Live Performance Industry in Australia

2015 Ticket Attendance and Revenue Survey

Live Performance Australia

FINAL REPORT

15 November 2016

Building a better working world

Contents

Key findings

Background

This report presents the findings of ticket attendances and revenues for the Live Performance Industry for the 2015 calendar year. This follows on from the previous annual ticketing studies published by LPA since 2004, and by LPA in partnership with Ernst & Young (EY) since 2006.

As in previous years, the 2015 Ticket Attendance and Revenue Survey has captured ticket attendance and revenue data from ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies. In addition to this data, the 2015 Survey also includes ticket attendance and revenue data from the Australia Council for the Arts (Key Organisations) and a selection of Australian Performing Arts Centres Association (APACA) members (also referred to in this report as the "Supplementary" data). This supplementary dataset has been compiled to provide a representation of the small to medium sector, as well as regional and metropolitan (non-capital city) venues. This additional data is reported separately in the Survey to ensure data sets are comparable.

The Live Performance Industry encompasses performances, productions, previews and concerts that are performed in front of a live audience. Our analysis in this report groups events into 12 distinct categories based on the type of art form (as defined in Section 1.2).

Overall results

Ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies ("Ticketing Survey data")

Major ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies experienced a decline in revenue and attendance at live performances in the 2015 calendar year compared to 2014. Approximately 18.38 million tickets were issued to live entertainment events in 2015, representing a decrease of 0.9% on 2014 when 18.54 million tickets were issued to events. Ticket sales in 2015 generated total revenue of $1.41 billion, down 6.7% on 2014 when ticket sales totalled $1.51 billion. This decline in revenue occurred as a result of a drop in the number of paid tickets sold from 16.47 million sold in 2014 to 16.12 million in 2015 and a reduction in the average ticket price from $91.57 in 2014 to $87.29 in 2015.

This result is consistent with a year of weaker consumer confidence across Australia over the course of the year. Consumer confidence measures the level of economic optimism that consumers have and as such, is an indicator of their willingness to spend. Productivity in the arts and recreation industry declined in 2014/15, recording negative productivity growth of 4.3%.[*]

An analysis of longer term trends in the figures that follow provides an indication of how the Industry has performed in recent years. However, given the limitations outlined in Section 1.3, our trend analysis has only been performed on data from 2008 to 2015. Between 2008 and 2015, industry revenue has increased by 33%, despite falling in 2011, 2012 and 2015. Over the same period, total attendance increased by 16%. The compound annual growth rates (CAGRs) for revenue and average ticket price between 2008 and 2015 were 4.1% and 1.9% respectively while the CAGR for attendance for the same period was 2.2%. However, these trends do not account for the inclusion of new data providers over time. On a like for like basis, industry revenue increased by 14% between 2008 and 2015, with a CAGR of 2.1% and total attendance experienced a slight decline of approximately 0.2%. The higher increase in revenue as opposed to attendance can be explained by the steady increase in average ticket price between 2008 and 2015.

[*] Productivity Commission 2016, PC Productivity Update

The following graphs highlight the historical trends in total revenue, attendance and average ticket price.

Figure 1: Total Revenue (2004 – 2015)

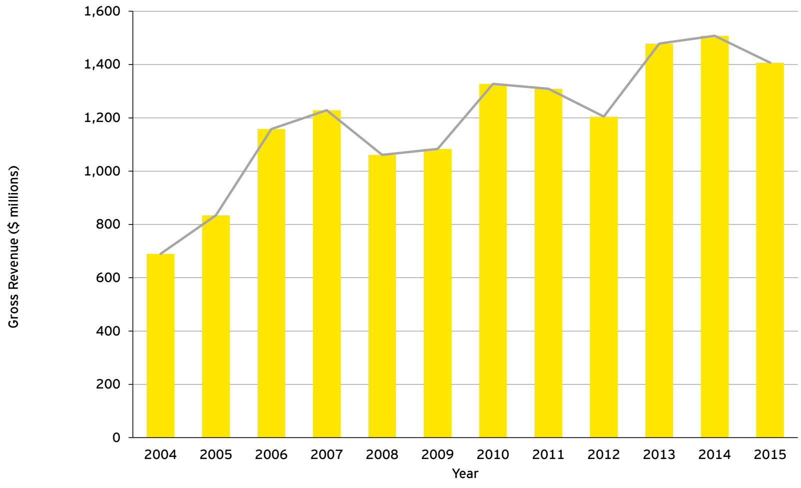


Figure 2: Total Attendances (2004 – 2015)

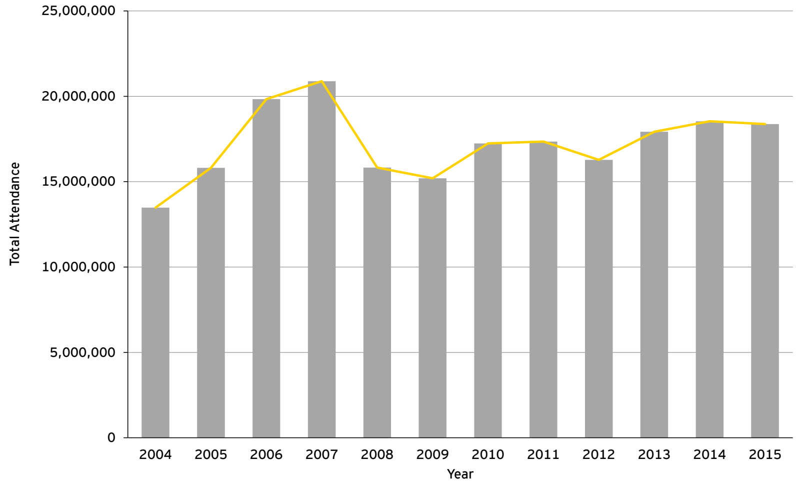
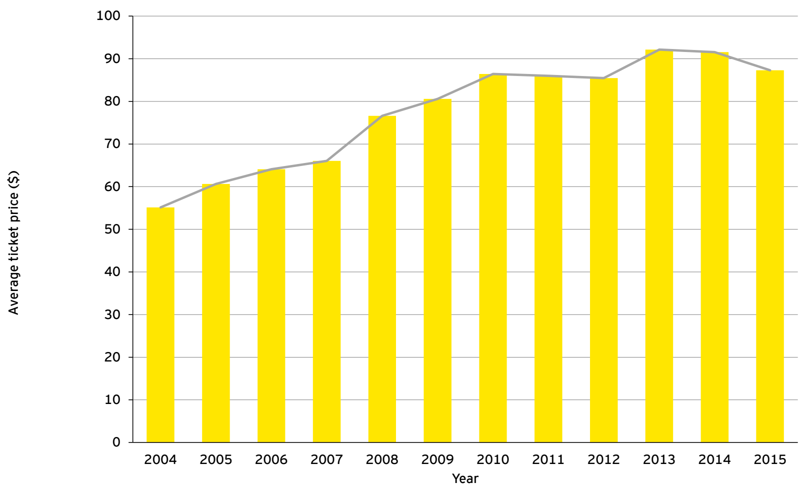


Figure 3: Average Ticket Price (2004 – 2015)



Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members ('Supplementary data')

In 2015, approximately 1.56 million tickets were issued to 7,736 live performances in Australia at regional and metropolitan venues and by the small to medium sector, as represented through the Australia Council's Key Organisations and Australian Performing Arts Centres Association (APACA) member venues, generating revenue of $43.6 million.

These 1.56 million tickets are in addition to the 18.38 million tickets that were issued by ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies (Ticketing Survey data). Overall in 2015, 19.94 million tickets were issued to live performance events in Australia with total ticket sales of $1.45 billion.

Table 1 summarises revenue, attendance and average ticket price for 2015.

Table 1: Total revenue, attendance and average ticket prices (2015)

	Revenue ($)	Total tickets*	Average ticket price ($)**
Supplementary data	$43,597,800	1,563,552	$37.43
Ticketing Survey data	$1,407,014,442	18,378,183	$87.29
Total for 2015	$1,450,612,242	19,941,735	$83.93

**Based on both paid and unpaid tickets*
***Average ticket prices are calculated on paid tickets only.*

It is important to note that the data included is not a comprehensive survey of regional and metropolitan venues, as only 45 APACA member venues out of a total of 108 non-capital city member venues provided data. This includes a mix of small and large regional and metropolitan venues. Whilst attempts have been made to remove data that was previously captured in the data provided by major ticketing companies, self-ticketing venues, event promoters and Australia Major Performing Arts Group (AMPAG) companies, it was not possible to match individual performances as the regional and metropolitan data provided was aggregated at the venue level.

Result by State

Ticketing Survey data

Between 2014 and 2015, **New South Wales** experienced a decline in terms of revenue (12.6%) and attendance (8.8%). This decline was largely driven by a fall in revenue in the following genres:

- Circus and Physical Theatre category, with revenue declining by 46% and attendance by 45%. This can be attributed to Cirque du Soleil's season of *TOTEM* opening in Sydney in October 2014 and closing in January 2015
- Contemporary Music category, with revenue declining by 21% and attendance by 17% between 2014 and 2015. This reflects the overall decline in growth in Contemporary Music nationally, with major international touring acts that contributed to the high revenue and attendance results recorded in 2014 not returning in 2015
- Festivals (Multi-Category), with revenue declining by 30% and attendance by 15%

Victoria experienced a slight decline in terms of revenue (2.9%) between 2014 and 2015, despite a slight increase in attendance (4.3%). This decline in revenue was largely driven by a fall in the following genres:

- Theatre category, with revenue declining by 47% between 2014 and 2015
- Festivals (Single-Category), with revenue declining by 45%
- Contemporary Music category, with revenue declining by 24%. As in New South Wales, this reflects the overall decline in growth in Contemporary Music nationally.

The fall in revenue was partially offset by strong growth in the Circus and Physical Theatre category, which improved in 2015 as a direct consequence of Cirque du Soleil performances returning to Victoria for the first time since 2013. Despite the decline in total revenue, attendance at live performance events in Victoria rose due to high attendance growth in the Ballet and Dance, Circus and Physical Theatre, Special Events and Festivals (Multi-Category) categories.

Overall, New South Wales and Victoria had combined revenue of $915.01 million and continued to account for approximately two-thirds of the entire Australian Live Performance Industry.

Queensland suffered a decline in revenue of 4.2% between 2014 and 2015. This decline was largely driven by a fall in revenue in the following genres:

- Ballet and Dance category, with revenue declining by 39% and attendance by 34% between 2014 and 2015. The decline may be due to the fact that the American Ballet Theatre, which performed a season of *Swan Lake* and *Three Masterpieces* in Brisbane in 2014, not returning in 2015.
- Theatre category, with revenue declining by 66% and attendance by 42% due predominately to a decline in the number of commercial productions staged in Brisbane.

Despite a fall in revenue, attendance at live performance events in Queensland rose due to high attendance growth in the Festivals (Multi-Category), Musical Theatre, Special Events and Circus and Physical Theatre categories.

Western Australia* experienced a significant decline in revenue (8.4%) and attendance (13.1%) due primarily to falls in the:

- Children's/Family category, with revenue declining by 58% and attendance by 54% between 2014 and 2015.
- Theatre category, with revenue declining by 80% and attendance by 67%. As in Queensland, this is due predominately to a decline in the number of commercial productions staged in Perth.

*Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015. On a like for like basis including Fringe World Festival, Western Australia experienced a decline in revenue and attendance of 4.9% and 2.1% respectively.

Across the other States and Territories, results were mixed. Notably, **ACT** experienced significant revenue growth (69.7%) due predominately to the return of Cirque du Soleil with performances of *QUIDAM*. **Tasmania** and **South Australia** experienced declining revenue despite attendance growth. Despite a significant decline in attendance of 37%, revenue growth in the **Northern Territory** remained steady due to revenue growth in the Comedy, Circus and Physical Theatre and Contemporary Music categories.

A comparison of each state and territory's share of the live performance industry against their population provides insight into spend per capita, as well as the concentration of the industry relative to where people live. Table 2 illustrates that New South Wales and Victoria command a larger share of revenue compared to their share of Australia's population. Victoria's revenue and attendance were above its share of the population and this state had the highest spend per capita in 2014 and 2015. Queensland had a significantly lower proportion of industry revenue and attendance compared to its share of population and consequently a significantly lower spend per capita ($40.62) compared to the national average ($58.78). This may be because the majority of regional performances are not included in this per capita analysis and as such, performances in larger states with significant regional markets, such as Queensland, are under-reported. Additionally, cities such as Brisbane are constrained in their ability to host performances due to a smaller number of venues and hence capacity.

Table 2: Population and per capita results (2015)

State/Territory	Population (2015) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	7.67	32.0%	34.0%	30.4%	$62.33
Victoria	6.00	25.1%	31.1%	30.2%	$72.87
Queensland	4.81	20.1%	13.9%	15.9%	$40.62
Western Australia*	2.60	10.9%	11.5%	10.7%	$62.40
South Australia	1.70	7.1%	6.9%	9.2%	$56.85
Australian Capital Territory	0.39	1.6%	1.7%	2.0%	$45.43
Tasmania	0.52	2.2%	0.8%	1.1%	$43.61
Northern Territory	0.24	1.0%	0.2%	0.4%	$8.19
Total	23.94	100.0%	100.0%	100.0%	$58.78

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

Consistent with revenue and attendance figures from the Ticketing Survey data, New South Wales and Victoria had combined revenue of $28.5 million and accounted for approximately two thirds of revenue from the Supplementary data. Total revenue generated from events staged in Queensland generated 19.5% of total revenue, representing a significantly higher industry share than the revenue from the Ticketing Survey. Revenue growth in Queensland was driven by the Contemporary Music and Children's/Family categories which generated 50.4% of total revenue.

It is important to note that the data included is not a comprehensive survey of regional and metropolitan venues, as only 45 APACA member venues out of a total of 108 non-capital city member venues provided data. This includes a mix of small and large regional and metropolitan venues. Whilst attempts have been made to remove data that was previously captured in the data provided by major ticketing companies, self-ticketing venues, event promoters and Australia Major Performing Arts Group (AMPAG) companies, it was not possible to match individual performances as the regional and metropolitan data provided was aggregated at the venue level.

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015. On a like for like basis including Fringe World Festival, Western Australia experienced a decline in revenue and attendance of 4.9% and 2.1% respectively.

Result by event category

Ticketing Survey data

As with previous years, the Contemporary Music and Musical Theatre categories represent the two largest categories in the industry, generating 34% and 23.8% of revenue, respectively. Combined, these two categories account for 57.8% of the Live Performance Industry in terms of gross revenue and 47.9% of total attendance. The top 3 revenue categories combined, which also includes Festivals (Single-Category), account for 65.4% of all industry revenue.

The most significant gains were experienced by Circus and Physical Theatre, Special Events and Comedy categories. The significant increases for **Circus and Physical Theatre** can be attributed to the return of major performances by Cirque du Soleil for the first time since 2013, with the exception of NSW in which Cirque du Soleil's season of *TOTEM* opened in Sydney in October 2014 and closed in January 2015. Cirque du Soleil toured *TOTEM* in Sydney, Brisbane, Melbourne, Adelaide and Perth and *QUIDAM* in Canberra and Wollongong in 2015.

The **Special Events** category is particularly variable from year to year as it is dependent on whether performances that cannot be classified into other categories take place. The *Doctor Who Symphonic Spectacular* contributed to the strong growth in this category. Revenue and attendance growth in the **Comedy** category was due in part to the success of tours by internationally renowned comedians *Billy Connolly* and *Dylan Moran* who performed across the country in 2015.

There were significant declines in the **Contemporary Music** category with revenue falling by 21% and attendance by 13%, with performances in 2015 unable to match the growth recorded in the previous two years. Major international acts, such as *Katy Perry*, *Bruce Springsteen*, *Bruno Mars* and *Eminem*, whose successful national tours were a contributing factor to the high revenue and attendance results recorded in 2014, did not return in 2015. The decline in **Festivals (Single-Category)** can largely be explained by the cancellation of the festival *Big Day Out* in 2015. The annual festival ran from 1999 to 2014 in Sydney, Melbourne, Adelaide, Perth and the Gold Coast and its cancellation impacted significantly on total revenue and attendance.

There were also noticeable declines in the **Theatre** category in both revenue (43%) and attendance (24.5%). Although the subsidised sector experienced strong growth in revenue and attendance at AMPAG events, there was a significant decline in the number of commercial theatrical productions throughout the year. Large commercial productions, such as *Mrs Brown's Boys,* that generated strong revenue and attendance in 2014, did not return in 2015.

Table 3: Top 5 Categories – Revenue and Attendance

	Revenue			Attendance		
	Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
1	Contemporary Music	$477,904,944	34.0%	Contemporary Music	5,554,811	30.2%
2	Musical Theatre	$334,869,038	23.8%	Musical Theatre	3,258,734	17.7%
3	Festivals (Single-Category)	$106,825,241	7.6%	Festivals (Single-Category)	1,300,025	7.1%
4	Circus and Physical Theatre	$99,558,819	7.1%	Festival (Multi-Category)*	1,238,325	6.7%
5	Ballet and Dance	$63,522,318	4.5%	Theatre	1,135,128	6.2%

* Note: This report does not include 248,274 tickets generated by the Fringe World Festival (Perth) in 2015.

Table 4: Top 3 Biggest Changes in Revenue by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2014	Category	Decrease from 2014
1	Circus and Physical Theatre	116.0%	Theatre	-43.0%
2	Special Events	85.2%	Contemporary Music	-21.0%
3	Comedy	21.6%	Festivals (Single-Category)	-17.3%

Table 5: Top 3 Biggest Changes in Attendance by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2014	Category	Decrease from 2014
1	Special Events	164.7%	Theatre	-24.5%
2	Circus and Physical Theatre	72.6%	Contemporary Music	-13.0%
3	Festivals (Multi-Category)*	16.8%	Children's/Family	-11.0%

Table 6: Total Revenue and Attendances by Category (2015)

Category	Revenue	% Change in Revenue (from 2014)	Share of Industry	Tickets	% Change in Attendance (from 2014)	Share of Industry
Ballet and Dance	$63,522,318	20.4%	4.5%	859,095	11.9%	4.7%
Children's/Family	$38,368,367	-11.7%	2.7%	1,081,003	-11.0%	5.9%
Circus and Physical Theatre	$99,558,819	116.0%	7.1%	974,645	72.6%	5.3%
Classical Music	$56,395,824	-13.1%	4.0%	993,906	-2.1%	5.4%
Comedy	$54,924,280	21.6%	3.9%	992,399	3.0%	5.4%
Contemporary Music	$477,904,944	-21.0%	34.0%	5,554,811	-13.0%	30.2%
Festivals (Multi-Category)*	$55,967,934	17.1%	4.0%	1,238,325	16.8%	6.7%
Festivals (Single-Category)	$106,825,241	-17.3%	7.6%	1,300,025	1.5%	7.1%
Musical Theatre	$334,869,038	4.5%	23.8%	3,258,734	2.4%	17.7%
Opera	$41,505,346	-2.6%	2.9%	433,198	12.0%	2.4%
Special Events	$20,340,607	85.2%	1.4%	556,914	164.7%	3.0%
Theatre	$56,831,724	-43.0%	4.0%	1,135,128	-24.5%	6.2%
Total	$1,407,014,442	-6.7%	100%	18,378,183	-0.9%	100%

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

Compared with the revenues generated by ticketing companies, self-ticketing venues, and event promoters (Ticketing Survey data), there is a more even spread of revenues and attendances across categories at regional and metropolitan venues and by the small to medium sector, as represented through the Australia Council's Key Organisations and Australian Performing Arts Council Centres Association (APACA) member venues. The data collected from these surveys does not include major concert tours and musical productions in capital cities.

Table 7 provides a breakdown of the data by category based on share of gross revenue, total attendance and average ticket prices for Australia Council for the Arts (Key Organisations) & Australian Performing Arts Centres Association (APACA) members.

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Table 7: Key Organisations & APACA members - Revenue and Attendance by Category (2015)

Category	Revenue	Share of industry	Tickets*	Share of industry	Average ticket price**
Ballet and Dance	$3,792,412	8.7%	103,102	6.6%	$47.28
Children's/Family	$4,578,781	10.5%	259,680	16.6%	$19.23
Circus and Physical Theatre	$618,926	1.4%	28,708	1.8%	$32.22
Classical Music	$2,814,563	6.5%	106,995	6.8%	$38.11
Comedy	$5,419,130	12.4%	127,732	8.2%	$43.99
Contemporary Music	$13,047,477	29.9%	312,632	20.0%	$48.08
Festival (Multi-Category)	$622,814	1.4%	39,014	2.5%	$28.11
Festival (Single-Category)	$1,085,315	2.5%	36,324	2.3%	$44.63
Musical Theatre	$3,584,680	8.2%	121,447	7.8%	$37.76
Opera	$755,155	1.7%	20,147	1.3%	$69.79
Special Events	$2,269,691	5.2%	194,373	12.4%	$46.21
Theatre	$5,008,856	11.5%	213,398	13.6%	$31.83
Total	**$43,597,800**	**100%**	**1,563,552**	**100%**	**$37.43**

**Based on both paid and unpaid tickets ** Average ticket prices are calculated based on paid tickets, with the exception of regional and metropolitan venues. Regional and metropolitan venues do not provide information on paid/unpaid tickets. As a result, some unpaid tickets are likely to be included and the average ticket price is likely to be underestimated.*

The top 5 categories by revenue and attendance are a reflection of the type of works produced by small to medium companies (Key Organisations), and the type of shows touring regionally (Table 8). Consistent with the Ticketing Survey data, Contemporary Music appears in the top 5 categories in the industry accounting for nearly a third of revenue in the Supplementary data. However, there are a number of differences. In particular, Comedy's share of attendance and revenue is significantly higher compared to the Ticketing Survey data, with Comedy accounting for 12.4% of industry share of revenue, mainly due to attendances at regional and metropolitan venues. The *Melbourne International Comedy Festival: Roadshow 2015* most likely contributed significantly to the Comedy category.

There are also some differences in the ranking of total revenue and attendance. Children's/Family and Contemporary Music rank higher in attendance than revenue due to the low average ticket prices in these categories. In contrast, Comedy ranked higher in revenue than attendance due to the high average ticket price in this category.

Table 8: Top 5 categories - Revenue and Attendance

	Revenue				Attendance			
	Category	Total revenue	Industry share	Average ticket price	Category	Total attendance	Industry share	Average ticket price
1	Contemporary Music	$13,047,477	29.9%	$48	Contemporary Music	312,632	20.0%	$48
2	Comedy	$5,419,130	12.4%	$44	Children's/Family	259,680	16.6%	$19
3	Theatre	$5,008,856	11.5%	$32	Theatre	213,398	13.6%	$32
4	Children's/Family	$4,578,781	10.5%	$19	Special Events	194,373	12.4%	$46
5	Ballet and Dance	$3,792,412	8.7%	$47	Comedy	127,732	8.2%	$44

It is important to note that the data included is not a comprehensive survey of regional and metropolitan venues, as only 45 APACA member venues out of a total of 108 non-capital city member venues provided data. This includes a mix of small and large regional and metropolitan venues. Whilst attempts have been made to remove data that was previously captured in the data provided by major ticketing companies, self-ticketing venues, event promoters and Australia Major Performing Arts Group (AMPAG) companies, it was not possible to match individual performances as the regional and metropolitan data provided was aggregated at the venue level.

1. Introduction

1.1 Scope of work

Ernst & Young (EY) has been engaged by Live Performance Australia (LPA) to undertake a survey of ticket attendances and revenues for the Live Performance Industry for the 2015 calendar year. The Live Performance Industry encompasses performances, productions, previews and concerts that are performed in front of a live audience. The scope of our work included:

- Coordinating the collection of the ticket sales and revenue data ("Ticketing Survey data") for the Live Performance Industry in Australia from participating ticketing companies, venues, entertainment companies, event promoters and the Australian Major Performing Arts Group (AMPAG) companies
- Coordinating the collection of the ticket sales and revenue data ("Supplementary data") for the Live Performance Industry in Australia from small to medium companies (Key Organisations) and regional and metropolitan venues (APACA venue members)
- Compiling the 2015 national survey data on an overall basis, by state and by event category
- Performing an analysis of the 2015 national survey data on an overall basis (and in comparison to previous years), by state and by event category.

This study follows on from the previous annual ticketing studies published by LPA in partnership with EY since 2006.

This report includes data received from participating ticketing companies, venues, entertainment companies, event promoters and the Australia Council for the Arts. In addition to previous year's reports, the 2015 report also incorporates the ticket attendance and revenue for Key Organisations (via the Australia Council) and a selection of venues that are members of the Australian Performing Arts Centres Association (APACA). This supplementary dataset has been compiled to provide a representation of the small to medium sector, as well as regional and metropolitan (non-capital city) venues. This new data is reported separately to ensure comparability to previous studies.

1.2 Approach

1.2.1 Survey participants

Ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies ("Ticketing Survey data")

For this Survey, EY compiled data from ticketing companies, self-ticketing venues, event promoters and the Australia Council for the Arts. The survey participants were as follows:

- Adelaide Festival Centre Trust
- Adelaide Fringe
- Araluen Arts Centre
- The Arts Centre (Melbourne)
- Arts Projects Australia (WOMAdelaide)
- Bluesfest
- Brisbane Powerhouse
- Canberra Ticketing
- Cirque du Soleil
- Darwin Entertainment Centre
- Hayes Theatre Co
- Melbourne Recital Centre

- MONA[2]
- Oztix
- Queensland Performing Arts Centre (Qtix)
- Sydney Opera House
- Ticketmaster
- Ticketek
- The Ticket Group (previously Moshtix and Foxtix)

These companies were identified by LPA and provided both gross revenue and attendance data to EY for the 2015 calendar year. Gross revenue comprised of revenue sourced from paid tickets only (i.e. it excludes sponsorships); while the attendance data provided and applied in the analysis included both paid and non-paid tickets[3]. Average ticket price data was calculated based on paid tickets only.

Further, as part of these guidelines, the ticketing companies and venues are requested to exclude from their data all events produced or presented by the AMPAG companies. This is to avoid double counting of revenue and attendance data.

The data for the Australia Council was limited to the AMPAG companies. These were:

- Adelaide Symphony Orchestra
- The Australian Ballet
- Australian Brandenburg Orchestra
- Australian Chamber Orchestra
- Bangarra Dance Theatre
- Bell Shakespeare
- Belvoir
- Black Swan Theatre Company
- Circus Oz
- Malthouse Theatre
- Melbourne Symphony Orchestra
- Melbourne Theatre Company
- Musica Viva
- Opera Australia
- Opera Queensland
- Orchestra Victoria
- Queensland Ballet
- Queensland Symphony Orchestra
- Queensland Theatre Company
- State Opera of South Australia
- State Theatre Company of South Australia
- Sydney Dance Company
- Sydney Symphony Orchestra
- Sydney Theatre Company
- Tasmanian Symphony Orchestra
- West Australian Ballet
- West Australian Opera
- West Australian Symphony Orchestra.

For these AMPAG companies, the gross revenue includes both single ticket sales as well as subscription revenues.

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[2] Data relating to live performance events only.

[3] Non-paid tickets include complimentary/sponsor/zero-price tickets which 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 generated with a zero price.

Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members ("Supplementary data")

EY compiled data from the Australia Council for the Arts (Key Organisations) to collect revenue data for small to medium companies and the Australian Performing Arts Centres Association (APACA) to get a clearer representation of regional and metropolitan venues.

The organisations and venues identified by LPA (See Appendix A) provided both gross revenue and attendance data to EY for the 2015 calendar year. Gross revenue comprised revenue sourced from paid tickets and subscription revenues (i.e. it excludes sponsorships); while the attendance data provided and applied in the analysis included both paid and non-paid tickets[4].

1.2.2 Event categorisation

Ticketing data was assigned to event categories by survey participants based on the guidelines established by LPA. Table 9 presents a description of these event categories.

Table 9: Category descriptor guide (2015)

Category	Description
Ballet and Dance	Traditional forms, Ethnic dance, Folk dance, Ballet, Ballroom, Latin dance, Liturgical dance, Modern dance, Ballet, Tap, and Breakdancing
Children's/Family	Live entertainment for children, Interactive performances for children and Workshops for children
Circus and Physical Theatre*	Physical Theatre, Circus and Burlesque
Classical Music	Any of the following in classical/contemporary art (i.e. current, but not 'pop') style: Orchestral music, Chamber music, Choirs and choral music, Recitals, and Singing/playing. All styles of the following: Sacred music and Traditional music/ethnic music/world music
Comedy*	Stand up, comedy performances (but not Comedy plays)
Contemporary Music^	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): Pop, Jazz, Blues, Country, Rock, Folk, Soul, R&B, Techno, Hip hop, Rap, Heavy Metal, and Electronic Dance Music
Festivals (Multi-Category)	Festivals/events which contain a number of different types of events which fall into two or more categories
Festivals (Single-Category)	Festivals/events which contain a number of events but which fall into one category only
Musical Theatre	Staged productions which include music/drama/movement in popular form, primarily (but not limited to): Musicals and Cabarets in cabaret mode/style
Opera	Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style: Opera and Operetta (includes Gilbert and Sullivan)
Special Events	Unique presentations which do not fall into any other category
Theatre	Script based theatre, Drama, Comedy theatre, Mime and Plays

While our scope of works did not include a detailed review of all data to determine the

[4] Non-paid tickets include complimentary/sponsor/zero price tickets which are defined as those tickets that are given away for free or as part of contractual, sponsorship or sales incentive agreements. It may also include tickets with an undetermined value at the time of issue, providing the ticket is generated with a zero price.

*These categories were introduced in 2009
^This category was renamed in 2011, having been named "Non-Classical Music" in prior years

appropriateness of the events and event category allocations, where obvious anomalies were identified, appropriate amendments were made. Examples of such anomalies included:

- Sporting events, fashion festivals, workshops, cinema screenings, award nights, graduation ceremonies and art exhibitions were identified in some data sets. These were excluded as they are not considered part of the Live Performance Industry.
- Amateur events such as school performances, dance academy concerts and other community group performances were excluded as the scope of this Survey does not include amateur performances.
- Music festivals included in Contemporary Music were reallocated to Festivals (Single-Category).
- Comedy events included in Theatre or Festivals (Single-Category) were reallocated to the Comedy category.
- Circus events included in the Theatre, Special Events, or Children's/Family categories were reallocated to the Circus and Physical Theatre category.

1.3 Limitations

As with previous studies, data on ticket revenues and attendances for the live performance industry was limited to that provided by the Survey participants. The following sections highlight the key limitations in data collection.

Ticketing Survey data

Attendances at festivals are under-reported in this Survey. First, some festivals maintain their own ticketing systems and many of these are not part of this Survey. The inclusion of ticketing data from Oztix, *MONA FOMA* and *Dark MOFO* addresses some under reporting in the festival categories. However, revenue and attendance are likely to be undervalued in the category because a number of boutique festival events are self-ticketed and are presently not contributing data to the Survey, including music festivals such as *Listen Out*, *Harbourlife* and *Strawberry Fields*.

For a number of festivals, the Survey only reports paid tickets and does not include the substantial unpaid and/or unticketed components. The Contemporary Music category is subject to similar limitations as pub and club venues that self-ticket, or use ticketing companies who are not part of the Survey are not included in the results. However, data from Oztix and The Ticket Group helps to decrease the level of under-reporting, as these ticketing agencies include smaller performances at certain bars and hotels. Still, this Survey provides a conservative estimate of the total ticket revenues and attendances sourced from live performance events in Australia.

As part of our analysis, the 2015 data was compared against historical data sourced directly from Live Performance Australia's *Live Performance Industry in Australia 2006 - 2014* Reports. EY notes that we did not revisit the data collection and allocation methodology used in 2006 and 2007 as the historical data used to prepare the reports in these years was not provided in a disaggregated format. As such, EY was unable to query the accuracy of the allocation of events in these years.

