogenous in terms of the events that can be classified here, and could therefore be expected to exhibit some volatility. As a category Special Events/Other is not strictly comparable with the other categories, but nonetheless represents a valid part of the Live Entertainment industry. The data within this category therefore should be interpreted with some caution.

Over 2004, the Special Events/Other category had the highest number of tickets sold and was the fourth largest category in terms of revenue generated. Of note is the very large peak in the number of paid tickets in the September 2004 quarter. While revenue followed the same general pattern as tickets sold, the peak in revenue in the September quarter was not as marked, reflecting the different nature of events that are placed in this category.

Figure 17, Special Events/Other

Special Events/ Other					
Survey Quarter	Total Tickets (No.)	Total Tickets (% of Quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of Quarter)
Oct-Dec 03	534,209	15.3	353,204	6,774,946.17	4.0
Jan-Mar 04	260,499	8.3	254,628	15,379,394.79	8.5
Apr-June 04	742,726	25.2	735,155	16,909,917.00	1.6
Jul-Sep 04	1,433,571	34.7	1,232,521	34,413,629.00	18.9
Oct-Dec 04	688,217	21.0	614,742	30,004,845.00	15.9
2004 Total	3,125,013		2,575,508	\$96,707,785.79	

The following two graphs present the number of paid tickets in each quarter for each event category, followed by the Gross Revenue generated in each quarter by each event category. The commentary above for each event category can be read in conjunction with these two graphs.

