Live Performance Industry in Australia

2018 Ticket Attendance and Revenue Report

Live Performance Australia

Reliance Restricted

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The results of EY's work, including the assumptions and qualifications made are set out in this Report. The Report should be read in its entirety including the introductory chapters, the applicable scope of the work and any limitations. A reference to the Report includes any part of the Report. No further work has been undertaken by EY since the date of the Report to update it.

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Basis of our work and limitations

The information and analysis contained in this Report is based on ticketing data provided by Survey Participants as outlined in Appendix B of this Report. We have not independently verified, or accepted any responsibility or liability for independently verifying, any such information nor do we make any representation as to the accuracy or completeness of the information.

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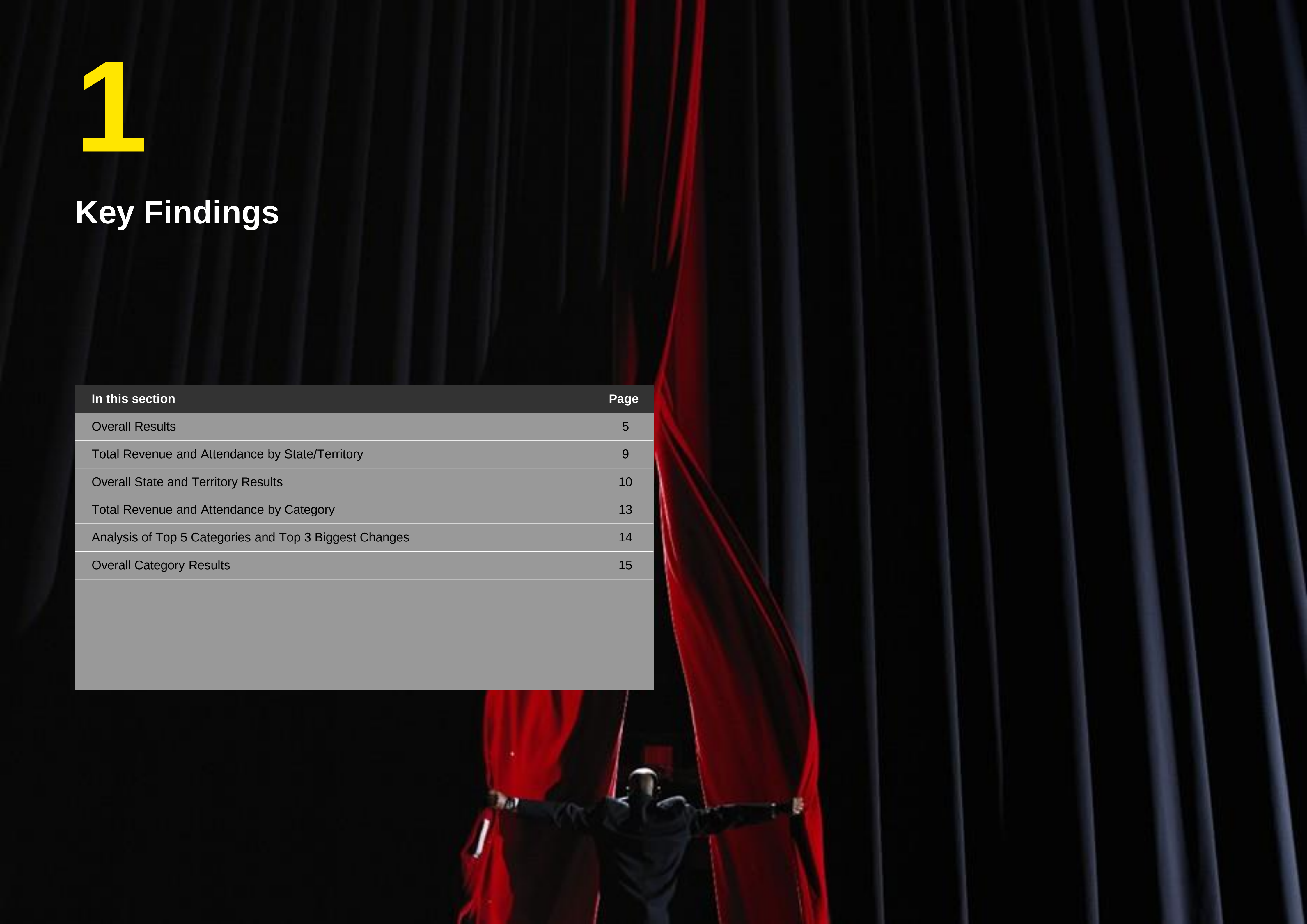

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Key Findings

1 Key Findings
Overall Results

Background

This report presents the findings of ticket attendances and revenue for the live performance industry for the 2018 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 the 2006 Report.

As in previous years, the 2018 Ticket Attendance and Revenue Report has captured ticket attendance and revenue data from ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies.

The 2018 Report also includes ticket attendance and revenue data from a selection of Performing Arts Connections (PAC) Australia members. Prior to 2017, this dataset was reported separately to the primary data and was referred to as "Supplementary" data. However, since 2017 the supplementary data is incorporated along with the main data and also presented under a separate section in this report to provide a greater representation of venues that self-ticket, particularly regional venues.

Industry Growth

- In 2018 (calendar year), the Australian live performance industry generated total ticket sales revenue of almost $2.2b, an increase of 14.8% from 2017, when ticket sales totalled $1.88b. This increase in revenue was a result of a 5.0% increase in the total number of paid tickets in 2018, coupled with an increase in the average ticket price by 9.3% from $90.59 to $99.03.
- Approximately 26.3m tickets were issued in 2018, representing an increase of 14.1% from 2017, when 23.0m tickets were issued. Of the 26.3m total tickets, the number of paid tickets issued was 21.8m (an increase from 20.8m tickets sold in 2017). The remaining 4.4m tickets issued in 2018 were complimentary, sponsor allocated and zero priced tickets.
- In 2018, the number of tickets issued, revenue generated and the average ticket price ($99.03) for live performance events was the highest recorded since LPA began publishing data in 2004. This was primarily driven by major international tours in the Contemporary Music category during the period, including Pink, Ed Sheeran and Bruno Mars; musicals such as *The Book of Mormon, Aladdin* and *Beautiful: The Carole King Musical*; and by festivals such as Splendour in the Grass and Adelaide Fringe.

Growth in 2018

$2.2b	**Revenue**	14.8%
26.3m	**No of Tickets issued**	14.1%

Growth in revenue and attendance is primarily impacted by major tours or events, particularly international tours, in the market in any given year.

Drivers of Growth

- New South Wales (NSW) generated the highest share of national live performance revenue (34.9%) and attendance (31.3%) in 2018, with Victoria being the second largest contributor in revenue (32.3%) and in attendance (30.5%). Combined, NSW and Victoria generated approximately 67.2% of Australia's live performance revenue and 61.8% of attendance in 2018.
- NSW experienced the highest growth in revenue (22.4%), closely followed by Queensland (20.2%). The highest growth in attendance was witnessed in Tasmania (67.1%), followed by Queensland (20.1%) and NSW (19.4%).
- Contemporary Music remains the largest category in the industry in 2018, representing a market share of 50.5% in revenue and 38.4% in attendance.
- Revenue growth in Special Events (337.9%), Comedy (72.5%), Contemporary Music (32.2%) and Festivals (Multi-Category) (26.2%) categories has driven growth in the live performance industry in 2018 as compared to 2017. This growth was partially offset by revenue declines in Circus and Physical Theatre (79.9%) and Musical Theatre (4.0%).

1 Key Findings
Overall Results

2018 Ticket Attendance and Revenue (2004 – 2018)

	Revenue		Attendance		Ticket price	
Year	**Revenue ($)**	**Growth (%)**	**Total Attendance***	**Growth (%)**	**Average Ticket Price ($)****	**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 ***	$1,413,208,686	(6.3%)	18,626,457	0.5%	$86.34	(5.7%)
2016	$1,430,399,693	1.2%	18,782,588	0.8%	$83.72	(3.0%)
2017	$1,884,141,882	31.7%	23,027,550	22.6%	$90.59	8.2%
2018	$2,162,425,399	14.8%	26,268,788	14.1%	$99.03	9.3%

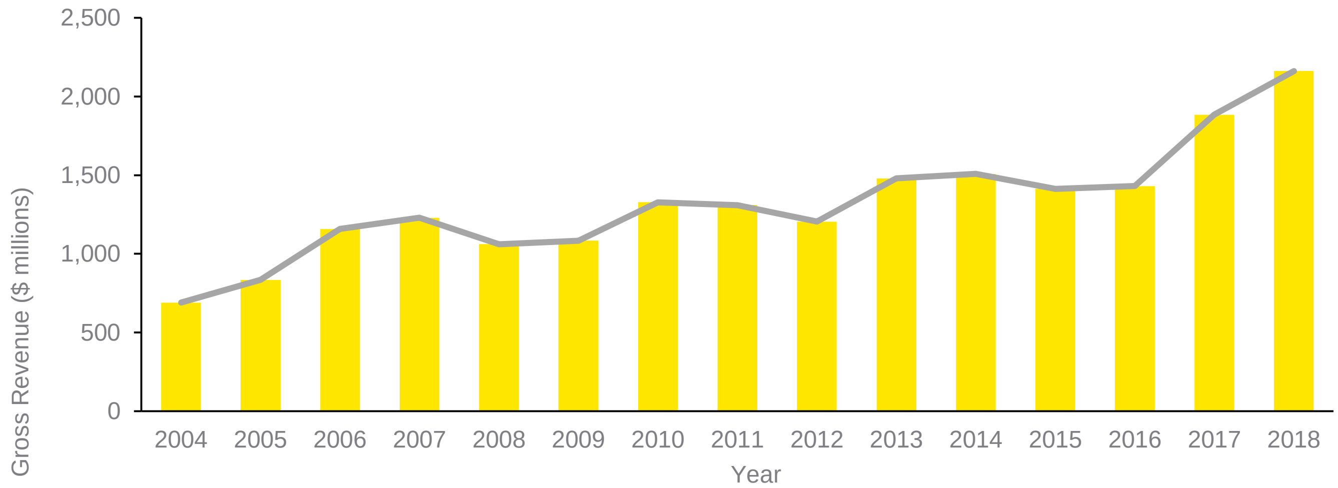
Trend analysis considerations

- An analysis of longer term trends that follows over the page provides an indication of how the industry has performed in recent years. However, given that data used to prepare the reports prior to 2008 was not provided in a disaggregated format, EY was unable to validate the accuracy of the allocation of events in these years. Our trend analysis has only been performed on data from 2008 to 2018. Further, these trends do not account for the inclusion of new data providers over time.

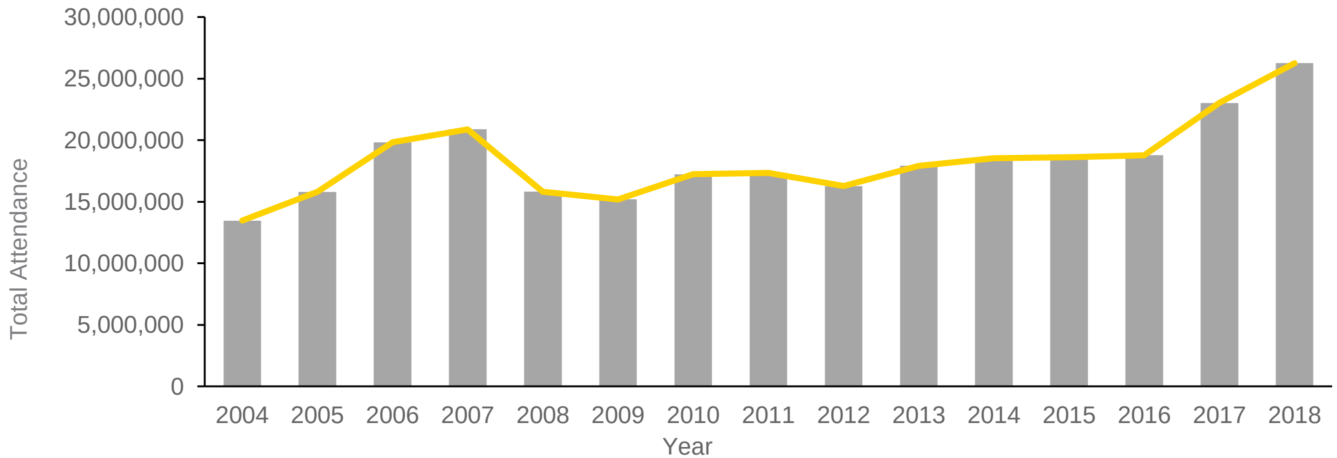
* Based on both paid and unpaid tickets ** Average Ticket Prices are calculated based on paid tickets only
*** The 2015 survey did not include the revenue and attendance generated by the Fringe World Festival in 2015. To ensure the report is comparing figures on a like for like basis. EY has adjusted the 2015 revenue and attendance figures in the 2016 report.

1 Key Findings
Overall Results

Revenue (2004 – 2018)



Attendance (2004 – 2018)



Key Revenue Insights

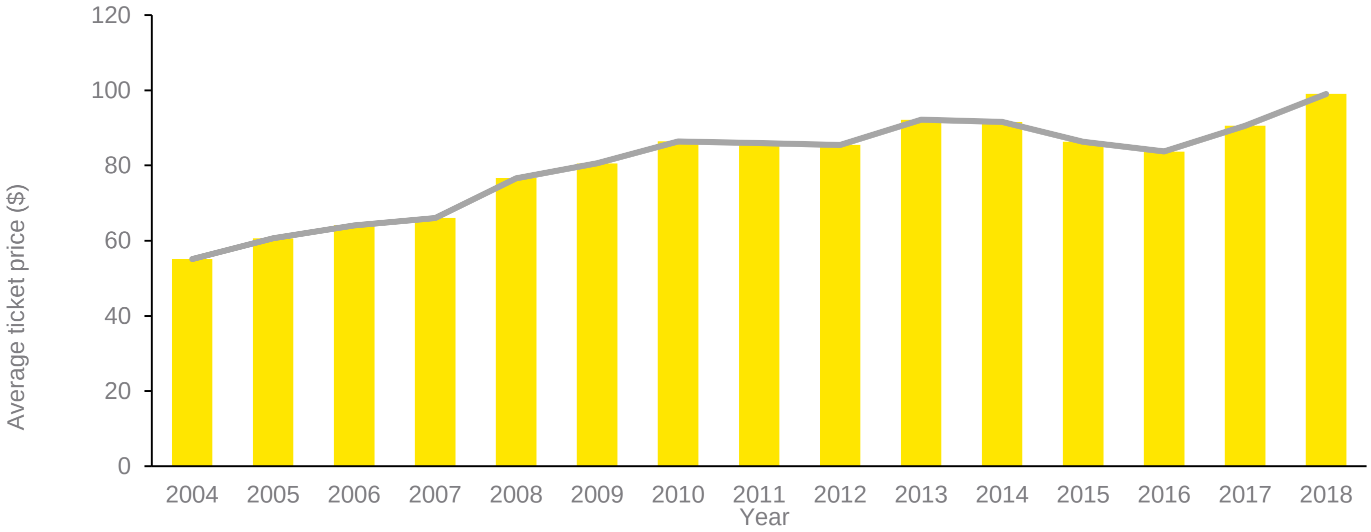
- Total industry revenue more than doubled over the period 2008 to 2018. Revenue has grown at a compound annual growth rate (CAGR) of 7.4% over the same period.
- In 2018, overall industry revenue has grown year-over-year (y-o-y) by 14.8%.
- In 2018, the Special Events category experienced the highest y-o-y increase (337.9%) among all the categories, followed by Comedy (72.5%).
- NSW witnessed the highest y-o-y growth in revenue among all the states by 22.4% ($753.7m) in 2018.

Key Attendance Insights

- Total attendance has increased by 66.0% from 15.8m in 2008 to 26.3m in 2018.
- Attendance has grown at a CAGR of 5.2% over the period 2008 to 2018.
- In 2018, the y-o-y attendance growth recorded was 14.1%.
- In 2018, Comedy witnessed the highest y-o-y increase in attendance (98.5%) among all the categories. Among all the states and territories, Tasmania experienced the highest y-o-y growth in attendance (67.1%).