Therefore caution should be applied when comparing data from 2008 to 2015 with data from previous years as inconsistencies may exist in the data collection methodology between the surveys performed in these seven years, and for previous surveys (where more detailed event specific information was not requested).

Supplementary data

The 2015 report incorporates the ticket attendance and revenue for a selection of Key Organisations (via the Australia Council) and ticketing data from venues that are members of the Australian Performing Arts Centres Association (APACA). This supplementary dataset has been compiled to provide a representation of the small to medium sector, as well as regional and metropolitan (non-capital city) venues. This new data is reported separately to ensure comparability to previous studies.

Appendix A provides a full list of these additional survey participants. It is important to note that the data included is not a comprehensive survey of regional and metropolitan venues, as only 45 APACA member venues out of a total of 108 non-capital city member venues provided data. This includes a mix of small and large regional and metropolitan venues. Whilst attempts have been made to remove data that was previously captured in the data provided by major ticketing companies, self-ticketing venues, event promoters and Australia Major Performing Arts Group (AMPAG) companies, it was not possible to match individual performances as the regional and metropolitan data provided was aggregated at the venue level.

1.4 Changes in the 2015 Survey compared to prior years

We have made the following changes to the 2015 survey compared to previous years.

- The inclusion of venue capacity data measuring the average venue utilisation per performance (attendance per performance/venue capacity) for selected ticketing companies, self-ticketing venues, event promoters and Australia Major Performing Arts Group (AMPAG) companies
- The inclusion of data from a number of providers since 2014 including:
  - Brisbane Powerhouse, which included events across most categories
  - Hayes Theatre Co, a Sydney-based venue predominantly presents small-scale musical theatre and cabaret
  - MONA provided ticketing information for MONA FOMA and Dark MOFO in the category of Festivals (Multi-Category) as well as some smaller events in the Contemporary Music and Special Events categories
  - Oztix provided ticketing information for events in most categories, with an emphasis on Contemporary Music and Festivals (Single-Category).
- Fringe Tix (Adelaide Fringe Festival), Fringe World[*] and Bluesfest were new ticket providers in 2013, somewhat addressing the under reporting in the festivals categories.
- The Non-Classical Music category was renamed to 'Contemporary Music' in 2011. However, the scope of performances in this category remains the same as prior years.
- The Melbourne Recital Centre and The Ticket Group (formerly Foxtix together with Moshtix) were new data providers in 2011. Melbourne Recital Centre provides ticketing services primarily in the categories of Classical Music and Opera while The Ticket Group operates primarily in the categories of Festivals (Single-Category) and Contemporary Music.
- In 2009, the 'Comedy' and 'Circus and Physical Theatre' categories were introduced. As defined in Section 1.2 under our Approach, the Comedy category includes all comedy events such as stand up but does not include comedy plays, while the Circus and Physical Theatre includes Circus, Physical Theatre and Burlesque events. The introduction of these categories does not represent an extension of the scope of the Ticketing Survey, rather events which fall within these new categories would have been included in other categories in prior years.
- The inclusion of data from Arts Projects Australia. Arts Projects Australia from 2009 onwards provided ticketing data for WOMADelaide, a multi-category festival in Adelaide previously not covered by this Survey. Also in 2009, data from The Arts Centre (Melbourne) was included for the first time, having previously been outsourced to Ticketmaster (and therefore included in Ticketmaster's data).

[*] Note: This report does not include revenue and attendance generated by the Fringe World Festival (Perth) in 2015.

2. Ticket attendance and revenue results

Overview

The live performance industry experienced negative growth in revenue and attendance in 2015. This result is consistent with a year of weaker consumer confidence across Australia over the course of the year. Consumer confidence measures the level of economic optimism that consumers have and as such, is an indicator of their willingness to spend. Productivity in the arts and recreation industry declined in 2014/15, recording negative productivity growth of 4.3%.[5]

Results for major ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies (referred to as "Ticketing Survey data") and Australia Council for the Arts (Key Organisations) & Australia Performing Arts Centres Association (APACA) members (referred to as "Supplementary data") are discussed in the following sections.

Ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies ("Ticketing Survey data")

Strong growth in revenue and attendance was recorded for Ballet and Dance, Circus and Physical Theatre, Special Events, Comedy and Festivals (Multi-Category)[*]. Reasons for these gains varied. Growth in the Comedy category was driven by the success of internationally renowned comedians *Billy Connolly* and *Dylan Moran* who toured Australia in 2015 as well as strong attendance at shows staged during the *Melbourne International Comedy Festival*. The increase for Festivals (Multi-Category)[*] was in part due to the strong growth in attendance and revenue at the *Adelaide Fringe Festival* and sustained growth of the *Falls Music & Arts Festival* in Victoria, New South Wales and Tasmania. The significant increases for Circus and Physical Theatre are due primarily to the return of Cirque du Soleil for the first time since 2013. The Special Events category tends to be volatile and is dependent on the number of performances that cannot be classified. The *Doctor Who Symphonic Spectacular*, contributed to the strong growth in this category.

There were significant declines in the Theatre, Contemporary Music, Festivals (Single-Category) and Classical Music categories in 2015. Performances in Contemporary Music were unable to match the growth recorded in the previous two years. Major international acts, such as *Katy Perry*, *Bruce Springsteen*, *Bruno Mars* and *Eminem*, whose successful national tours were a contributing factor to the high revenue and attendance results recorded in 2014, did not return in 2015.The significant decline in both revenue and attendance for Festivals (Single-Category) is in part due to the cancellation of the festival *Big Day Out* in 2015. Despite strong growth in theatrical productions among AMPAG companies, there was a significant decline in the number of commercial theatrical productions throughout the year. Large commercial productions, such as *Mrs Brown's Boys*, that generated strong revenue and attendance in 2014, did not return in 2015.

Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members ("Supplementary data")

The top 5 categories by revenue and attendance are a reflection of the type of works produced by Key Organisations, and the type of shows touring regionally. Consistent with the Ticketing Survey data, Contemporary Music appears in the top 5 categories in the industry. However, there are a number of differences between the two sets of data. In particular, Comedy's share of attendance and revenue is significantly higher than its share reported in the Ticketing Survey data, with Comedy accounting for 12.4% of industry share of revenue, mainly due to attendances at regional and metropolitan venues. The *Melbourne International Comedy Festival: Roadshow 2015* most likely contributed significantly to the Comedy category.

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[5] Productivity Commission 2016, PC Productivity Update

[*] Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

There are also some differences in the ranking of total revenue and attendance. Children's/Family ranks higher in attendance than revenue due to the low average ticket price while Comedy ranked higher in revenue than attendance due to the high average ticket price in this category.

Table 10: Top 5 categories - Revenue and attendance

	Revenue				Attendance			
	Category	Total revenue	Industry share	Average ticket price	Category	Total attendance	Industry share	Average ticket price
1	Contemporary Music	$13,047,477	29.9%	$48	Contemporary Music	312,632	20.0%	$48
2	Comedy	$5,419,130	12.4%	$44	Children's/Family	259,680	16.6%	$19
3	Theatre	$5,008,856	11.5%	$32	Theatre	213,398	13.6%	$32
4	Children's/Family	$4,578,781	10.5%	$19	Special Events	194,373	12.4%	$46
5	Ballet and Dance	$3,792,412	8.7%	$47	Comedy	127,732	8.2%	$44

2.1 Analysis of overall trends

Ticketing Survey data

In 2015, approximately 18.38 million tickets were issued to live performance events in Australia, representing a decline of 0.9% on 2014 when 18.54 million tickets were issued. Of the 18.38 million total tickets, the number of paid tickets was 16.12 million, a decline from 16.47 million sold in 2014 while the remaining 2.26 million tickets issued in 2015 were complimentary, sponsor and zero-priced tickets.

Ticket sales in 2015 generated total revenue of $1.41 billion, down 6.7% on 2014, when ticket sales totalled $1.51 billion. This decrease in revenue occurred as a result of a decline in the total number of paid tickets, attendance and average ticket price.

An analysis of longer term trends in the figures that follow provides an indication of how the Industry has performed in recent years. However, given the limitations outlined in Section 1.3, our trend analysis has only been performed on data from 2008 to 2015. Between 2008 and 2015, industry revenue has increased by 33%, despite falling in 2011, 2012 and 2015. Over the same period, total attendance increased by 16%. The compound annual growth rates (CAGRs) for revenue and average ticket price between 2008 and 2015 were 4.1% and 1.9% respectively while the CAGR for attendance for the same period was 2.2%. However, these trends do not account for the inclusion of new data providers over time. On a like for like basis, industry revenue increased by 14% between 2008 and 2015, with a CAGR of 2.1% and total attendance experienced a slight decline of approximately 0.2%. Table 11 summarises the changes in revenue, tickets and ticket price between 2004 and 2015.

Table 11: Total Revenue, Attendance and Average Ticket Price (2004 – 2015)

	Revenue ($)	Growth (%)	Total tickets*	Growth (%)	Average ticket price ($)**	Growth (%)
2004	$689,599,070		13,477,231		$55.13	
2005	$834,337,206	21.0%	15,808,790	17.3%	$60.62	10.0%
2006	$1,158,064,526	38.8%	19,835,756	25.5%	$64.08	5.7%
2007	$1,228,658,664	6.1%	20,887,365	5.3%	$66.03	3.1%
2008	$1,061,273,304	-13.6%	15,823,705	-24.2%	$76.60	16.0%
2009	$1,083,329,949	2.1%	15,196,773	-4.0%	$80.57	5.2%
2010	$1,327,805,816	22.6%	17,241,139	13.5%	$86.43	7.3%
2011	$1,309,187,150	-1.4%	17,345,720	0.6%	$85.99	-0.5%
2012	$1,204,883,551	-8.0%	16,273,730	-6.2%	$85.46	-0.6%
2013	$1,478,976,893	22.7%	17,926,626	10.2%	$92.16	7.8%
2014	$1,507,963,952	2.0%	18,536,434	3.4%	$91.57	-0.6%
2015	$1,407,014,442	-6.7%	18,378,183	-0.9%	$87.29	-4.7%

*Based on both paid and unpaid tickets ** Average Ticket Prices are calculated based only on paid tickets

Figure 4: Total Revenue (2004 – 2015)

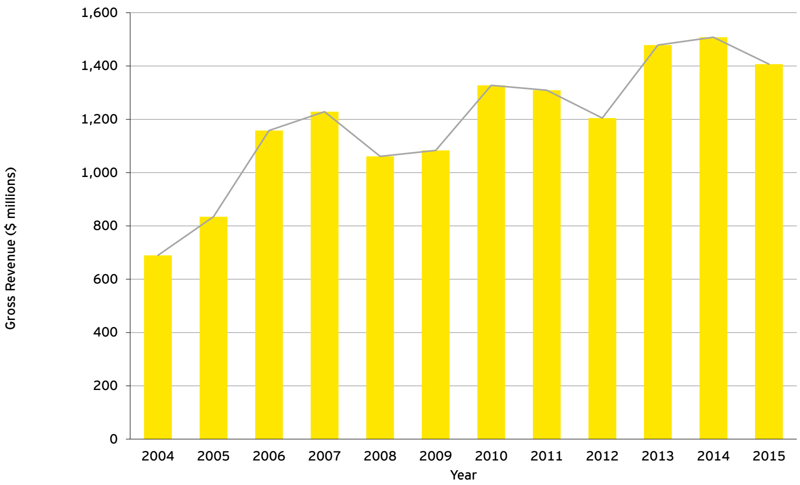


Figure 5: Total Attendances (2004 – 2015)

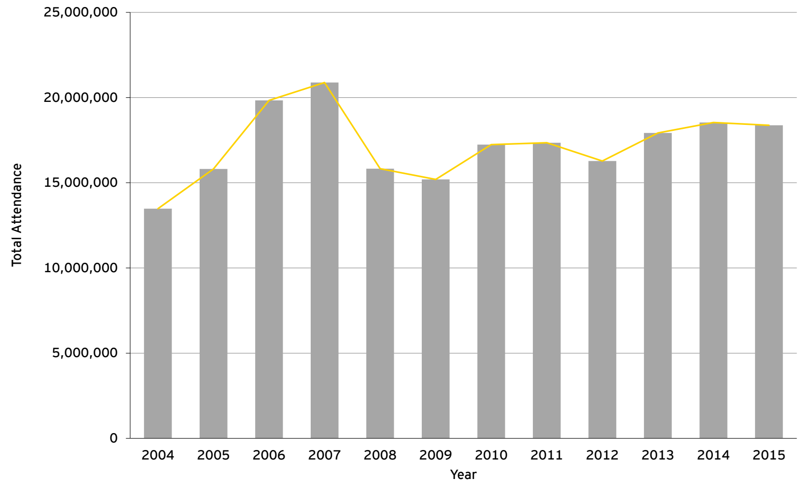
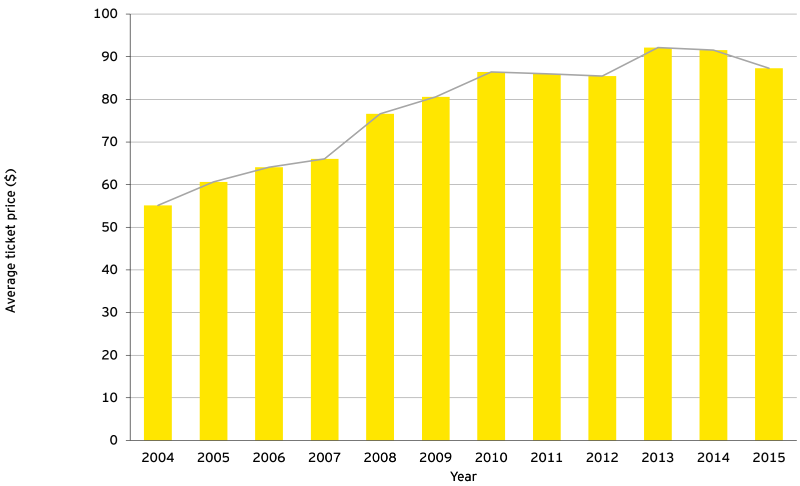


Figure 6: Average Ticket Price (2004 – 2015)



Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

In 2015, approximately 1.56 million tickets were issued to 7,736 live performances in Australia at regional and metropolitan venues and by the small to medium sector, as represented through the Australia Council's Key Organisations and APACA member venues, generating revenue of $43.6 million.

These 1.56 million tickets are in addition to the 18.38 million tickets that were issued by ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies. Overall in 2015, 19.94 million tickets were issued to live performance events in Australia with total ticket sales of $1.45 billion.

Table 12 summarises revenue, tickets and average ticket price for 2015.

Table 12: Total revenue, tickets and average ticket price for 2015

	Revenue ($)	Total tickets*	Average ticket price ($)**
Supplementary data	$43,597,800	1,563,552	$37.43
Ticketing Survey data	$1,407,014,442	18,378,183	$87.29
Total for 2015	$1,450,612,242	19,941,735	$83.93

**Based on both paid and unpaid tickets*

*** Average ticket prices are calculated based on paid tickets, with the exception of regional and metropolitan venues. Regional and metropolitan venues do not provide information on paid/unpaid tickets. As a result, some unpaid tickets are likely to be included and the average ticket price is likely to be underestimated.*

The graphs below illustrate the breakdown between the two sets of ticketing data. Although the Supplementary data accounts for 8% of total attendance, it accounts for only 3% of the total revenue. This is on account of the substantially lower average ticket price for APACA member venues and Australia Council (Key Organisations).

Figure 7: Share of total revenue (2015)

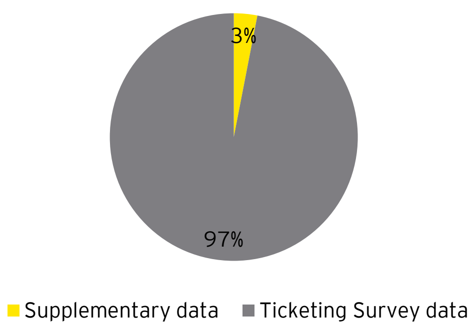
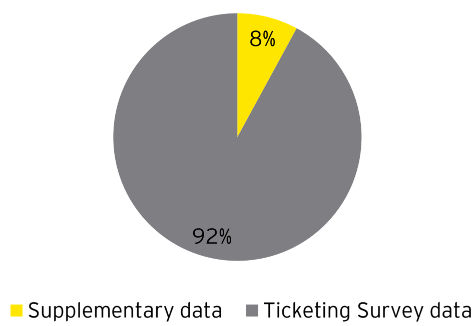


Figure 8: Share of total attendance (2015)



It is important to note that the data included is not a comprehensive survey of regional and metropolitan venues, as only 45 APACA member venues out of a total of 108 non-capital city member venues provided data. This includes a mix of small and large regional and metropolitan venues. Whilst attempts have been made to remove data that was previously captured in the data provided by major ticketing companies, self-ticketing venues, event promoters and Australia Major Performing Arts Group (AMPAG) companies, it was not possible to match individual performances as the regional and metropolitan data provided was aggregated at the venue level.

3. Revenue and attendance by state

3.1 Overall results

It is to be noted that due to confidentiality requirements, revenue and attendance by state results have not been provided for Australia Council for the Arts (Key Organisations) & Australian Performing Arts Centres Association (APACA) members ("Supplementary data"). As such the following sub-sections on our state analysis only refer to the Ticketing Survey data and not the Supplementary data.

Ticketing Survey data

Between 2014 and 2015, **New South Wales** experienced a decline in terms of revenue (12.6%) and attendance (8.8%). This decline was largely driven by a fall in revenue in the following genres:

- Circus and Physical Theatre category, with revenue declining by 46% and attendance by 45%. This can be attributed to Cirque du Soleil's season of *TOTEM* opening in Sydney in October 2014 and closing in January 2015
- Contemporary Music category, with revenue declining by 21% and attendance by 17% between 2014 and 2015
- Festivals (Multi-Category), with revenue declining by 30% and attendance by 15%

Victoria experienced a slight decline in terms of revenue (2.9%) between 2014 and 2015, despite a slight increase in attendance (4.3%). This decline in revenue was largely driven by a fall in the following genres:

- Theatre category, with revenue declining by 47% between 2014 and 2015
- Festivals (Single-Category), with revenue declining by 45%
- Contemporary Music category, with revenue declining by 24%

The fall in revenue was partially offset by strong growth in the Circus and Physical Theatre category, which improved in 2015 as a direct consequence of Cirque du Soleil performances returning to Victoria for the first time since 2013. Despite the decline in total revenue, attendance at live performance events in Victoria rose due to high attendance growth in the Ballet and Dance, Circus and Physical Theatre, Special Events and Festivals (Multi-Category) categories.

Overall, New South Wales and Victoria had combined revenue of $915.01 million and continued to account for approximately two-thirds of the entire Australian Live Performance Industry.

Queensland suffered a decline in revenue of 4.2% between 2014 and 2015. This decline was largely driven by a fall in revenue in the following genres:

- Ballet and Dance category, with revenue declining by 39% and attendance by 34% between 2014 and 2015. The decline may be partially due to the fact that the American Ballet Theatre, which performed a season of *Swan Lake* and *Three Masterpieces* in Brisbane in 2014, did not return in 2015.
- Theatre category, with revenue declining by 66% and attendance by 42% due predominately to a decline in the number of commercial productions staged in Brisbane.

Despite a fall in revenue, attendance at live performance events in Queensland rose due to high attendance growth in the Festivals (Multi-Category), Musical Theatre, Special Events and Circus and Physical Theatre categories.

Western Australia* experienced a significant decline in revenue (8.4%) and attendance (13.1%) due primarily to falls in the:

*Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015. On a like for like basis including Fringe World Festival, Western Australia experienced a decline in revenue and attendance of 4.9% and 2.1% respectively.

- Children's/Family category, with revenue declining by 58% and attendance by 54% between 2014 and 2015.
- Theatre category, with revenue declining by 80% and attendance by 67%.

Across the other States and Territories, results were mixed. Notably, **ACT** experienced significant revenue growth (69.7%) due predominately to the return of Cirque du Soleil with performances of *QUIDAM*. **Tasmania** and **South Australia** experienced declining revenue despite attendance growth. Despite a significant decline in attendance of 37%, revenue growth in the **Northern Territory** remained steady due to revenue growth in the Comedy, Circus and Physical Theatre and Contemporary Music categories.

Table 13: Total Revenue and Attendance by State and Territory (2014 – 2015)

State/Territory	Revenue	Share of Industry (2015)	Share of Industry (2014)	Change in Revenue from 2014	Tickets	Share of Industry (2015)	Share of Industry (2014)	Change in Attendance from 2014
New South Wales	$478,077,501	34.0%	36.3%	-12.6%	5,592,686	30.4%	33.1%	-8.8%
Victoria	$436,933,907	31.1%	29.8%	-2.9%	5,548,412	30.2%	28.7%	4.3%
Queensland	$195,336,838	13.9%	13.5%	-4.2%	2,914,530	15.9%	14.4%	9.5%
Western Australia*	$162,494,027	11.5%	11.8%	-8.4%	1,969,668	10.7%	12.2%	-13.1%
South Australia	$96,804,782	6.9%	6.7%	-4.1%	1,699,529	9.2%	8.7%	5.3%
Australian Capital Territory	$23,506,143	1.7%	0.9%	69.7%	372,546	2.0%	1.3%	51.1%
Tasmania	$10,641,913	0.8%	0.8%	-8.3%	210,798	1.1%	1.0%	13.9%
Northern Territory	$3,219,331	0.2%	0.2%	3.4%	70,014	0.4%	0.6%	-37.0%
Total	**$1,407,014,442**	**100.0%**	**100.0%**	**-6.7%**	**18,378,183**	**100.0%**	**100.0%**	**-0.9%**

Figure 9: Market Share (Revenue) by State/Territory (2015)*

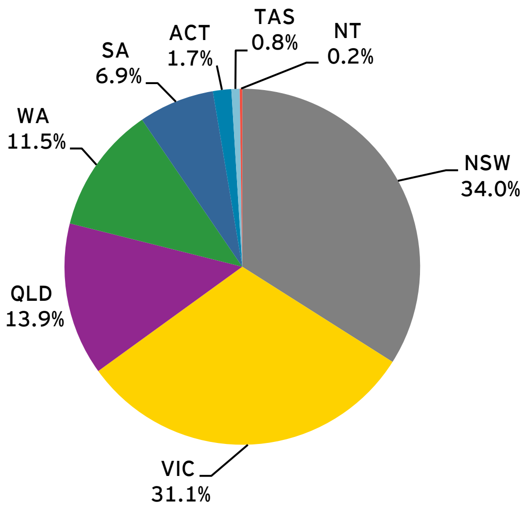
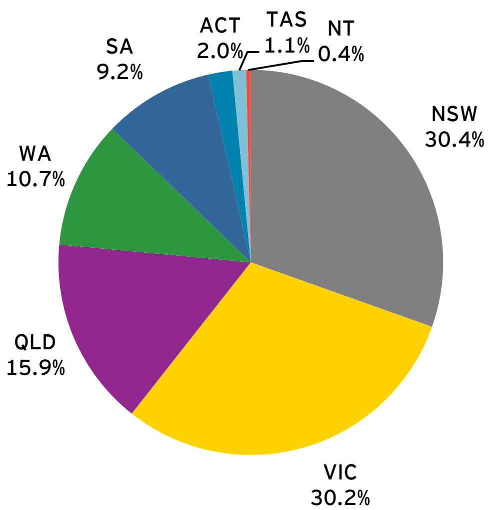


Figure 10: Market Share (Attendance) by State/Territory (2015)*



*Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015. On a like for like basis including Fringe World Festival, Western Australia experienced a decline in revenue and attendance of 4.9% and 2.1% respectively.

Figure 11: Percentage Movement in Revenue by State/Territory (2014/15)*

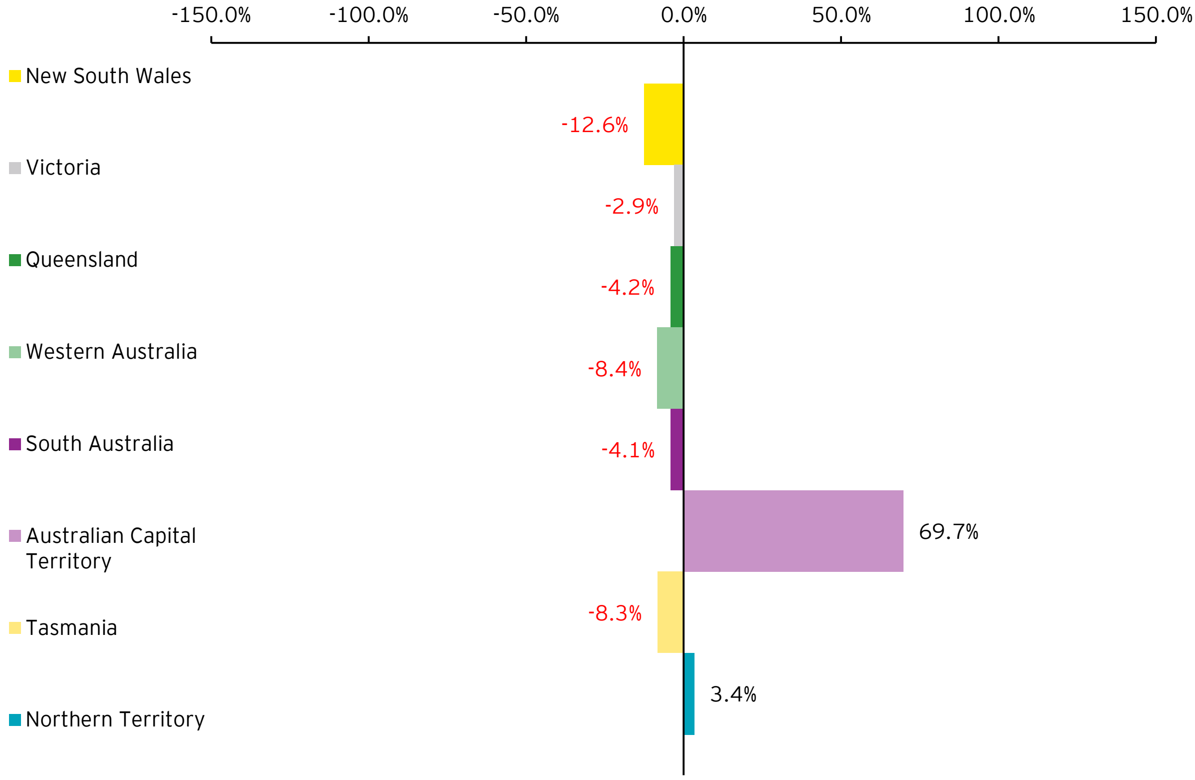
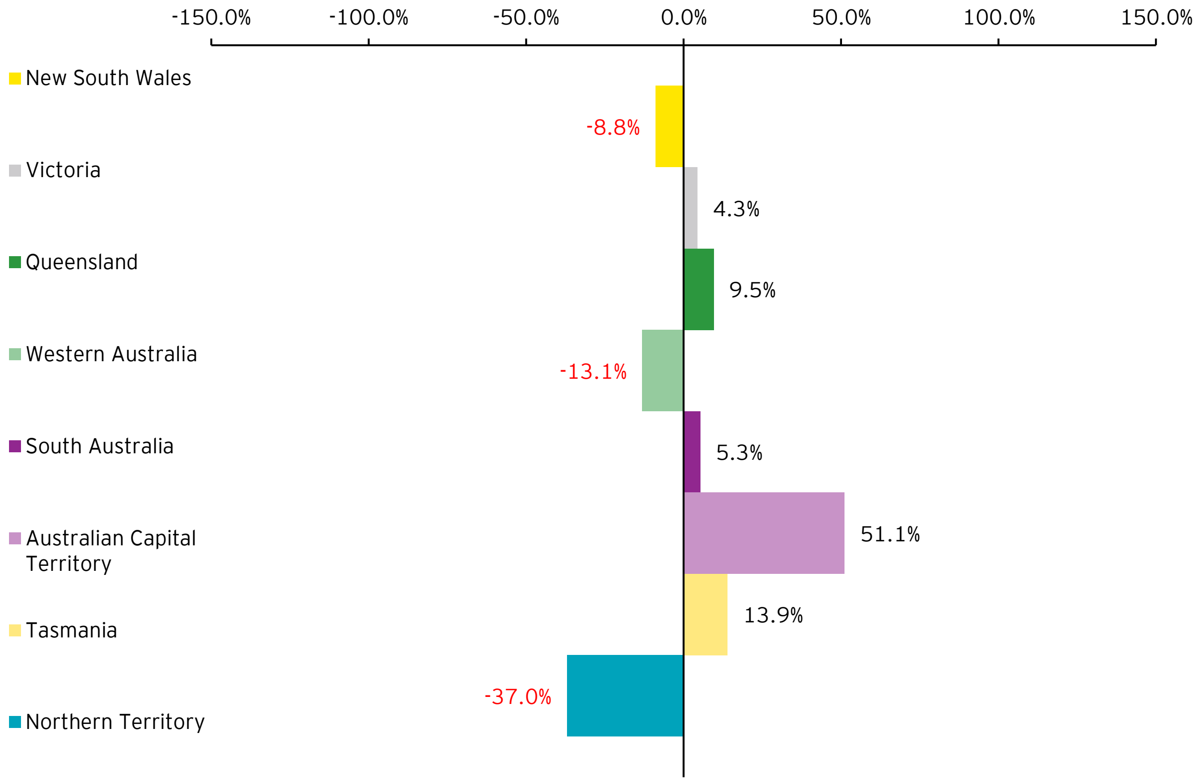


Figure 12: Percentage Movement in Attendance by State/Territory (2014/15)*



* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Figure 13: Total Revenue by State/Territory (2009 - 2015)*