Figure 18, Attendance December Quarter 2003—December Quarter 2004

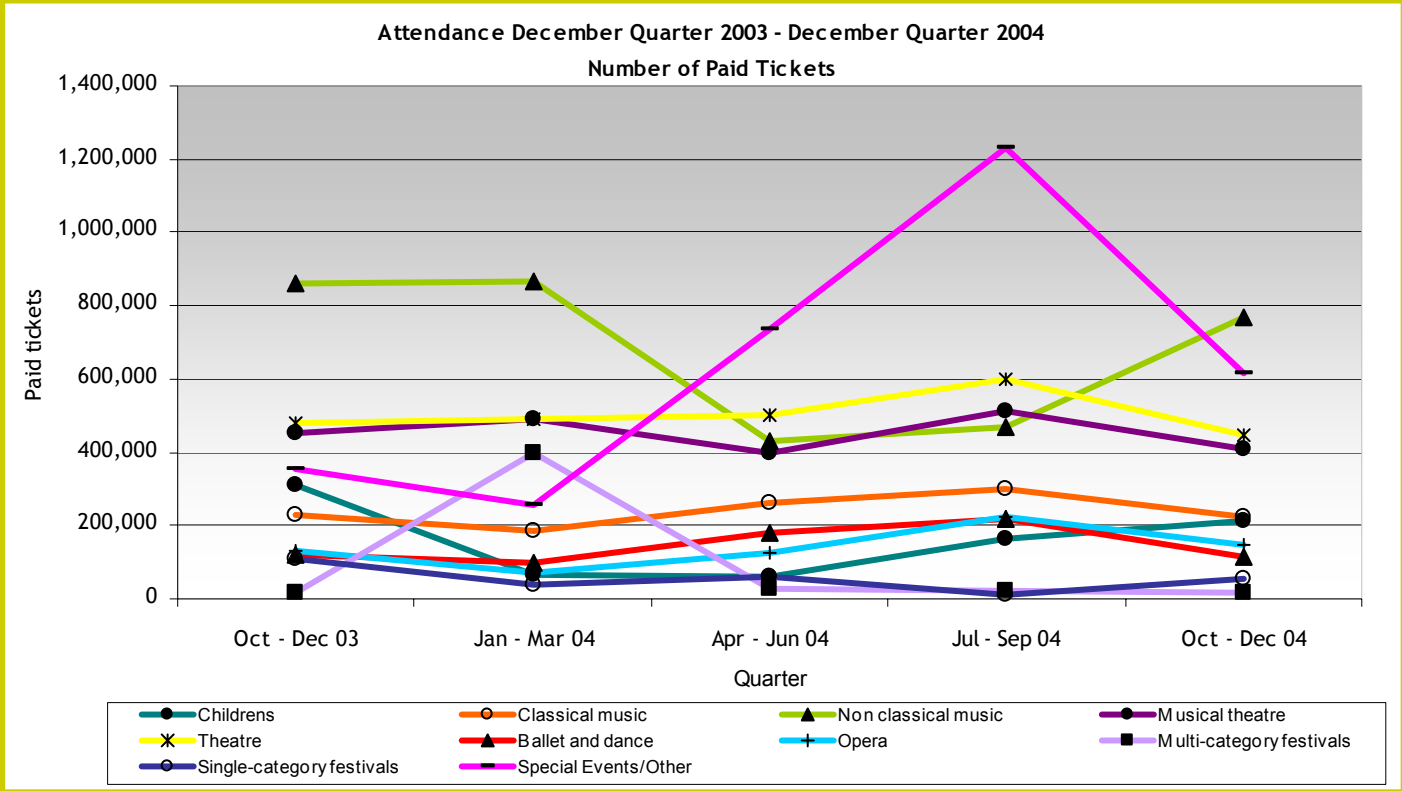
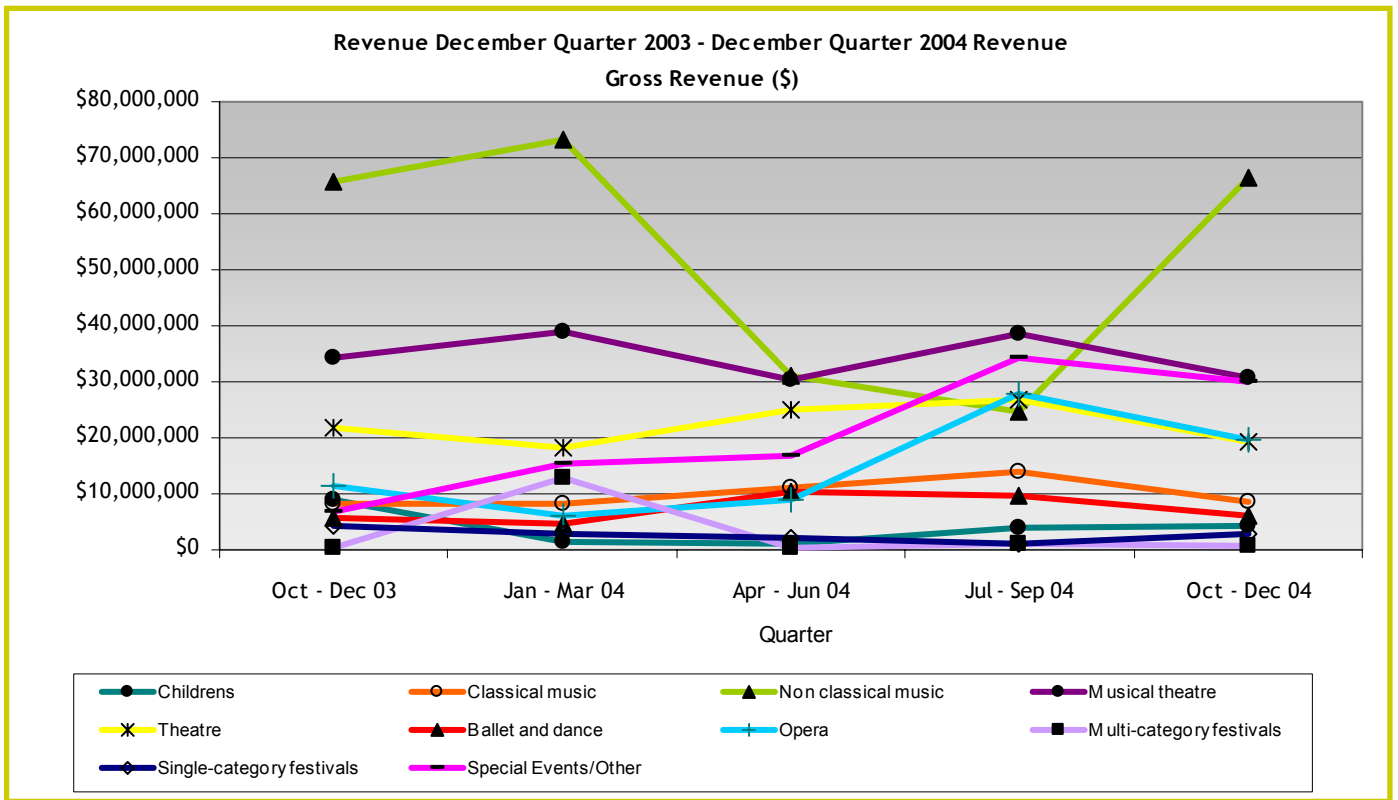