1 Key Findings
Overall Results

Average Ticket Price (2004 – 2018)



Key Average Ticket Price Insights

- The average ticket price increased by 29.2%, from $76.60 in 2008 to $99.03 in 2018.
- The average ticket price has grown at a CAGR of 2.6% over the period 2008 to 2018.
- Average ticket price increased by 9.3% y-o-y in 2018, from $90.59 in 2017 to $99.03 in 2018, which is the highest recorded average ticket price.
- The growth in average ticket price was primarily driven by a surge in the average ticket price in Special Events ($152.70, 202.8% y-o-y growth) and Comedy ($114.20, 83.3% y-o-y growth) categories.

1 Key Findings
Total Revenue and Attendance by State/Territory

Total Revenue and Attendance by State/Territory (2018)

	Revenue				Attendance			
State/Territory	Revenue	Share of Industry (2018)	Share of Industry (2017)	Change in Revenue (from 2017)	Tickets*	Share of Industry (2018)	Share of Industry (2017)	Change in Attendance (from 2017)
NSW	$753,667,850	34.9%	32.7%	22.4%	8,230,950	31.3%	29.9%	19.4%
VIC	$698,857,788	32.3%	34.0%	9.2%	7,999,434	30.5%	32.0%	8.6%
QLD	$317,179,536	14.7%	14.0%	20.2%	3,840,497	14.6%	13.9%	20.1%
WA	$211,421,549	9.8%	10.4%	7.5%	2,772,963	10.6%	11.3%	6.5%
SA	$131,560,865	6.1%	6.6%	6.5%	2,212,725	8.4%	9.1%	5.4%
ACT	$27,848,747	1.3%	1.3%	12.3%	405,899	1.5%	1.6%	12.6%
TAS	$18,965,730	0.9%	0.9%	17.0%	738,444	2.8%	1.9%	67.1%
NT	$2,923,333	0.1%	0.2%	(12.8%)	67,876	0.3%	0.3%	1.9%
Total	**$2,162,425,399**	**100.0%**	**100.0%**	**14.8%**	**26,268,788**	**100.0%**	**100.0%**	**14.1%**

Between 2017 and 2018 the live performance industry across Australia has experienced growth in both revenue and attendance.

Both NSW and Queensland experienced significant growth in revenue and attendance.

- **NSW** experienced the highest growth in revenue (by 22.4% to $753.7m) and third highest growth in attendance (by 19.4% to 8.2m) between 2017 and 2018. The increase in revenue was driven by significant increases in revenue in **Special Events** (380.7%), **Festivals (Multi-Category)** (134.2%), **Theatre** (58.3%), **Comedy** (46.7%), **Musical Theatre** (31.2%) and **Contemporary Music** (26.1%). This revenue was partially offset by declines in **Circus and Physical Theatre** (55.4%), **Festivals (Contemporary Music)** (5.2%) and **Classical Music** (2.1%) revenue.
  - **Special Events** revenue increased primarily due to a 21.2% increase in attendance and increase in average ticket prices in 2018**. Festivals (Multi-Category)** revenue increased primarily due to a 29.9% increase in attendance and increase in average ticket prices in 2018. The growth was driven by festivals such as The Falls Music & Arts Festival*, and VIVID Festival. **Comedy** revenue increased primarily due to a 78.5% increase in attendance in 2018. **Musical Theatre** revenue increased significantly due to a 19.2% growth in attendance. **Contemporary Music** revenue increased significantly due to 16.0% growth in attendance driven by performances from Ed Sheeran, Pink, Bruno Mars and Taylor Swift.
  - **Circus and Physical Theatre** revenue declined, primarily due to the absence of Cirque du Soleil's tours in 2018. **Festivals (Contemporary Music)** revenue declined, despite an increase in attendance of 6.8%. This is primarily due to the fall in average ticket prices in 2018.
- **Queensland** experienced the second highest growth in revenue and second highest growth in attendance amongst all states and territories. Between 2017 and 2018, revenue increased by 20.2% (to $317.2m) and attendance increased by 20.1% (to 3.8m). This significant growth was primarily driven by major performers such as Pink and Ed Sheeran, musicals such as *Aladdin, Beautiful: The Carole King Musical* and *Priscilla, Queen of the Desert* and special events presented as part of the Gold Coast Commonwealth Games.

Victoria witnessed significant growth in revenue in Contemporary Music and Comedy, as well as significant growth in attendance in Festivals (Multi-Category) and Comedy.

Victoria experienced steady growth in both revenue and attendance.

- **Victoria** experienced an increase of 9.2% in revenue (to $698.9m) and 8.6% in attendance (to 8.0m) between 2017 and 2018. The increase in revenue is primarily driven by a significant increase in **Festivals (Multi-Category)** (73.5%), **Contemporary Music** (59.1%), **Comedy** (58.7%) and **Opera** (44.2%).
- **Festivals (Multi-Category)** revenue growth was primarily due to a 199.0% increase in attendance in 2018. The growth was driven by festivals such as The Falls Music & Arts Festival and Melbourne Fringe Festival. **Contemporary Music** revenue increased primarily due to an increase in attendance by 34.8%, driven by performances from Pink, Ed Sheeran, Bruno Mars and Taylor Swift. **Comedy** revenue increased primarily due to an increase in attendance by 85.4%, driven by events such as the Melbourne International Comedy Festival, *For the Love of Mrs. Brown* and performers such as Kevin Hart.
- **Circus and Physical Theatre** revenue declined, primarily due to the absence of Cirque du Soleil's tours in 2018. The decline in revenue and attendance in **Musical Theatre** may be explained by the closure of the Princess Theatre for refurbishment and the movement of *The Book of Mormon* to NSW.

* Tickets and attendance for Falls Music & Arts Festivals across Australia were taken from Falls Music & Arts Festival Marion Bay (29/12/18 – 31/12/18), Byron Bay (31/12/18 – 02/01/19), Fremantle (06/01/18 – 07/01/18), and Lorne (28/12/18 – 31/12/18).

1 Key Findings
Overall State and Territory Results

Due to their size, NT and Tasmania contributed the least to national live performance revenue in 2018.

- **Tasmania** witnessed the third highest y-o-y growth in revenue and the highest y-o-y growth in attendance in 2018. Tasmania witnessed a y-o-y increase in revenue by 17.0% (to $19.0m), while attendance increased y-o-y by 67.1% (to 0.7m).
- **Northern Territory (NT)** is the only jurisdiction which witnessed y-o-y decline in revenue in 2018**.** The jurisdiction experienced a decline in revenue by 12.8% (to $2.9m) between 2017 and 2018, despite moderate growth in attendance by 1.9% (to 67.9k). This is primarily attributed to the decline in average ticket prices for the Northern Territory across different categories.

WA and ACT experienced moderate growth in both revenue and attendance.

WA recorded its highest revenue and attendance since 2009. After consistent decline in revenue over 2013-2016, revenue has been increasing steadily over the last two years. Attendance has been growing steadily, increasing by 28.8% between 2013 and 2018.

- **Australian Capital Territory (ACT)** revenue increased by 12.3% (to $27.8m), while attendance increased by 12.6% (to 0.4m) between 2017 and 2018. This was driven by significant growth across Festivals (Multi-Category), Opera, Comedy, Theatre and Special Events categories.
- **WA** witnessed an increase in revenue by 7.5% (to $211.4m), while there was a 6.5% growth in attendance (to 2.8m) between 2017 and 2018. The growth in revenue was largely driven by increases in the following categories:
  - **Comedy** witnessed a significant growth of 64.0% (to $15.8m) in revenue, while there was an increase of 85.9% (to 0.2m) in attendance between 2017 and 2018. The growth was primarily driven by Perth Comedy Festival; performances from Kevin Hart and Jim Jefferies, and events such as *For the Love of Mrs. Brown*.
  - **Musical Theatre** witnessed a significant growth of 58% (to $33.8m) in revenue, while there was an increase of 89.1% (to 0.4m) in attendance between 2017 and 2018. The growth was primarily driven by musicals such as *We Will Rock You*, *New Jersey Nights*, *Legally Blonde*, *Carousel*, *In the Mood*, *Aladdin* and *Mamma Mia!*
  - **Ballet and Dance** experienced growth of 37.5% (to $5.7m) in revenue, while there was an increase of 23.9% (to 0.1m) in attendance between 2017 and 2018. The growth was primarily driven by productions such as *The Nutcracker, Dracula* and *Swan Lake.*
  - **Children's/Family** experienced a growth of 21.4% (to $7.7m) in revenue, while there was an increase of 9.1% (to 0.2m) in attendance between 2017 and 2018.
- The growth in revenue in the above categories in WA was slightly offset by the decline in revenue in the following categories:
  - **Circus and Physical Theatre** witnessed a significant decline of 95.0% (to $1.4m) in revenue, due to a large decline of 92.1% (to 22.2k) in attendance. This was primarily due to the absence of Cirque du Soleil's tours in 2018.
  - **Theatre** experienced a decline of 24.0% (to $2.8m) in revenue, contributed by the decline in attendance by 43.8% (to 61.3k).
  - **Festivals (Contemporary Music)** witnessed a decline of 21.0% (to $5.8m) in revenue, while there was a decline of 5.2% (to 69.6k) in attendance.

1 Key Findings
Overall State and Territory Results

SA witnessed steady growth in attendance each year since 2013, increasing by 47.8% between 2013 and 2018.

SA witnessed significant growth in revenue over the last two years (2017 and 2018). Revenue has increased by 40.2% over the 2013 – 2018 period.

- **SA** experienced a growth in revenue of 6.5% (to $131.6m), while attendance increased by 5.4% (to 2.2m) between 2017 and 2018. Major categories which contributed to the growth in revenue were:
  - **Comedy** witnessed a significant growth of 142.0%, contributed by a significant increase of 246.3% in attendance driven by events such as *For the Love of Mrs. Brown* and performers such as Carl Barron and Jim Jefferies.
  - **Ballet and Dance** witnessed growth of 32.6% in revenue, with a 22.5% increase in attendance primarily attributable to events such as *The Sleeping Beauty* and *Ballet Revolucíon.*
  - **Special Events** experienced a growth of 49.5% in revenue and 48.2% growth in attendance, primarily attributable to Harlem Globetrotters.
  - **Festivals (Contemporary Music)** experienced a growth of 37.4% contributed by 57.5% growth in attendance. The growth in revenue is primarily attributable to events such as Groovin' the Moo and Spin Off Festival.
- The growth in revenue in the above categories was slightly offset by the decline in revenue in the following categories:
  - **Circus and Physical Theatre** witnessed a decline of 96.8% in revenue, with a decline of 96.2% in attendance.
  - **Classical Music** witnessed a decline of 11.3% in revenue, with a decline of 25.5% in attendance.
  - **Theatre** witnessed a decline of 3.2% in revenue, with a decline of 27.2% in attendance.

Victoria and NSW combined generated the largest share of revenue and attendance.

- **NSW** represented the highest market share of revenue and attendance amongst all the states and territories in Australia, accounting for 34.9% and 31.3% of the national market share of revenue and attendance respectively in 2018. **Victoria** recorded the second highest share of revenue and attendance, representing 32.3% and 30.5% respectively. Combined, **Victoria** and **NSW** generated approximately 67.2% of Australia's live performance revenue and 61.8% of attendance in 2018.
- **Victoria** and **NSW** held the top positions in spend per capita in 2018, with $107.08 and $93.67 respectively. This was much higher than the national spend ($85.89 per capita).
- **NSW** and **Victoria** accounted for the largest market share of revenue and attendance in most of the categories in 2018. Notable exceptions included:
  - **Festivals (Multi-Category):** SA and WA generated the majority of revenue and attendance in this category, with a combined 56.6% market share of revenue and 54.0% of attendance. Major annual festivals held in SA and WA included Adelaide Fringe, WOMADelaide and Fringe World Festival.
  - In **Festivals (Contemporary Music)** and **Special Events:** NSW and QLD combined accounted for the largest market share of revenue and attendance in these categories. In **Circus and Physical Theatre,** NSW and QLD accounted for the largest market share of revenue, while NSW and VIC accounted for the largest market share of attendance.

1 Key Findings
Total Revenue and Attendance by Category

Total Revenue and Attendance by Category in 2018

	Revenue			Attendance		
Category	Revenue	% Change in Revenue (from 2017)	Share of Industry	Attendance	% Change in Attendance (from 2017)	Share of Industry
Ballet and Dance	$63,988,882	2.6%	3.0%	800,781	(1.2%)	3.0%
Children's/Family	$59,777,596	16.5%	2.8%	1,650,955	26.4%	6.3%
Circus and Physical Theatre	$23,410,423	(79.9%)	1.1%	450,446	(61.3%)	1.7%
Classical Music	$79,456,707	2.0%	3.7%	1,261,565	(4.3%)	4.8%
Comedy	$124,742,437	72.5%	5.8%	2,458,198	98.5%	9.4%
Contemporary Music	$1,092,275,549	32.2%	50.5%	10,088,329	19.2%	38.4%
Festivals (Multi-Category)	$68,972,653	26.2%	3.2%	2,577,932	38.1%	9.8%
Festivals (Contemporary Music)	$102,015,922	1.3%	4.7%	975,233	14.4%	3.7%
Musical Theatre	$400,199,798	(4.0%)	18.5%	3,917,532	(3.1%)	14.9%
Opera	$46,965,221	29.2%	2.2%	487,195	31.9%	1.9%
Special Events	$22,115,160	337.9%	1.0%	170,359	24.5%	0.6%
Theatre	$78,505,052	22.2%	3.6%	1,430,263	(1.9%)	5.4%
Total	**$2,162,425,399**	**14.8%**	**100.0%**	**26,268,788**	**14.1%**	**100.0%**

1 Key Findings

Analysis of Top 5 Categories and Top 3 Biggest Changes

Top 5 Categories - Revenue and Attendance

Revenue			Attendance		
Category	**Total Revenue**	**Industry Share**	**Category**	**Total Attendance**	**Industry Share**
Contemporary Music	$1,092,275,549	50.5%	Contemporary Music	10,088,329	38.4%
Musical Theatre	$400,199,798	18.5%	Musical Theatre	3,917,532	14.9%
Comedy	$124,742,437	5.8%	Festivals (Multi-Category)	2,577,932	9.8%
Festivals (Contemporary Music)	$102,015,922	4.7%	Comedy	2,458,198	9.4%
Classical Music	$79,456,707	3.7%	Children's/Family	1,650,955	6.3%

Top 3 Biggest Changes in Revenue by Category

	Revenue Increase		Revenue Decrease	
	Biggest Increase in Revenue		**Biggest Decline in Revenue**	
No.	Category	Increase from 2017	Category	Decrease from 2017
1	Special Events	337.9%	Circus and Physical Theatre	(79.9%)
2	Comedy	72.5%	Musical Theatre	(4.0%)
3	Contemporary Music	32.2%	-	-

Top 3 Biggest Changes in Attendance by Category

	Attendance Increase		Attendance Decrease	
	Biggest Increase in Attendance		**Biggest Decline in Attendance**	
No.	Category	Increase from 2017	Category	Decrease from 2017
1	Comedy	98.5%	Circus and Physical Theatre	(61.3%)
2	Festivals (Multi-Category)	38.1%	Classical Music	(4.3%)
3	Children's/Family	26.4%	Musical Theatre	(3.1%)

1 Key Findings
Overall Category Results

This section presents an analysis for each of the 12 event categories, as defined in Appendix B.

While total ticket sales revenue and attendance increased by 14.8% and 14.1% respectively, most of the categories experienced either significant growth or decline. This is primarily due to the impact of major tours or events, particularly international tours, in the market in any given year.

Comedy, Contemporary Music, Festivals (Multi-Category), Special Events and Opera categories experienced significant increases in revenue and attendance in 2018. Comedy, Contemporary Music and Special Events categories, in particular, witnessed record-breaking growth. The growth in Comedy and Contemporary Music categories was primarily driven by major tours of high-profile international artists that took place across Australia in 2018.