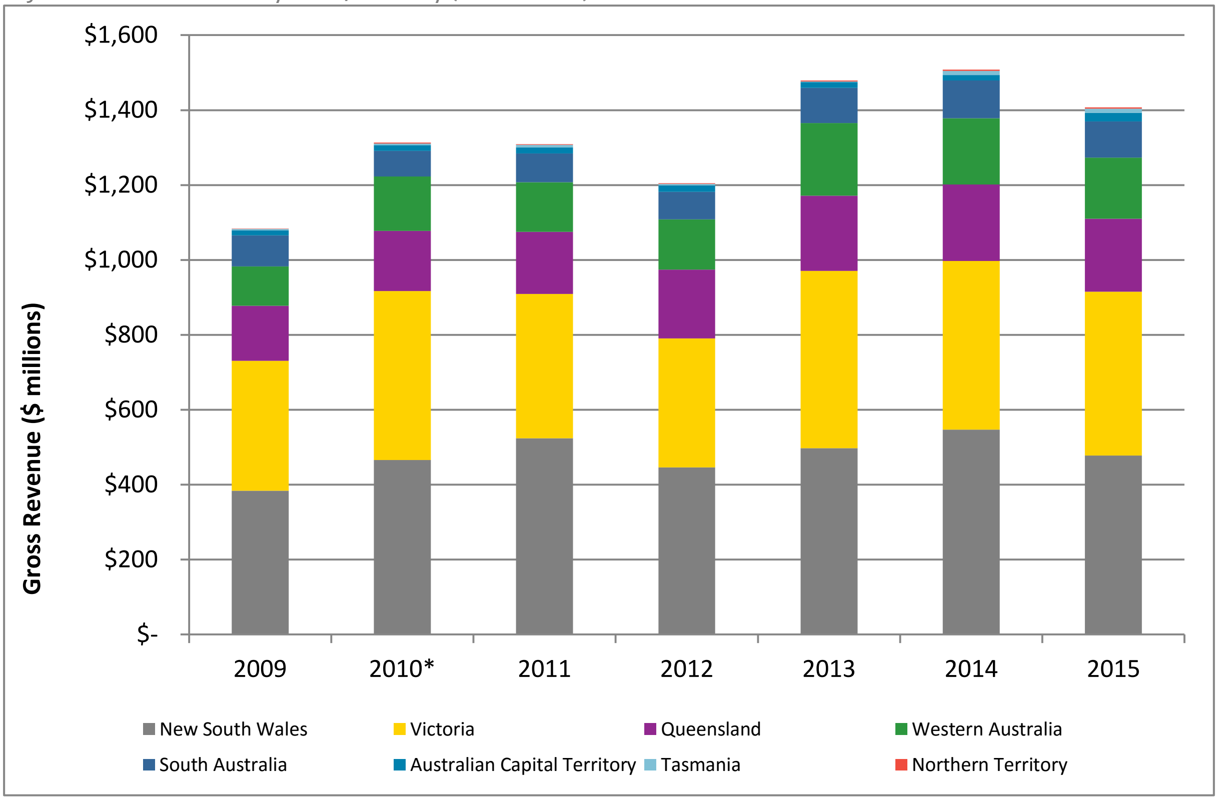
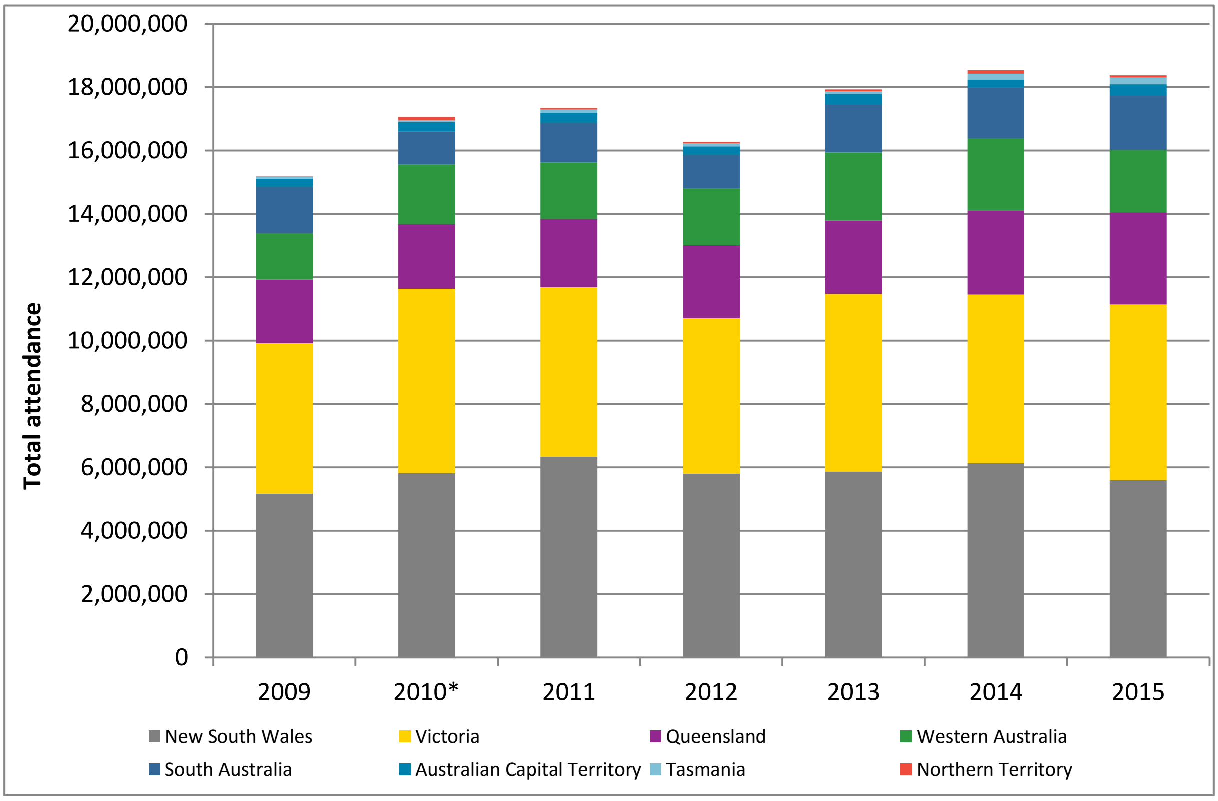


Figure 14: Total Attendance by State/Territory (2009-2015)*



* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Table 14: Total Revenue by State/Territory (2009 – 2015) ($ millions)

	New South Wales	Victoria	Queensland	Western Australia	South Australia	Australian Capital Territory	Tasmania	Northern Territory	Total
2009	$383.71	$347.31	$146.57	$105.31	$82.33	$14.15	$3.54	$0.41	$1,083.33
2010	$465.76	$451.05	$160.52	$145.48	$68.54	$15.25	$3.78	$3.31	$1,313.70
2011	$523.90	$385.64	$165.84	$131.94	$77.22	$16.18	$6.74	$1.73	$1,309.19
2012	$446.06	$344.39	$183.78	$134.13	$73.54	$17.29	$4.22	$1.47	$1,204.88
2013	$497.46	$473.52	$200.18	$194.31	$93.86	$15.10	$2.40	$2.13	$1,478.98
2014	$547.17	$450.03	$203.92	$177.33	$100.94	$13.85	$11.60	$3.11	$1,507.96
2015	**$478.08**	**$436.93**	**$195.34**	**$162.49***	**$96.80**	**$23.51**	**$10.64**	**$3.22**	**$1,407.01**

Table 15: Total Attendance by State/Territory (2009 – 2015)

	New South Wales	Victoria	Queensland	Western Australia	South Australia	Australian Capital Territory	Tasmania	Northern Territory	Total
2009	5,176,385	4,744,449	2,006,608	1,468,882	1,449,260	264,174	72,336	14,679	15,196,773
2010	5,818,163	5,820,603	2,043,327	1,879,408	1,035,243	304,168	59,753	96,872	17,057,537
2011	6,331,001	5,359,749	2,150,329	1,788,262	1,237,386	325,233	99,653	54,107	17,345,720
2012	5,795,757	4,916,559	2,302,462	1,791,795	1,053,997	271,525	97,972	43,663	16,273,730
2013	5,865,914	5,607,475	2,318,207	2,153,483	1,497,204	351,242	75,115	57,986	17,926,626
2014	6,132,827	5,318,537	2,661,632	2,266,435	1,614,267	246,542	185,011	111,183	18,536,434
2015	**5,592,686**	**5,548,412**	**2,914,530**	**1,969,668***	**1,699,529**	**372,546**	**210,798**	**70,014**	**18,378,183**

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Table 16: Revenue by Category and State/Territory in 2015

	NSW	VIC	QLD	WA*	SA	ACT/TAS/NT	Total
Ballet and Dance	$24,451,546	$21,351,100	$6,280,513	$6,414,087	$2,699,323	$2,325,750	$63,522,318
Children's/Family	$14,420,994	$12,253,486	$4,524,136	$3,080,603	$2,760,305	$1,328,843	$38,368,367
Circus & Physical Theatre	$15,106,383	$28,079,009	$17,115,229	$20,177,425	$10,981,772	$8,099,002	$99,558,819
Classical Music	$22,822,871	$16,842,115	$5,769,958	$6,008,370	$2,751,481	$2,201,029	$56,395,824
Comedy	$11,755,262	$25,517,580	$7,338,913	$4,460,181	$2,605,456	$3,246,888	$54,924,280
Contemporary music	$153,403,848	$138,570,682	$74,375,250	$70,568,308	$33,761,828	$7,225,027	$477,904,944
Festivals (Multi Category)	$8,610,964	$16,776,310	$3,532,292	$3,523,836	$17,862,734	$5,661,798	$55,967,934
Festivals (Single Category)	$55,720,532	$13,215,157	$10,334,820	$16,457,217	$9,078,014	$2,019,500	$106,825,241
Musical Theatre	$108,434,253	$134,201,517	$55,866,357	$23,451,240	$9,914,302	$3,001,370	$334,869,038
Opera	$30,363,572	$7,446,330	$913,346	$1,141,310	$1,451,595	$189,193	$41,505,346
Special Events	$2,292,445	$6,321,899	$5,230,352	$4,588,318	$1,058,270	$849,324	$20,340,607
Theatre	$30,694,830	$16,358,722	$4,055,671	$2,623,132	$1,879,704	$1,219,664	$56,831,724
Total	**$478,077,501**	**$436,933,907**	**$195,336,838**	**$162,494,027**	**$96,804,782**	**$37,367,387**	**$1,407,014,442**

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Table 17: Attendance by Category and State/Territory in 2015

	NSW	VIC	QLD	WA*	SA	ACT/TAS/NT	Total
Ballet and Dance	288,743	279,548	120,103	98,377	37,821	34,503	859,095
Children's/Family	391,772	351,430	131,848	83,902	70,869	51,182	1,081,003
Circus & Physical Theatre	155,821	285,123	157,619	180,693	108,252	87,137	974,645
Classical Music	315,867	344,888	112,295	127,881	40,881	52,094	993,906
Comedy	139,997	555,999	150,420	54,421	34,368	57,194	992,399
Contemporary music	1,746,399	1,525,481	951,698	813,321	398,307	119,605	5,554,811
Festivals (Multi Category)	68,124	189,550	115,329	50,711	694,993	119,618	1,238,325
Festivals (Single Category)	586,084	197,762	171,136	186,709	132,600	25,734	1,300,025
Musical Theatre	1,068,617	1,271,244	576,132	207,503	97,011	38,227	3,258,734
Opera	249,964	94,716	28,824	39,229	17,255	3,210	433,198
Special Events	30,917	120,817	289,679	60,734	15,328	39,439	556,914
Theatre	550,381	331,854	109,447	66,187	51,844	25,415	1,135,128
Total	5,592,686	5,548,412	2,914,530	1,969,668	1,699,529	653,358	18,378,183

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

3.2 New South Wales

Table 18: New South Wales – Revenue and Attendance (2009 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)
2009	$383,713,353		5,176,385	
2010	$465,761,849	21.4%	5,818,163	12.4%
2011	$523,903,477	12.5%	6,331,001	8.8%
2012	$446,063,403	-14.9%	5,795,757	-8.5%
2013	$497,463,659	11.5%	5,865,914	1.2%
2014	$547,173,799	10.0%	6,132,827	4.6%
2015	$478,077,501	-12.6%	5,592,686	-8.8%

Figure 15: Total Revenue – NSW (2009-2015)

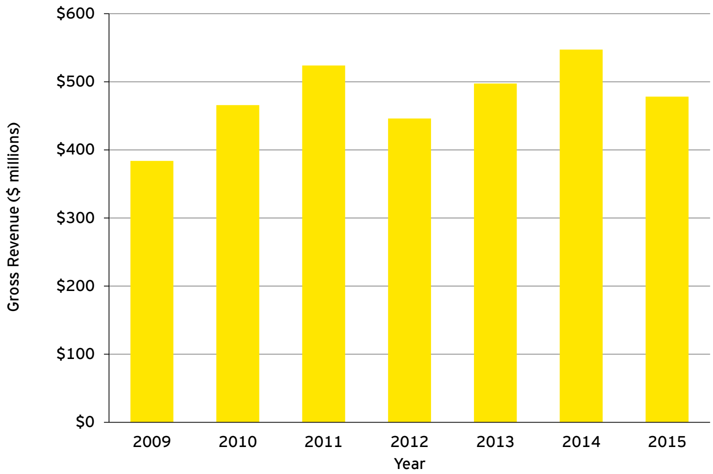


Figure 16: Total Attendance – NSW (2009-2015)

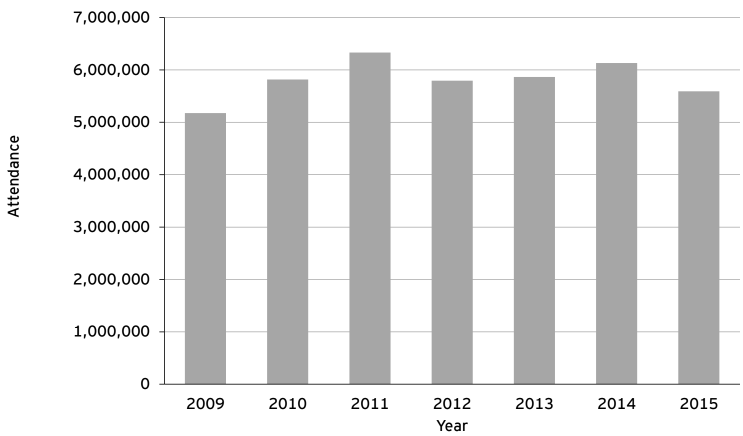


Figure 17: Revenue by Category (2015)

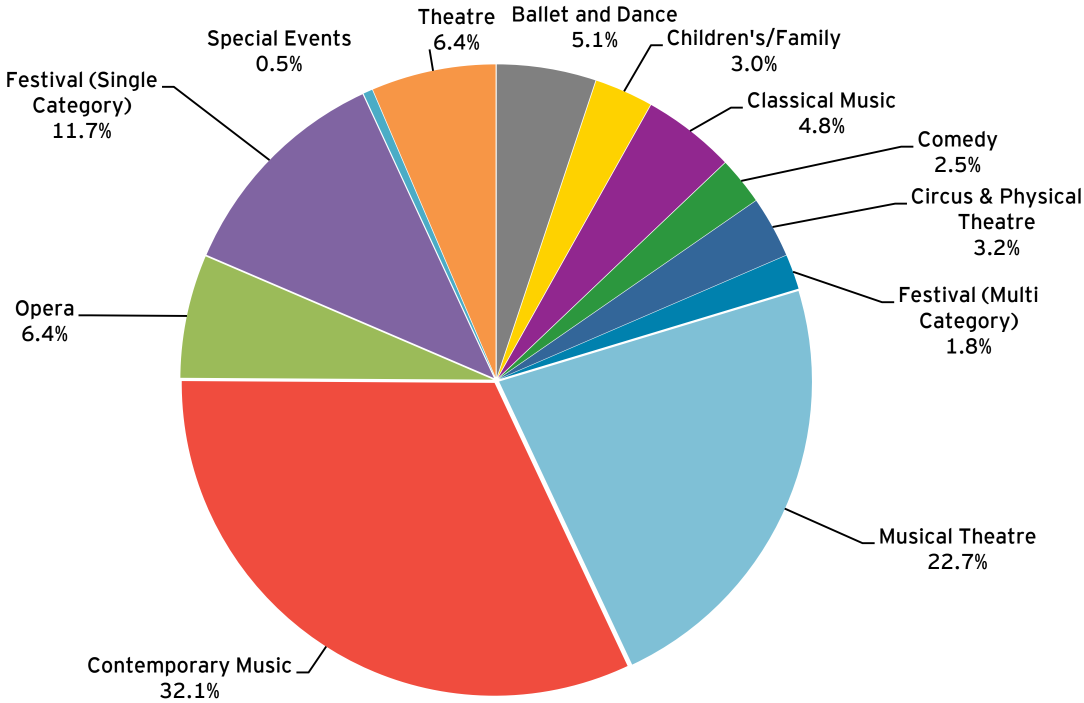
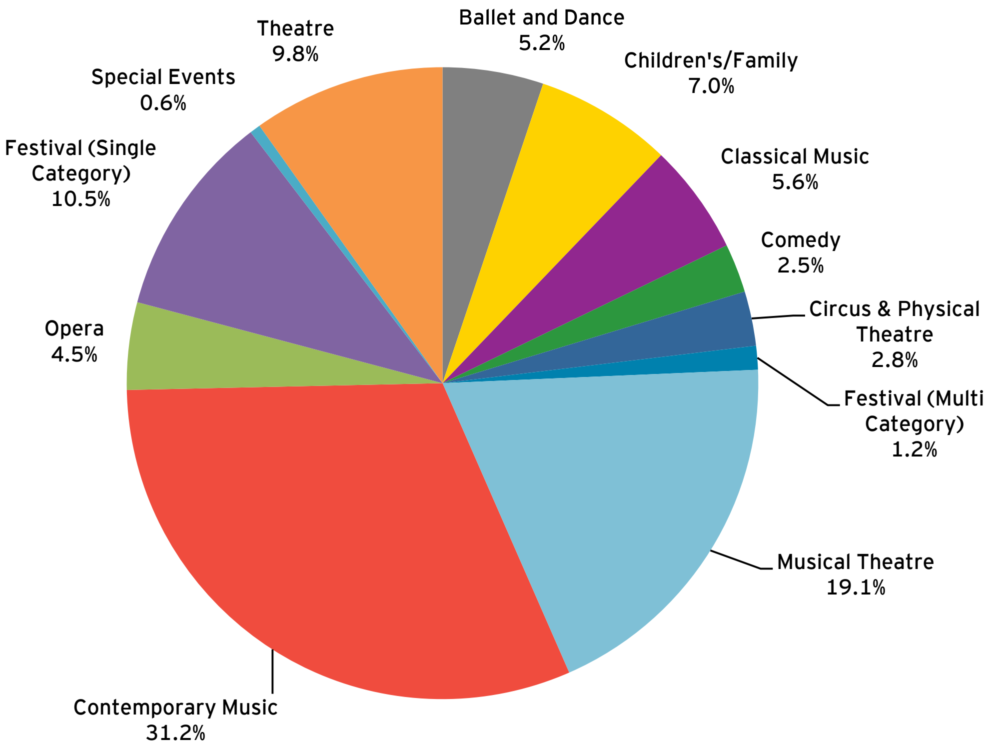


Figure 18: Attendance by Category (2015)



3.3 Victoria

Table 19: Victoria – Revenue and Attendance (2009 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)
2009	$347,305,100		4,744,449	
2010	$451,053,035	29.9%	5,820,603	22.7%
2011	$385,643,996	-14.5%	5,359,749	-7.9%
2012	$344,389,414	-10.7%	4,916,559	-8.3%
2013	$473,516,913	37.5%	5,607,475	14.1%
2014	$450,034,039	-5.0%	5,318,537	-5.2%
2015	$436,933,907	-2.9%	5,548,412	4.3%

Figure 19: Total Revenue – VIC (2009-2015)

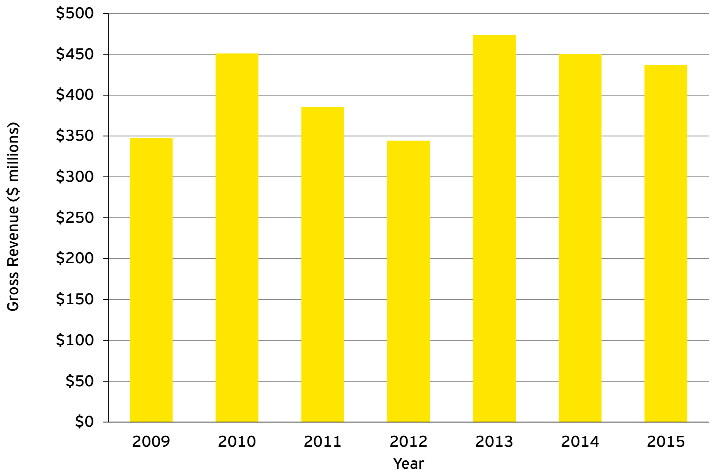


Figure 20: Total Attendance - VIC (2009-2015)

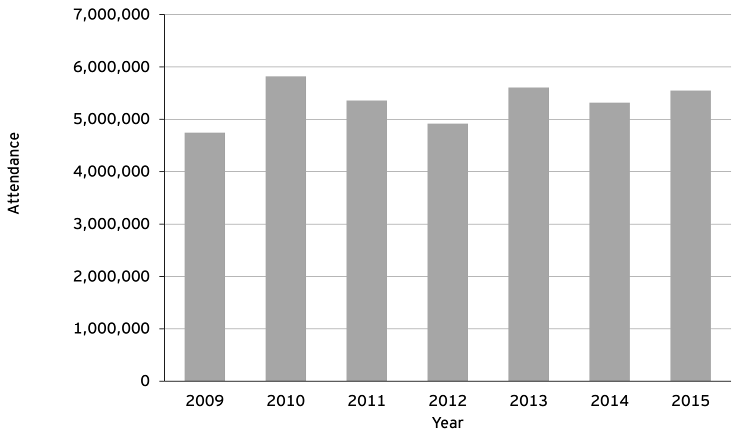


Figure 21: Revenue by Category (2015)

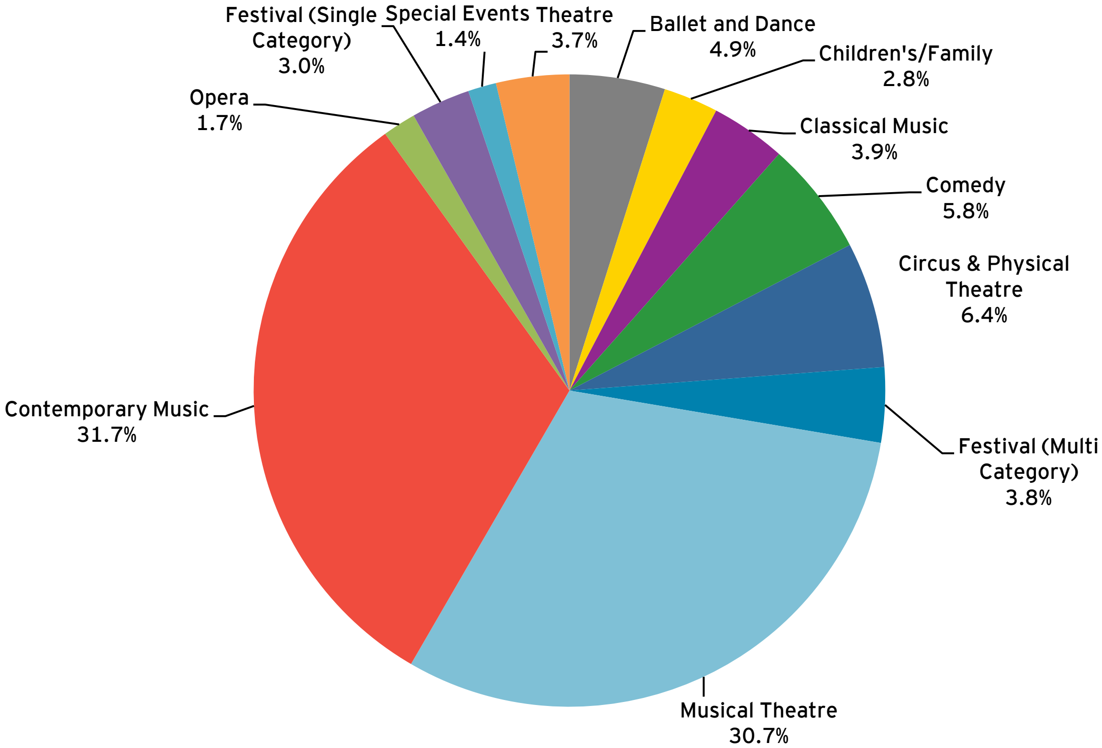
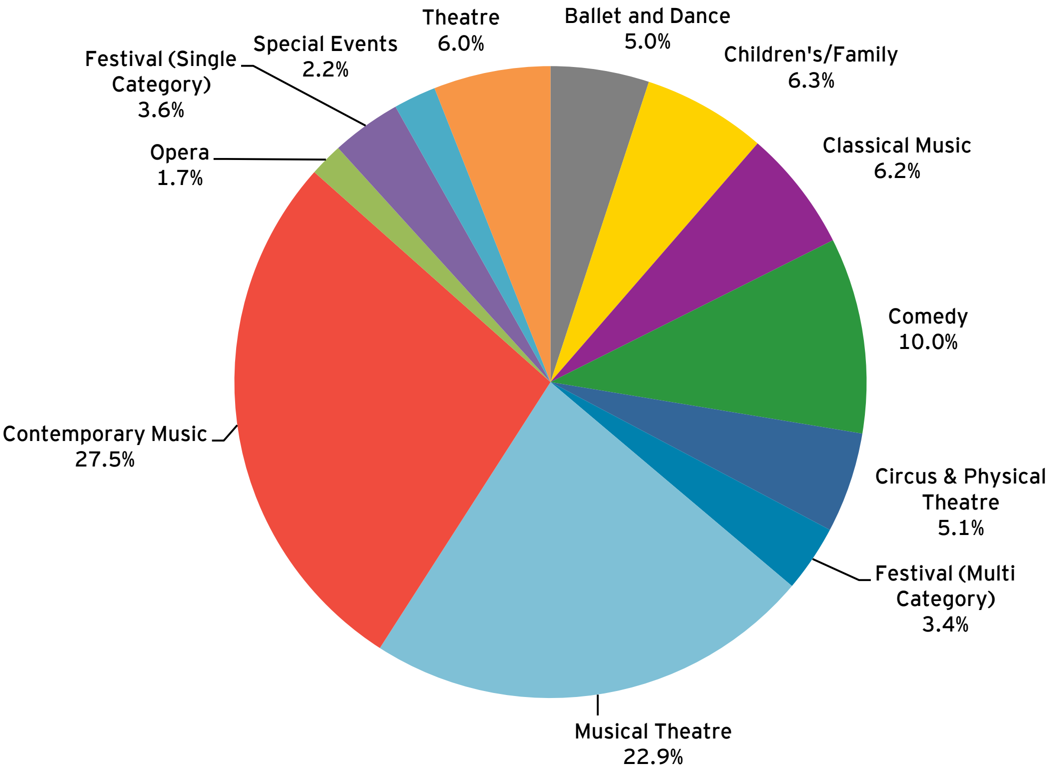


Figure 22: Attendance by Category (2015)



3.4 Queensland

Table 20: Queensland – Revenue and Attendance (2009 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)
2009	$146,567,867		2,006,608	
2010	$160,520,942	9.5%	2,043,327	1.8%
2011	$165,840,931	3.3%	2,150,329	5.2%
2012	$183,775,420	10.8%	2,302,462	7.1%
2013	$200,178,524	8.9%	2,318,207	0.7%
2014	$203,918,468	1.9%	2,661,632	14.8%
2015	$195,336,838	-4.2%	2,914,530	9.5%

Figure 23: Total Revenue – QLD (2009-2015)

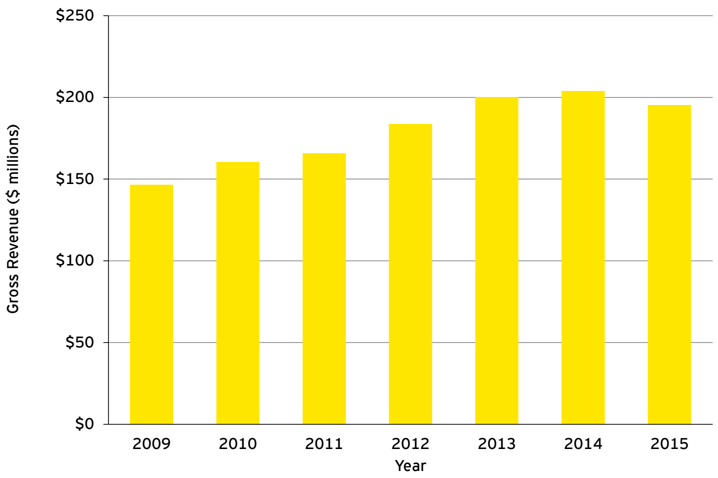


Figure 24: Total Attendance - QLD (2009-2015)

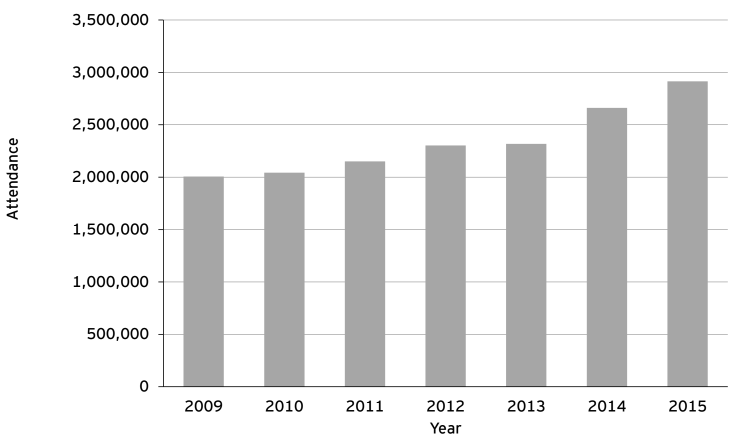


Figure 25: Revenue by Category (2015)

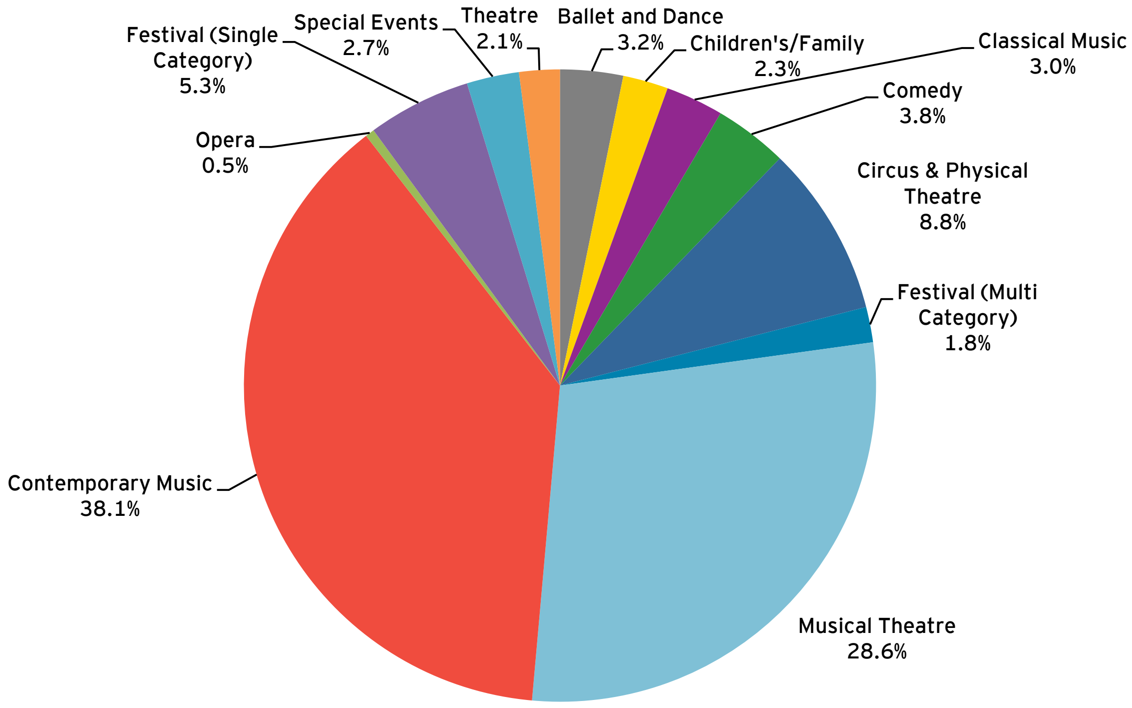
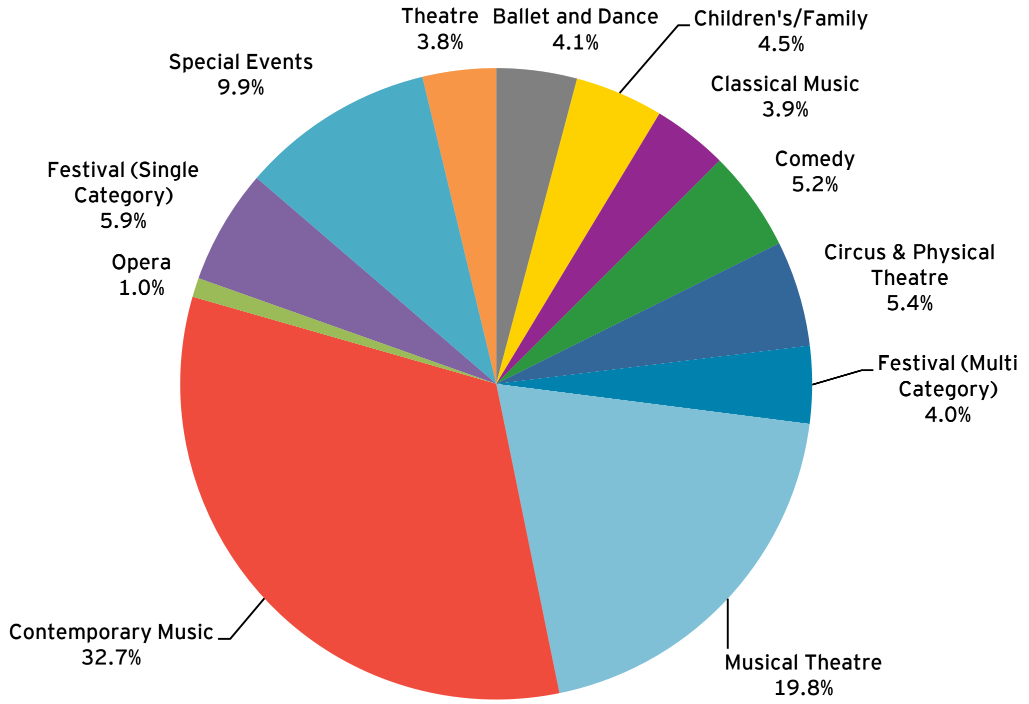


Figure 26: Attendance by Category (2015)



3.5 Western Australia

Table 21: Western Australia – Revenue and Attendance (2009 – 2015) *

	Revenue	Growth (%)	Total attendance	Growth (%)
2009	$105,312,778		1,468,882	
2010	$145,479,374	38.1%	1,879,408	27.9%
2011	$131,936,782	-9.3%	1,788,262	-4.8%
2012	$134,131,622	1.7%	1,791,795	0.2%
2013	$194,312,089	44.9%	2,153,483	20.2%
2014	$177,326,653	-8.7%	2,266,435	5.2%
2015	$162,494,027	-8.4%	1,969,668	-13.1%

Figure 27: Total Revenue– WA (2009-2015)*

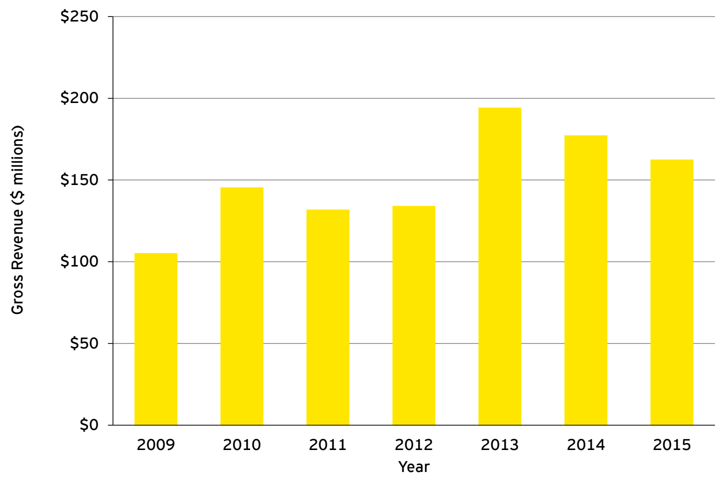
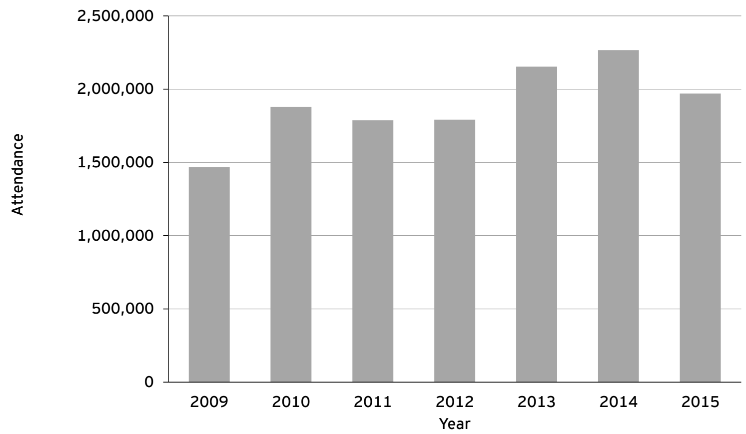


Figure 28: Total Attendance - WA (2009-2015)*



* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015. On a like for like basis including Fringe World Festival, Western Australia experienced a decline in revenue and attendance of 4.9% and 2.1% respectively.