Figure 19, Revenue December Quarter 2003—December Quarter 2004 Revenue



Explanatory Notes

1. *Revenue and attendance* is the aggregate of figures supplied by Australia's major ticketing companies, the Australian Major Performing Arts Group (AMPAG), the Australia Council and leading Festivals.
2. The Australia Council data is limited to that provided to it by the AMPAG companies listed in this Report.
3. Ticketing company data is limited to that provided by those companies listed in this Report.
4. *Revenue data* refers to the revenue from events that occur in the quarter. Revenue will be reported for the quarter in which the event occurs. This is not necessarily the quarter in which the sale is made. Subscription data are allocated to the quarter in which the event occurs.
5. *Complimentary/sponsor/zero price tickets* are defined as those tickets that are given away for free or as part of contra, sponsorship, or sales incentive agreements. It may also include tickets with an undetermined value at the time of issue, providing the ticket is pulled with a zero price.
6. The Survey lists complimentary and sponsor's tickets separately from paid tickets. Not all tickets have been split, so paid tickets will be slightly over-accounted and complimentary and sponsor's tickets slightly under-accounted.
7. *Attendance data* refers to the number of tickets sold for events that occur in the quarter. These figures include only paid tickets and not complimentary tickets. It also excludes "sponsorship" tickets.
8. *Event Categorisation*. Ticketing companies, Australia Council, Festivals assign events to the respective event categories on the basis of definitions developed by the partners.
9. *Data collection*. On a quarterly basis, ticketing companies and the Australia Council send their data to the University of Queensland. This data consists of total attendance and revenue data aggregated across the events within each of the ten live entertainment categories. No data is provided to the University of Queensland about individual events. This data is then compiled to produce national figures for each category of event.
10. *Festivals*. Attendance at festivals is under-reported in this Survey. Firstly, some festivals maintain their own ticketing systems and are not yet part of this Survey. Secondly, the Survey only reports paid tickets and does not include the substantial unpaid and/or unticketed components of festivals. As each of the 10 event categories is mutually exclusive, single events which are a component of a festival are reported only in the festival category. Attendance and revenues for other event categories will not, therefore, include events held as part of festivals. This ensures that attendance and revenues for the other eight categories of event are necessarily also under-reported.
11. *Coverage*. While national in reach, the coverage of this Survey collects data on that part of the market covered by the major ticketing companies, the major performing arts companies and the leading festivals included in this Survey. The Survey is therefore, an under-estimation of the total live entertainment industry in Australia. For instance, the Survey does not collect revenue and detailed attendance data for some regional touring (for performances in community venues), for free performances and also for schools performances of the AMPAG companies. Audited annual returns for subsidised performing arts companies indicate up to 1 million paid attendances of school aged children and teachers in education venues across Australia. Free performances, including outdoor concerts, are a core part of the work of many companies in dance, music, opera and circus and are not included here.

Category Descriptor Guide

Category	Code	Description
Ballet and Dance	DANCE	Traditional forms Ethnic dance Folk dance Ballet Ballroom Latin dance Liturgical dance Modern dance Ballet Tap Breakdancing
Theatre	THEATR	Script based theatre Drama Comedy theatre Mime Physical Theatre Plays
Musical Theatre	MHTRE	<i>Staged productions which include music/drama/movement in popular form, primarily (but not limited to):</i> Musicals Cabarets in cabaret mode/style
Classical Music	CLASMU	<i>Any of the following in classical/contemporary art (i.e. current, but not 'pop') style:</i> Orchestral music Chamber music Choirs and choral music Recitals Singing/playing <i>All styles of the following:</i> Sacred music Traditional music/ethnic music/world music
Non—Classical Music	NCMUSI	<i>All forms of the following, performed by any type of ensemble or soloist (including any ensemble/chorus/solo musicians advertising a program which is exclusively one of the following categories, e.g. 'pop' or 'jazz,' as in The Australian Jazz Orchestra):</i> Pop Jazz Blues Country Rock Folk Soul R&B Techno Hip Hop Rap Heavy Metal Dance parties
Opera	OPERA	<i>Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style:</i> Opera Operetta (includes Gilbert and Sullivan)
Children's	CHILDR	Kids workshops Live entertainment for kids Interactive performances for kids
Special Events/Others	SPECIA	Unique presentations which do not fall into any other category
Multi-Category Festivals	MCFES	Festivals/events which contains a number of different types of events which fall into two or more categories
Single-Category Festivals	SCFES	Festivals/events which contain a number of events but which fall into one category only

Participating Ticketing Companies

- ◆ Adelaide Fringe Festival
- ◆ Araluen Centre for Arts & Entertainment (Alice Springs, NT)
- ◆ BASS South Australia
- ◆ BOCS Ticketing and Marketing Services (WA)
- ◆ Canberra Ticketing, Canberra Theatre Centre
- ◆ Qtix, Queensland Performing Arts Centre
- ◆ Sydney Opera House
- ◆ Ticketek Pty Ltd
- ◆ Ticketmaster7

Australian Major Performing Arts Group (AMPAG)

- ◆ Adelaide Symphony Orchestra
- ◆ Australian Chamber Orchestra
- ◆ The Australian Ballet
- ◆ Bangarra Dance Theatre
- ◆ The Bell Shakespeare Company
- ◆ Circus Oz
- ◆ Company B Ltd
- ◆ Melbourne Symphony Orchestra
- ◆ Melbourne Theatre Company
- ◆ Musica Viva
- ◆ Opera Australia
- ◆ Opera Queensland
- ◆ Orchestra Victoria
- ◆ Malthouse Theatre
- ◆ Queensland Ballet
- ◆ The Queensland Orchestra
- ◆ Queensland Theatre Company
- ◆ State Opera Company of SA
- ◆ State Theatre of South Australia
- ◆ Sydney Dance Company
- ◆ Sydney Symphony Orchestra
- ◆ Sydney Theatre Company
- ◆ Tasmanian Symphony Orchestra
- ◆ West Australian Ballet
- ◆ The West Australian Opera
- ◆ West Australian Symphony Orchestra

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The AEIA web site will have links specifically for the Survey which will include Quarterly and Annual results and updated information.

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Disclaimer

To the best knowledge of the AEIA and the University of Queensland, the material contained in these Survey results is correct. However, the AEIA and the University of Queensland hold no responsibility for any loss which may arise from relying on the information contained herein. The reader assumes all risk concerning the completeness and accuracy of the information within this paper, which may contain technical inaccuracies or typographical errors.

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