- **Comedy** experienced the second highest growth in revenue and the highest growth in attendance amongst all categories, generating 72.5% growth in revenue (to $124.7m) and 98.5% growth in attendance (to 2.5m) between 2017 and 2018. This is the highest recorded revenue and attendance for Comedy. Between 2009 and 2018, revenue in the Comedy category has increased by 215.2% and attendance has increased by 219.6%. The growth in Comedy in 2018 was primarily driven by the success of the Melbourne International Comedy Festival and Perth Comedy Festival, performances by renowned comedians such as Kevin Hart, Jim Jefferies, Trevor Noah and Russell Peters, and events such as *For the Love of Mrs. Brown*. Additional ticketing providers also submitted data in the reporting period. Furthermore, an increase of the average ticket price by 83.3% (to $114.20) between 2017 and 2018 contributed to the increase in revenue.
- **Contemporary Music** experienced the third highest growth in revenue and sixth highest growth in attendance amongst all categories, generating 32.2% growth in revenue (to $1.1b) and 19.2% growth in attendance (to 10.1m) between 2017 and 2018. This is the highest recorded revenue and attendance for Contemporary Music. Between 2004 and 2018, revenue in Contemporary Music has increased by 460% and attendance has increased by 268.5%. The growth in Contemporary Music in 2018 was primarily driven by tours of internationally renowned artists Pink, Ed Sheeran, Bruno Mars, Taylor Swift, Celine Dion, Katy Perry, Bon Jovi, and Foo Fighters. Additionally, an increase of the average ticket price by 11.4% (to $117.77) contributed to the increase in revenue.
- **Festivals (Multi-Category)** experienced the fifth highest growth in revenue and the second highest growth in attendance amongst all categories, generating 26.2% growth in revenue (to $69.0m) and 38.1% growth in attendance (to 2.6m) between 2017 and 2018. This is the highest recorded revenue and attendance for Festivals (Multi-Category). Between 2004 and 2018, revenue in the Festivals (Multi-Category) category has increased by 364.7% and attendance has increased by 432.8%. The growth in Festivals (Multi-Category) in 2018 was primarily driven by Adelaide Fringe, Fringe World Festival, The Falls Music & Arts Festival, Dark Mofo, MONA FOMA and Melbourne Fringe Festival.
- **Special Events** experienced the highest growth in revenue and the fifth highest growth in attendance amongst all categories, generating 337.9% growth in revenue (to $22.1m) and 24.5% growth in attendance (to 0.2m) between 2017 and 2018. The growth in revenue is primarily attributed to a significant increase in the average ticket prices by 202.8% (to $152.70) in 2018. Top events in this category in 2018 were the special events presented as part of the Gold Coast Commonwealth Games, Mardi Gras Party, Nitro Circus, *Bill Murray, Jan Vogler and Friends* and *Crossing Over with John Edward*. The Special Events category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.
- **Opera** experienced an increase in revenue by 29.2% (to $47.0m) and an increase in attendance by 31.9% (to 0.49m) between 2017 and 2018. Additionally, the marginal increase in average ticket price by 7.5% (to $124.11) also contributed to the increase in revenue. The top contributors to the revenue were *La Bohème, The Merry Widow, Aida, Carmen, La Traviata* and *Rigoletto.*

1 Key Findings
Overall Category Results

Children's/Family and Festivals (Contemporary Music) also experienced an increase in revenue driven by growth in attendance and the average ticket price.

- **Children's/Family** experienced the seventh highest growth in revenue and fourth highest growth in attendance amongst all categories, generating 16.5% growth in revenue (to $59.8m) and 26.4% growth in attendance (to 1.7m) between 2017 and 2018. This is the highest recorded revenue and attendance for the Children's/Family category. Between 2004 and 2018, revenue in this category has increased by 456.7% and attendance has increased by 220.4%. The top events in this category in 2018 were *Disney on Ice,* The Wiggles, Paw Patrol and *The 78-Storey Treehouse*. The growth in revenue is partially offset by the decline in the average ticket price by 4.1% (to $40.63).
- **Festivals (Contemporary Music)** experienced a marginal increase in revenue by 1.3% (to $102.0m) in 2018, despite attendance increasing by 14.4% (to 1.0m) and growth in the average ticket prices by 3.9% (to $131.58). This was primarily due to the higher proportion of zero-priced tickets. The top events in this category in 2018 were Splendour in the Grass, Bluesfest, CMC Rocks QLD, and Groovin' the Moo.

Despite decline in attendance, Ballet and Dance, Classical Music and Theatre reported growth in revenue in 2018, driven by growth in average ticket prices.

- **Ballet and Dance** experienced an increase in revenue by 2.6%% (to $64.0m) and a decrease in attendance by 1.2% (to 0.8m) between 2017 and 2018. The increase in average ticket price by 6.1% (to $90.81) contributed to the increase in revenue. 2018 recorded the highest average ticket price and the second highest revenue (2007 holds the top spot) in the Ballet and Dance category. The top contributors to the revenue were *The Merry Widow*, *Cinderella, Spartacus, Murphy* and *Giselle.*
- **Classical Music** experienced a slight increase in revenue by 2.0% (to $79.5m) despite a decrease in attendance by 4.3% (to 1.3m). The growth in revenue is primarily attributed to the increase in average ticket prices by 2.6% (to $79.13) in 2018. 2018 recorded the second highest revenue (2008 being the highest) and the fourth highest attendance (following 2006, 2008 and 2017) in the Classical Music category. The top events in the Classical Music category in 2018 were André Rieu, Staatskapelle Berlin, Anne-Sophie Mutter, *Beethoven Nine* and *Yundi Touch of Chopin*.
- **Theatre** experienced a growth in revenue by 22.2% (to $78.5m) despite a decrease in attendance by 1.9% (to 1.4m). The growth in revenue is primarily attributed to the increase in average ticket prices by 29.8% (to $63.91) in 2018. The top events in this category in 2018 were *The Curious Incident of the Dog in the Night-Time, An Ideal Husband, The Resistible Rise of Arturo Ui* and *Twelfth Night.*

1 Key Findings

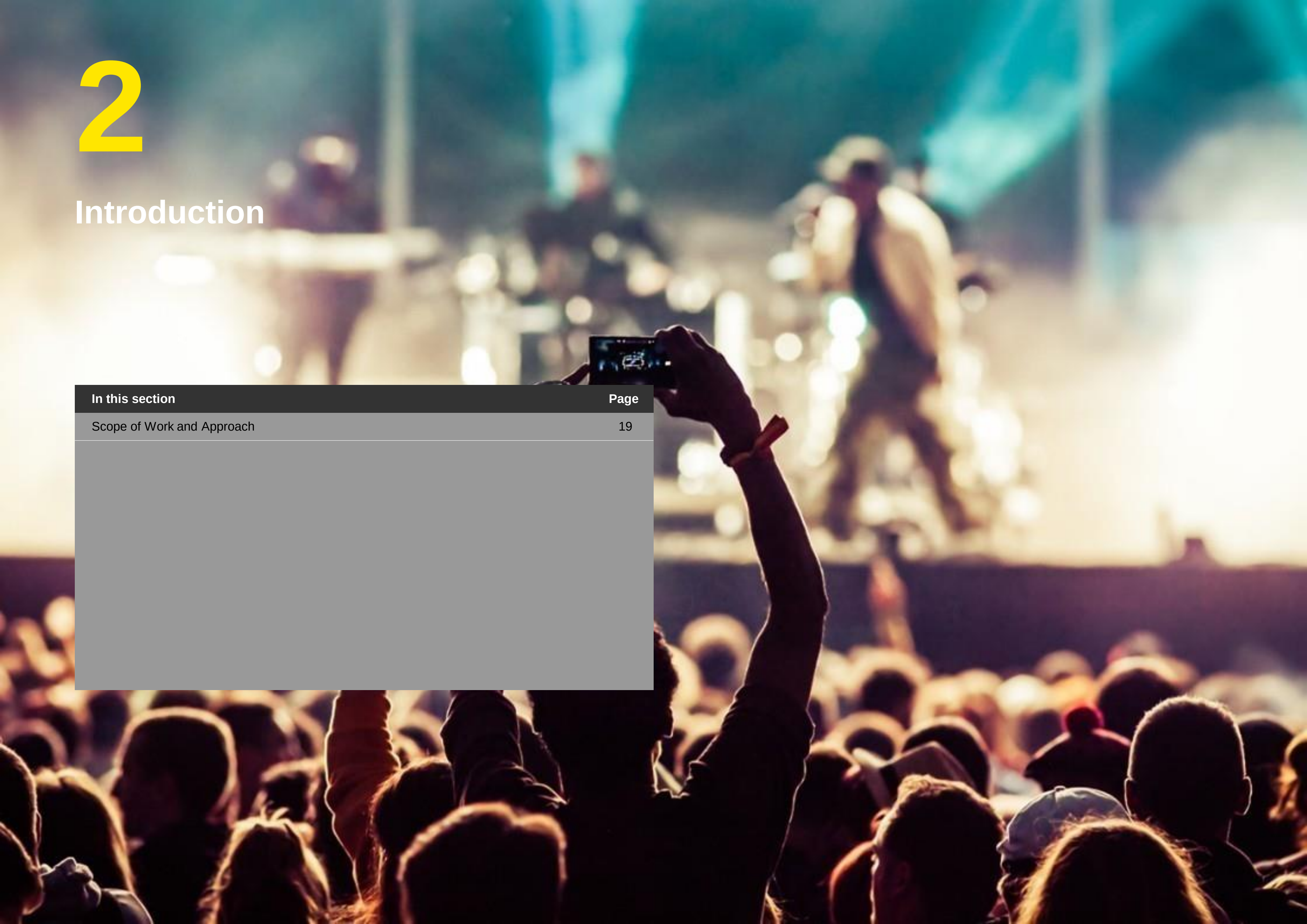
Overall Category Results

Circus and Physical Theatre and Musical Theatre reported a decrease in revenue in 2018. Significant impact was observed in the Circus and Physical Theatre category, primarily due to the absence of some major events in 2018.

- **Circus and Physical Theatre** experienced a significant decline of 79.9% in revenue (to $23.4m) and a decline of 61.3% in attendance (to 0.5m) between 2017 and 2018. 2018 records the lowest revenue and attendance for Circus and Physical Theatre events since 2011. The significant decline in this category in 2018 was primarily attributed to the absence of Cirque du Soleil's tours of *Toruk* and *Kooza*, which happened in 2017. Additionally, a decrease in the average ticket price by 44.1% (to $60.96) contributed to the decline in revenue.
- **Musical Theatre** experienced a decline of 4.0% in revenue (to $400.2m) and a decrease in attendance by 3.1% (to 3.9m) in 2018. The decrease in revenue was also aided by the slight decline in the average ticket prices by 0.7% (to $108.85) in 2018. Top events in this category in 2018 were *The Book of Mormon*, *Aladdin, Beautiful: The Carole King Musical, Evita, Dream Lover: The Bobby Darin Musical* and *Priscilla, Queen of The Desert.*

Contemporary Music continues to be the top live performance category. Contemporary Music generated more than 50% of revenue and approximately 38% of attendance of the overall live performance market.

- The top 5 categories accounted for approximately 83.2% of industry revenue and 78.8% of the attendance in 2018.
- **Contemporary Music** and **Musical Theatre** represent the two largest categories in the industry generating 50.5% and 18.5% of revenue respectively, and 38.4% and 14.9% of attendance respectively. Combined, these two categories account for 69.0% of the live performance industry in terms of revenue and 53.3% of attendance.



2

Introduction

2 Introduction

Scope of Work and Approach

Scope of Work

Ernst & Young (EY) has been engaged by Live Performance Australia (LPA) to undertake the annual compilation of ticket attendances and revenue for the live performance industry for the calendar year 2018. 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:

- Collating and consolidating the collection of the ticket sales and revenue data (national survey data) for the live performance industry in Australia from participating ticketing companies, venues, entertainment companies, event organisers and the Australia Council for the Arts on behalf of the Australian Major Performing Arts Companies (AMPAG).
- Compiling the 2018 national data on an overall basis, by state and by event category.
- Conducting an analysis of the 2018 national data on an overall basis (and in comparison to previous years), by state and by event category.

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

Approach

For this Report, EY compiled data from ticketing companies, self-ticketing venues, event promoters and the Australia Council for the Arts (collectively referred to in this study as the “Survey Participants”). The ticketing companies, self-ticketing venues and event promoters that provided data as part of this study are provided in Appendix A of this Report.

Ticketing data was assigned by the Survey Participants to event categories based on the guidelines established between LPA and these organisations. Appendix B of this Report presents a description of these event categories. Further, as part of these guidelines, the ticketing companies and venues were requested to exclude from their data all events produced or presented by the AMPAG companies. This was to avoid double counting of revenue and attendance data.

Survey Participants provided data to EY directly. Confidentiality Deeds were signed between data providers and EY, where requested. As such, and consistent with our agreed approach, EY did not reveal, insofar as possible, disaggregated raw survey data or event specific revenue or ticketing data to LPA.

While our scope of works did not include a detailed review of all data to determine the appropriateness of the events and event category allocations, where obvious anomalies were identified, appropriate amendments were made.

Examples of such anomalies included:

- Events which were wrongly categorised were reallocated. For example, music festivals were reallocated to Festivals (Contemporary Music).
- Sporting events (except for the special events presented as part of the Gold Coast Commonwealth Games), talk shows, fashion festivals, food festivals (that do not include music line ups), 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 Report does not include amateur performances.

2 Introduction
Scope of Work and Approach

Limitations

As with previous studies, data on ticket revenue and attendances for the live performance industry were limited to those provided by the Survey Participants. While national in reach, the coverage of this Report excludes events in some regional venues as well as contract-fee performances by AMPAG companies. Small to medium companies and independent theatre are also under-represented as many of these companies either self-ticket or use ticketing service providers and venues not currently involved in the Report. LPA and EY are working towards improving the Report's inclusion of these events by increasing the supplementary dataset.

- It is important to note that festivals are under-reported in this Report as some festivals maintain their own ticketing systems and many of these do not contribute data into this Report. The inclusion of ticketing data from Oztix, Bluesfest, MONA FOMA and Dark Mofo in recent years 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 not presently contributing data to the Report. For numerous festivals, the Report only documents 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 Report are not included in the results. However, data from Oztix and Moshtix (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 Report provides a conservative estimate of the total ticket revenue and attendances sourced from live performance events in Australia.

As part of our analysis, the 2018 data was compared against historical data sourced directly from Live Performance Australia's Live Performance Industry in Australia 2006 - 2017 Reports. EY acknowledges 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.

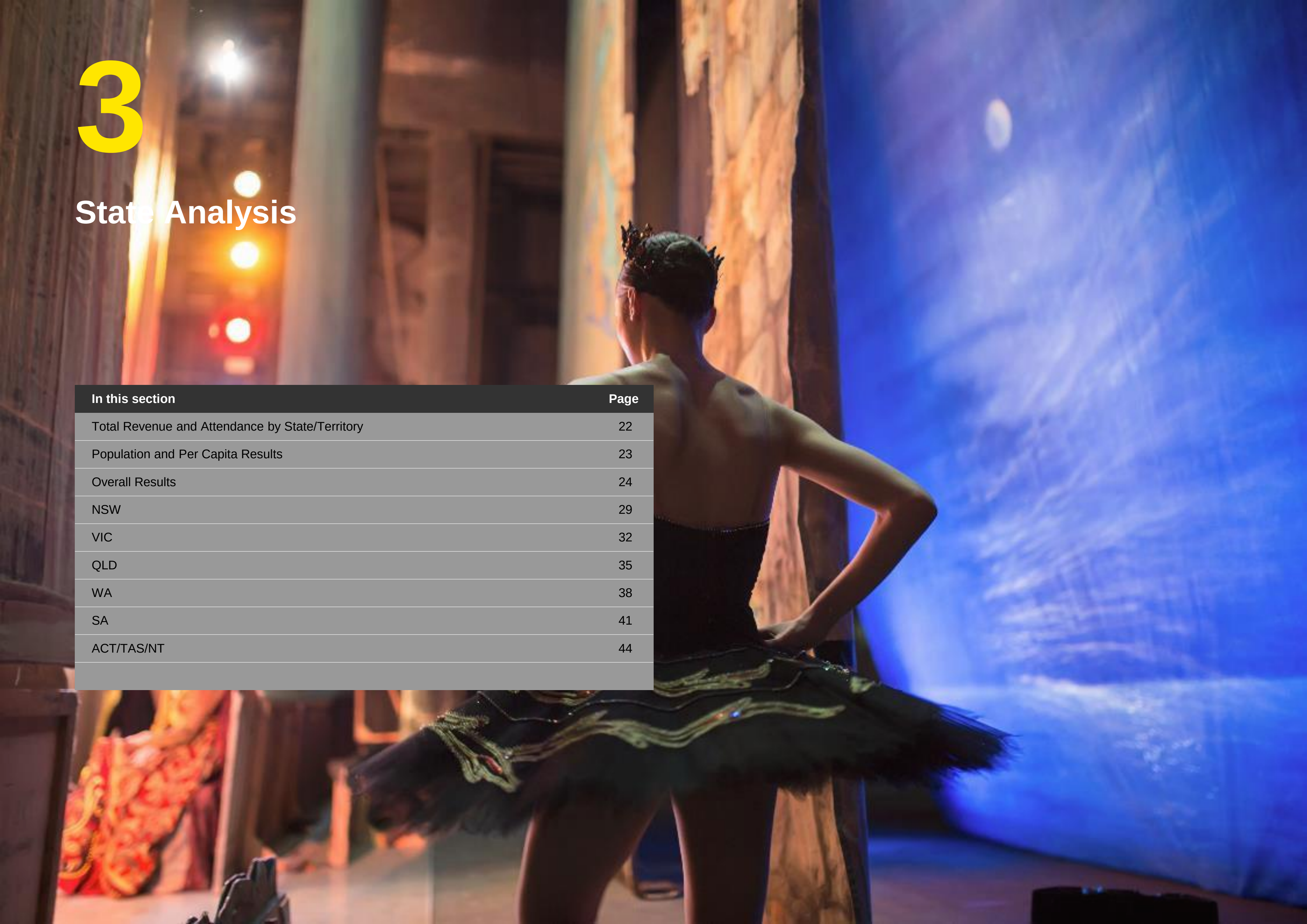
Therefore, caution should be applied when comparing data from 2008 to 2018 periods with that of data from previous years. Inconsistencies may exist in the data collection methodology between the surveys performed in these ten years, and for previous surveys (where more detailed event specific information was not requested).