Figure 29: Revenue by category (2015)*

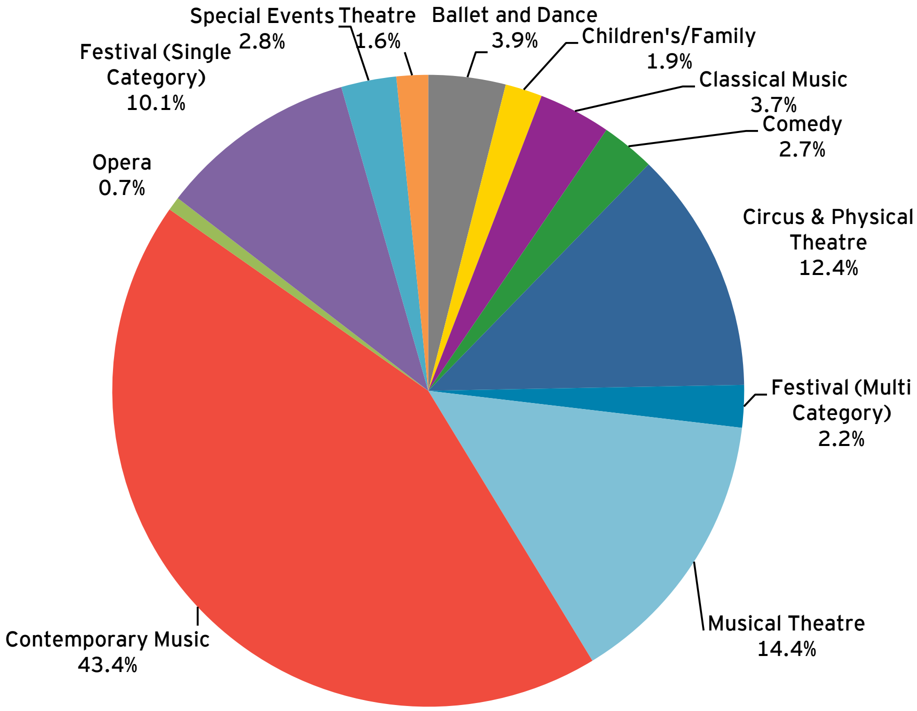
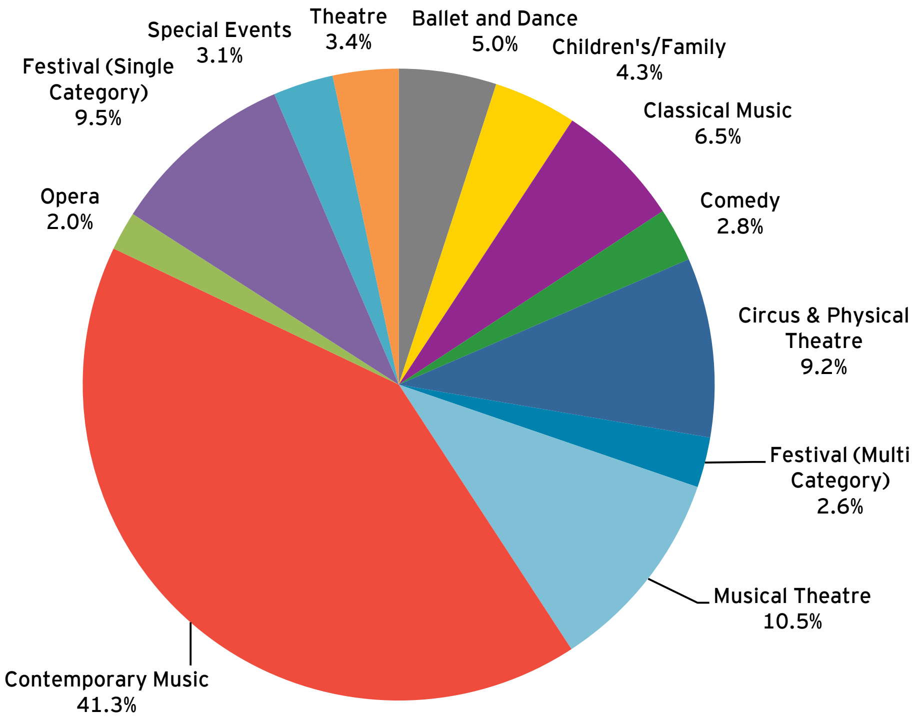


Figure 30: Attendance by category (2015)*



3.6 South Australia

Table 22: South Australia – Revenue and Attendance (2009 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)
2009	$82,326,982		1,449,260	
2010	$68,538,320	-16.7%	1,035,243	-28.6%
2011	$77,215,957	12.7%	1,237,386	19.5%
2012	$73,536,693	-4.8%	1,053,997	-14.8%
2013	$93,864,893	27.6%	1,497,204	42.1%
2014	$100,944,048	7.5%	1,614,267	7.8%
2015	$96,804,782	-4.1%	1,699,529	5.3%

Figure 31: Total Revenue – SA (2009-2015)

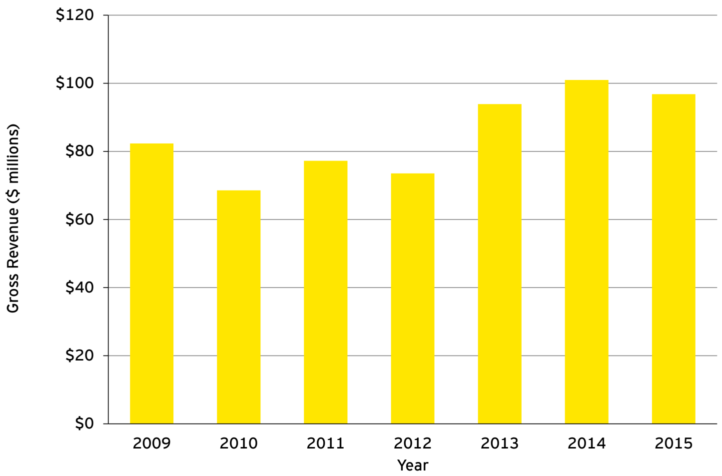


Figure 32: Total Attendance- SA (2009-2015)

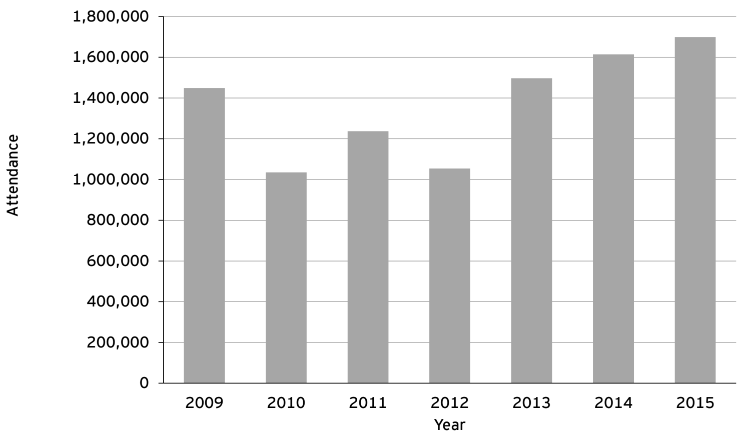


Figure 33: Revenue by category (2015)

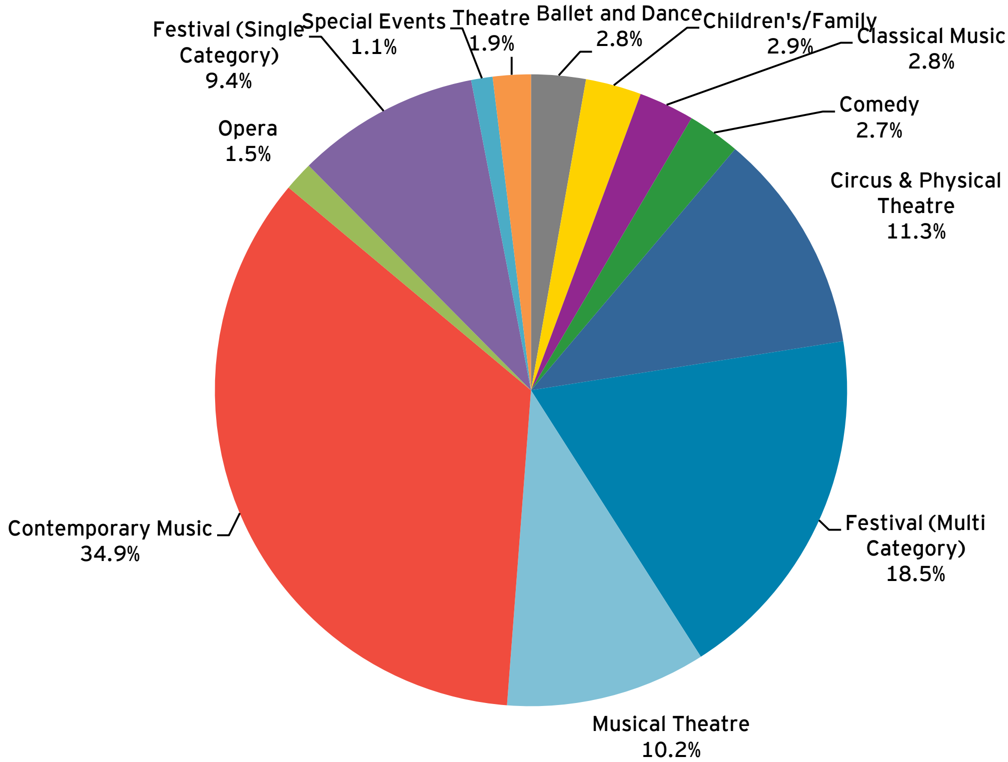
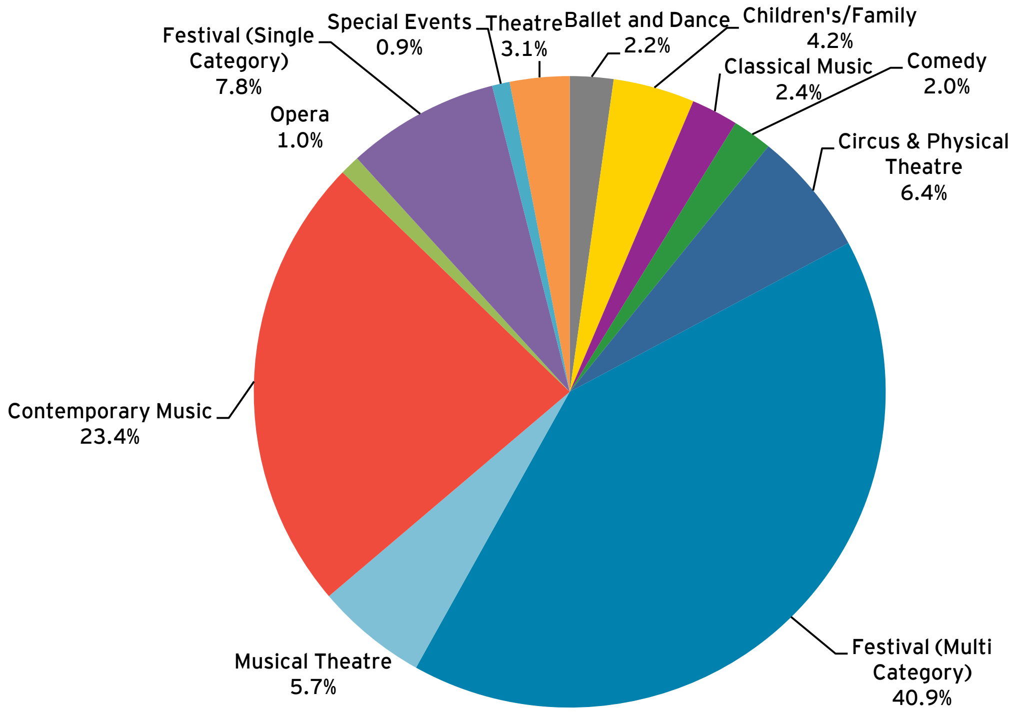


Figure 34: Attendance by Category (2015)



3.7 ACT/TAS/NT

Table 23: ACT/TAS/NT – Revenue and Attendance (2009 – 2015)*

	Revenue	Growth (%)	Total attendance	Growth (%)
2009	$18,103,869		351,189	
2010	$22,345,107	23.4%	460,793	31.2%
2011	$24,646,007	10.3%	478,993	3.9%
2012	$22,986,999	-6.7%	413,160	-13.7%
2013	$19,640,815	-14.6%	484,343	17.2%
2014	$28,566,945	45.4%	542,736	12.1%
2015	$37,367,387	30.8%	653,358	20.4%

* Total revenue and attendance data has been combined for ACT/TAS/NT for confidentiality purposes.

Figure 35: Total Revenue – ACT/TAS/NT (2009-2015)

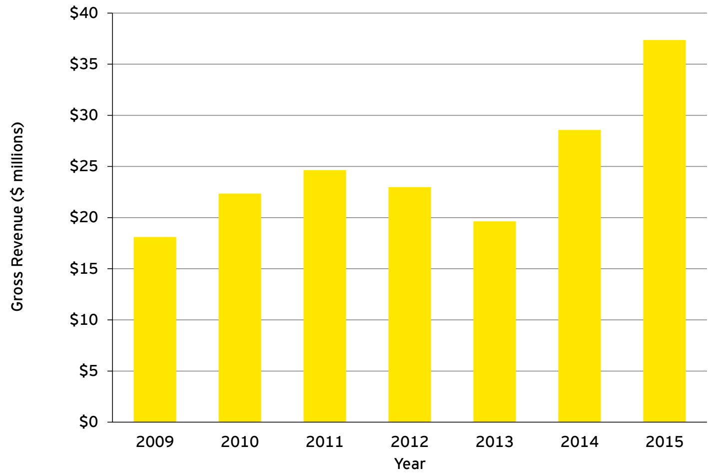


Figure 36: Total Attendance - ACT/TAS/NT (2009-2015)

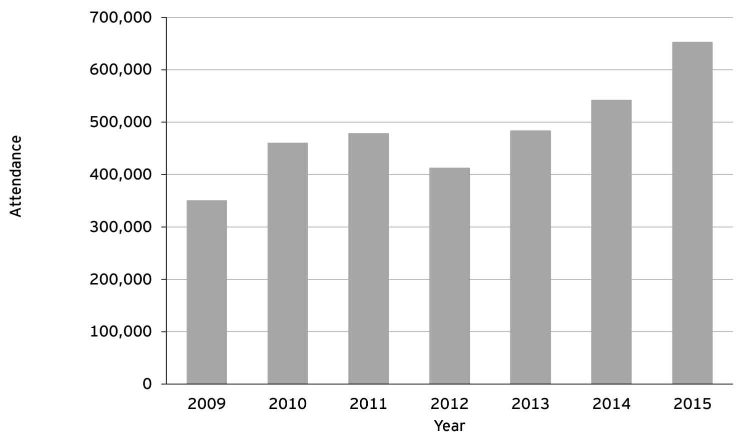


Figure 37: Revenue by Category (2015)

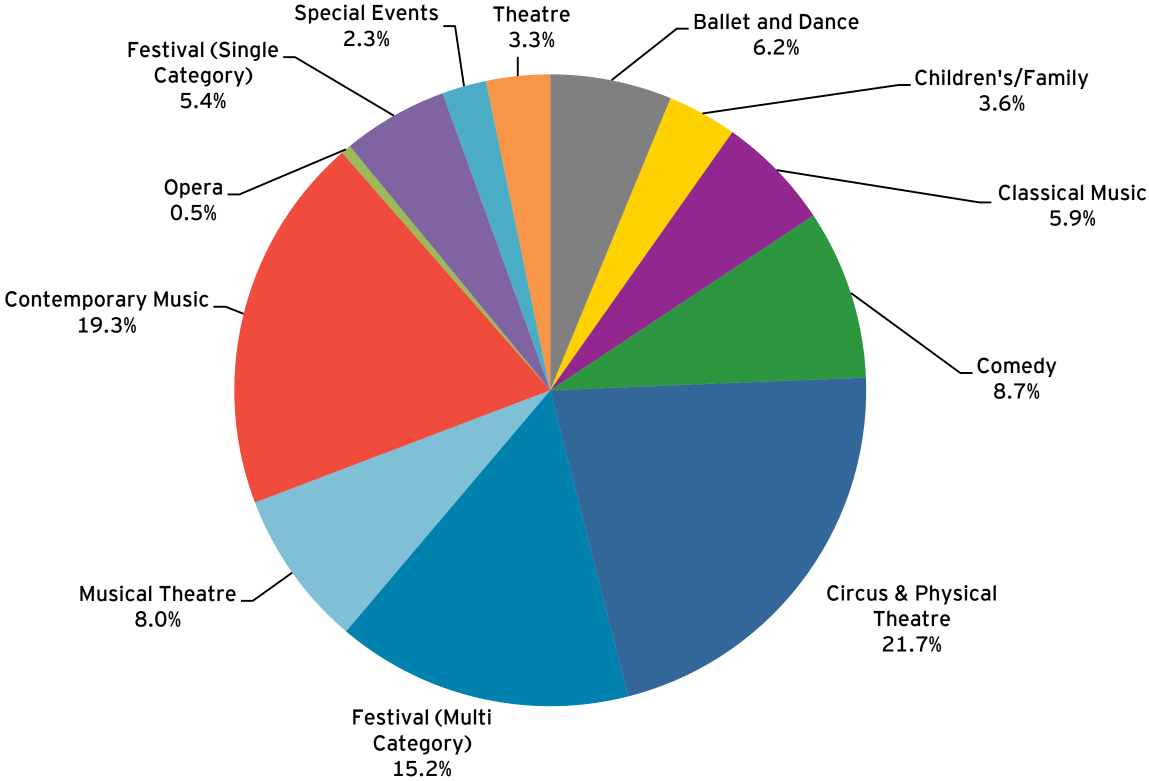
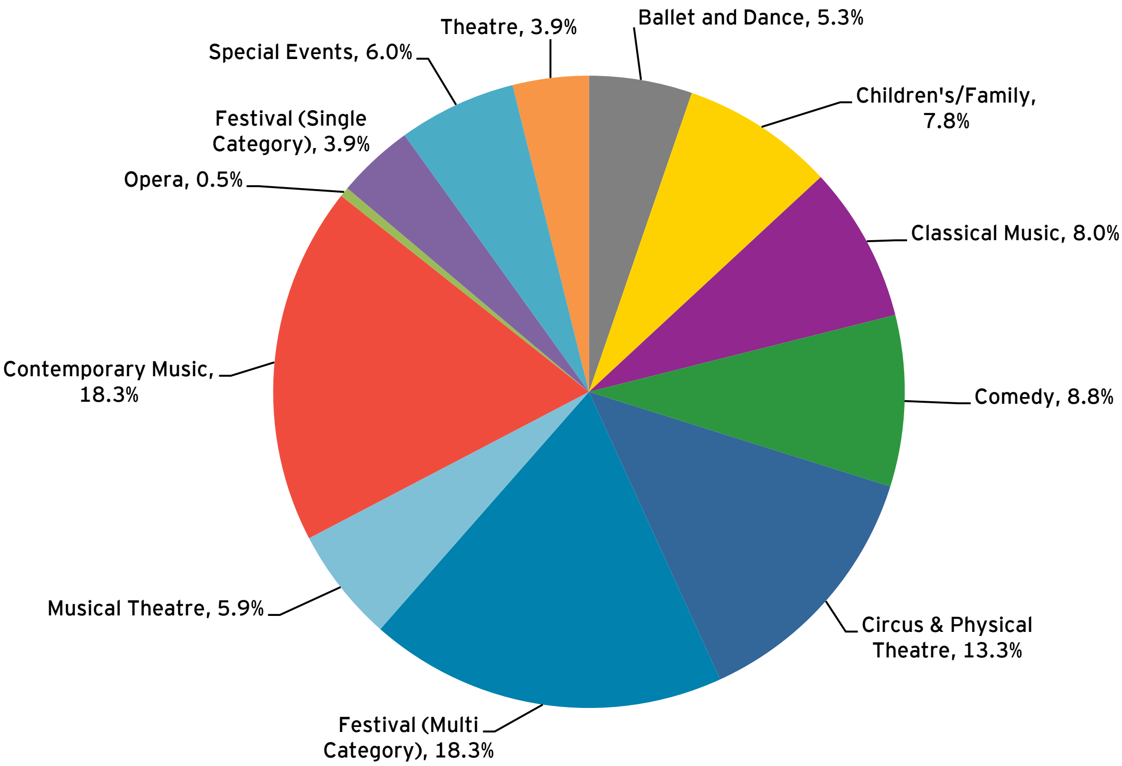


Figure 38: Attendance by Category (2015)



3.8 Per capita results

It is to be noted that due to confidentiality requirements, per capita results have not been provided for Australia Council for the Arts (Key Organisations) & Australian Performing Arts Centres Association (APACA) members.

Ticketing Survey data

A comparison of each state and territory's share of the Live Performance Industry against their population provides insight into spend per capita, as well as the concentration of the industry relative to where people live. Table 24 illustrates that New South Wales and Victoria command a larger share of revenue compared to their share of Australia's population. Victoria's revenue and attendance was above its share of the population and had the highest spend per capita in 2014 and 2015.

Queensland had a significantly lower proportion of industry revenue and attendance compared to its share of population and consequently a significantly lower spend per capita ($40.62) compared to the national average ($58.78). There exist several reasons for these disproportional results:

- Some of Australia's largest performing arts companies are based in New South Wales and Victoria and as such stage the bulk of their performances in Sydney and Melbourne, for example Opera Australia (Sydney), Melbourne Symphony Orchestra, Sydney Symphony Orchestra and The Australian Ballet (Melbourne).
- Destination NSW and Visit Victoria (formerly Victorian Major Events Company) are particularly active in the live performance major events market and as such have been successful in attracting major live performance events to these states.
- The majority of regional performances are not included in this per capita analysis and as such, performances in larger states with significant regional markets, such as Queensland, are under-reported. Some of these events have been captured in the data provided by Australia Council for the Arts (Key Organisations) & Australian Performing Arts Centres Association (APACA) members.
- Cities such as Brisbane are constrained in their ability to host performances due to a smaller number of venues and hence capacity, compared to Melbourne for example. South Australia's larger share of attendance can partly be explained by the inclusion of *Adelaide Fringe* data. This festival attracted high attendance to numerous low cost events.

It should be noted that these state and territory breakdowns do not take into account people who travel from interstate or overseas to watch a live performance. Industry share only accounts for the state or territory in which the performance took place and hence where the revenue and attendance are recognised. This is particularly relevant for categories such as Musical Theatre where musicals opening their season in a particular state often attract significant visitation from outside that state.

Table 24: Population and per capita results (2015)

State/Territory	Population (2015) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	7.67	32.0%	34.0%	30.4%	$62.33
Victoria	6.00	25.1%	31.1%	30.2%	$72.87
Queensland	4.81	20.1%	13.9%	15.9%	$40.62
Western Australia*	2.60	10.9%	11.5%	10.7%	$62.40
South Australia	1.70	7.1%	6.9%	9.2%	$56.85
Australian Capital Territory	0.39	1.6%	1.7%	2.0%	$45.43
Tasmania	0.52	2.2%	0.8%	1.1%	$43.61
Northern Territory	0.24	1.0%	0.2%	0.4%	$8.19
Total	23.94	100.0%	100.0%	100.0%	$58.78

Note: Population is as of December 2015 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

3.9 Venue capacity utilisation

Ticket Survey data

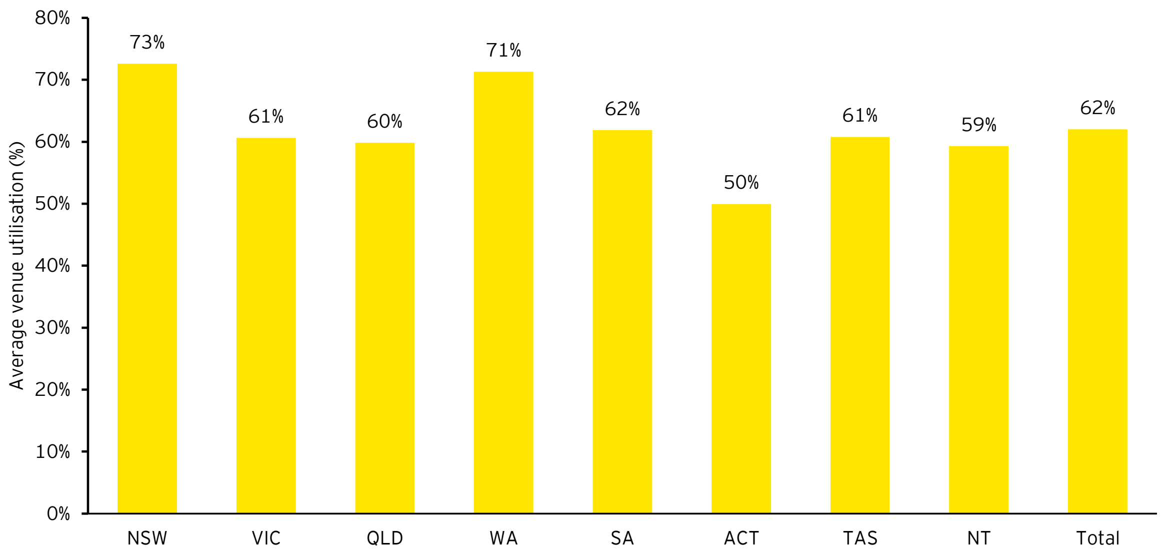
An additional measure included in the 2015 survey seeks to determine the average venue utilisation (attendance per ticket availability/venue capacity) for each state/territory and genre. Venue capacity relates to the maximum number of tickets available for each performance/event or the maximum capacity of a venue. Some venues may have a larger capacity than the maximum number of tickets for sale, but due to staging configurations or other special requirements, the number of tickets available for sale may reduce.

This can provide an indication of the average number of tickets sold in comparison to the capacity that these venues can hold or the maximum tickets that were available. A number of key limitations should be taken into consideration when analysing the venue capacity utilisation data including:

- A number of ticketing companies (e.g. Ticketek, the Ticket Group and Oztix), self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies did not provide venue capacity data. The data set is therefore not representative of the entire industry
- There are inherent difficulties in defining the venue capacity for Festivals (Multi-Category and Single-Category). For example, the Adelaide Fringe Festival has multiple events across different locations making it difficult to estimate venue capacity across multiple events. As a result the Festivals (Multi-Category) and Festivals (Single-Category) have been excluded from our analysis
- Events staged by Cirque du Soleil have been excluded from the data analysis. As these events are held at large multi-purpose venues such as racecourses and showgrounds, it is difficult to accurately estimate the venue capacity directly attributable to each individual performance. As a consequence the Circus and Physical Theatre category has been exclude from our analysis.

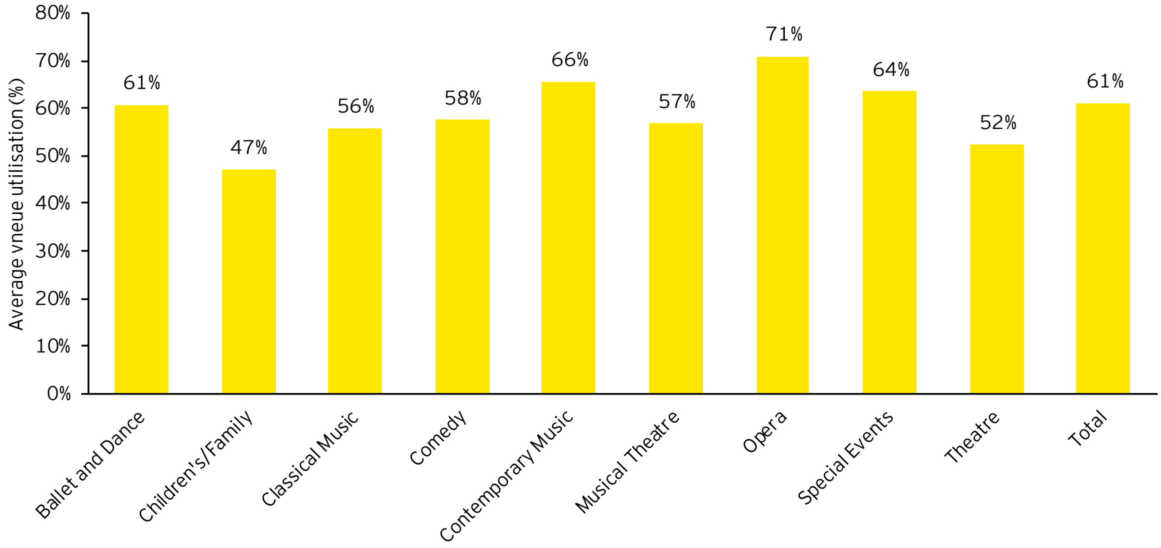
The graphs below highlight the average venue utilisation by State/Territory and Category in 2015 of selected venues. Due to the data limitations, the graphs provide a snapshot only. We intend to build upon this data to provide a more comprehensive representation of venue capacity utilisation in the coming years.

Figure 39: Average venue utilisation by State/Territory (2015) (Selected venues)*



* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Figure 40: Average venue utilisation by Category (2015)



4. Category analysis

4.1 Overall highlights

Ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies ("Ticketing Survey data")

As with previous years, the Contemporary Music and Musical Theatre categories represent the two largest categories in the industry, generating 34% and 23.8% of revenue, respectively. Combined, these two categories account for 57.8% of the live performance industry in terms of gross revenue and 47.9% of total attendance. The top 3 revenue categories combined, which also includes Festivals (Single-Category), account for 65.4% of all industry revenue.

The most significant gains were experienced by Circus and Physical Theatre, Special Events and Comedy categories. The significant increases for **Circus and Physical Theatre** can be attributed to the return of major performances by Cirque du Soleil for the first time since 2013, with the exception of NSW in which Cirque du Soleil's season of *TOTEM* opened in Sydney in October 2014 and closed in January 2015. Cirque du Soleil toured *TOTEM* in Sydney, Brisbane, Melbourne, Adelaide and Perth and *QUIDAM* in Canberra and Wollongong in 2015.

The **Special Events** category is particularly variable from year to year as it is dependent on whether performances that cannot be classified into other categories take place. The *Doctor Who Symphonic Spectacular*, contributed to the strong growth in this category. Revenue and attendance growth in the **Comedy** category was due in part to the success of tours by internationally renowned comedians *Billy Connolly* and *Dylan Moran* who performed across the country in 2015.

There were significant declines in the **Contemporary Music** category with revenue falling by 21% and attendance by 13%, with performances in 2015 unable to match the growth recorded in the previous two years. Major international acts, such as *Katy Perry*, *Bruce Springsteen, Bruno Mars* and *Eminem*, whose successful national tours were a contributing factor to the high revenue and attendance results recorded in 2014, did not return in 2015. The decline in **Festivals (Single-Category)** can largely be explained by the cancellation of the festival *Big Day Out* in 2015. The annual festival ran from 1999 to 2014 in Sydney, Melbourne, Adelaide, Perth and the Gold Coast and its cancellation impacted significantly on total revenue and attendance.

There were also noticeable declines in the **Theatre** category in both revenue (43%) and attendance (24.5%). Although the subsidised sector experienced strong growth in revenue and attendance at AMPAG events, there was a significant decline in the number of commercial theatrical productions throughout the year. Large commercial productions, such as *Mrs Brown's Boys,* that generated strong revenue and attendance in 2014, did not return in 2015.

Table 25 presents the largest categories by revenue and attendance, while Table 26 and Table 27 highlight the categories which experienced the greatest movements in revenue and attendance.

Table 25: Top 5 Categories – Revenue and Attendance (2015)

	Revenue			Attendance		
	Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
1	Contemporary Music	$477,904,944	34.0%	Contemporary Music	5,554,811	30.2%
2	Musical Theatre	$334,869,038	23.8%	Musical Theatre	3,258,734	17.7%
3	Festivals (Single-Category)	$106,825,241	7.6%	Festivals (Single-Category)	1,300,025	7.1%
4	Circus and Physical Theatre	$99,558,819	7.1%	Festival (Multi-Category)*	1,238,325	6.7%
5	Ballet and Dance	$63,522,318	4.5%	Theatre	1,135,128	6.2%

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Table 26: Top 3 Biggest Changes in Revenue by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2014	Category	Decrease from 2014
1	Circus and Physical Theatre	116.0%	Theatre	-43.0%
2	Special Events	85.2%	Contemporary Music	-21.0%
3	Comedy	21.6%	Festivals (Single-Category)	-17.3%

Table 27: Top 3 Biggest Changes in Attendance by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2014	Category	Decrease from 2014
1	Special Events	164.7%	Theatre	-24.5%
2	Circus and Physical Theatre	72.6%	Contemporary Music	-13.0%
3	Festivals (Multi-Category)*	16.8%	Children's/Family	-11.0%

Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members ("Supplementary data")*

The top 5 categories by revenue and attendance are a reflection of the type of works produced by the small to medium sector (Key Organisations), and the type of shows touring regionally. Consistent with the ticketing companies, self-ticketing venues, event promoters and AMPAG companies (Ticketing Survey data), Contemporary Music appears in the top 5 categories in the industry. However, there are some differences. In particular, Comedy's share of attendance and revenue is significantly higher compared to the Ticketing Survey data. Comedy accounted for 12.4% of industry share of revenue, mainly due to attendances at regional and metropolitan venues. The *Melbourne International Comedy Festival: Roadshow 2015* most likely contributed significantly to this category.

There are also some differences in the ranking of total revenue and attendance. The Children's/Family category ranks higher in attendance than revenue due to the low average ticket price, while Comedy ranked higher in revenue than attendance due to the high average ticket price. Table 28 presents the top 5 categories by revenue and attendance in 2015.

Table 28: Top 5 categories - Revenue and attendance

	Revenue				Attendance			
	Category	Total revenue	Industry share	Average ticket price	Category	Total attendance	Industry share	Average ticket price
1	Contemporary Music	$13,047,477	29.9%	$48	Contemporary Music	312,632	20%	$48
2	Comedy	$5,419,130	12.4%	$44	Children's/Family	259,680	16.6%	$19
3	Theatre	$5,008,856	11.5%	$32	Theatre	213,398	13.6%	$32
4	Children's/Family	$4,578,781	10.5%	$19	Special Events	194,373	12.4%	$46
5	Ballet and Dance	$3,792,412	8.7%	$47	Comedy	127,732	8.2%	$44

It is important to note that the data included is not a comprehensive survey of regional and metropolitan venues, as only 45 APACA member venues out of a total of 108 non-capital city member venues provided data. This includes a mix of small and large regional and metropolitan venues. Whilst attempts have been made to remove data that was previously captured in the data provided by major ticketing companies, self-ticketing venues, event promoters and Australia Major Performing Arts Group (AMPAG) companies, it was not possible to match individual performances as the regional and metropolitan data provided was aggregated at the venue level.

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

4.2 Category trends

Ticketing Survey data

This section presents an analysis for each of the 12 event categories, as defined in Section 1.2 and presents the following*:

- Total revenue and attendances by category for 2015
- The breakdown of the live performance industry in Australia based on share of gross revenue by category in 2014 and 2015.
- The industry breakdown based on share of total attendance by category in 2014 and 2015.
- The year on year revenue and attendance movements by category
- Time series data of the market shares of each event category over the past 12 years of the Survey in terms of ticket revenues and attendances.
- The average ticket price by category for the past 8 years.

Table 29: Total Revenue and Attendance by Category (2015)

Category	Revenue	% Change in Revenue (from 2014)	Share of Industry	Tickets	% Change in Attendance (from 2014)	Share of Industry
Ballet and Dance	$63,522,318	20.4%	4.5%	859,095	11.9%	4.7%
Children's/Family	$38,368,367	-11.7%	2.7%	1,081,003	-11.0%	5.9%
Circus and Physical Theatre	$99,558,819	116.0%	7.1%	974,645	72.6%	5.3%
Classical Music	$56,395,824	-13.1%	4.0%	993,906	-2.1%	5.4%
Comedy	$54,924,280	21.6%	3.9%	992,399	3.0%	5.4%
Contemporary Music	$477,904,944	-21.0%	34.0%	5,554,811	-13.0%	30.2%
Festivals (Multi-Category)	$55,967,934	17.1%	4.0%	1,238,325	16.8%	6.7%
Festivals (Single-Category)	$106,825,241	-17.3%	7.6%	1,300,025	1.5%	7.1%
Musical Theatre	$334,869,038	4.5%	23.8%	3,258,734	2.4%	17.7%
Opera	$41,505,346	-2.6%	2.9%	433,198	12.0%	2.4%
Special Events	$20,340,607	85.2%	1.4%	556,914	164.7%	3.0%
Theatre	$56,831,724	-43.0%	4.0%	1,135,128	-24.5%	6.2%
Total	$1,407,014,442	-6.7%	100.0%	18,378,183	-0.9%	100.0%

Table 30: Average Ticket Prices by Category (2008 – 2015)

	2008	2009	2010	2011	2012	2013	2014	2015	CAGR
Ballet and Dance	$60.67	$63.33	$64.86	$71.93	$77.93	$74.69	$80.82	$84.36	4.8%
Children's/Family	$34.24	$32.38	$34.23	$43.87	$43.17	$38.17	$38.27	$39.15	1.9%
Circus & Physical Theatre	N/A	$47.98	$43.03	$86.81	$103.67	$118.91	$88.60	$109.41	12.5%
Classical Music	$84.81	$74.01	$60.43	$68.82	$60.34	$73.18	$75.05	$71.50	-2.4%
Comedy	N/A	$54.06	$51.53	$55.07	$53.55	$48.82	$50.55	$60.11	1.5%
Contemporary music	$101.35	$108.61	$102.78	$103.45	$100.27	$110.50	$107.60	$96.38	-0.7%
Festivals (Multi Category)	$52.11	$33.60	$43.12	$57.02	$59.58	$34.59	$48.41	$56.69	1.2%
Festivals (Single Category)	$60.91	$81.19	$119.39	$138.97	$128.71	$130.46	$136.91	$117.72	9.9%
Musical Theatre	$89.23	$93.54	$98.84	$92.79	$97.08	$100.94	$105.70	$108.13	2.8%
Opera	$114.46	$111.62	$112.86	$124.66	$126.84	$145.28	$124.92	$121.43	0.8%
Special Events	$43.60	$67.79	$88.67	$57.28	$57.58	$73.18	$86.90	$42.26	-0.4%
Theatre	$46.92	$46.58	$51.47	$56.14	$59.86	$72.88	$73.83	$56.81	2.8%
All Categories	$76.60	$80.57	$86.43	$85.99	$85.46	$92.16	$91.57	$87.29	1.9%

*Note: *The Circus and Physical Theatre and Comedy categories were introduced in 2009*

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Figure 41: Gross Revenue by Category (2015)*

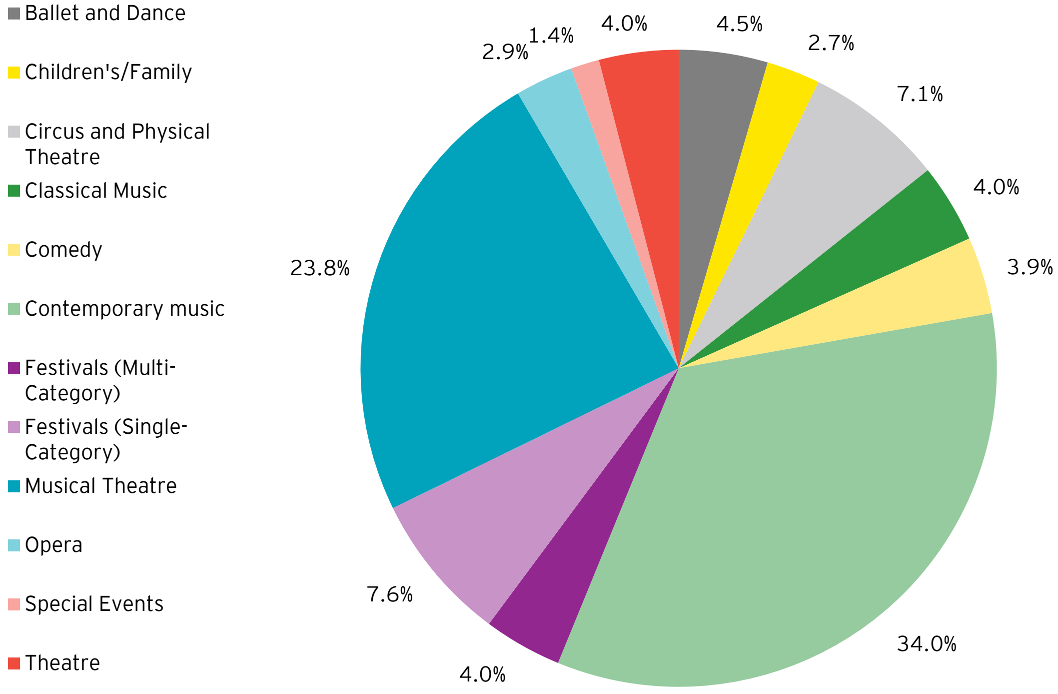
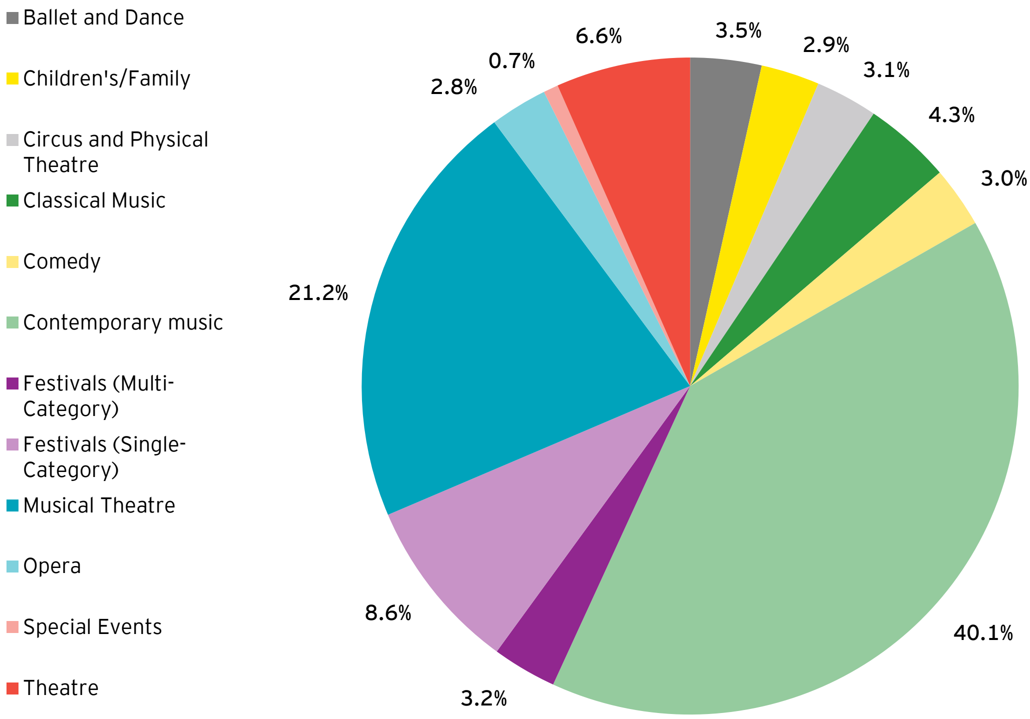


Figure 42: Gross Revenue by Category (2014)



* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Figure 43: Total Attendance by Category (2015)*

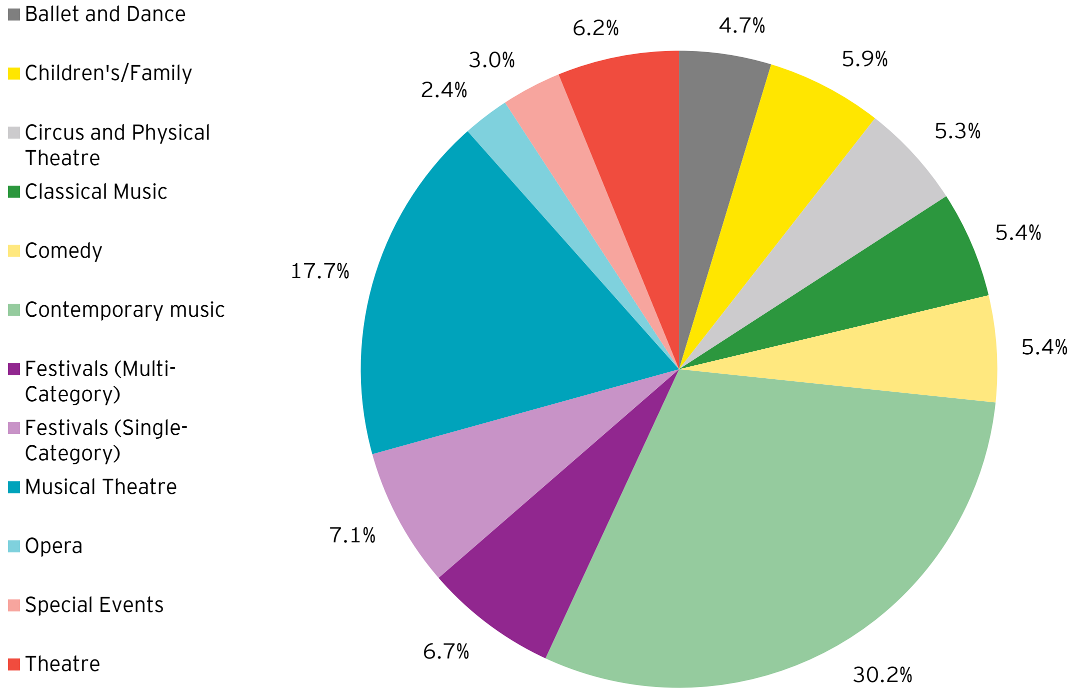
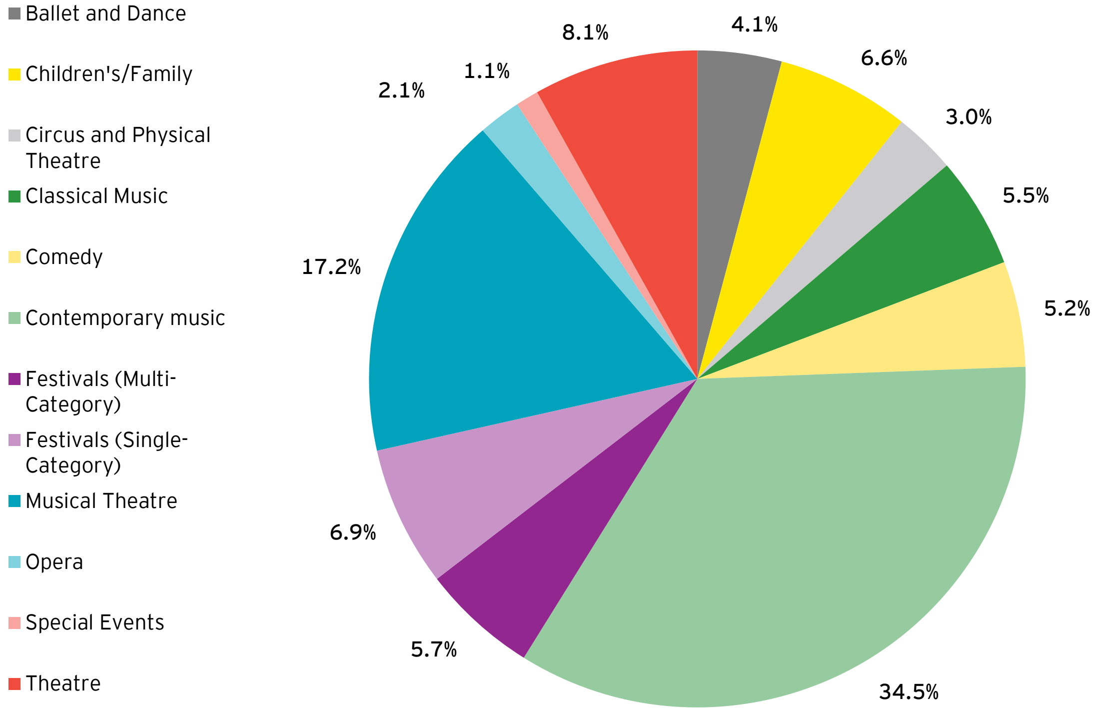


Figure 44: Total Attendance by Category (2014)



* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Figure 45: Percentage Movement in Revenue by Category (2014-15)*

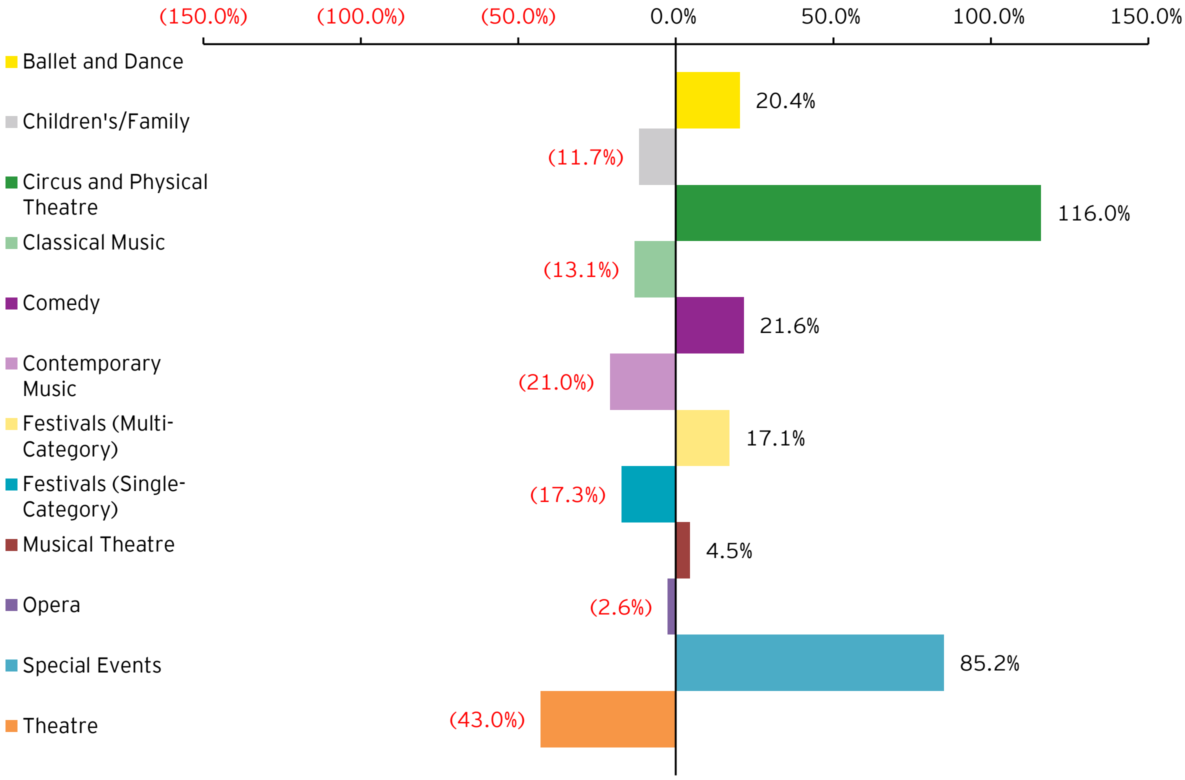
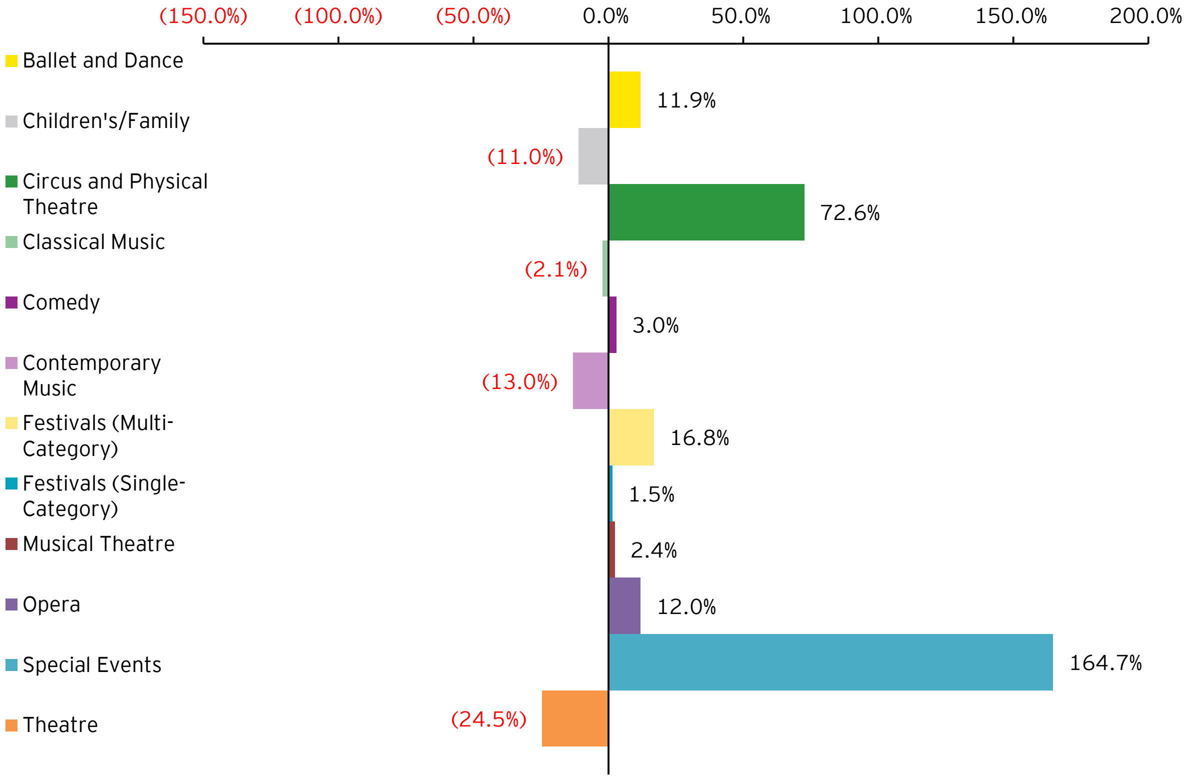


Figure 46: Percentage Movement in Attendance by Category (2014-2015)*



* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Figure 47: Market Shares (Gross Revenue) by Category (2004 – 2015)*

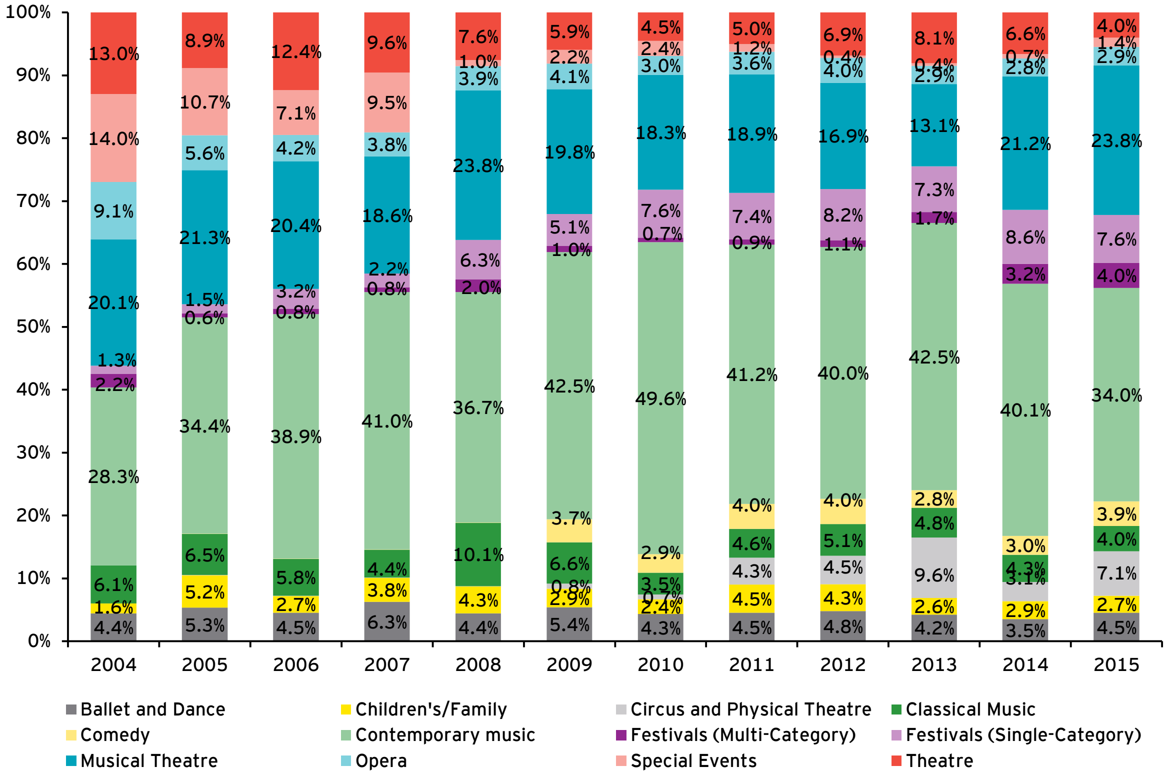
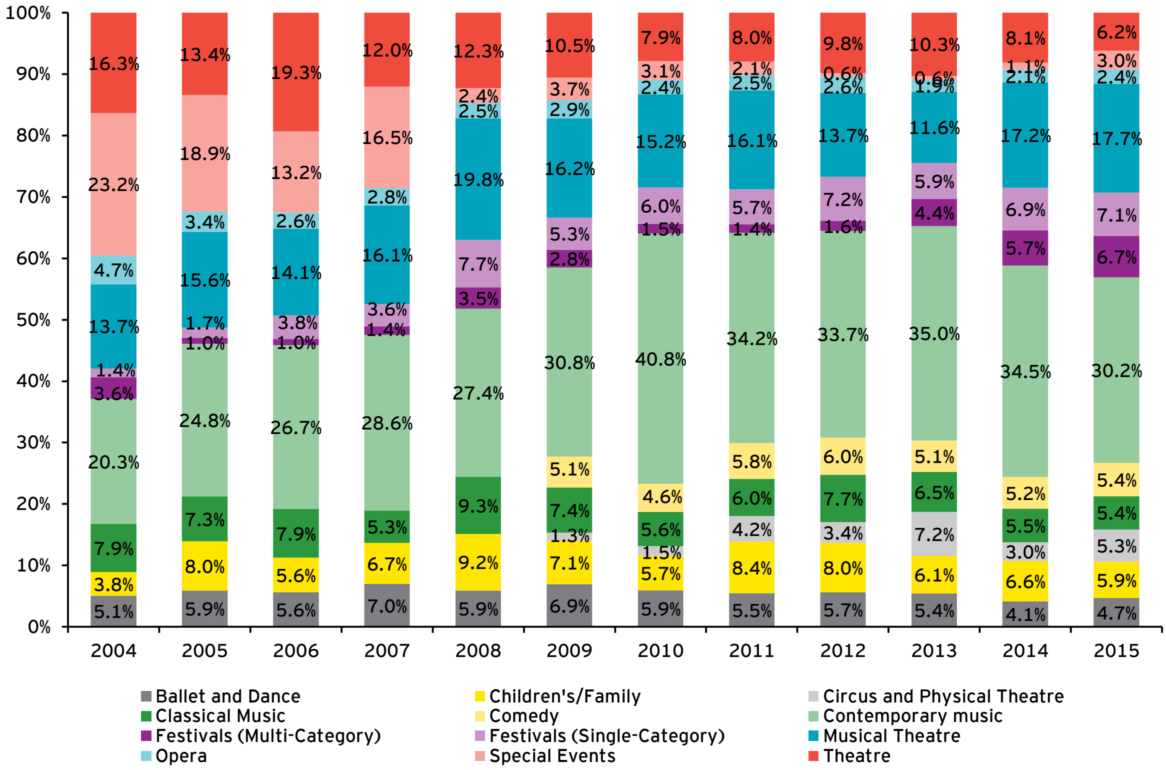


Figure 48: Market Shares (Attendance) by Category (2004 – 2015)*



* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

This section presents an analysis for each of the 12 event categories, as defined in Section 1.2. Table 31 provides a breakdown of the 2015 data by category based on share of gross revenue, total attendance and average ticket prices. As regional and metropolitan data was aggregated at the venue level, it is not possible to provide information about the types of shows that toured.