Changes in 2018 Report compared to prior years

1. In 2016, Festivals (Single-Category) was renamed as Festivals (Contemporary Music) for better clarity. We have retained this naming convention in 2018.

2. As noted in the 2017 Report, Perth Theatre Trust has fully transitioned to self-ticketing and is now a regular data provider.

3. New providers have been added to the report, including the Melbourne International Comedy Festival, Bunbury Regional Entertainment Centre, Theatre North, Tamworth Regional Council, Illawarra Centre and Secret Sounds.



3

State Analysis

3 State Analysis

Total Revenue and Attendance by State/Territory

Total Revenue and Attendance by State/Territory (2018)

	Revenue				Attendance			
State/Territory	**Revenue**	**Share of Industry (2018)**	**Share of Industry (2017)**	**Change in Revenue (from 2017)**	**Tickets***	**Share of Industry (2018)**	**Share of Industry (2017)**	**Change in Attendance (from 2017)**
New South Wales	$753,667,850	34.9%	32.7%	22.4%	8,230,950	31.3%	29.9%	19.4%
Victoria	$698,857,788	32.3%	34.0%	9.2%	7,999,434	30.5%	32.0%	8.6%
Queensland	$317,179,536	14.7%	14.0%	20.2%	3,840,497	14.6%	13.9%	20.1%
Western Australia	$211,421,549	9.8%	10.4%	7.5%	2,772,963	10.6%	11.3%	6.5%
South Australia	$131,560,865	6.1%	6.6%	6.5%	2,212,725	8.4%	9.1%	5.4%
Australian Capital Territory	$27,848,747	1.3%	1.3%	12.3%	405,899	1.5%	1.6%	12.6%
Tasmania	$18,965,730	0.9%	0.9%	17.0%	738,444	2.8%	1.9%	67.1%
Northern Territory	$2,923,333	0.1%	0.2%	(12.8%)	67,876	0.3%	0.3%	1.9%
Total	**$2,162,425,399**	**100.0%**	**100.0%**	**14.8%**	**26,268,788**	**100.0%**	**100.0%**	**14.1%**

*Based on both paid and unpaid tickets

3 State Analysis
Population and Per Capita Results

Population and Per Capita Results (2018)

	Population		Revenue	Attendance	Spending
State/Territory	Population (2018) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend Per Capita
NSW	8.05	32.0%	34.9%	31.3%	$93.67
VIC	6.53	25.9%	32.3%	30.5%	$107.08
QLD	5.05	20.1%	14.7%	14.6%	$62.77
WA	2.61	10.4%	9.8%	10.6%	$81.12
SA	1.74	6.9%	6.1%	8.4%	$75.49
ACT	0.42	1.7%	1.3%	1.5%	$65.71
TAS	0.53	2.1%	0.9%	2.8%	$35.68
NT	0.25	1.0%	0.1%	0.3%	$11.89
Total	**25.18**	**100.0%**	**100.0%**	**100.0%**	**$85.89**

Per capita results

- A comparison of each state and territory's share of the live performance industry against population provides insight into spend per capita, as well as the concentration of the industry relative to where people live. The above table shows that NSW and Victoria command a larger share of revenue compared to their share of Australia's population.

It should be noted that these state and territory breakdowns do not take into account people who travel from interstate or overseas to attend 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 open their season in a particular state and often attract significant visitation from outside that state.

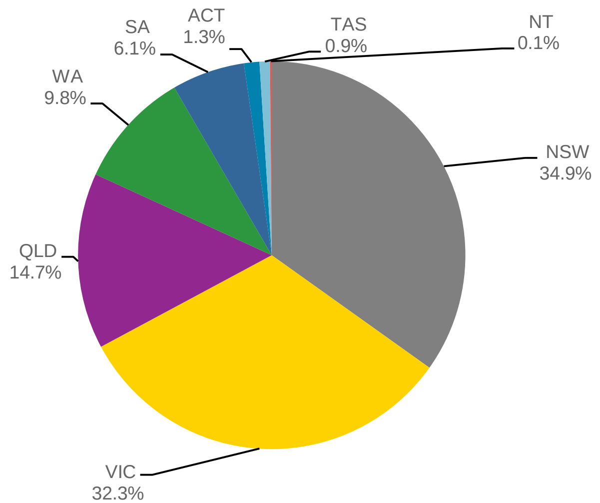
QLD reflects notable disparity in proportion of industry revenue and attendance when compared with its share of population. This trend was observed in previous years as well. Reasons for these disproportional results include:

- 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.
- Cities such as Brisbane are constrained in their ability to host performances due to a smaller number of venues and limited capacity.
- Some of Australia's largest performing arts companies are based in NSW and Victoria and as such stage the bulk of their performances in Sydney and Melbourne. These companies include Opera Australia (Sydney), Melbourne Symphony Orchestra, Sydney Symphony Orchestra and the Australian Ballet (Melbourne).
- Destination NSW and Visit Victoria are particularly active in the live performance major events markets and as such have been successful in attracting major live performance events to these states.
- Victoria and NSW hold top positions in per capita spend amongst all states and territories in 2018. Victoria ($107.08) and NSW ($93.67) are the only states that are above the national per capita spend ($85.89).

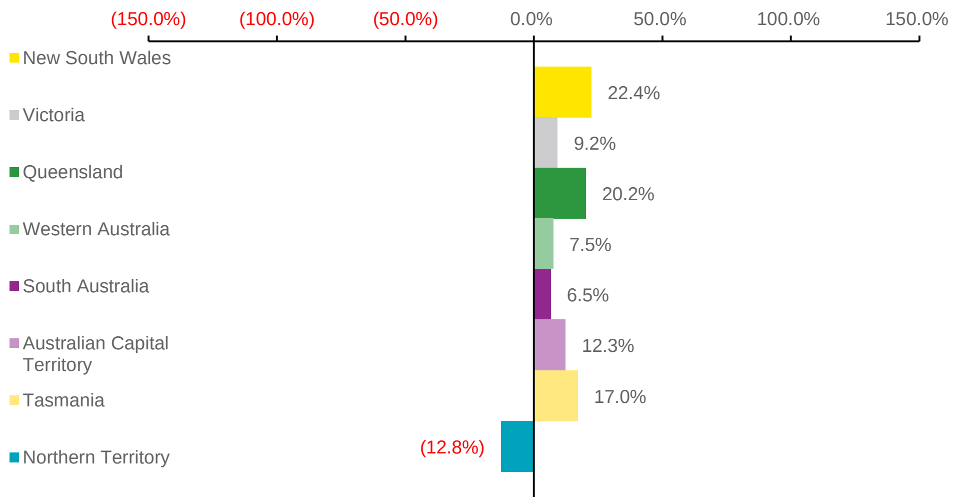
Note: Population is as of December 2018 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0

3 State Analysis
Overall Results

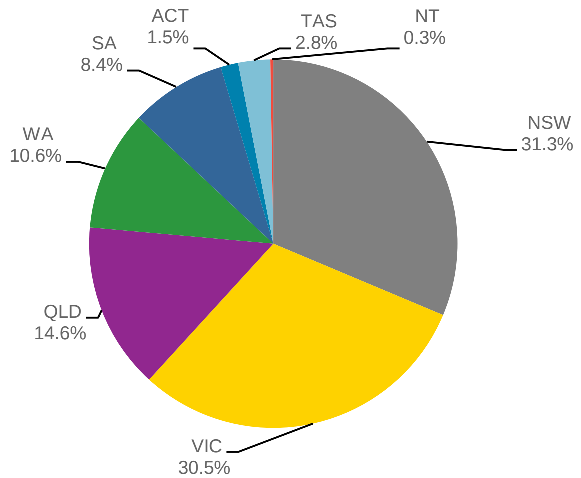
Market Share (Revenue) by State/Territory 2018



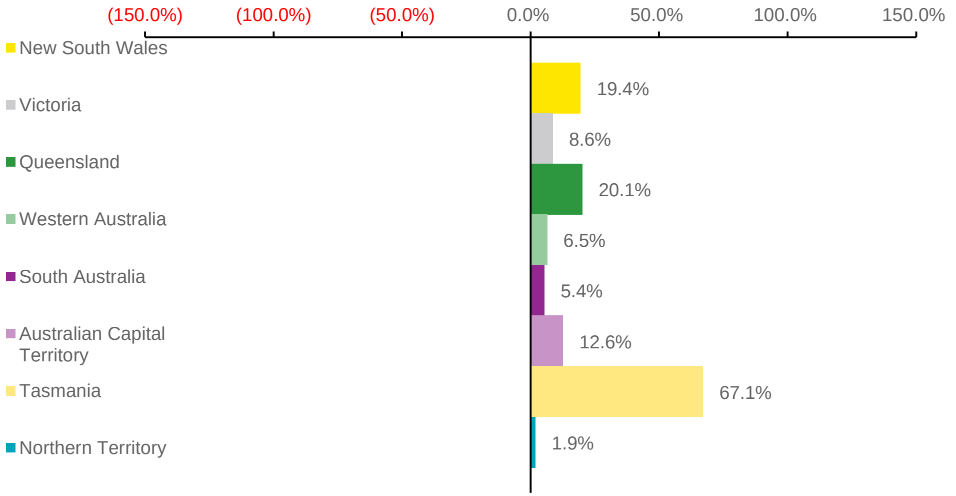
Percentage Movement in Revenue by State/Territory (2017/18)



Market Share (Attendance) by State/Territory 2018

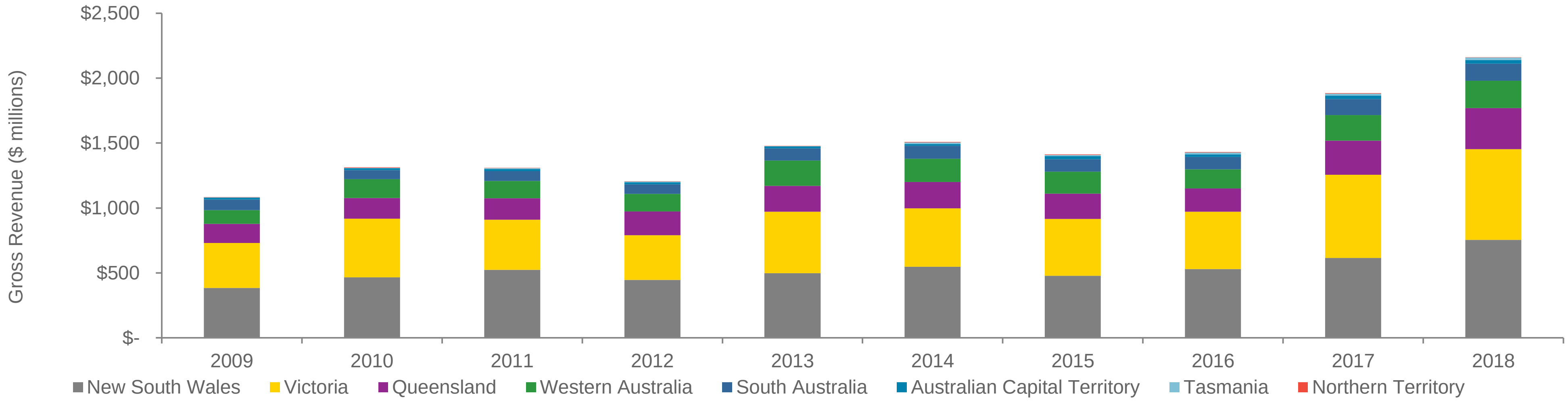


Percentage Movement in Attendance by State/Territory (2017/18)

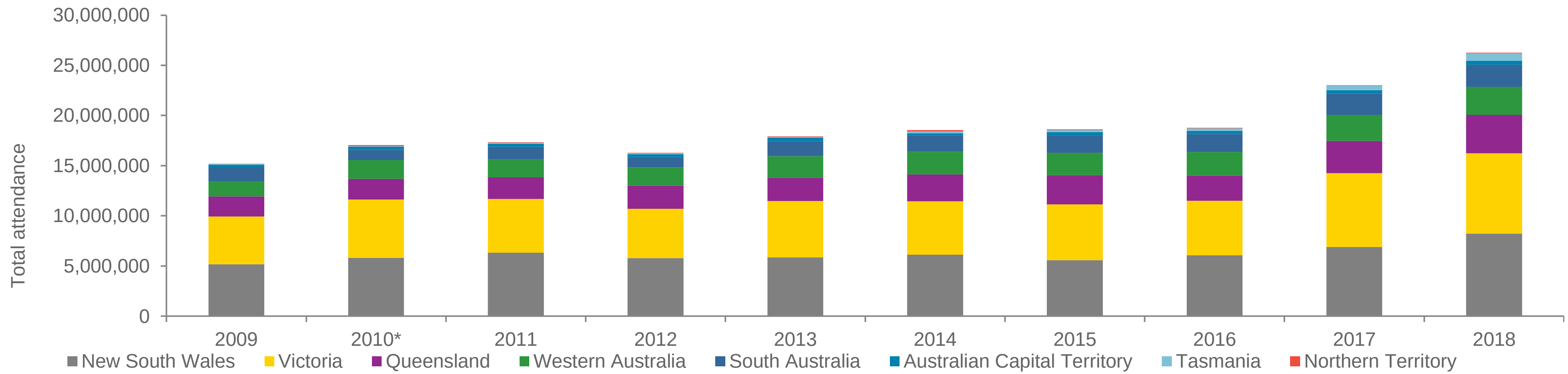


3 State Analysis
Overall Results

Revenue by State/Territory (2009-2018)



Total Attendance by State/Territory (2009-2018)



3 State Analysis
Overall Results

Total Revenue by State/Territory (2009 – 2018)

Revenue									
Year	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
2009	$383,713,353	$347,305,100	$146,567,867	$105,312,778	$82,326,982	$14,151,594	$3,543,859	$408,416	**$1,083,329,949**
2010	$465,761,849	$451,053,035	$160,520,942	$145,479,374	$68,538,320	$15,248,151	$3,783,068	$3,313,888	**$1,313,698,627**
2011	$523,903,477	$385,643,996	$165,840,931	$131,936,782	$77,215,957	$16,178,998	$6,739,343	$1,727,665	**$1,309,187,150**
2012	$446,063,403	$344,389,414	$183,775,420	$134,131,622	$73,536,693	$17,293,297	$4,221,182	$1,472,520	**$1,204,883,551**
2013	$497,463,659	$473,516,913	$200,178,524	$194,312,089	$93,864,893	$15,104,224	$2,402,818	$2,133,774	**$1,478,976,893**
2014	$547,173,799	$450,034,039	$203,918,468	$177,326,653	$100,944,048	$13,852,222	$11,600,525	$3,114,197	**$1,507,963,952**
2015	$478,077,501	$436,933,907	$195,336,838	$168,688,271	$96,804,782	$23,506,143	$10,641,913	$3,219,331	**$1,413,208,686**
2016	$530,186,274	$440,330,153	$180,304,512	$147,807,422	$94,316,578	$19,564,660	$14,743,791	$3,146,303	**$1,430,399,693**
2017	$615,837,613	$639,876,934	$263,878,152	$196,671,338	$123,525,390	$24,794,403	$16,203,732	$3,354,321	**$1,884,141,882**
2018	$753,667,850	$698,857,788	$317,179,536	$211,421,549	$131,560,865	$27,848,747	$18,965,730	$2,923,333	**$2,162,425,399**