Compared to Ticketing Survey data there is a more even spread of revenues and attendances across categories as the data does not include major concert tours and musical productions in capital cities. In particular, the Children's/Family and Theatre categories have a much larger share of revenue and attendance, while Musical Theatre categories generate a much smaller share of revenue.

Table 31 provides an additional breakdown of the supplementary data by category, based on the number of performances in each category.

Table 31: Revenue and Attendance by Category (2015)

Category	Revenue	Share of industry	Tickets*	Share of industry	Average ticket price**
Ballet and Dance	$3,792,412	8.7%	103,102	6.6%	$47.28
Children's/Family	$4,578,781	10.5%	259,680	16.6%	$19.23
Circus and Physical Theatre	$618,926	1.4%	28,708	1.8%	$32.22
Classical Music	$2,814,563	6.5%	106,995	6.8%	$38.11
Comedy	$5,419,130	12.4%	127,732	8.2%	$43.99
Contemporary Music	$13,047,477	29.9%	312,632	20.0%	$48.08
Festival (Multi-Category)	$622,814	1.4%	39,014	2.5%	$28.11
Festival (Single-Category)	$1,085,315	2.5%	36,324	2.3%	$44.63
Musical Theatre	$3,584,680	8.2%	121,447	7.8%	$37.76
Opera	$755,155	1.7%	20,147	1.3%	$69.79
Special Events	$2,269,691	5.2%	194,373	12.4%	$46.21
Theatre	$5,008,856	11.5%	213,398	13.6%	$31.83
Total	**$43,597,800**	**100.0%**	**1,563,552**	**100.00%**	**$37.43**

**Based on both paid and unpaid tickets ** Average ticket prices are calculated based on paid tickets, with the exception of regional and metropolitan venues. Regional and metropolitan venues do not provide information on paid/unpaid tickets. As a result, some unpaid tickets are likely to be included and the average ticket price is likely to be underestimated.*

It is important to note that the data included is not a comprehensive survey of regional and metropolitan venues, as only 45 APACA member venues out of a total of 108 non-capital city member venues provided data. This includes a mix of small and large regional and metropolitan venues. Whilst attempts have been made to remove data that was previously captured in the data provided by major ticketing companies, self-ticketing venues, event promoters and Australia Major Performing Arts Group (AMPAG) companies, it was not possible to match individual performances as the regional and metropolitan data provided was aggregated at the venue level.

Figure 49: Gross revenue by category (2015)

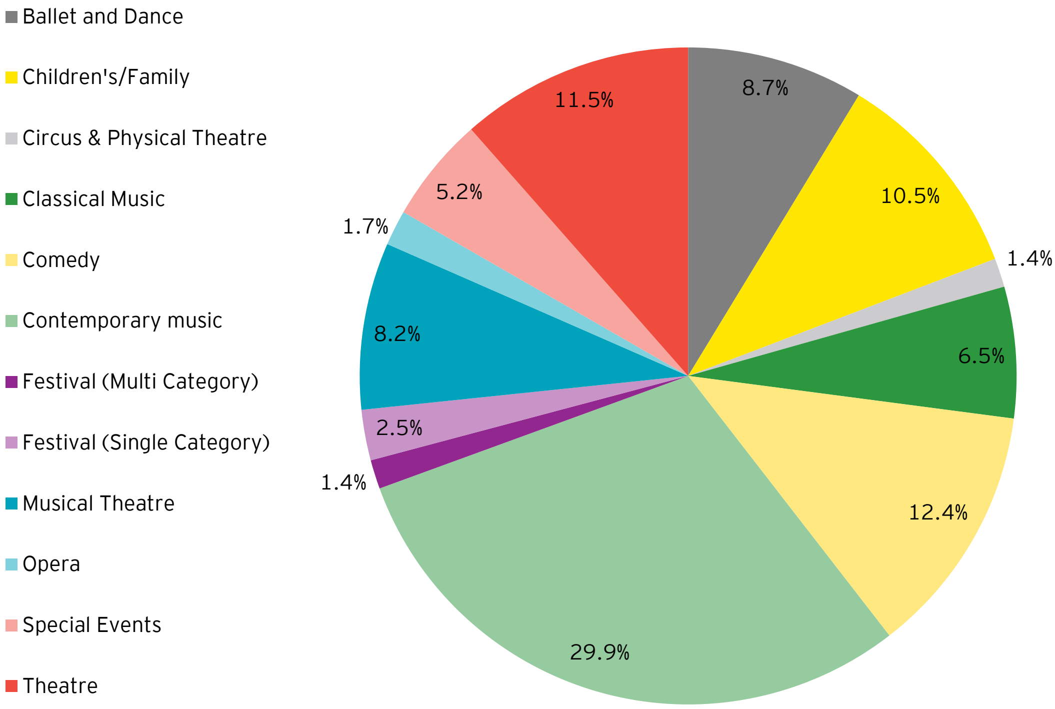


Figure 50: Total attendance by category (2015)

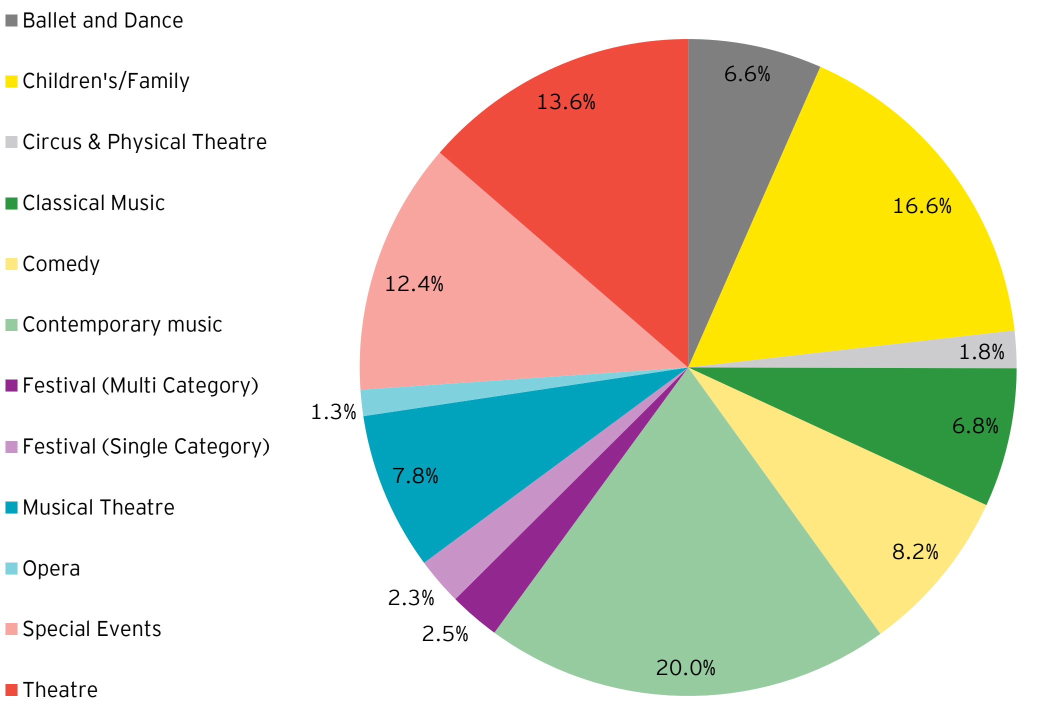


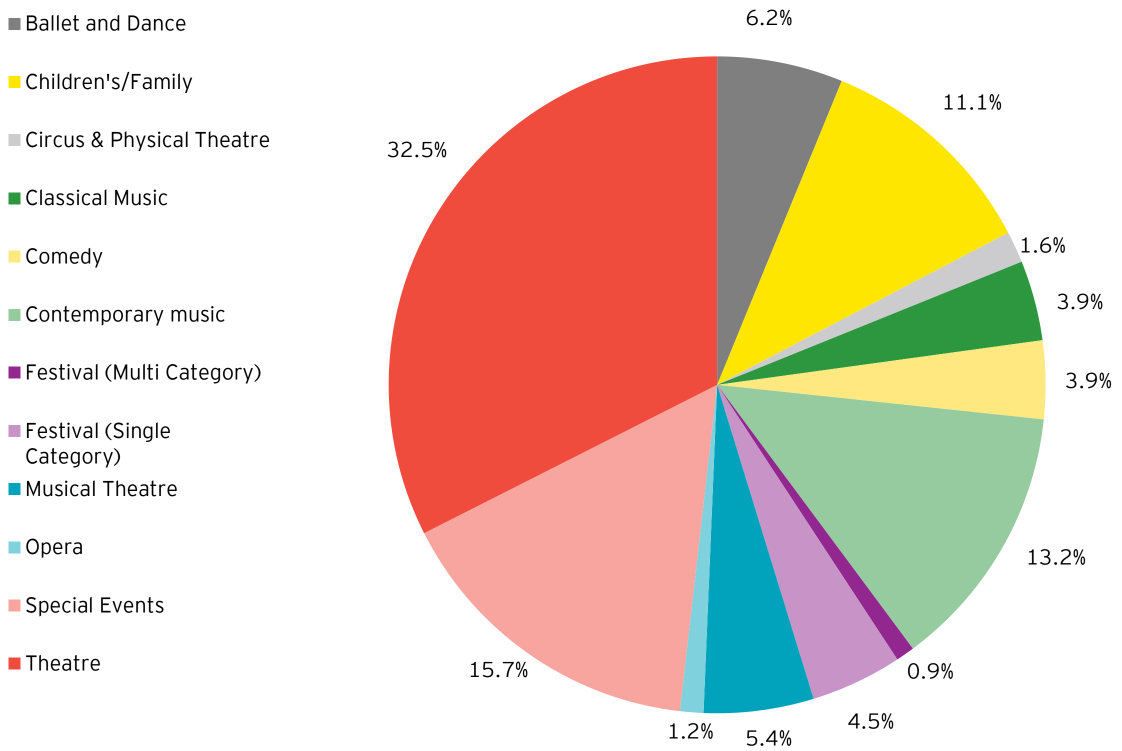
Table 32: Top 5 categories - Revenue and attendance

	Revenue				Attendance			
	Category	Total revenue	Industry share	Average ticket price	Category	Total attendance	Industry share	Average ticket price
1	Contemporary Music	$13,047,477	29.9%	$48.08	Contemporary Music	312,632	20.0%	$48.08
2	Comedy	$5,419,130	12.4%	$43.99	Children's/Family	259,680	16.6%	$19.23
3	Theatre	$5,008,856	11.5%	$31.83	Theatre	213,398	13.6%	$31.83
4	Children's/Family	$4,578,781	10.5%	$19.23	Special Events	194,373	12.4%	$46.21
5	Ballet and Dance	$3,792,412	8.7%	$47.28	Comedy	127,732	8.2%	$43.99

Table 33: Number of performances by category (2015)

Category	Number of performances	Share of industry	Average revenue per performance	Average attendance per performance
Ballet and Dance	479	6.2%	$7,917	215
Children's/Family	862	11.1%	$5,312	301
Circus and Physical Theatre	120	1.6%	$5,158	239
Classical Music	305	3.9%	$9,228	351
Comedy	298	3.9%	$18,185	429
Contemporary Music	1,018	13.2%	$12,817	307
Festival (Multi-Category)	71	0.9%	$8,772	549
Festival (Single-Category)	348	4.5%	$3,119	104
Musical Theatre	418	5.4%	$8,576	291
Opera	89	1.2%	$8,485	226
Special Events	1,217	15.7%	$1,865	160
Theatre	2,511	32.5%	$1,995	85
Total	7,736	100.0%	$5,636	202

Figure 51: Number of performances by category (2015)



4.3 Ballet and Dance

Ticketing Survey data

National overview

The Ballet and Dance category experienced a significant increase in both gross revenue and attendance in 2015. Gross revenue increased by 20.4% from $52.77 million in 2014 to $63.52 million in 2015. Total attendances also increased by 11.9% over the same timeframe while the average ticket price increased by 4.4% from $80.82 to $84.36.

Strong revenue growth in this category can be attributed to the growth among AMPAG companies with revenue rising by 175% in 2015. Strong growth is directly attributable to successful national tours of *The Sleeping Beauty*, *Giselle*, *The Dream*, *Swan Lake* and *2021* which recorded strong attendance in Victoria and New South Wales.

The Northern Territory experienced a significant decline in revenue (67%) and attendance (76%), while Queensland also experienced declining revenue (39%) and attendance (34%) throughout the course of the year. The decline experienced in Queensland may be due to the American Ballet Theatre, which performed a season of *Swan Lake* and *Three Masterpieces* in Brisbane in 2014, not returning in 2015. All other states experienced growth in both revenue and attendance except for Western Australia, with an increase in revenue (25%) yet a decline in attendance (4%), and Tasmania with a slight decline in attendance (9%) despite a significant increase in revenue (70%).

Figure 52: Ballet and Dance – Gross Revenue (2004 – 2015)

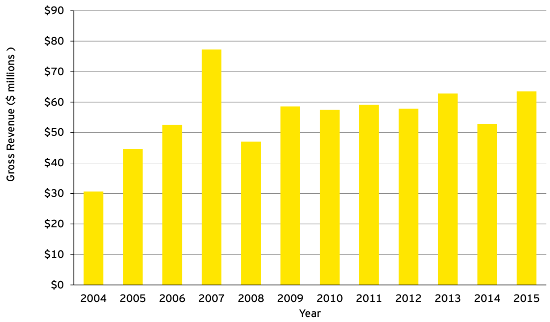


Figure 53: Ballet and Dance – Total Attendance (2004 – 2015)

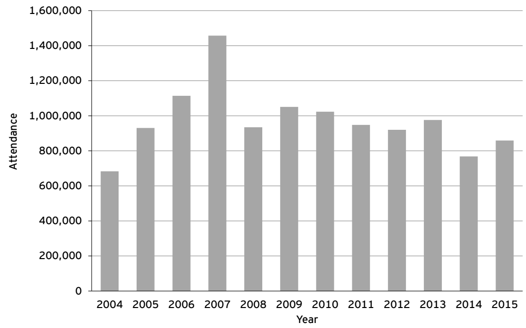


Table 34: Ballet and Dance – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$30,664,060		682,755		$50.07	
2005	$44,563,085	45.3%	930,639	36.3%	$52.76	5.4%
2006	$52,523,644	17.9%	1,113,849	19.7%	$50.52	-4.2%
2007	$77,287,071	47.1%	1,457,306	30.8%	$57.39	13.6%
2008	$47,051,946	-39.1%	934,533	-35.9%	$60.67	5.7%
2009	$58,570,704	24.5%	1,050,763	12.4%	$63.33	4.4%
2010	$57,509,401	-1.8%	1,023,077	-2.6%	$64.86	2.4%
2011	$59,164,135	2.9%	947,846	-7.4%	$71.93	10.9%
2012	$57,865,897	-2.2%	920,193	-2.9%	$77.93	8.3%
2013	$62,832,992	8.6%	976,336	6.1%	$74.69	-4.2%
2014	$52,771,905	-16.0%	767,890	-21.3%	$80.82	8.2%
2015	$63,522,318	20.4%	859,095	11.9%	$84.36	4.4%

State/Territory breakdown

Figure 54: Ballet and Dance – Revenue by State/Territory

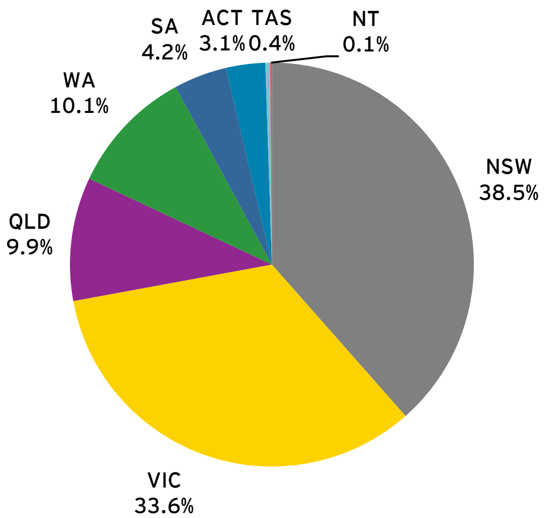


Table 35: Ballet and Dance – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$24,451,546	38.5%	4.6%
VIC	$21,351,100	33.6%	3.2%
QLD	$6,280,513	9.9%	-9.6%
WA	$6,414,087	10.1%	0.4%
SA	$2,699,323	4.2%	0.0%
ACT	$1,995,245	3.1%	1.6%
TAS	$244,465	0.4%	0.1%
NT	$86,040	0.1%	-0.4%
Total	$63,522,318	100.0%	

Figure 55: Ballet and Dance – Attendance by State/Territory

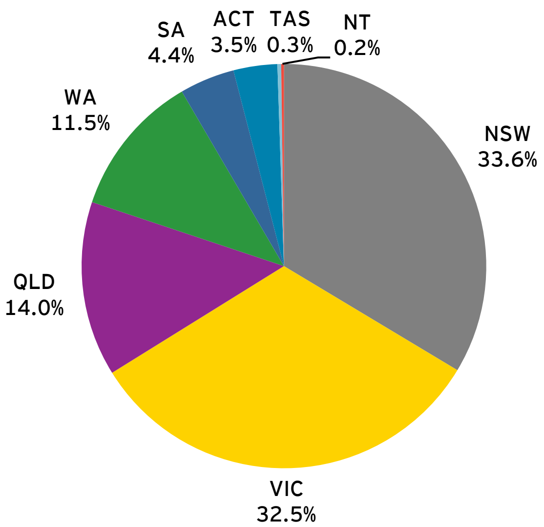


Table 36: Ballet and Dance – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	288,743	33.6%	6.0%
VIC	279,548	32.5%	4.4%
QLD	120,103	14.0%	-9.6%
WA	98,377	11.5%	-1.9%
SA	37,821	4.4%	0.3%
ACT	30,059	3.5%	1.5%
TAS	2,587	0.3%	-0.1%
NT	1,857	0.2%	-0.8%
Total	859,095	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

There were 479 performances in the Ballet and Dance category in 2015, which drew attendance of 103,102 and generated revenue of $3.79 million. The average attendance per performance (215) was above the industry average (202) while the average revenue per performance ($7,917) was above the industry average ($5,636).

In terms of revenue, the largest regional and metropolitan venues included the Civic Theatre (NSW), Illawarra Performing Arts Centre (NSW) and Frankston Arts Centre (VIC). Australia Council Key Organisations generated 10% of total revenue for this category, including productions by companies such as Expressions Dance Company.

4.4 Children's/Family Events

Ticketing Survey data

National overview

2015 saw a decline in gross revenue and attendance for the Children's/Family Events category with gross revenue falling by 11.7% from $43.43 million in 2014 to $38.37 million in 2015. Total attendance fell by 11% while the average ticket price increased by 2.3% to $39.15.

Major events in 2015 in this category included *Disney on Ice*, *The 26 Story Treehouse*, *The Tiger Who Came to Tea* and *Disney Live*.

Most states experienced a decline in revenue and attendance in this category. In particular, Western Australia saw more significant declines in revenue (58%) and attendance (54%), while the Northern Territory also experienced declining revenue (24%) and attendance (14%) over the course of the year. South Australia experienced significant growth recording an increase in revenue (24%) and attendance (16%), while Victoria also experienced slight gains. Tasmania experienced a slight increase in attendance (1%) despite a decline in revenue (6%).

Figure 56: Children's/Family Events– Gross Revenue (2004 – 2015)

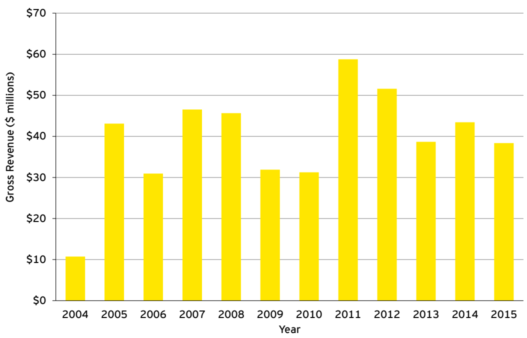


Figure 57: Children's/Family Events – Total Attendance (2004 – 2015)

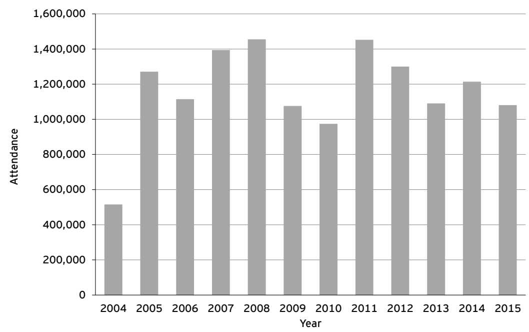


Table 37: Children's/Family Events – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$10,737,662		515,276		$21.25	
2005	$43,108,863	301.5%	1,271,239	146.7%	$35.52	67.1%
2006	$30,944,086	-28.2%	1,114,427	-12.3%	$28.96	-18.5%
2007	$46,535,403	50.4%	1,393,942	25.1%	$36.49	26.0%
2008	$45,647,441	-1.9%	1,455,400	4.4%	$34.24	-6.2%
2009	$31,904,974	-30.1%	1,076,332	-26.0%	$32.38	-5.4%
2010	$31,247,780	-2.1%	974,624	-9.4%	$34.23	5.7%
2011	$58,777,398	88.1%	1,453,012	49.1%	$43.87	28.1%
2012	$51,587,317	-12.2%	1,300,334	-10.5%	$43.17	-1.6%
2013	$38,684,410	-25.0%	1,090,598	-16.1%	$38.17	-11.6%
2014	$43,431,918	12.3%	1,214,273	11.3%	$38.27	0.3%
2015	$38,368,367	-11.7%	1,081,003	-11.0%	$39.15	2.3%

State/Territory breakdown

Figure 58: Children's/Family Events- Revenue by State/Territory

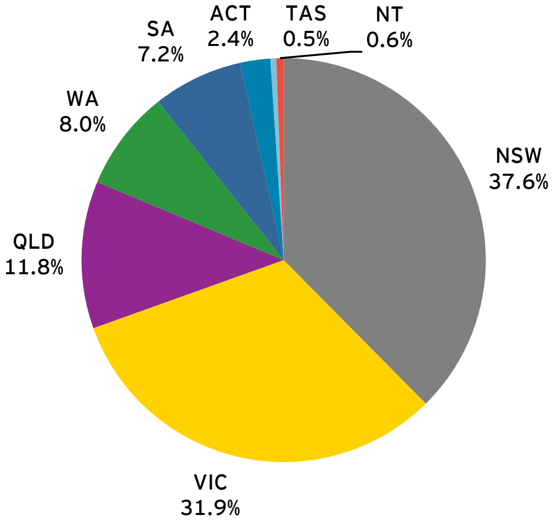


Table 38: Children's/Family Events – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$14,420,994	37.6%	-0.3%
VIC	$12,253,486	31.9%	6.6%
QLD	$4,524,136	11.8%	0.7%
WA	$3,080,603	8.0%	-9.0%
SA	$2,760,305	7.2%	2.1%
ACT	$925,154	2.4%	0.1%
TAS	$182,139	0.5%	0.0%
NT	$221,551	0.6%	-0.1%
Total	$38,368,367	100.0%	

Figure 59: Children's/Family Events – Attendance by State/Territory

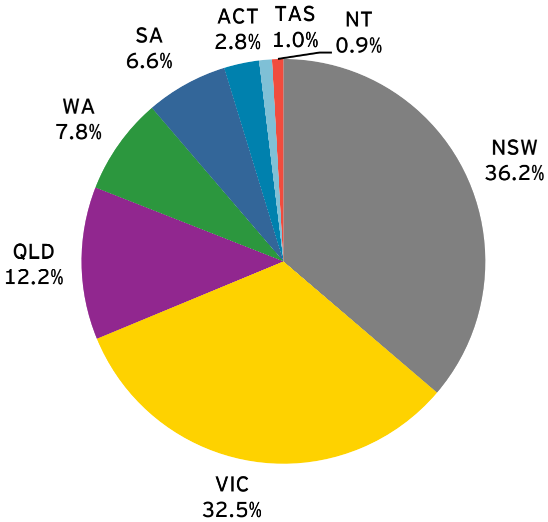


Table 39: Children's/Family Events – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	391,772	36.2%	-1.5%
VIC	351,430	32.5%	8.3%
QLD	131,848	12.2%	-0.8%
WA	83,902	7.8%	-7.4%
SA	70,869	6.6%	1.5%
ACT	30,252	2.8%	-0.3%
TAS	11,325	1.0%	0.1%
NT	9,605	0.9%	0.0%
Total	1,081,003	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Children's/Family category drew attendance of 259,680 and generated revenue of $4.58 million. Its share of industry revenue (10.5%) is low given its share of industry attendance (16.6%), due to its low average ticket price ($19.23) compared to the industry average ($37.43). There were 862 performances in the Children's/Family category throughout the year. The average attendance at each performance was 301, with each performance generating an average of $5,312 in revenue. The largest regional and metropolitan venues in terms of revenue were Civic Theatre (NSW) Frankston Arts Centre (VIC) and Orange Civic Theatre (NSW). Key Organisations in South Australia also made a notable contribution to this category, including companies such as Windmill Theatre Company and Patch Theatre Company.

4.5 Circus & Physical Theatre

Ticketing Survey data

National overview

The Circus and Physical Theatre category experienced strong growth across the board between 2014 and 2015, in contrast to the sharp decline experienced in 2014. Gross revenue increased by 116% from $46.09 million to $99.56 million while total attendance increased by 72.6%. The average ticket price also increased by 23.5% from $88.60 to $109.41.

The significant increases for Circus and Physical Theatre can be attributed to the return of major performances by Cirque du Soleil for the first time since 2013 for most states. Cirque du Soleil toured *TOTEM* in Sydney, Brisbane, Melbourne, Adelaide and Perth and *QUIDAM* in Canberra and Wollongong.

All states experienced significant growth, with the exception of a decrease in revenue (46%) and attendance (45%) in New South Wales. This can be attributed to Cirque du Soleil's season of *TOTEM* opening in Sydney in October 2014 and closing in January 2015.

The Circus and Physical Theatre category was introduced in the 2009 Survey, prior to which such events were included in the Theatre or Children's/Family categories.

Figure 60: Circus and Physical Theatre – Gross Revenue (2004 – 2015)

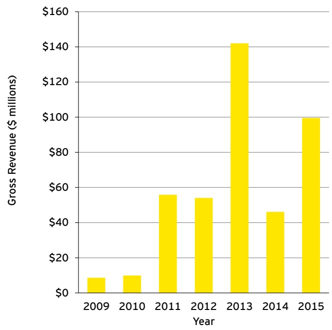


Figure 61: Circus and Physical Theatre – Total Attendance (2004 – 2015)

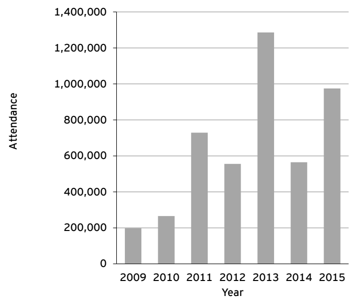


Table 40: Circus and Physical Theatre – Revenue and Attendance (2009 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2009	$8,601,990	N/A	198,274	N/A	$47.98	N/A
2010	$9,900,116	15.1%	265,837	34.1%	$43.03	-10.3%
2011	$55,865,945	464.3%	728,799	174.2%	$86.81	101.8%
2012	$54,042,789	-3.3%	555,506	-23.8%	$103.67	19.4%
2013	$142,033,217	162.8%	1,285,991	131.5%	$118.91	14.7%
2014	$46,094,984	-67.5%	564,676	-56.1%	$88.60	-25.5%
2015	$99,558,819	116.0%	974,645	72.6%	$109.41	23.5%

State/Territory breakdown

Figure 62: Circus and Physical Theatre – Revenue by State/Territory

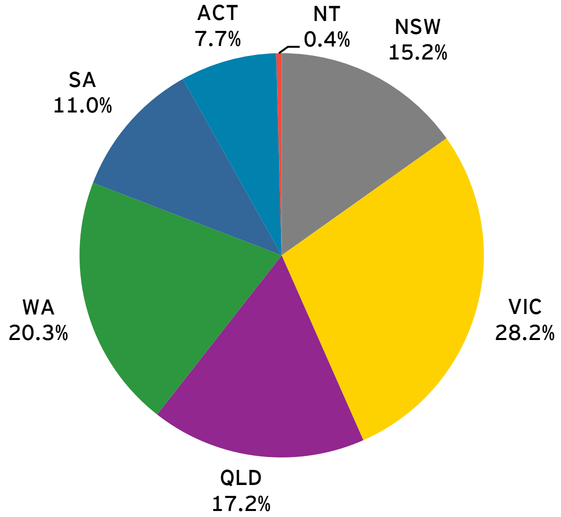


Table 41: Circus and Physical Theatre – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$15,106,383	15.2%	-46.1%
VIC	$28,079,009	28.2%	12.4%
QLD	$17,115,229	17.2%	5.6%
WA	$20,177,425	20.3%	13.1%
SA	$10,981,772	11.0%	8.4%
ACT	$7,670,246	7.7%	6.8%
TAS	$0	0.0%	0.0%
NT	$428,756	0.4%	-0.3%
Total	$99,558,819	100.0%	

Figure 63: Circus and Physical Theatre – Attendance by State/Territory

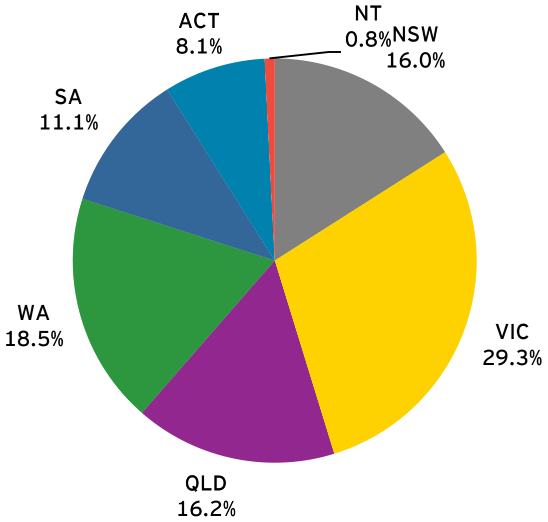


Table 42: Circus and Physical Theatre – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	155,821	16.0%	-33.8%
VIC	285,123	29.3%	7.8%
QLD	157,619	16.2%	1.1%
WA	180,693	18.5%	11.6%
SA	108,252	11.1%	6.9%
ACT	79,349	8.1%	6.9%
TAS	0	0.0%	0.0%
NT	7,788	0.8%	-0.5%
Total	974,645	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Circus and Physical Theatre category drew attendance of 28,708 and generated revenue of $618,926 in 2015. Overall, this category has a 1.4% share of industry revenue and a 1.8% share of industry attendance, making it one of the smaller categories in this survey. This category staged 120 performances, with average attendance of 239 per performance with each performance generating an average of $5,158 in revenue. APACA venues generated most revenue in this category with the Judith Wright Centre of Contemporary Arts (QLD) being the key contributor, followed by the Southbank Theatre (VIC), with performances of *Scotch & Soda* by Company 2 taking place in both states.

4.6 Classical Music

Ticketing Survey data

National overview

Between 2014 and 2015, the Classical Music category experienced a decrease in revenue and attendance. Gross revenue fell by 13.1% from $64.87 million to $56.40 million while total attendance fell by 2.1%. The decrease in average ticket price by 4.7% from $75.05 to $71.50 also contributed to the decline in gross revenue.

As with previous years, the majority of revenue generated in the Classical Music category came from the AMPAG companies, with 77% of total revenue coming from AMPAG performances. Major companies include The Australian Chamber Orchestra, the Melbourne Symphony Orchestra, the Sydney Symphony Orchestra, the Queensland Symphony Orchestra, the West Australian Symphony Orchestra, the Australian Brandenburg Orchestra, Adelaide Symphony Orchestra, Tasmanian Symphony Orchestra and Musica Viva Australia.

Outside of AMPAG companies, there were further declines in revenue and attendance in 2015, with fewer performances overall. Major performances in this category included *Anne Sophie Mutter* and performances by the Australian World Orchestra. However, popular performer *André Rieu* did not return in 2014 or 2015, impacting on the decline in revenue and attendance in both years. All states experienced a decline in revenue, particularly South Australia (23%) and Western Australia (18%). Increases in attendance were experienced by Tasmania (46%), Western Australia (11%) and Victoria (5%), while other states saw a decline in attendance.

Figure 64: Classical Music– Gross Revenue (2004 – 2015)

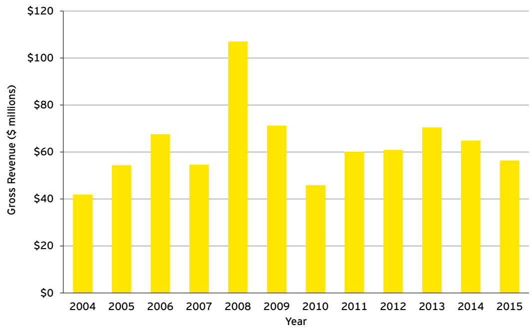


Figure 65: Classical Music – Total Attendance (2004 – 2015)

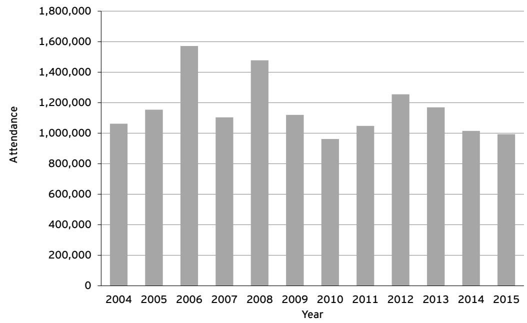


Table 43: Classical Music – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$41,875,659		1,062,071		$43.21	
2005	$54,395,768	29.9%	1,154,340	8.7%	$52.95	22.5%
2006	$67,568,915	24.2%	1,571,748	36.2%	$46.93	-11.4%
2007	$54,615,181	-19.2%	1,104,146	-29.8%	$55.85	19.0%
2008	$107,050,440	96.0%	1,478,281	33.9%	$84.81	51.9%
2009	$71,273,338	-33.4%	1,120,002	-24.2%	$74.01	-12.7%
2010	$45,882,050	-35.6%	962,132	-14.1%	$60.43	-18.3%
2011	$60,096,039	31.0%	1,048,115	8.9%	$68.82	13.9%
2012	$60,884,219	1.3%	1,254,963	19.7%	$60.34	-12.3%
2013	$70,481,841	15.8%	1,169,643	-6.8%	$73.18	21.3%
2014	$64,870,493	-8.0%	1,015,122	-13.2%	$75.05	2.6%
2015	$56,395,824	-13.1%	993,906	-2.1%	$71.50	-4.7%

State/Territory breakdown

Figure 66: Classical Music – Revenue by State/Territory

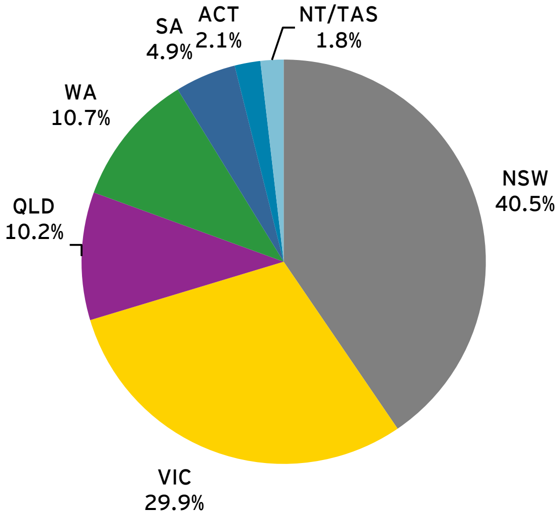


Table 44: Classical Music – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$22,822,871	40.5%	-0.1%
VIC	$16,842,115	29.9%	0.4%
QLD	$5,769,958	10.2%	1.0%
WA	$6,008,370	10.7%	-0.6%
SA	$2,751,481	4.9%	-0.7%
ACT	$1,160,376	2.1%	-0.1%
NT/TAS	$1,040,653	1.8%	-
Total	$56,395,824	100.0%	

Figure 67: Classical Music – Attendance by State/Territory

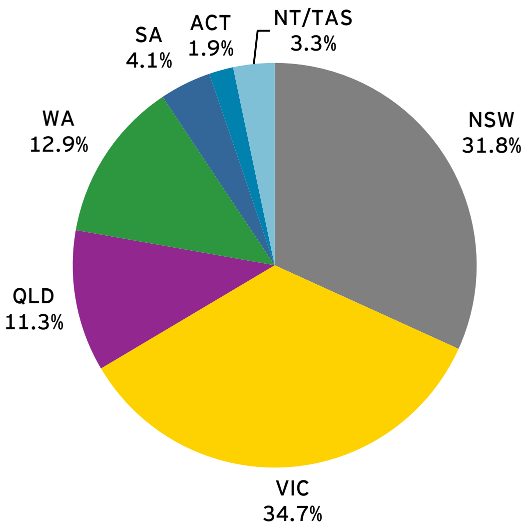


Table 45: Classical Music – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	315,867	31.8%	-3.2%
VIC	344,888	34.7%	2.2%
QLD	112,295	11.3%	-0.1%
WA	127,881	12.9%	1.5%
SA	40,881	4.1%	-0.8%
ACT	19,262	1.9%	-0.5%
NT/TAS	32,832	3.3%	-
Total	993,906	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Classical Music category drew attendance of 106,995 and generated $2.8 million in revenue which is quite sizeable given its high proportion of unpaid tickets (31%). With average attendance of 351 per performance and average revenue of $9,228 per performance, it is one of the higher yielding categories. The Townsville Civic Theatre (QLD), Illawarra Performing Arts Centre (NSW) and City Recital Hall (NSW) staged very successful performances and contributed a substantial amount of revenue for this category.

4.7 Comedy

Ticketing Survey data

National overview

The Comedy category experienced significant gains in attendance and revenue between 2014 and 2015, surpassing the peak revenue and attendance figures recorded in 2011 and 2012. Gross revenue increased by 21.6% from $45.15 million to $54.92 million. Total attendance rose by 3% while the average ticket price increased significantly by 18.9% from $50.55 to $60.11.

As in previous years, revenue and attendances in the Comedy category largely came from the *Melbourne International Comedy Festival* and *Sydney Comedy Festival*. Notable comedians that toured in 2015 included *Dylan Moran*, *Billy Connelly* and *Noel Fielding*, while local comedians *Carl Barron* and *Jim Jeffries* also had successful tours in 2015.

All states and territories saw an increase in both revenue and attendance, with the exception of Western Australia that experienced a decrease in revenue (17%) and attendance (37%), and New South Wales that experienced a decrease in attendance (29%) despite an increase in revenue (6%). The highest increases in revenue and attendance were recorded in South Australia, Tasmania and the ACT.

The Comedy category was introduced in 2009, prior to which most comedy events were likely to have been classified as either Theatre or Festivals (Single-Category) events.

Figure 68: Comedy – Gross Revenue (2004 – 2015)

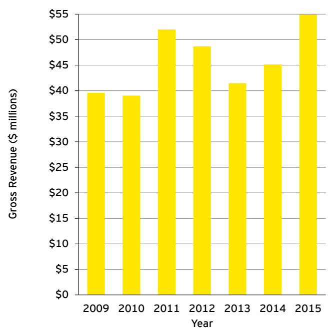


Figure 69: Comedy – Total Attendance (2004 – 2015)

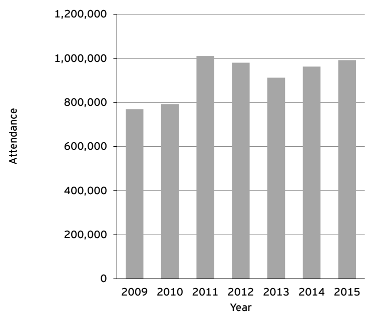


Table 46: Comedy – Revenue and Attendance (2009 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2009	$39,570,117	N/A	661,445	N/A	$44.07	N/A
2010	$39,048,164	-1.3%	792,713	19.8%	$51.53	16.9%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	-6.4%	981,035	-3.0%	$53.55	-2.8%
2013	$41,473,321	-14.8%	912,609	-7.0%	$48.82	-8.8%
2014	$45,154,726	8.9%	963,108	5.5%	$50.55	3.5%
2015	$54,924,280	21.6%	992,399	3.0%	$60.11	18.9%

State/Territory breakdown

Figure 70: Comedy – Revenue by State/Territory

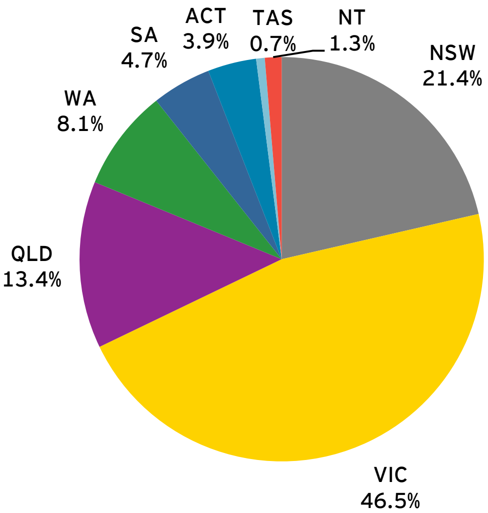


Table 47: Comedy – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$11,755,262	21.4%	-3.1%
VIC	$25,517,580	46.5%	1.7%
QLD	$7,338,913	13.4%	0.8%
WA	$4,460,181	8.1%	-3.8%
SA	$2,605,456	4.7%	3.1%
ACT	$2,135,656	3.9%	1.1%
TAS	$377,898	0.7%	0.2%
NT	$733,334	1.3%	-0.1%
Total	$54,924,280	100.0%	

Figure 71: Comedy – Attendance by State/Territory

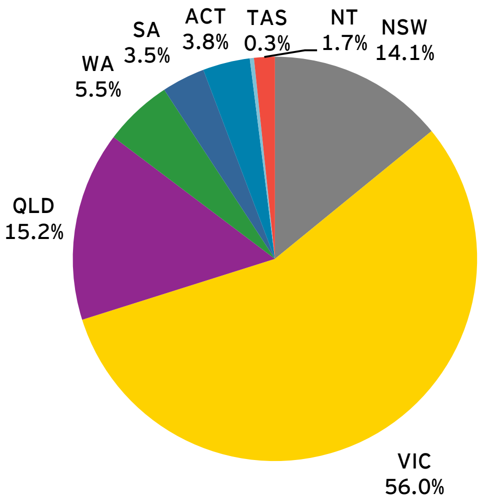


Table 48: Comedy– Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	139,997	14.1%	-6.2%
VIC	555,999	56.0%	2.8%
QLD	150,420	15.2%	3.1%
WA	54,421	5.5%	-3.4%
SA	34,368	3.5%	2.3%
ACT	37,433	3.8%	1.0%
TAS	3,297	0.3%	0.1%
NT	16,464	1.7%	0.3%
Total	992,399	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Comedy category drew attendance of 127,732 and generated $5.42 million in revenue. This category is ranked second in terms of industry revenue, due to a high average ticket price ($43.99) and few unpaid tickets (4% of total attendance). This category staged 298 performances, which generated average revenue of $18,185 per performance due to a high average attendance rate of 429 per performance. The *Melbourne International Comedy Festival: Roadshow 2015* most likely contributed significantly to this category. Regional and metropolitan venues generated the vast majority of revenue and attendance for this category. Notable venues include Civic Theatre (NSW) and Geelong Performing Arts Centre (VIC). Amongst Key Organisations, companies in Western Australia were the sole contributor to this category.

4.8 Contemporary Music

Ticketing Survey data

National overview

In 2015, the Contemporary Music category experienced a decline in gross revenue, falling by 21% from $604.96 million to $447.90 million. The fall in gross revenue can be explained by the 13% fall in attendance and 10.4% decrease in the average ticket price.

Despite the generally weak result, the Contemporary Music category continues to be the biggest in the Live Performance Industry, commanding 34.0% of revenue and 30.2% of attendance of the live performance industry's share. Comparatively, in 2010 Contemporary Music commanded 49.6% of revenue and 40.8% of attendance of the live performance industry's share. However, the annual variability of this category strongly reflects the number of big-name international artists which tour in any given year, particularly the number of stadium tours. These figures do not include music festivals, which are categorised under Festivals (Single-Category).

Successful tours by *Fleetwood Mac, AC/DC, Ed Sheeran,* and the *Foo Fighters* contributed significantly to the revenue and attendance in this category. However, there were significant declines in the Contemporary Music category, with performances in 2015 unable to match the growth recorded in the previous two years. Major international acts, such as *Katy Perry*, *Bruce Springsteen*, *Eminem* and *Bruno Mars*, whose successful national tours were a contributing factor to the high revenue and attendance results recorded in 2014, did not return in 2015.

All states experienced negative growth with the exception of the Northern Territory that experienced a slight increase in revenue (8%) despite a significant decline in attendance (58%).

Figure 72: Contemporary Music – Gross Revenue (2004 – 2015)

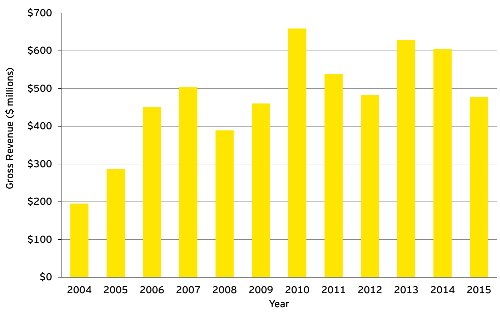


Figure 73: Contemporary Music – Total Attendance (2004 – 2015)

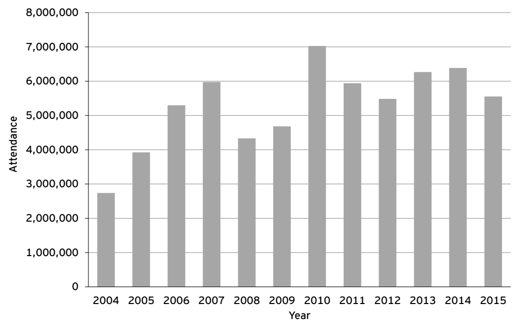


Table 49: Contemporary Music – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$195,058,791		2,737,873		$77.09	
2005	$287,201,319	47.2%	3,924,276	43.3%	$83.37	8.1%
2006	$450,855,531	57.0%	5,295,988	35.0%	$92.78	11.3%
2007	$503,240,419	11.6%	5,975,561	12.8%	$90.49	-2.5%
2008	$389,160,746	-22.7%	4,330,620	-27.5%	$101.35	12.0%
2009	$460,443,027	18.3%	4,682,805	8.1%	$108.61	7.2%
2010	$659,102,048	43.1%	7,028,235	50.1%	$102.78	-5.4%
2011	$539,274,481	-18.2%	5,939,618	-15.5%	$103.45	0.6%
2012	$482,180,550	-10.6%	5,484,257	-7.7%	$100.27	-3.1%
2013	$628,130,146	30.3%	6,266,137	14.3%	$110.50	10.2%
2014	$604,963,041	-3.7%	6,386,058	1.9%	$107.60	-2.6%
2015	$477,904,944	-21.0%	5,554,811	-13.0%	$96.38	-10.4%

State/Territory breakdown

Figure 74: Contemporary Music – Revenue by State/Territory

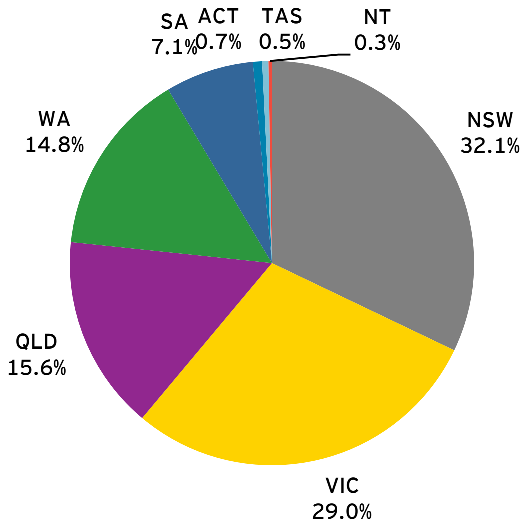


Table 50: Contemporary Music – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$153,403,848	32.1%	0.2%
VIC	$138,570,682	29.0%	-1.2%
QLD	$74,375,250	15.6%	1.2%
WA	$70,568,308	14.8%	0.2%
SA	$33,761,828	7.1%	-0.5%
ACT	$3,508,754	0.7%	-0.1%
TAS	$2,416,213	0.5%	0.1%
NT	$1,300,061	0.3%	0.1%
Total	$477,904,944	100.0%	

Figure 75: Contemporary Music– Attendance by State/Territory

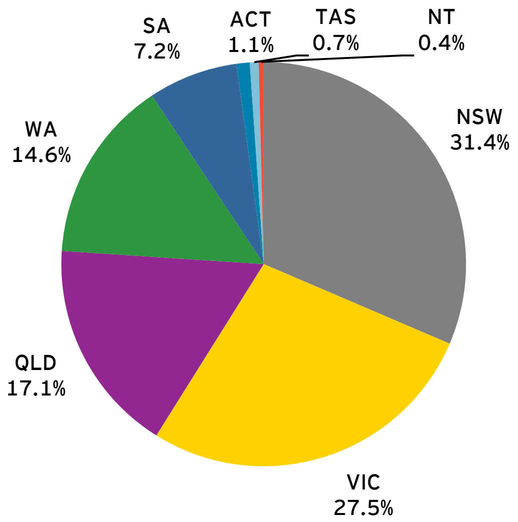


Table 51: Contemporary Music – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	1,746,399	31.4%	-1.5%
VIC	1,525,481	27.5%	-1.0%
QLD	951,698	17.1%	1.9%
WA	813,321	14.6%	0.9%
SA	398,307	7.2%	0.4%
ACT	58,601	1.1%	-0.2%
TAS	39,133	0.7%	0.0%
NT	21,871	0.4%	-0.4%
Total	5,554,811	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Contemporary Music category drew attendance of 312,632 and generated revenue of $13.05 million. This made it the biggest category of the supplementary data in terms of revenue and attendance. Average ticket prices in this category ($48.08) are also substantially higher than the industry average ($37.43). Higher average ticket prices are also reflected for Contemporary Music in the primary Ticketing Survey data. Contemporary music staged a total of 1,018 performances. On average, each performance drew attendance of 307 and generated revenue of $12,817. Regional and metropolitan venues generated the vast majority of revenue and attendance for this category contributing 97% to total revenue. Notable venues include Empire Theatre (QLD), Civic Theatre (NSW) and Geelong Performing Arts Centre (VIC).

4.9 Festivals (Multi-Category)*

Ticketing Survey data

National overview

In the period 2014 to 2015, Festivals (Multi-Category) increased in terms of revenue and attendance. Gross revenue increased by 17.1% from $47.81 million to $55.97 million. The increase in revenue was derived from an increase in total attendance of 16.8% and the average ticket price which increased from $48.41 in 2014 to $56.69 in 2015, an increase of 17.1%.

The increase for Festivals (Multi-Category) was in part due to the strong growth in attendance and revenue at the *Adelaide Fringe Festival* and sustained growth of the *Falls Music & Arts Festival* in Victoria, New South Wales and Tasmania. Other major events in this category in 2015 included the annual *Sydney Festival*, *Brisbane Festival*, *Perth International Arts Festival* and *Melbourne Festival*. Significant increases in growth were experienced by Victoria with revenue increasing by 121% and attendance by 336%. The significant increase in Victoria is partially due to the success of the *Falls Music and Arts Festival*. In Queensland revenue rose by 77% and attendance by 37%, partially due to the growth of *Brisbane Festival*.

Tasmania experienced an increase in revenue (17%) and attendance (60%), in part due to the biennial *Tasmanian International Arts Festival* taking place in 2015. Notable declines were experienced in the ACT with revenue and attendance falling by 94% and 91% respectively, and in New South Wales with revenue and attendance declining by 30% and 15%.

Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

Figure 76: Festivals (Multi-Category) – Gross Revenue (2004 – 2015)

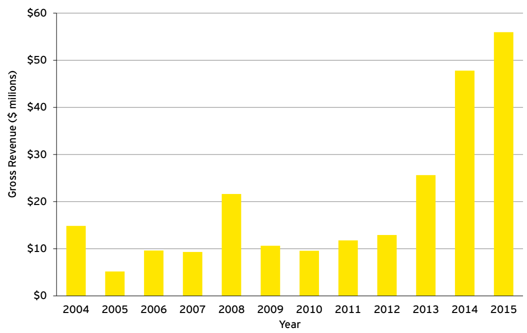


Figure 77: Festivals (Multi-Category) – Total Attendance (2004 – 2015)

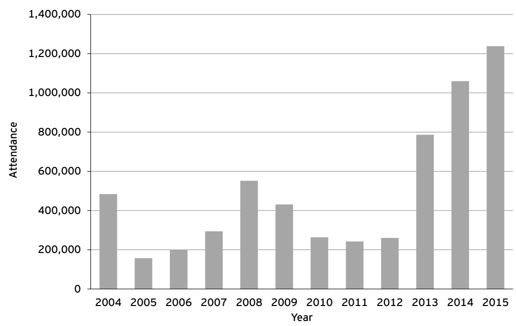


Table 52: Festivals (Multi-Category) – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$14,842,476		483,858		$32.26	
2005	$5,170,934	-65.2%	157,228	-67.5%	$39.13	21.3%
2006	$9,633,454	86.3%	201,711	28.3%	$56.72	44.9%
2007	$9,318,441	-3.3%	294,296	45.9%	$44.09	-22.3%
2008	$21,615,824	132.0%	551,810	87.5%	$52.11	18.2%
2009	$10,642,917	-50.8%	431,061	-21.9%	$33.60	-35.5%
2010	$9,570,915	-10.1%	263,464	-38.9%	$43.12	28.3%
2011	$11,777,244	23.1%	242,222	-8.1%	$57.02	32.2%
2012	$12,916,787	9.7%	260,623	7.6%	$59.58	4.5%
2013	$25,622,029	98.4%	786,530	201.8%	$34.59	-41.9%
2014	$47,805,136	86.6%	1,059,806	34.7%	$48.41	39.9%
2015	$55,967,934	17.1%	1,238,325	16.8%	$56.69	17.1%

Note: The significant increases for Festivals (Multi-Category) between 2012 and 2013 can be largely explained by the first time inclusion of data for Adelaide Fringe and Perth's *Fringe World* festivals in 2013.

State/Territory breakdown

Figure 78: Festivals (Multi-Category) – Revenue by State/Territory

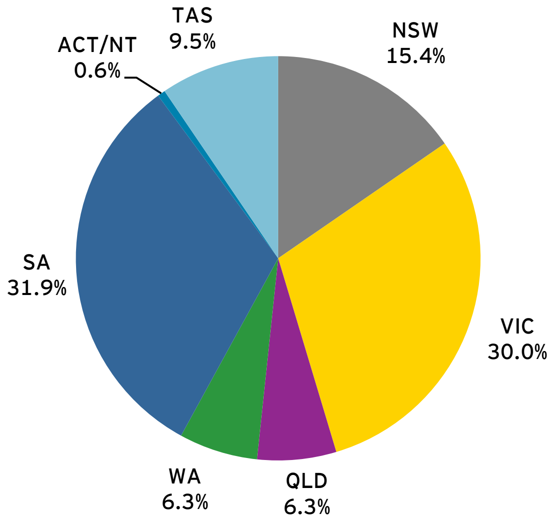


Table 53: Festivals (Multi-Category) – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$8,610,964	15.4%	-10.5%
VIC	$16,776,310	30.0%	14.1%
QLD	$3,532,292	6.3%	2.1%
WA*	$3,523,836	6.3%	-3.1%
SA	$17,862,734	31.9%	-2.8%
ACT/NT	$347,173	0.6%	-
TAS	$5,314,625	9.5%	0.0%
Total	$55,967,934	100.0%	

Figure 79: Festivals (Multi-Category) – Attendance by State/Territory

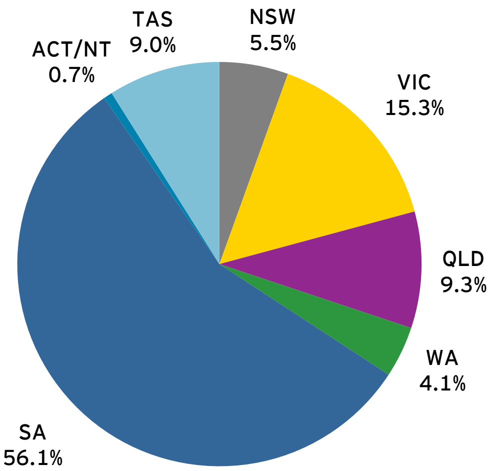


Table 54: Festivals (Multi-Category) – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	68,124	5.5%	-2.0%
VIC	189,550	15.3%	11.2%
QLD	115,329	9.3%	1.4%
WA*	50,711	4.1%	-12.9%
SA	694,993	56.1%	0.1%
ACT/NT	8,722	0.7%	-
TAS	110,896	9.0%	2.4%
Total	1,238,325	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The category attracted 39,014 attendees and generated $622,814 in revenue. The slightly weaker revenue result is due to a large percentage of unpaid tickets (43.0% of total attendance) and lower than average ticket prices ($28.11). This category however had high average attendance (549) and revenue ($8,772) per performance. Regional and metropolitan venues generated the majority of revenue and attendance for this category generating 94% of total revenue, with festivals held at City Recital Hall (NSW) and Riverside Theatres (NSW). Key Organisations in New South Wales also made a notable contribution to this category, including performances such as *Day for Night* by The Performance Space.

* Note: This report does not include 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015.

4.10 Festivals (Single-Category)

Ticketing Survey data

National overview

In 2015, the Festivals (Single-Category) experienced a decline in gross revenue, falling by 17.3% from $129.21 million to $106.83 million. The fall in gross revenue can be explained in part by the 14% fall in the average ticket price, which fell from $136.91 to $117.72. Attendance increased by 1.5% in 2015. This category has the highest average ticket price in the industry.

The above changes can largely be explained by the cancellation of the festival *Big Day Out* in 2015. The annual festival has been running from 1999 to 2014 in Sydney, Melbourne, Adelaide, Perth and the Gold Coast and its cancellation impacted significantly on total revenue and attendance. Major festivals that contributed to revenue and attendance growth in this category in 2015 included *Splendour in the Grass*, *Bluesfest*, *Future Music Festival*, *Stereosonic*, *Groovin' the Moo and St. Jerome's Laneway Festival*.

All states experienced negative growth in this category, with the exception of New South Wales that experienced slight growth in revenue (2%) and attendance (25%), and South Australia that experienced a significant increase in revenue (68%) and a slight increase in attendance (6%).

It is worth noting that data for this category is likely to underestimate the size of Australia's music festival market, particularly boutique music festivals, as not all events provide data to the Survey.

Figure 80: Festivals (Single-Category) – Gross Revenue (2004 – 2015)

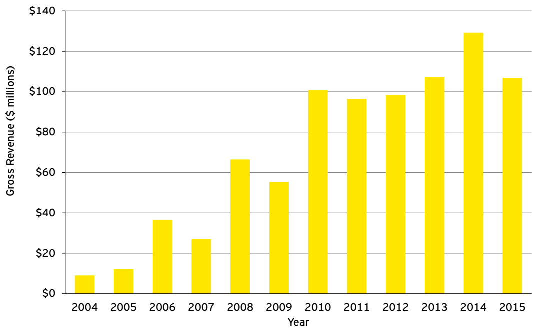


Figure 81: Festivals (Single-Category) – Total Attendance (2004 – 2015)

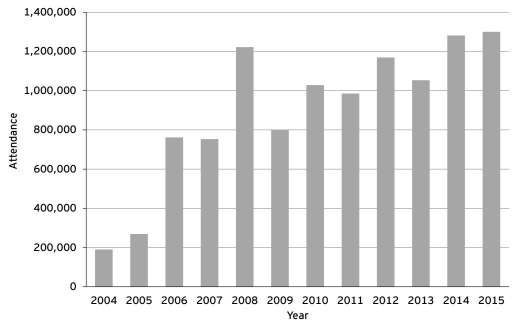


Table 55: Festivals (Single-Category) – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$9,015,128		190,260		$54.69	
2005	$12,128,384	34.5%	269,208	41.5%	$63.05	15.3%
2006	$36,576,877	201.6%	761,920	183.0%	$50.93	-19.2%
2007	$26,972,082	-26.3%	753,247	-1.1%	$39.00	-23.4%
2008	$66,429,106	146.3%	1,221,972	62.2%	$60.91	56.2%
2009	$55,275,589	-16.8%	800,145	-34.5%	$81.19	33.3%
2010	$100,918,020	82.6%	1,028,170	28.5%	$119.39	47.1%
2011	$96,453,486	-4.4%	984,946	-4.2%	$138.97	16.4%
2012	$98,365,490	2.0%	1,169,233	18.7%	$128.71	-7.4%
2013	$107,367,780	9.2%	1,053,419	-9.9%	$130.46	1.4%
2014	$129,210,058	20.3%	1,281,339	21.6%	$136.91	4.9%
2015	$106,825,241	-17.3%	1,300,025	1.5%	$117.72	-14.0%

State/Territory breakdown

Figure 82: Festivals (Single-Category) – Revenue by State/Territory

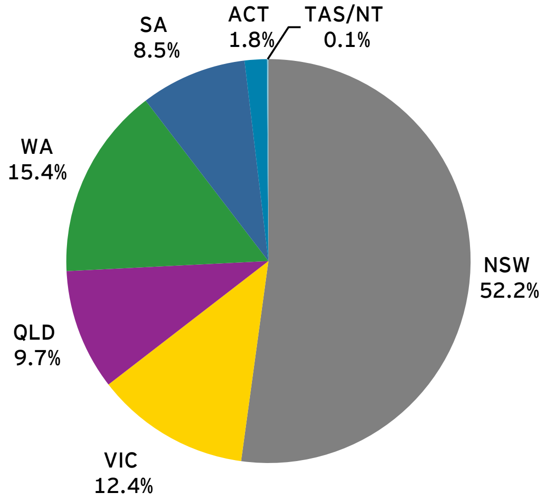


Table 56: Festivals (Single-Category) – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$55,720,532	52.2%	9.9%
VIC	$13,215,157	12.4%	-6.1%
QLD	$10,334,820	9.7%	-6.0%
WA	$16,457,217	15.4%	-2.8%
SA	$9,078,014	8.5%	4.3%
ACT	$1,895,205	1.8%	0.6%
TAS/NT	$124,295	0.1%	-
Total	$106,825,241	100.0%	

Figure 83: Festivals (Single-Category) – Attendance by State/Territory

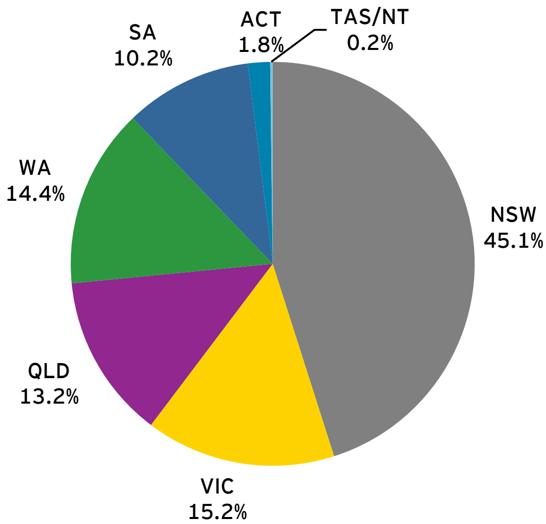


Table 57: Festivals (Single-Category) – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	586,084	45.1%	8.4%
VIC	197,762	15.2%	-1.4%
QLD	171,136	13.2%	-4.4%
WA	186,709	14.4%	-3.4%
SA	132,600	10.2%	0.4%
ACT	23,135	1.8%	0.4%
TAS/NT	2,599	0.2%	-
Total	1,300,025	100%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

Festivals (Single-Category) attracted 36,324 attendances and generated $1.09 million in revenue in 2015. Although this category had a slightly higher than average ticket price ($44.63) it staged 348 performances, well below the industry average of 645. Key Organisations generated 64% of total revenue with significant contributions from ACT and Victoria including festivals such as the *Canberra International Music Festival* and the *Wangaratta Jazz & Blues Festival*. City Recital Hall (NSW) also significantly contributed to revenue and attendance among metropolitan and regional venues.