Total Attendance by State/Territory (2009 – 2018)

Attendance									
Year	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	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	2,217,942	1,699,529	372,546	210,798	70,014	**18,626,457**
2016	6,073,498	5,431,066	2,527,535	2,334,951	1,797,087	313,386	239,778	65,287	**18,782,588**
2017	6,893,117	7,364,313	3,196,581	2,604,391	2,100,226	360,392	441,938	66,592	**23,027,550**
2018	8,230,950	7,999,434	3,840,497	2,772,963	2,212,725	405,899	738,444	67,876	**26,268,788**

3 State Analysis
Overall Results

Revenue by Category and State/Territory in 2018

Revenue									
Category/State	**NSW**	**VIC**	**QLD**	**WA**	**SA**	**ACT**	**TAS**	**NT**	**Total**
Ballet and Dance	$23,961,603	$19,475,016	$10,373,905	$5,740,264	$2,229,354	$1,513,560	$386,449	$308,732	$63,988,882
Children's/Family	$21,951,451	$15,744,846	$7,645,865	$7,652,153	$4,408,044	$1,474,759	$446,312	$454,166	$59,777,596
Circus & Physical Theatre	$10,516,692	$3,806,008	$6,072,764	$1,401,980	$237,402	$1,080,265	$40,584	$254,727	$23,410,423
Classical Music	$31,061,325	$23,616,779	$8,388,908	$9,876,702	$3,261,627	$1,534,053	$1,622,584	$94,729	$79,456,707
Comedy	$32,917,904	$43,339,714	$22,356,424	$15,810,158	$5,610,840	$2,906,314	$1,338,125	$462,958	$124,742,437
Contemporary Music	$340,686,456	$407,042,962	$157,984,632	$111,025,831	$63,691,069	$6,704,281	$4,517,088	$623,231	$1,092,275,549
Festivals (Multi Category)	$10,029,869	$7,158,235	$4,108,529	$15,431,437	$23,606,040	$723,442	$7,773,362	$141,740	$68,972,653
Festivals (Contemporary Music)	$52,212,514	$12,105,653	$19,568,697	$5,765,510	$4,281,552	$6,557,521	$1,524,474	-	$102,015,922
Musical Theatre	$153,597,132	$130,451,023	$59,055,742	$33,823,171	$19,962,343	$2,300,167	$593,310	$416,910	$400,199,798
Opera	$33,255,696	$8,774,040	$1,662,128	$1,432,881	$1,136,667	$336,571	$367,238	-	$46,965,221
Special Events	$6,747,994	$1,196,312	$12,529,378	$624,261	$533,142	$306,852	$169,957	$7,265	$22,115,160
Theatre	$36,729,214	$26,147,201	$7,432,565	$2,837,201	$2,602,787	$2,410,961	$186,247	$158,875	$78,505,052
Total	**$753,667,850**	**$698,857,788**	**$317,179,536**	**$211,421,549**	**$131,560,865**	**$27,848,747**	**$18,965,730**	**$2,923,333**	**$2,162,425,399**

3 State Analysis
Overall Results

Attendance by Category and State/Territory in 2018

Attendance									
Category/State	**NSW**	**VIC**	**QLD**	**WA**	**SA**	**ACT**	**TAS**	**NT**	**Total**
Ballet and Dance	255,424	215,833	155,518	108,015	31,323	19,493	5,694	9,481	800,781
Children's/Family	681,988	415,329	181,983	179,166	106,551	46,642	22,694	16,602	1,650,955
Circus & Physical Theatre	171,927	116,431	111,677	22,153	2,867	18,374	2,597	4,420	450,446
Classical Music	412,985	404,820	143,137	186,885	47,522	25,382	37,330	3,504	1,261,565
Comedy	537,662	1,084,856	439,544	246,547	72,112	44,865	23,631	8,981	2,458,198
Contemporary Music	3,200,941	3,346,873	1,626,621	1,056,419	658,155	103,480	82,329	13,511	10,088,329
Festivals (Multi Category)	75,028	412,691	154,139	449,793	942,968	12,088	527,390	3,835	2,577,932
Festivals (Contemporary Music)	417,828	148,502	205,055	69,580	59,541	60,016	14,711	-	975,233
Musical Theatre	1,423,492	1,309,917	568,959	362,969	210,103	27,970	8,965	5,157	3,917,532
Opera	319,228	100,880	22,790	23,095	13,469	3,954	3,779	-	487,195
Special Events	52,453	11,292	79,530	7,061	10,365	5,910	3,513	235	170,359
Theatre	681,994	432,010	151,544	61,280	57,749	37,725	5,811	2,150	1,430,263
Total	**8,230,950**	**7,999,434**	**3,840,497**	**2,772,963**	**2,212,725**	**405,899**	**738,444**	**67,876**	**26,268,788**

3 State Analysis
NSW

NSW Revenue and Attendance

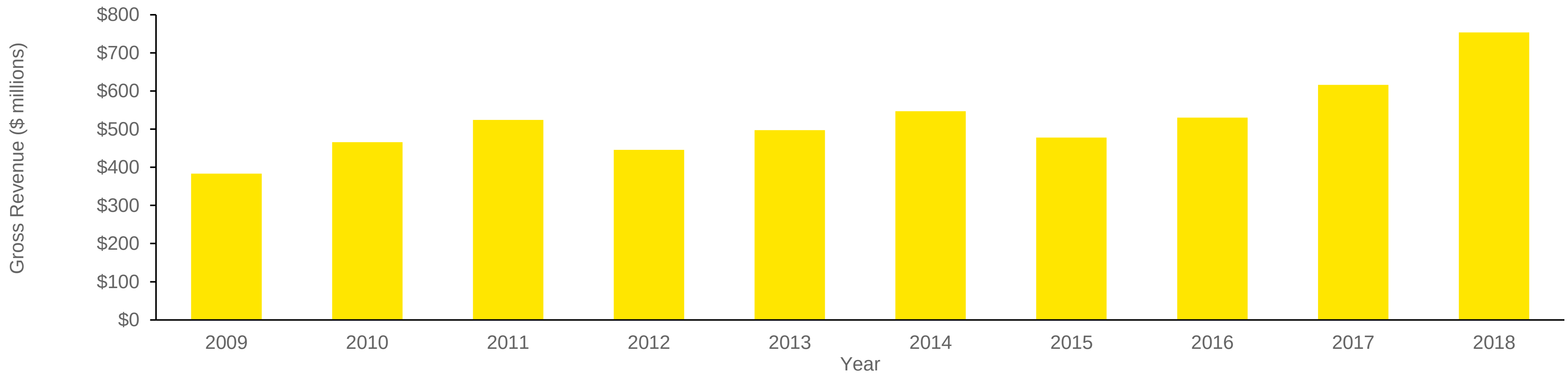
- In 2018, NSW generated $753.7m in revenue and recorded 8.2m in attendance.
- NSW accounts for the largest industry share of revenue (34.9%) and attendance (31.3%).
- The NSW spend per capita in 2018 was $93.67.
- Contemporary Music contributed the highest share to NSW's overall revenue and attendance, with a share of 45.2% and 38.9% respectively.
- In 2018, NSW recorded the highest y-o-y growth in revenue by 22.4% and third highest growth in attendance by 19.4% amongst all the states and territories. This increase in revenue and attendance was largely driven by growth in the following categories as compared to 2017:
  - Special Events witnessed a significant increase of revenue (380.7%) contributed by the growth in attendance (21.2%) and increase in average ticket prices. Top events included the Mardi Gras Party and Nitro Circus.
  - Festivals (Multi Category) witnessed a significant increase in revenue (134.2%) with a 29.9% increase in attendance. The highest contributor to this increase was The Falls Music & Arts Festival.
  - Comedy revenue increased by 46.7% with a 78.5% increase in attendance, primarily driven by performances from Kevin Hart and Jim Jefferies, and events such as *For the Love of Mrs. Brown*.
  - Musical Theatre witnessed an increase in revenue by 31.2%, with growth in attendance (19.2%), driven by musicals such as *The Book of Mormon*, *Evita* and *Grease – The Arena Experience*.
  - Contemporary Music experienced an increase in revenue by 26.1%, and 16.0% growth in attendance. The growth is primarily driven by performances from Ed Sheeran, Pink, Bruno Mars and Taylor Swift.
- The growth in revenue was offset by y-o-y declines in Circus and Physical Theatre (55.4%), Festivals (Contemporary Music) (5.2%) and Classical Music (2.1%) categories.

NSW – Revenue and Attendance (2009 – 2018)

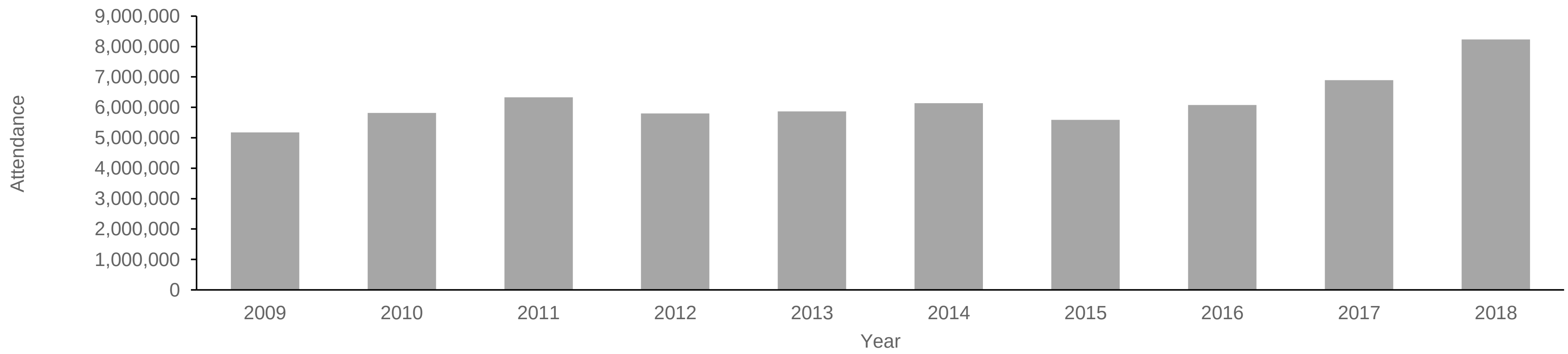
	Revenue		Attendance	
Year	**Revenue**	**% Growth in Revenue**	**Attendance**	**% Growth in Attendance**
2009	$383,713,353	-	5,176,385	-
2010	$465,761,849	21.4%	5,818,163	12.4%
2011	$523,903,477	12.5%	6,331,001	8.8%
2012	$446,063,403	(14.9%)	5,795,757	(8.5%)
2013	$497,463,659	11.5%	5,865,914	1.2%
2014	$547,173,799	10.0%	6,132,827	4.6%
2015	$478,077,501	(12.6%)	5,592,686	(8.8%)
2016	$530,186,274	10.9%	6,073,498	8.6%
2017	$615,837,613	16.2%	6,893,117	13.5%
2018	$753,667,850	22.4%	8,230,950	19.4%

3 State Analysis
NSW

Revenue – NSW (2009-2018)

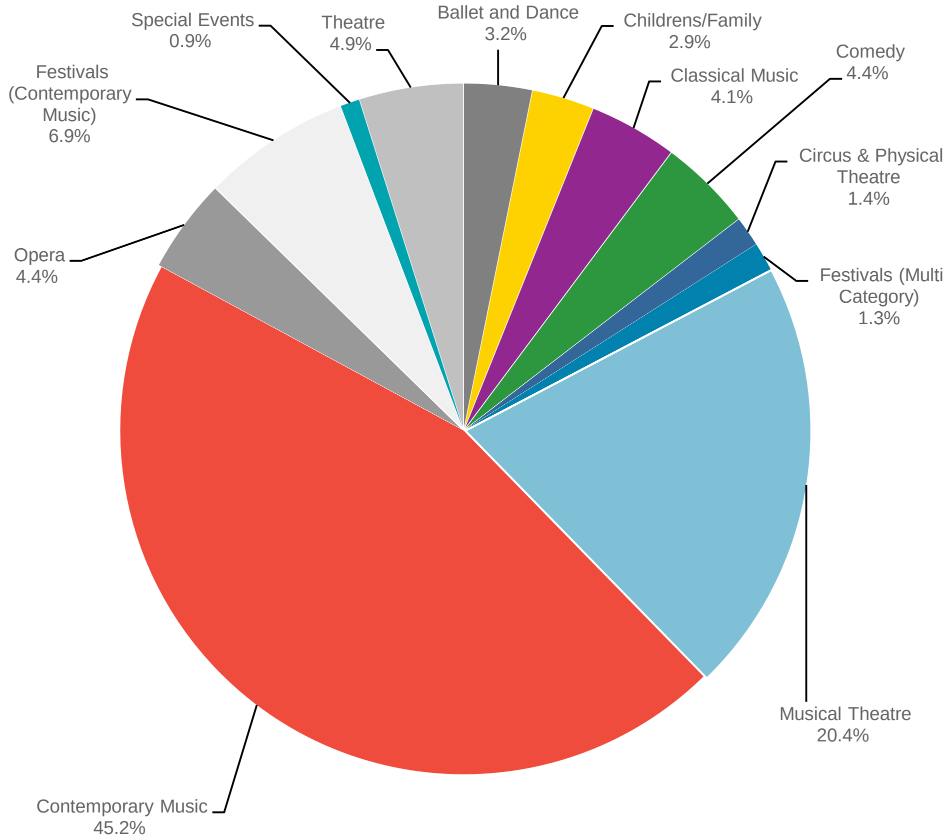


Total Attendance – NSW (2009-2018)

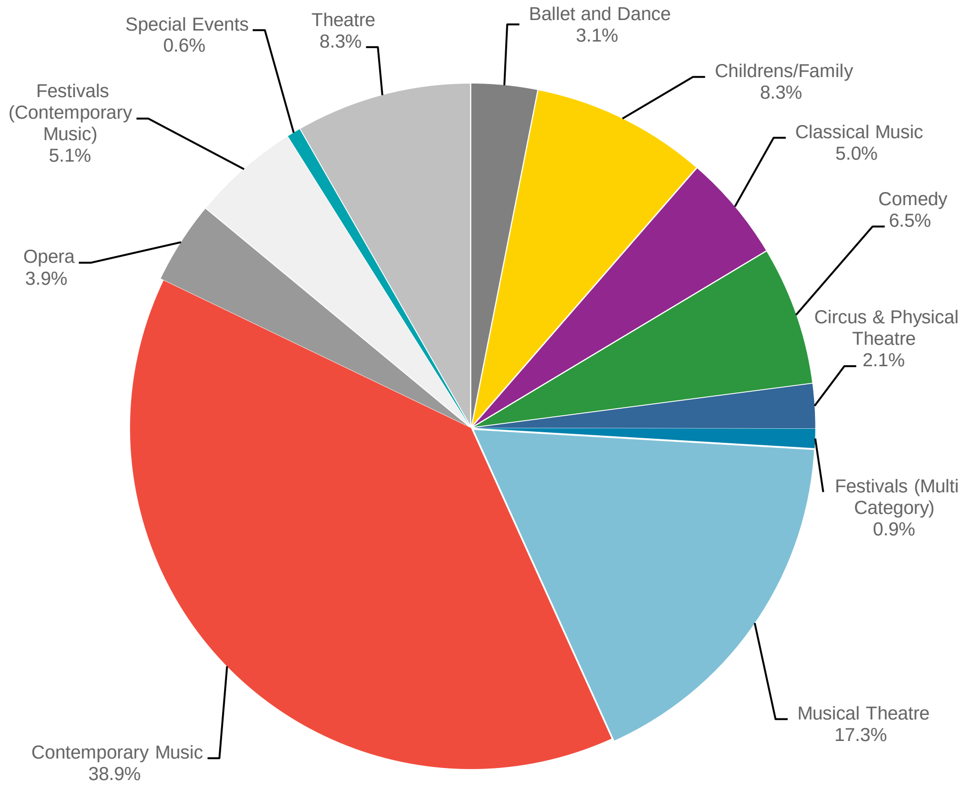


3 State Analysis
NSW

NSW Revenue by Category (2018)



NSW Attendance by Category (2018)



3 State Analysis
VIC

VIC Revenue and Attendance

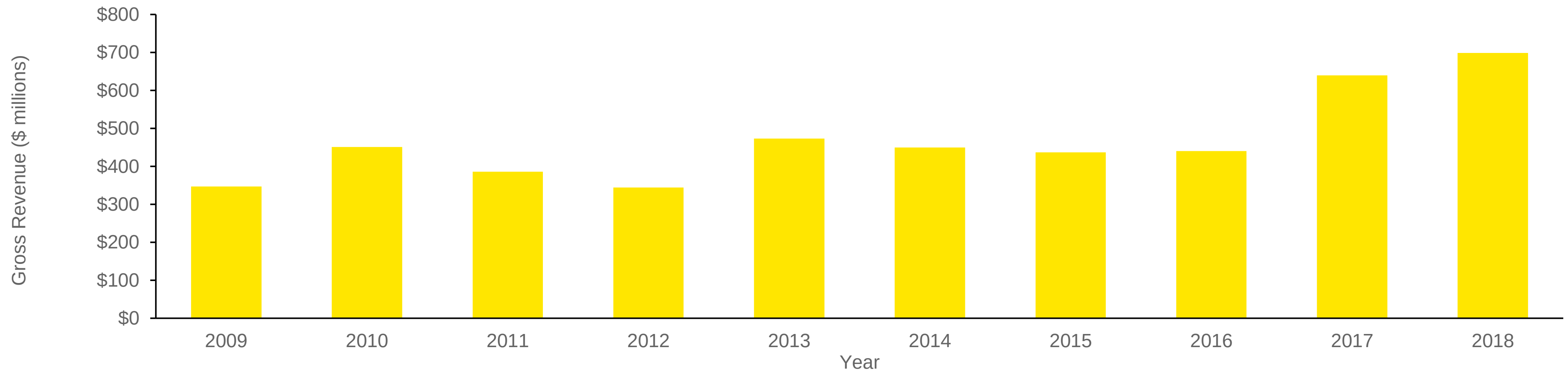
- In 2018, Victoria generated $698.9m in revenue and recorded 8.0m in attendance. Victoria experienced an increase in revenue and attendance by 9.2% and 8.6% respectively.
- Victoria recorded the second highest revenue and attendance amongst all the states and territories in Australia, accounting for 32.3% and 30.5% of the industry market share of revenue and attendance respectively in 2018.
- In 2018, the spend per capita was $107.08 in Victoria, highest among all the states.
- Consistent with previous years, Contemporary Music was the most popular category in Victoria in 2018, accounting for 58.2% and 41.8% respectively of its total revenue and attendance. It increased by 59.1% in terms of revenue and 34.8% in terms of attendance in 2018. Major international artists that performed included Pink, Ed Sheeran, Bruno Mars, Taylor Swift and Bon Jovi.
- Festivals (Multi-Category) revenue increased significantly by 73.5%, primarily due to a surge in attendance by 199.0%, driven by festivals such as The Falls Music & Arts Festival and Melbourne Fringe Festival.
- Comedy experienced a significant increase in 2018, with an increase in revenue by 58.7% and an increase in attendance by 85.4% when compared to 2017. The growth in this category was primarily driven by events such as the Melbourne International Comedy Festival and *For the Love of Mrs. Brown* and performances by renowned artists such as Kevin Hart, Lano & Woodley, Barry Humphries and Carl Barron. Additional ticketing providers also submitted data in the reporting period.
- The growth in revenue was primarily offset by y-o-y declines in Circus and Physical Theatre and Musical Theatre categories.
  - Revenue declined in Circus and Physical Theatre primarily due to absence of Cirque du Soleil's tours in 2018.
  - The decline in revenue and attendance in Musical Theatre may be explained by the closure of the Princess Theatre for refurbishment and the movement of *The Book of Mormon* to NSW.
  - Revenue also declined in Musical Theatre due to the decline in average ticket prices.

VIC – Revenue and Attendance (2009 – 2018)

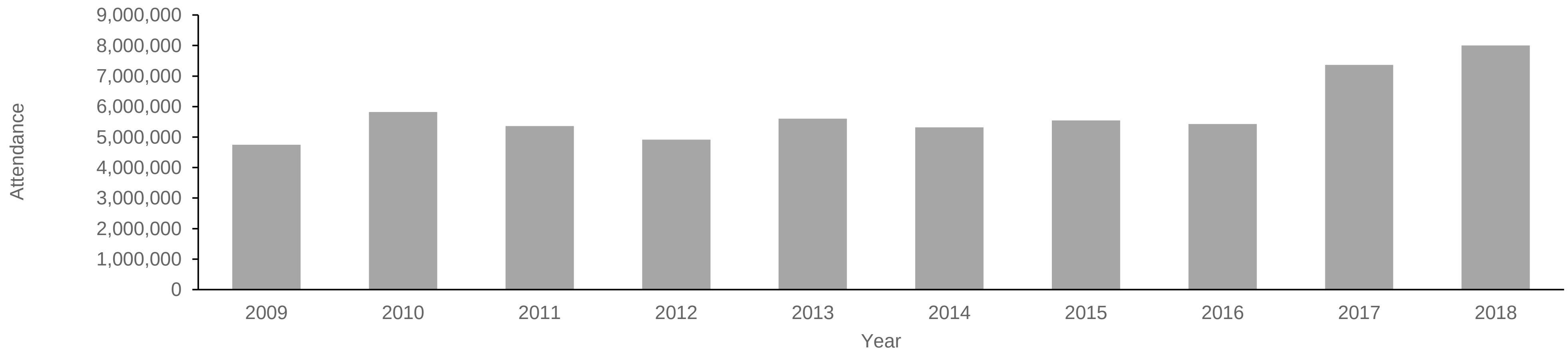
	Revenue		Attendance	
Year	Revenue	% Growth in Revenue	Attendance	% Growth in Attendance
2009	$347,305,100		4,744,449	
2010	$451,053,035	29.9%	5,820,603	22.7%
2011	$385,643,996	(14.5%)	5,359,749	(7.9%)
2012	$344,389,414	(10.7%)	4,916,559	(8.3%)
2013	$473,516,913	37.5%	5,607,475	14.1%
2014	$450,034,039	(5.0%)	5,318,537	(5.2%)
2015	$436,933,907	(2.9%)	5,548,412	4.3%
2016	$440,330,153	0.8%	5,431,066	(2.1%)
2017	$639,876,934	45.3%	7,364,313	35.6%
2018	$698,857,788	9.2%	7,999,434	8.6%

3 State Analysis
VIC

Revenue – VIC (2009-2018)

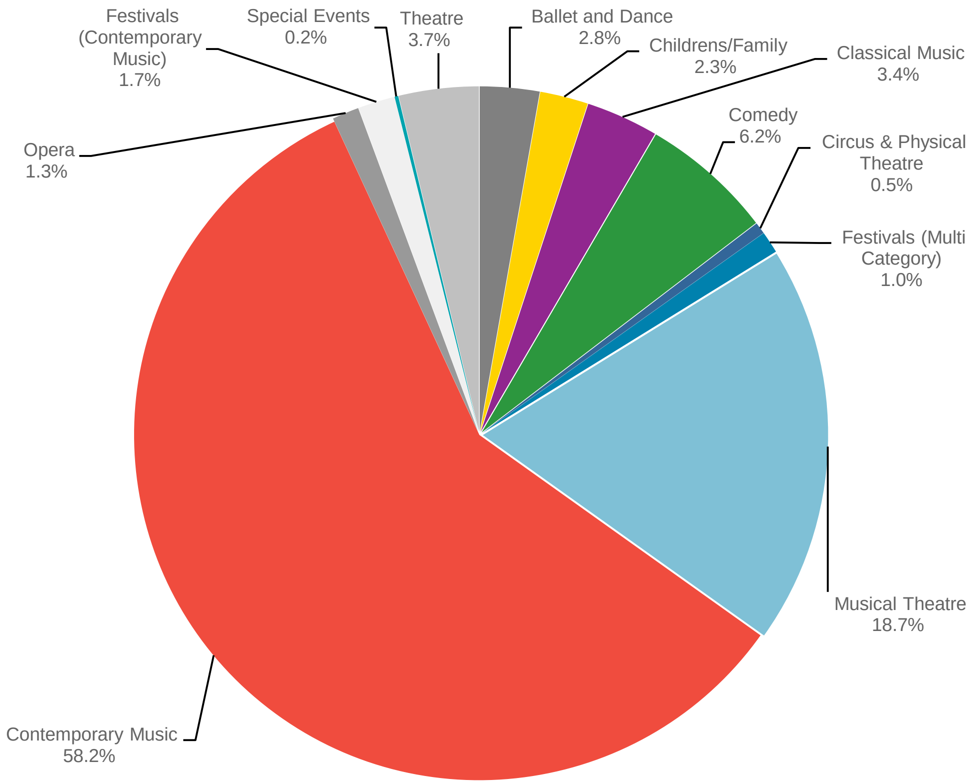


Total Attendance – VIC (2009-2018)

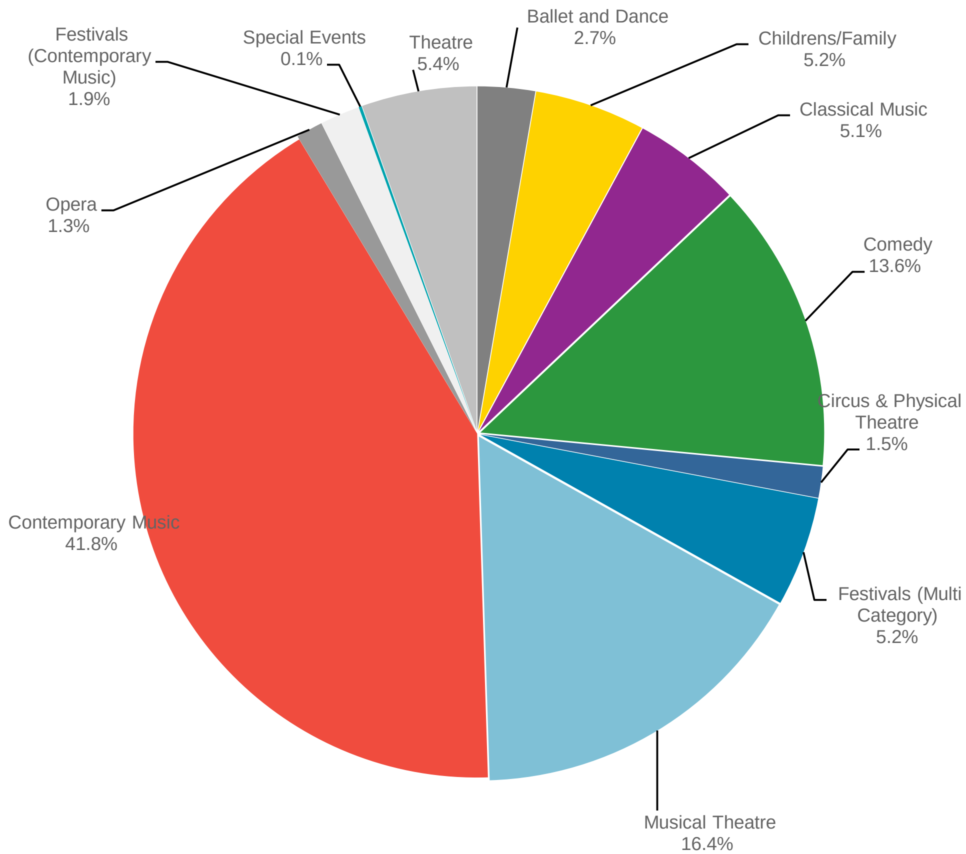


3 State Analysis
VIC

VIC Revenue by Category (2018)



VIC Attendance by Category (2018)



3 State Analysis
QLD

QLD Revenue and Attendance

- In 2018, Queensland generated $317.2m in revenue and recorded 3.8m in attendance.
- Queensland spend per capita in 2018 was $62.77.
- In 2018, Queensland experienced the second highest y-o-y increase in revenue (20.2%) and the second highest growth in attendance (20.1%) among all the other Australian states.
- Contemporary Music witnessed a y-o-y increase in revenue and attendance by 17.6% and 12.2% respectively. This was driven by high-profile major performers including Pink, Ed Sheeran, Foo Fighters, Taylor Swift and Bon Jovi. It is the largest contributor in the total revenue and attendance of Queensland's live performances with 49.8% and 42.3% of the market share respectively.
- Special Events witnessed a considerable increase of 1414.6% in revenue, contributed by the 235.9% growth in attendance and the increase in average ticket prices as compared to 2017. The top events in this category were the special events presented as a part of Gold Coast Commonwealth Games.
- Comedy experienced a significant y-o-y increase of 154.1% in revenue, contributed by significant growth of 177.3% in attendance. The growth in revenue was primarily driven by shows such as *For the Love of Mrs. Brown* and performances from renowned comedians such as Kevin Hart, Jim Jefferies and Carl Barron.
- Festivals (Contemporary Music) witnessed a 42.3% increase in revenue and 37.4% increase in attendance as compared to 2017. Major contributing festivals were CMC Rocks QLD, Good Things Festival, Big Pineapple Music Festival and St. Jerome's Laneway Festival.
- Festivals (Multi-Category) witnessed a 33.0% increase in revenue and 76.5% increase in attendance as compared to 2017. The major contributing festivals were Brisbane Festival and Melt Festival.
- The growth in revenue was partially offset by the y-o-y decline in Circus and Physical Theatre (60.2%), which was primarily due to the absence of Cirque du Soleil's tours in 2018.

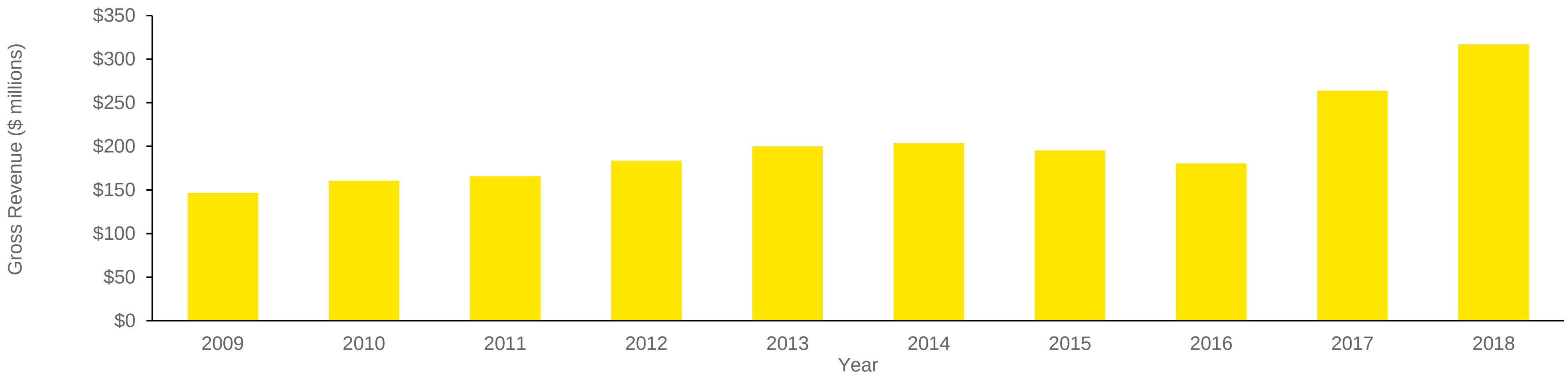
QLD – Revenue and Attendance (2009 – 2018)

	Revenue		Attendance	
Year	Revenue	% Growth in Revenue	Attendance	% Growth in Attendance
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%
2016	$180,304,512	(7.7%)	2,527,535	(13.3%)
2017	$263,878,152	46.4%	3,196,581	26.5%
2018	$317,179,536	20.2%	3,840,497	20.1%