4.11 Musical Theatre

Ticketing Survey data

National overview

Between 2014 and 2015, the Musical Theatre category experienced an increase in revenue and attendance. Gross revenue grew by 4.5% from $320.34 million to $334.87 million, while total attendance grew by 2.4%. Growth in revenue coincided with an increase in average ticket price by 2.3% from $105.70 to $108.13.

Major events in the Musical Theatre category in 2015 included *Anything Goes*, *Dirty Dancing*, *Les Misérables*, *The Lion King*, *Strictly Ballroom*, *Hugh Jackman Live* and *Wicked*. Significant growth was experienced in Western Australia with an increase in revenue (48%) and attendance (13%). *Wicked* and *Dirty Dancing* had seasons in Perth in 2015, and *The Lion King* had a season in Perth for the first time in its 20 year run. Queensland experienced an increase in revenue (19%) and attendance (23%), as did Victoria with stable growth in revenue (12%) and attendance (6%). Revenue and attendance grew significantly in the ACT due primarily to the strong performance of *Sweet Charity*. South Australia saw declining revenue (34%) and attendance (44%) in this category, as did New South Wales experience a decline in revenue (10%) and attendance (5%).

Figure 84: Musical Theatre – Gross Revenue (2004 – 2015)

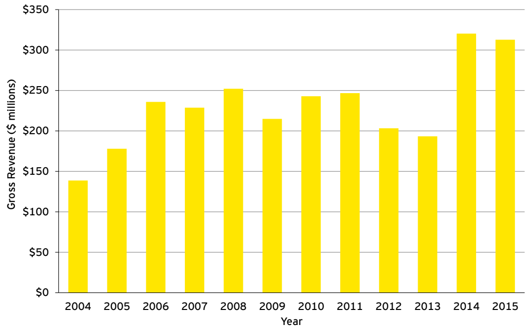


Figure 85: Musical Theatre – Total Attendance (2004 – 2015)

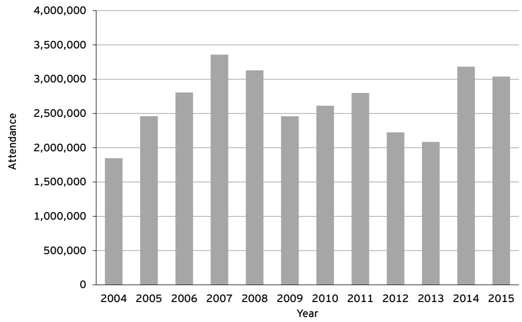


Table 58: Musical Theatre – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$138,718,880		1,847,505		$76.34	
2005	$178,032,172	28.3%	2,460,314	33.2%	$76.01	-0.4%
2006	$235,922,584	32.5%	2,806,153	14.1%	$86.18	13.4%
2007	$228,854,618	-3.0%	3,358,727	19.7%	$70.50	-18.2%
2008	$252,199,267	10.2%	3,129,729	-6.8%	$89.23	26.6%
2009	$214,959,848	-14.8%	2,458,212	-21.5%	$93.54	4.8%
2010	$242,897,364	13.0%	2,612,507	6.3%	$98.84	5.7%
2011	$246,792,376	1.6%	2,799,918	7.2%	$92.79	-6.1%
2012	$203,278,606	-17.6%	2,224,068	-20.6%	$97.08	4.6%
2013	$193,389,763	-4.9%	2,085,131	-6.2%	$100.94	4.0%
2014	$320,342,329	65.6%	3,182,478	52.6%	$105.70	4.7%
2015	$334,869,038	4.5%	3,258,734	2.4%	$108.13	2.3%

State/Territory breakdown

Figure 86: Musical Theatre– Revenue by State/Territory

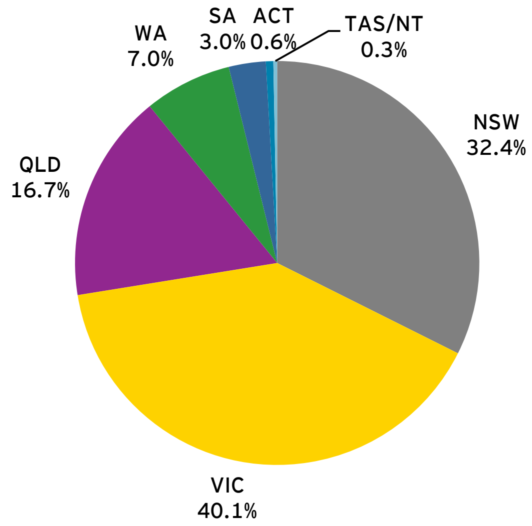


Table 59: Musical Theatre – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$108,434,253	32.4%	-5.1%
VIC	$134,201,517	40.1%	2.5%
QLD	$55,866,357	16.7%	2.0%
WA	$23,451,240	7.0%	2.1%
SA	$9,914,302	3.0%	-1.7%
ACT	$1,988,000	0.6%	0.5%
TAS/NT	$1,013,370	0.3%	-
Total	$334,869,038	100.0%	

Figure 87: Musical Theatre – Attendance by State/Territory

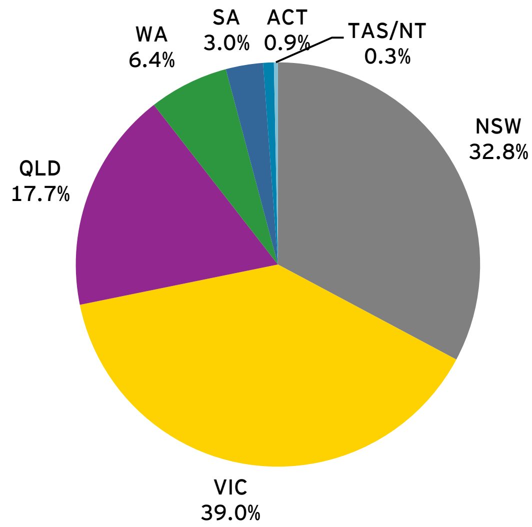


Table 60: Musical Theatre – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	1,068,617	32.8%	-2.7%
VIC	1,271,244	39.0%	1.2%
QLD	576,132	17.7%	2.9%
WA	207,503	6.4%	0.6%
SA	97,011	3.0%	-2.5%
ACT	27,812	0.9%	0.7%
TAS/NT	10,415	0.3%	-
Total	$3,258,734	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Musical Theatre category drew attendance of 121,447 and generated revenue of $3.58 million in 2015. Average ticket prices in this category ($37.76) aligns with the industry average of ($37.43). Musical Theatre staged a total of 418 performances with each performance drawing an average attendance of 291 and average revenue of $8,576 per performance. Regional and metropolitan venues generated 99% of total revenue for this category. Notable venues include Illawarra Performing Arts Centre with performances of Helpmann Award-winning musical *Sweet Charity*.

4.12 Opera

Ticketing Survey data

National overview

In 2015, the Opera category experienced a slight decrease in revenue and an increase in total attendances. Gross revenue declined by 2.6% from $42.62 million to $41.51 million, while total attendance grew by 12%. The decrease in average ticket price by 2.8% from $124.92 to $121.43 helps to explain the decrease in revenue despite the growth in attendance.

The majority of ticket sales and thus revenue came from productions staged by AMPAG companies. Major companies include Opera Australia, Opera Queensland, West Australian Opera Company and The State Opera of South Australia. Notably, Opera Australia staged its regular spring season in Melbourne during 2015, which included *The Marriage of Figaro and The Elixir of Love*. Other major performances by Opera Australia included *Opera on the Harbour*, *Madama Butterfly* and *Turandot*.

Slight increases in growth were experienced in New South Wales with revenue increasing by 8% and attendance by 21%, while in South Australia revenue and attendance grew by 12% and 15% respectively. Western Australia saw a significant increase in attendance (99%), but a decline in revenue of 19% which was predominately due to a significantly lower than average ticket price ($24.21) for shows staged by AMPAG companies in Western Australia throughout the year. All other states experienced negative growth in Opera, particularly Queensland where revenue (63%) and attendance (36%) both fell significantly.

Figure 88: Opera – Gross Revenue (2004 – 2015)

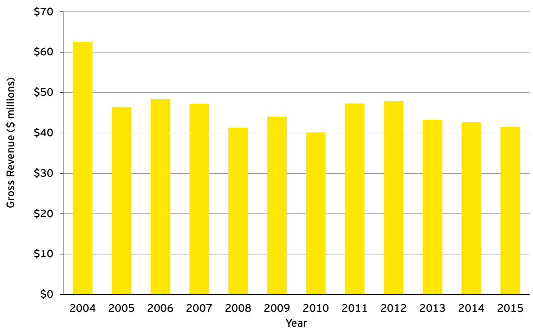


Figure 89: Opera – Total Attendance (2004 – 2015)

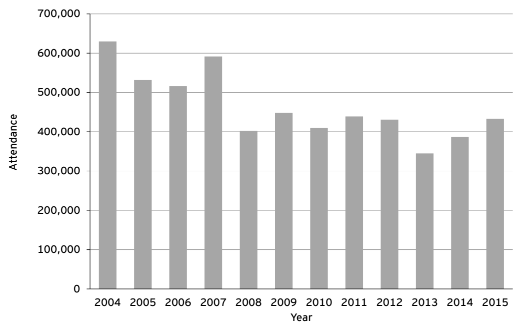


Table 61: Opera – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$62,562,433		629,808		$108.88	
2005	$46,390,544	-25.8%	531,595	-15.6%	$94.38	-13.3%
2006	$48,331,324	4.2%	515,927	-2.9%	$102.40	8.5%
2007	$47,249,031	-2.2%	591,605	14.7%	$85.28	-16.7%
2008	$41,316,885	-12.6%	402,549	-32.0%	$114.46	34.2%
2009	$44,044,027	6.6%	448,096	11.3%	$111.62	-2.5%
2010	$40,128,943	-8.9%	409,541	-8.6%	$112.86	1.1%
2011	$47,305,786	17.9%	439,041	7.2%	$124.66	10.5%
2012	$47,843,971	1.1%	430,904	-1.9%	$126.84	1.8%
2013	$43,283,705	-9.5%	344,761	-20.0%	$145.28	14.5%
2014	$42,620,749	-1.5%	386,927	12.2%	$124.92	-14.0%
2015	$41,505,346	-2.6%	433,198	12.0%	$121.43	-2.8%

State/Territory breakdown

Figure 90: Opera – Revenue by State/Territory

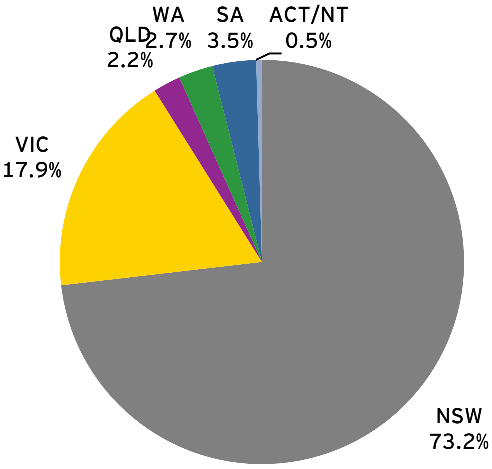


Table 62: Opera – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$30,363,572	73.2%	7.3%
VIC	$7,446,330	17.9%	-3.5%
QLD	$913,346	2.2%	-3.6%
WA	$1,141,310	2.7%	-0.5%
SA	$1,451,595	3.5%	0.5%
ACT/NT	$189,193	0.5%	-0.1%
TAS	-	-	-
Total	$41,505,346	100.0%	

Figure 91: Opera – Attendance by State/Territory

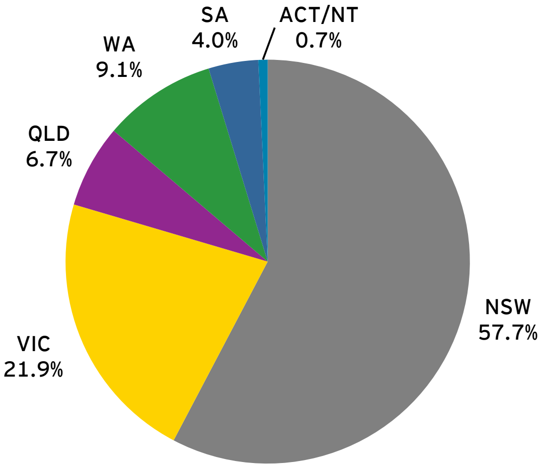


Table 63: Opera– Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	249,964	57.7%	4.3%
VIC	94,716	21.9%	-3.0%
QLD	28,824	6.7%	-4.9%
WA	39,229	9.1%	4.0%
SA	17,255	4.0%	0.1%
ACT/NT	3,210	0.7%	-0.3%
TAS	-	-	-
Total	433,198	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Opera category drew attendance of 20,147 and generated $755,155 in revenue, equating to 1.7% and 1.3% of total revenue and attendance respectively. While it is one of the smallest categories in this survey, opera performances have the highest average ticket prices ($69.79) across the industry. However, 46% of tickets in this category were unpaid, a proportion which is well above the industry average of 26%. Regional and metropolitan venues generated 97% of revenue for this category. Notable venues include Bathurst Memorial Entertainment Centre (NSW), City Recital Hall (NSW) and Orange Civic Theatre (NSW).

4.13 Special Events

Ticketing Survey data

National overview

As with previous years, the Special Events category is particularly variable as it is highly dependent on whether performances that cannot be classified into other categories take place. Revenue in the Special Events category increased by 85.2% from $10.98 million to $20.34 million while total attendances grew more strongly, increasing by 164.7%. However there was a significant drop in the average ticket price, falling from $86.90 to $42.26, explaining why revenue growth was softer than growth in attendance.

The increase in this category can be explained by the aforementioned fluctuation in events. Major events in this category in 2015 included the *Doctor Who Symphonic Spectacular* which toured nationally in 2015 and the *Floriade Nightfest*.

Figure 92: Special Events– Gross Revenue (2004 – 2015)

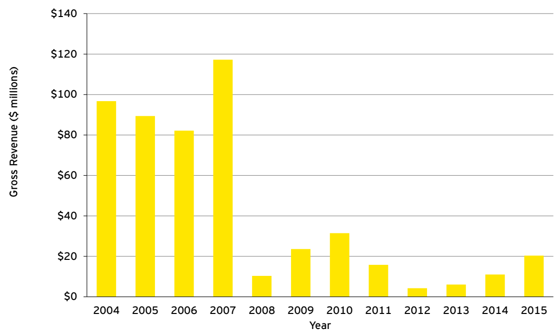


Figure 93: Special Events – Total Attendance (2004 – 2015)

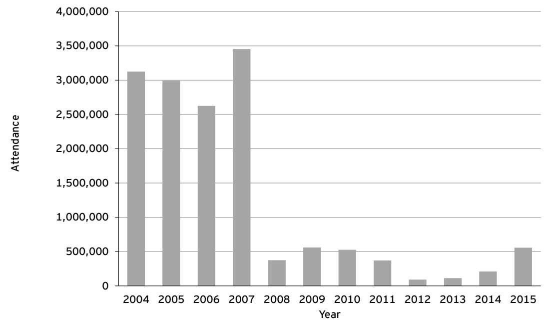


Table 64: Special Events – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$96,706,366		3,125,013		$45.43	
2005	$89,357,246	-7.6%	2,992,097	-4.3%	$31.50	-30.7%
2006	$82,143,879	-8.1%	2,625,779	-12.2%	$42.64	35.4%
2007	$117,203,892	42.7%	3,453,077	31.5%	$48.56	13.9%
2008	$10,324,979	-91.2%	374,623	-89.2%	$43.60	-10.2%
2009	$23,602,096	128.6%	559,434	49.3%	$67.79	55.5%
2010	$31,449,876	33.3%	526,503	-5.9%	$88.67	30.8%
2011	$15,799,946	-49.8%	370,239	-29.7%	$57.28	-35.4%
2012	$4,250,001	-73.1%	91,189	-75.4%	$57.58	0.5%
2013	$6,030,274	41.9%	113,294	24.2%	$73.18	27.1%
2014	$10,984,057	82.1%	210,390	85.7%	$86.90	18.8%
2015	$20,340,607	85.2%	556,914	164.7%	$42.26	-51.4%

State/Territory breakdown

Figure 94: Special Events – Revenue by State/Territory

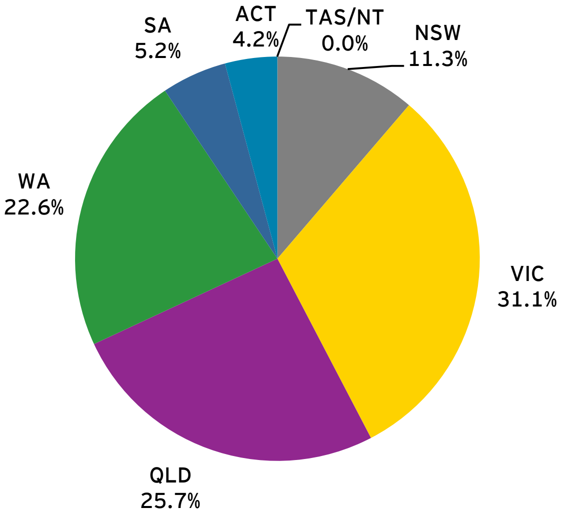


Table 65: Special Events – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$2,292,445	11.3%	-25.3%
VIC	$6,321,899	31.1%	13.7%
QLD	$5,230,352	25.7%	15.1%
WA	$4,588,318	22.6%	-1.3%
SA	$1,058,270	5.2%	-2.9%
ACT	$848,264	4.2%	2.4%
TAS/NT	$1,060	0.0%	-
Total	$20,340,607	100.0%	

Figure 95: Special Events – Attendance by State/Territory

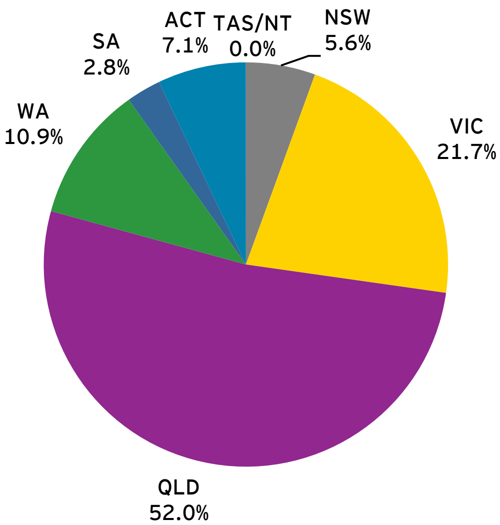


Table 66: Special Events – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	30,917	5.6%	-39.4%
VIC	120,817	21.7%	10.8%
QLD	289,679	52.0%	40.6%
WA	60,734	10.9%	-13.3%
SA	15,328	2.8%	-1.1%
ACT	39,405	7.1%	6.3%
TAS/NT	34	0.0%	-
Total	$556,914	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Special Events category drew attendance of 194,373 and generated revenue of $2.27 million in 2015. Although the average ticket price ($46.21) is higher than the industry average, the proportion of zero-priced tickets (75%) is significantly above the industry average (26%). This most likely reflects a large proportion of free events held in this category. Special Events is particularly variable as it is highly dependent on whether performances take place that cannot be classified into other categories. Although Key Organisations only generated 5% of total revenue, their share of attendance was 76% which is a direct consequence of the high proportion of zero-priced tickets issued.

4.14 Theatre

Ticketing Survey data

National overview

The Theatre category experienced significant decline in revenue and attendance in 2015, with gross revenue falling from $99.71 million to $56.83 million, a decrease of 43%. Total attendance decreased by 24.5%, while the average ticket price fell by 23% from $73.83 to $56.81.

The Theatre category experienced some of the larger declines in both revenue and attendance. Although the subsidised sector experienced strong growth through increased revenue and attendance at AMPAG events, there was a significant decline in the number of commercial theatrical touring productions throughout the year. Large commercial productions, such as *Mrs Brown's Boys* which performed in every state except the Northern Territory and generated strong revenue and attendance in 2014, did not return in 2015, which was a contributing factor to the decline in this category.

All states experienced negative growth in this category, with the most significant declines in revenue and attendance experienced in Western Australia with a decline in revenue (80%) and attendance (67%). New South Wales experienced a slight increase in attendance (1%) despite declining revenue (12%).

Figure 96: Theatre – Gross Revenue (2004 – 2015)

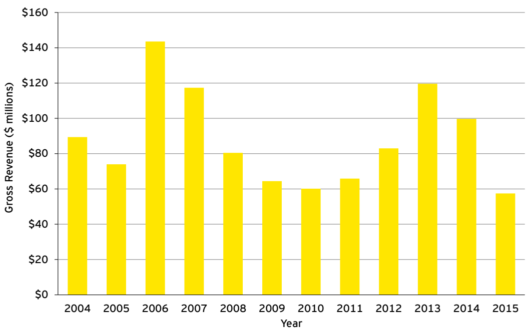


Figure 97: Theatre – Total Attendance (2004 – 2015)

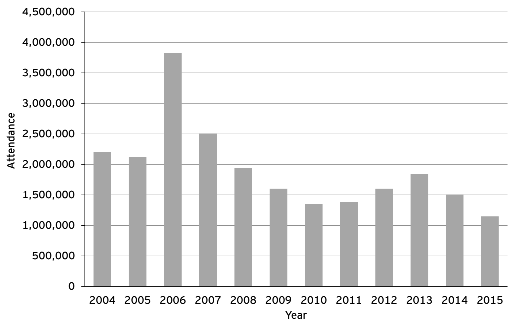


Table 67: Theatre – Revenue and Attendance (2004 – 2015)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$89,417,616		2,202,812		$43.87	
2005	$73,988,892	-17.3%	2,117,854	-3.9%	$38.04	-13.3%
2006	$143,564,232	94.0%	3,828,254	80.8%	$39.42	3.6%
2007	$117,382,525	-18.2%	2,505,458	-34.6%	$50.42	27.9%
2008	$80,476,671	-31.4%	1,944,188	-22.4%	$46.92	-6.9%
2009	$76,192,784	-5.3%	1,710,204	-12.0%	$51.34	9.4%
2010	$60,151,139	-21.1%	1,354,336	-20.8%	$51.47	0.2%
2011	$65,880,712	9.5%	1,380,622	1.9%	$56.14	9.1%
2012	$82,973,259	25.9%	1,601,425	16.0%	$59.86	6.6%
2013	$119,647,414	44.2%	1,842,177	15.0%	$72.88	21.8%
2014	$99,714,555	-16.7%	1,504,367	-18.3%	$73.83	1.3%
2015	$56,831,724	-43.0%	1,135,128	-24.5%	$56.81	-23.0%

State/Territory breakdown

Figure 98: Theatre – Revenue by State/Territory

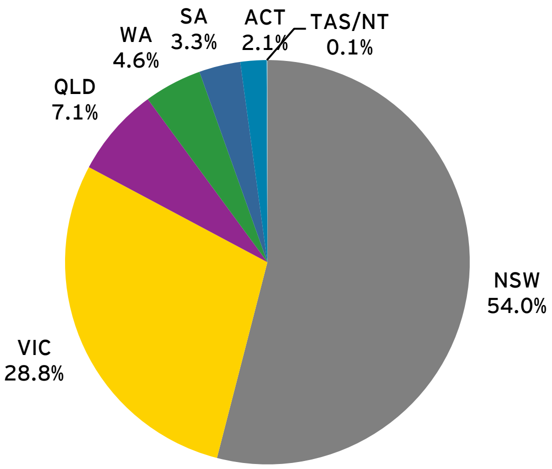


Table 68: Theatre – Revenue by State/Territory

State/ Territory	Revenue	Proportion	Industry Share Change from 2014
NSW	$30,694,830	54.0%	18.9%
VIC	$16,358,722	28.8%	-2.1%
QLD	$4,055,671	7.1%	-4.8%
WA	$2,623,132	4.6%	-8.5%
SA	$1,879,704	3.3%	-2.6%
ACT	$1,185,331	2.1%	0.2%
TAS/NT	$34,333	0.1%	-
Total	$56,831,724	100.0%	

Figure 99: Theatre – Attendance by State/Territory

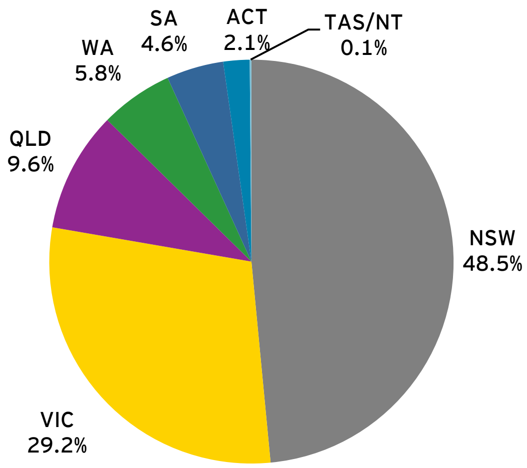


Table 69: Theatre – Attendance by State/Territory

State/ Territory	Attendance	Proportion	Industry Share Change from 2014
NSW	550,381	48.5%	12.3%
VIC	331,854	29.2%	-0.5%
QLD	109,447	9.6%	-2.9%
WA	66,187	5.8%	-7.5%
SA	51,844	4.6%	-1.4%
ACT	23,888	2.1%	0.5%
TAS/NT	1,527	0.1%	-
Total	1,135,128	100.0%	

Supplementary data

(Australia Council for the Arts (Key Organisations) and Australian Performing Arts Centres Association (APACA) members)

The Theatre category drew attendance of 213,398 and generated $5.01 million in revenue, making it the third highest grossing category in terms of revenue and attendance. This category staged the highest number of performances (2,511), which account for 32.5% of the total number of performances staged. However, average revenue per performance ($1,995) and average attendance per performance (85) are well below the industry averages. Key Organisations in Queensland, Victoria and Western Australia made the most significant contributions to this category generating 75% of total revenue. Major productions include *A Midsummer Night's Dream* by La Boite Theatre Company and *Caress Ache* by Griffin Theatre Company.

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Survey Participants- Supplementary data

Australian Performing Arts Centres Association (APACA)

- Albury Entertainment Centre (NSW)
- Bathurst Memorial Entertainment Centre (NSW)
- Burnie Arts & Function Centre (TAS)
- Cairns Civic Theatre (QLD)
- City Recital Hall (NSW)
- Civic Theatre Newcastle (NSW)
- Capital Venues and Events (VIC)
- Chaffey Theatre (SA)
- Devonport Entertainment & Convention Centre (TAS)
- Dubbo Regional Theatre (NSW)
- Drum Theatre (VIC)
- Empire Theatre (QLD)
- The Events Centre Caloundra (QLD)
- Frankston Arts Centre (VIC)
- Geelong Performing Arts Centre (VIC)
- Griffith Regional Theatre (NSW)
- Her Majesty's Ballarat (VIC)
- Hopgood Theatre (SA)
- Illawarra Performing Arts Centre (NSW)
- The Joan Sutherland Performing Arts Centre (NSW)
- Judith Wright Centre of Contemporary Arts (QLD)
- Lismore City Hall (NSW)
- Logan Entertainment Centre (QLD)
- Laycock Street Community Theatre (NSW)
- Malthouse Theatre (VIC)
- Mackay Entertainment & Convention Centre (QLD)
- Mandurah Performing Arts Centre (WA)
- Manning Entertainment Centre (NSW)
- Mildura Arts Centre (VIC)
- Mount Isa Civic Centre (QLD)
- Middleback Art Centre (SA)
- Northern Festival Centre (SA)
- Orange Civic Theatre (NSW)
- QUT Gardens Theatre (QLD)
- Riverside Theatres (NSW)
- Riverlinks, Shepparton (VIC)
- Shoalhaven Entertainment Centre (NSW)
- Southbank Theatre - Sumner and Lawler (VIC)
- Sir Robert Helpmann Theatre (SA)
- The Cube Wodonga (VIC)
- Theatre Royal (TAS)
- Townsville Civic Theatre (QLD)
- USQ Arts Theatre (QLD)
- University Theatres (WA)
- Wagga Wagga Civic Theatre (NSW)

Australia Council for the Arts (Key Organisations)

- Arena Theatre Company
- Australian Art Orchestra
- Australian Children's Performing Arts Co t/a Windmill Theatre Company
- Australian Dance Theatre
- Australian String Quartet
- Australian Theatre for Young People
- Back to Back Theatre
- BalletLab Association
- Barking Gecko Theatre Company
- Brink Productions
- Canberra Symphony Orchestra
- Chunky Move
- Circa
- Dance North
- Dancehouse
- Darwin Symphony Orchestra
- Ensemble Offspring
- Expressions Dance Company
- Force Majeure
- Gondwana Choirs
- Griffin Theatre Company
- Hot House Theatre Limited
- Ilbijerri Aboriginal and Torres Strait Islander Theatre Co-op
- Just Us Theatre Ensemble
- Kage Physical Theatre Association
- La Boite Theatre Company
- La Mama Theatre
- Legs On The Wall
- Lucy Guerin Association
- Milk Crate Theatre
- PACT Centre for Emerging Artists
- Patch Theatre Company
- Performing Arts Centre Society (The Blue Room Theatre)
- Performing Lines
- Polyglot Puppet Theatre
- Pro Musica (Canberra International Music Festival)
- Queensland Music Festival
- Ranters Theatre
- Red Stitch Actors Theatre
- Restless Dance Theatre
- Shaun Parker & Company
- Slingsby Theatre Company
- Snuff Puppets
- Somebody's Daughter Theatre Company
- Southern Cross Soloists Music
- Stalker Theatre
- Synergy & TaikOz
- Tasdance
- Terrapin Puppet Theatre
- The Black Arm Band
- The Performance Space
- The Song Company
- Tracks
- Urban Theatre Projects
- Wangaratta Festival of Jazz
- Yirra Yaakin Theatre Company

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