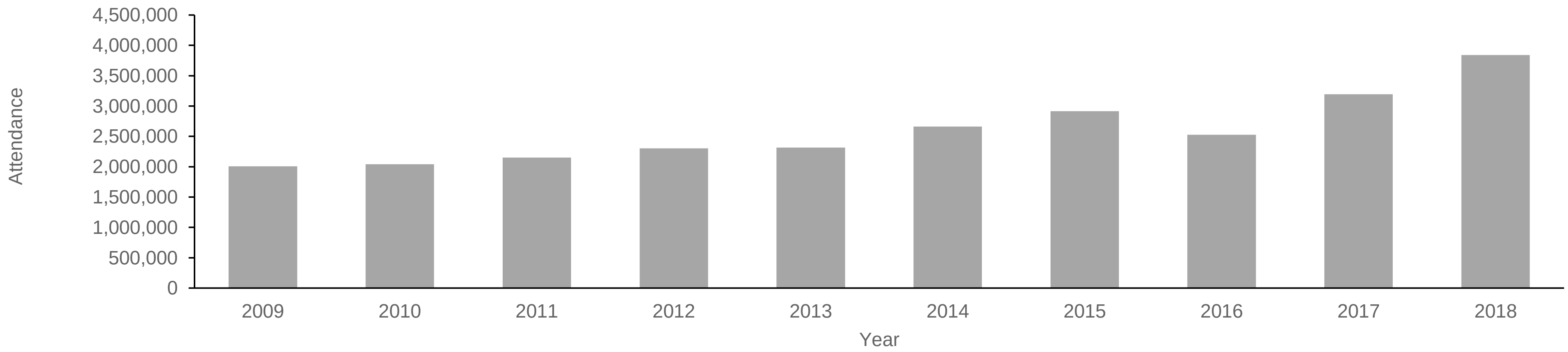
3 State Analysis

QLD

Revenue – QLD (2009-2018)

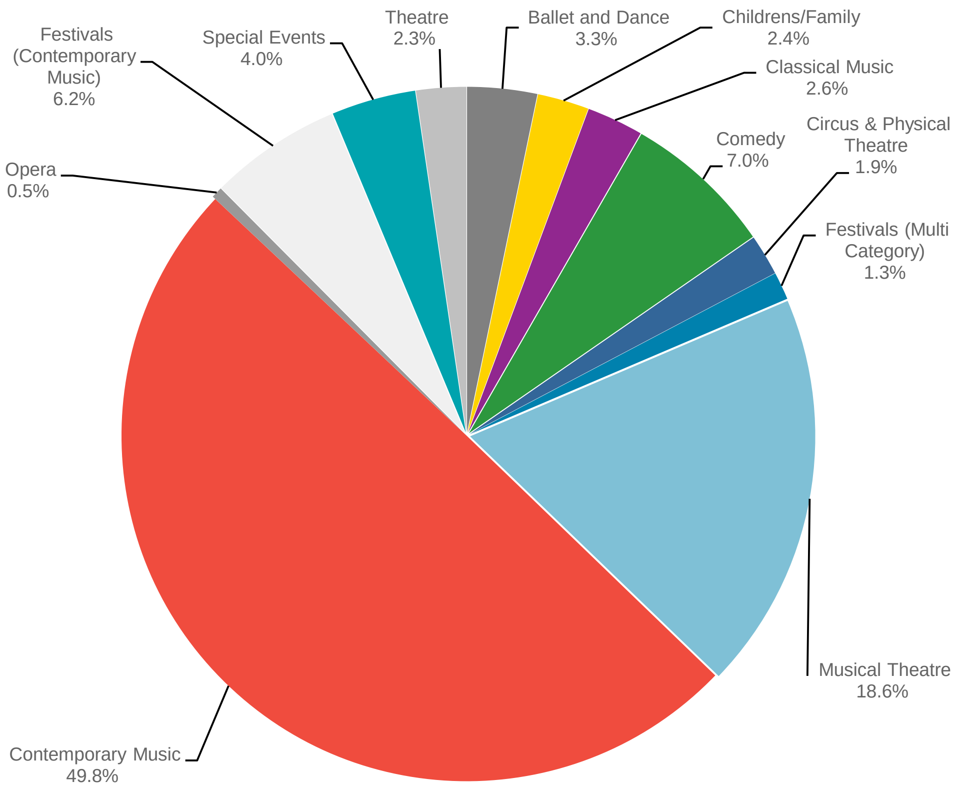


Total Attendance – QLD (2009-2018)

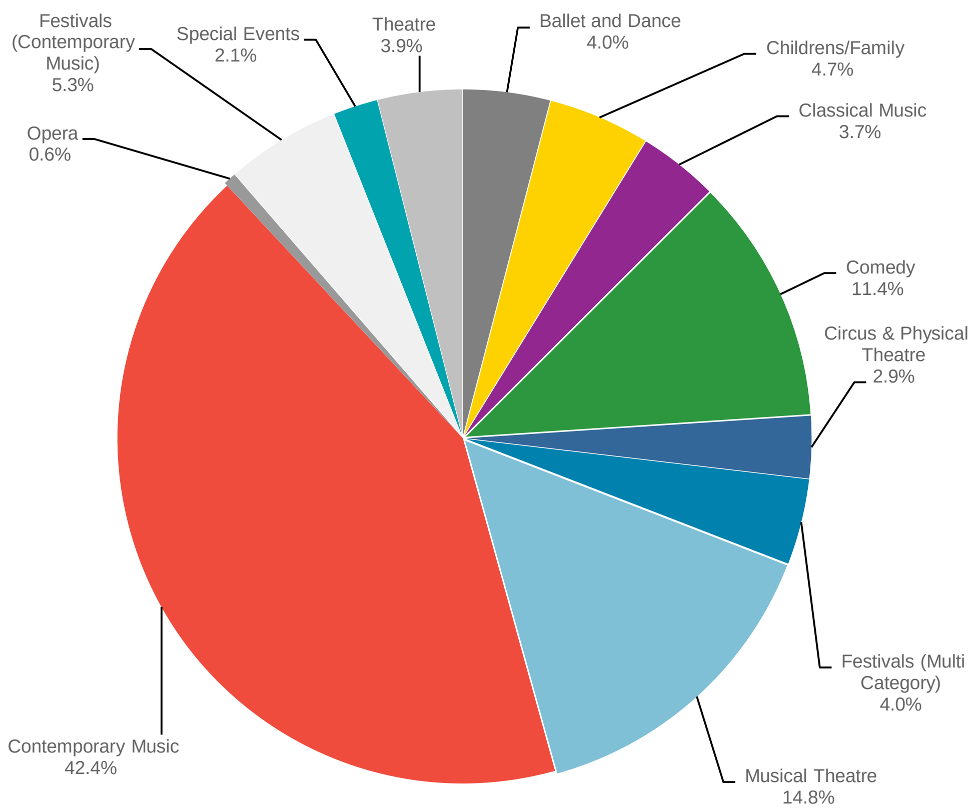


3 State Analysis
QLD

QLD Revenue by Category (2018)



QLD Attendance by Category (2018)



3 State Analysis
WA

WA Revenue and Attendance

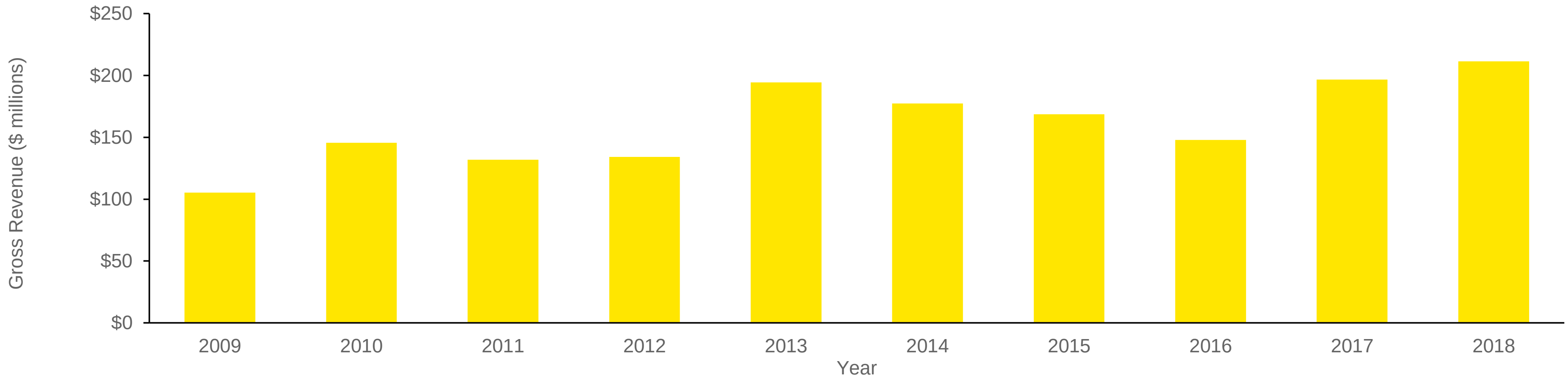
- In 2018, WA generated $211.4m in revenue and recorded 2.8m in attendance.
- The Contemporary Music category contributed the highest share to WA's total revenue and attendance in 2018 among all the live performance categories with a 52.5% and 38.1% share respectively.
- WA spend per capita was $81.12 in 2018.
- WA witnessed an increase in ticket sales revenue by 7.5%, while there was a 6.5% growth in attendance in 2018. The growth in revenue was primarily driven by the growth in the following categories as compared to last year:
    - Contemporary Music witnessed a growth of 20.9% in revenue, while there was an increase of 12.8% in attendance in 2018. Growth was primarily driven by performances from Pink, Ed Sheeran, Taylor Swift and Bruno Mars.
    - Musical Theatre experienced a significant growth of 58.0% in revenue, contributed by an increase of 89.1% in attendance in 2018. The growth was primarily driven by musicals such as *Aladdin, Mamma Mia!, We Will Rock You, New Jersey Nights, Legally Blonde, Carousel* and *In The Mood.*
    - Comedy witnessed a significant growth of 64.0% (to $15.8m) in revenue, while there was an increase of 85.9% (to 0.2m) in attendance between 2017 and 2018. The growth was primarily driven by Perth Comedy Festival and performances from Kevin Hart and Jim Jefferies, and events such as *For the Love of Mrs. Brown.*
- The growth in revenue was partially offset by y-o-y declines in Circus and Physical Theatre (95.0%), which was primarily due to the absence of Cirque du Soleil's tours in 2018; Theatre (24.0%), which was due to fewer major theatre productions; and Festivals (Contemporary Music) (21.0%), which experienced a general decline in revenue and attendance.

WA – Revenue and Attendance (2009 – 2018)

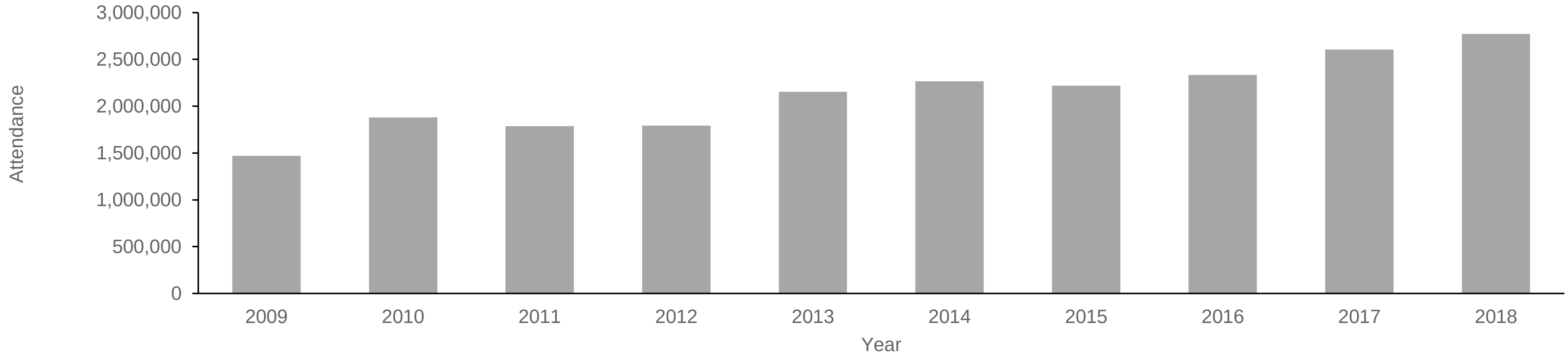
	Revenue		Attendance	
Year	Revenue	% Growth in Revenue	Attendance	% Growth in Attendance
2009	$105,312,778		1,468,882	
2010	$145,479,374	38.1%	1,879,408	27.9%
2011	$131,936,782	(9.3%)	1,788,262	(4.8%)
2012	$134,131,622	1.7%	1,791,795	0.2%
2013	$194,312,089	44.9%	2,153,483	20.2%
2014	$177,326,653	(8.7%)	2,266,435	5.2%
2015	$168,688,271	(4.9%)	2,217,942	(2.1%)
2016	$147,807,422	(12.4%)	2,334,951	5.3%
2017	$196,671,338	33.1%	2,604,391	11.5%
2018	$211,421,549	7.5%	2,772,963	6.5%

3 State Analysis
WA

Revenue – WA (2009-2018)

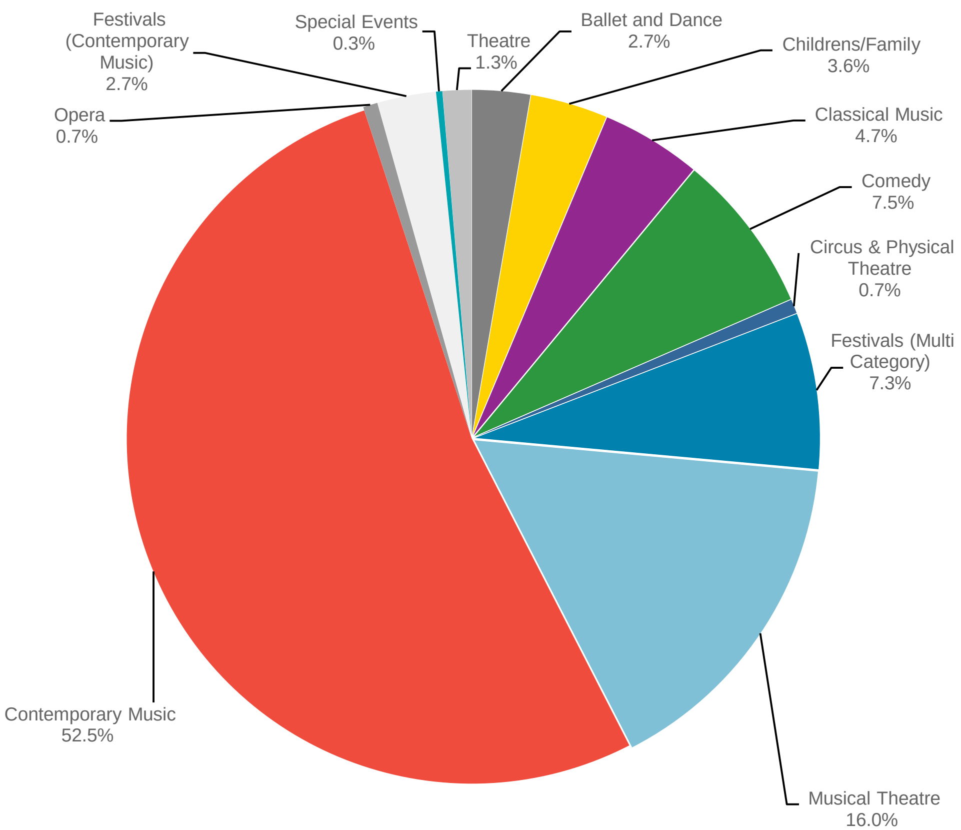


Total Attendance – WA (2009-2018)

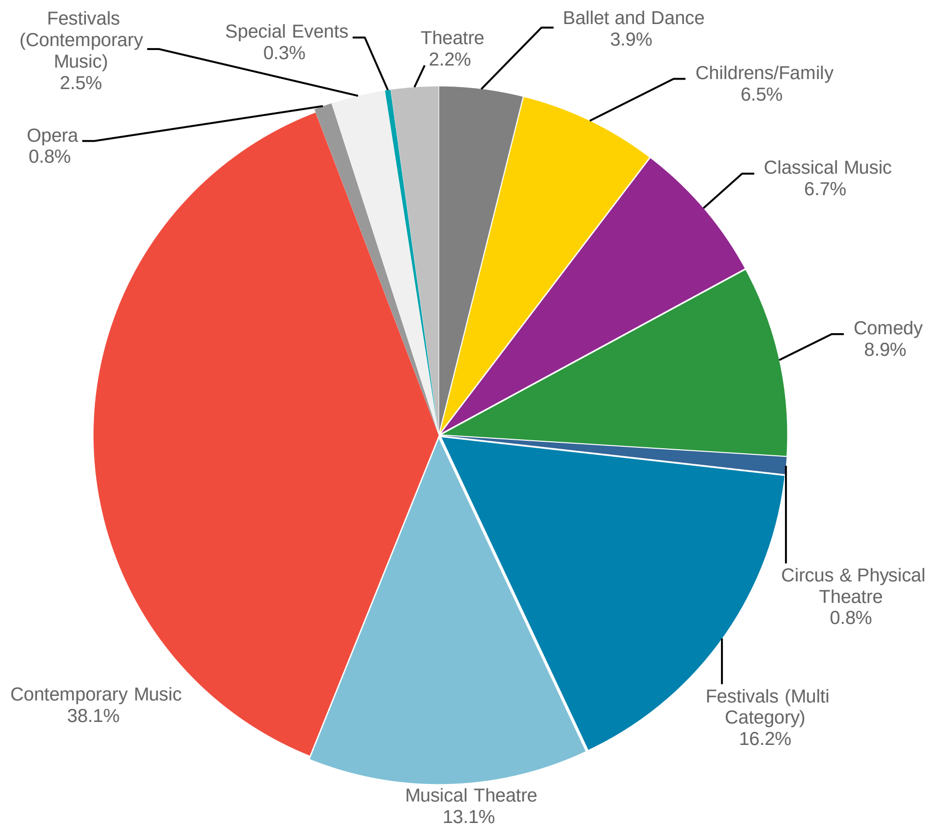


3 State Analysis
WA

WA Revenue by Category (2018)



WA Attendance by Category (2018)



3 State Analysis
SA

SA Revenue and Attendance

- In 2018, SA generated $131.5m in revenue and recorded 2.2m in attendance.
- SA per capita spend in 2018 was $75.49.
- Contemporary Music (48.4%) and Festivals (Multi Category) (42.6%) contributed the highest share to SA's total revenue and attendance respectively.
- SA experienced a growth in revenue of 6.5%, while attendance increased by 5.4% in 2018.
- It was primarily driven by significant changes in revenue and attendance in the following categories as compared to 2017:
    - Comedy witnessed a considerable growth of 142.0%, contributed by a significant increase of 246.3% in attendance driven by events such as *For the Love of Mrs. Brown*, and performers such as Carl Barron and Jim Jefferies.
    - Ballet and Dance witnessed growth of 32.6% in revenue, with a 22.5% increase in attendance primarily attributable to events such as *The Sleeping Beauty* and *Ballet Revolucíon.*
    - Special Events experienced a growth of 49.5% in revenue and 48.2% growth in attendance, primarily attributable to an increase in the number of events being hosted in SA, such as Harlem Globetrotters.
    - Revenue and attendance in Festivals (Contemporary Music) increased by 37.4% and 57.5% respectively. Major contributing festivals were Groovin' the Moo, Spin Off Festival, Handpicked Festival and St. Jerome's Laneway Festival. Spin Off Festival returned after a five year hiatus.
- The growth in revenue in the above categories was slightly offset by the declines in revenue in Circus and Physical Theatre (96.8%), Classical Music (11.3%) and Theatre (3.2%).

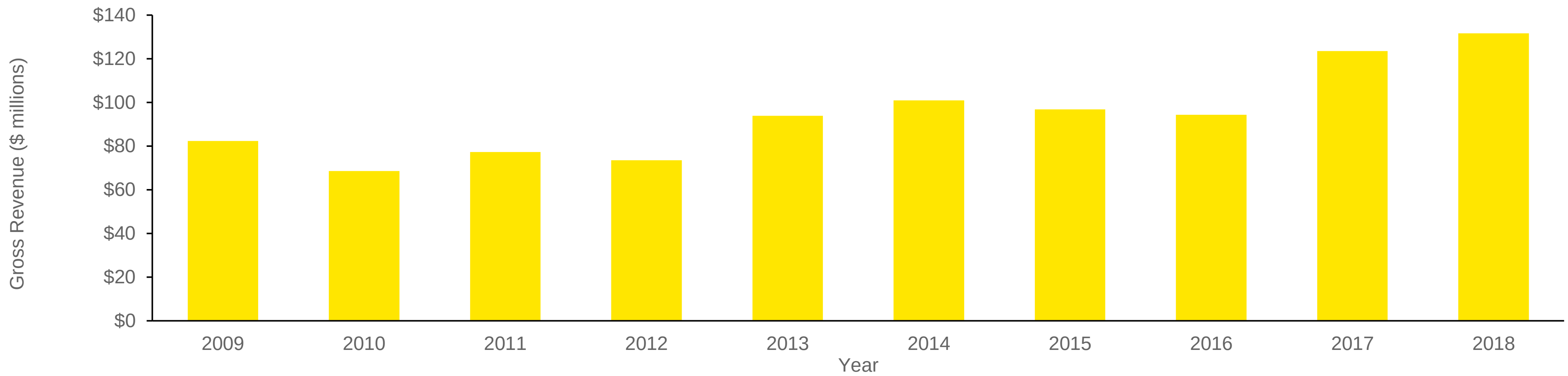
SA – Revenue and Attendance (2009 – 2018)

	Revenue		Attendance	
Year	**Revenue**	**% Growth in Revenue**	**Attendance**	**% Growth in Attendance**
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%
2016	$94,316,578	(2.6%)	1,797,087	5.7%
2017	$123,525,390	31.0%	2,100,226	16.9%
2018	$131,560,865	6.5%	2,212,725	5.4%

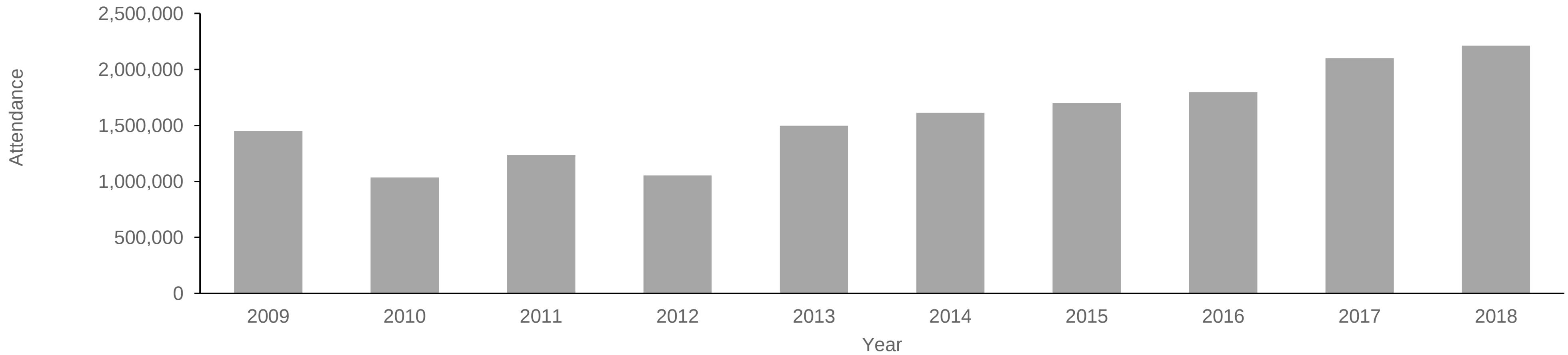
3 State Analysis

SA

Revenue – SA (2009-2018)



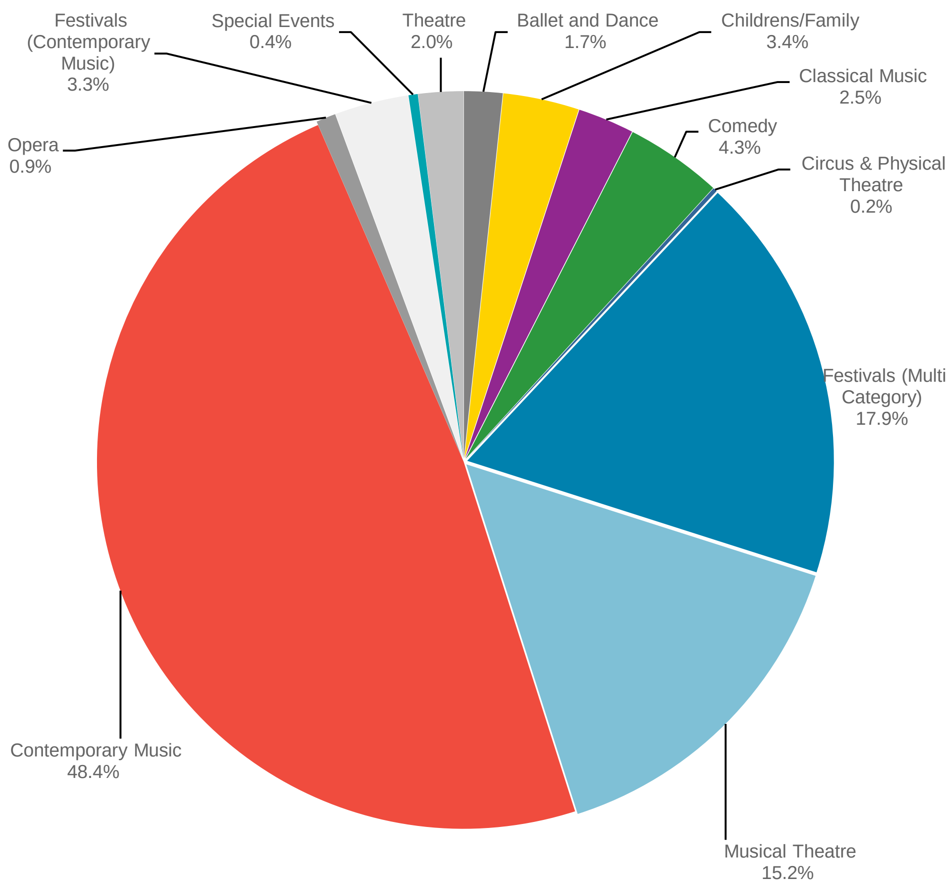
Total Attendance – SA (2009-2018)



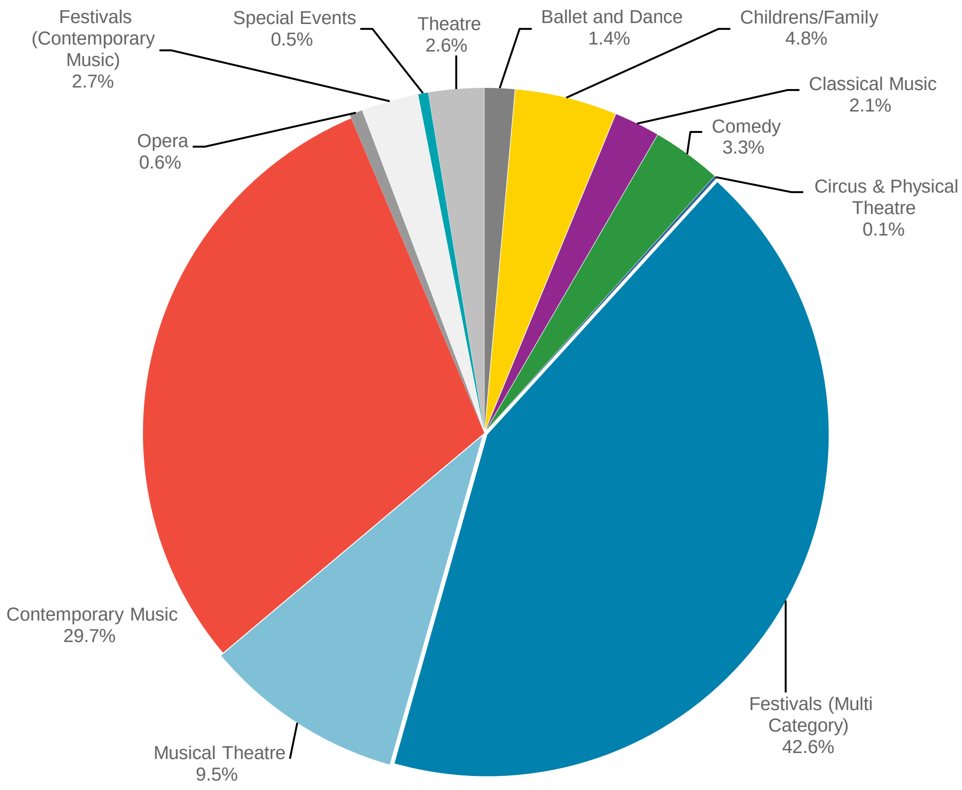
3 State Analysis

SA

SA Revenue by Category (2018)



SA Attendance by Category (2018)



3 State Analysis
ACT/TAS/NT

ACT, TAS and NT Revenue and Attendance

- In 2018, ACT/TAS/NT revenue increased by 12.1% to $49.7m and attendance increased by 39.5% to 1.2m as compared to 2017.
- Among these 3 states, Tasmania saw the highest y-o-y increase in revenue by 17.0% with an increase in attendance by 67.1% in 2018 when compared to 2017.
- Contemporary Music was the highest contributor to revenue (23.8%) in ACT/TAS/NT.
- ACT revenue increased to $27.8m and attendance to 0.4m with a $65.71 per capita spend in 2018.
  - This was driven by significant growth across Festivals (Multi-Category), Opera, Comedy, Theatre and Special Events categories.
  - Top events included Spilt Milk, Groovin' the Moo, Anthems and *Grease – The Arena Experience*.
- TAS revenue saw the increase in revenue to $18.5m. The TAS spend per capita was $35.68 in 2018.
  - The increase in revenue is primarily due to significant increase in revenue in Comedy, Festivals (Multi-Category), and Children's/Family categories.
  - Top events included Dark Mofo, The Falls Music & Arts Festival, Party in The Paddock and MONA FOMA.
- NT revenue declined by 16.4% despite a moderate increase of 1.9% in attendance as compared to last year. NT had the lowest per capita spend of $11.89, which may be due to a large number of free events being presented in the NT.
  - The decline in revenue was primarily driven by the decline in average ticket prices.
  - The decline in revenue was also due to a revenue decline in Contemporary Music. This was partially offset by the significant growth in revenue in the Musical Theatre, Ballet and Dance and Children's/Family categories.

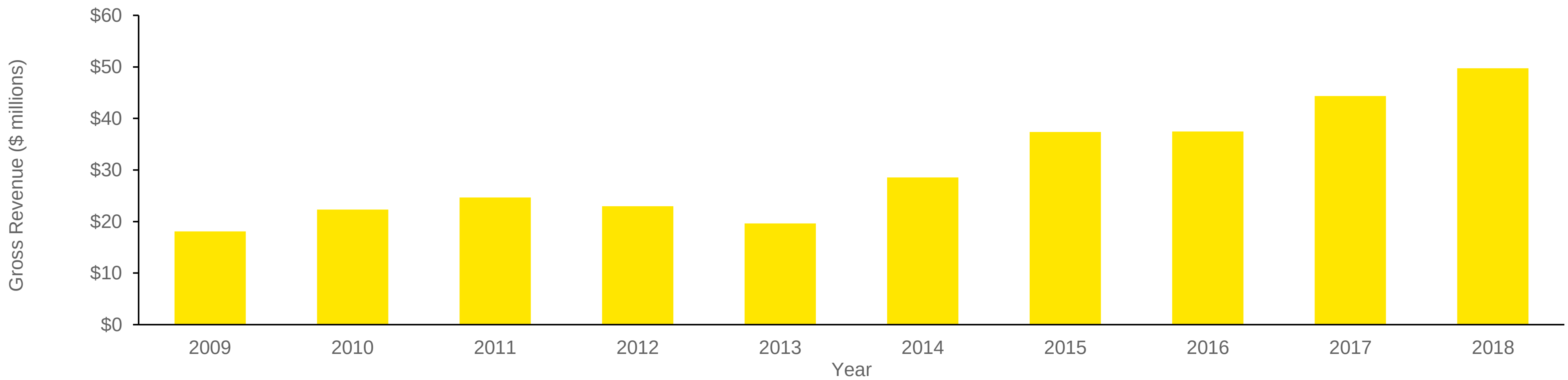
Note: ACT/TAS/NT revenue and attendance numbers and commentary have been combined for confidentiality purposes.

ACT/TAS/NT – Revenue and Attendance (2009 – 2018)

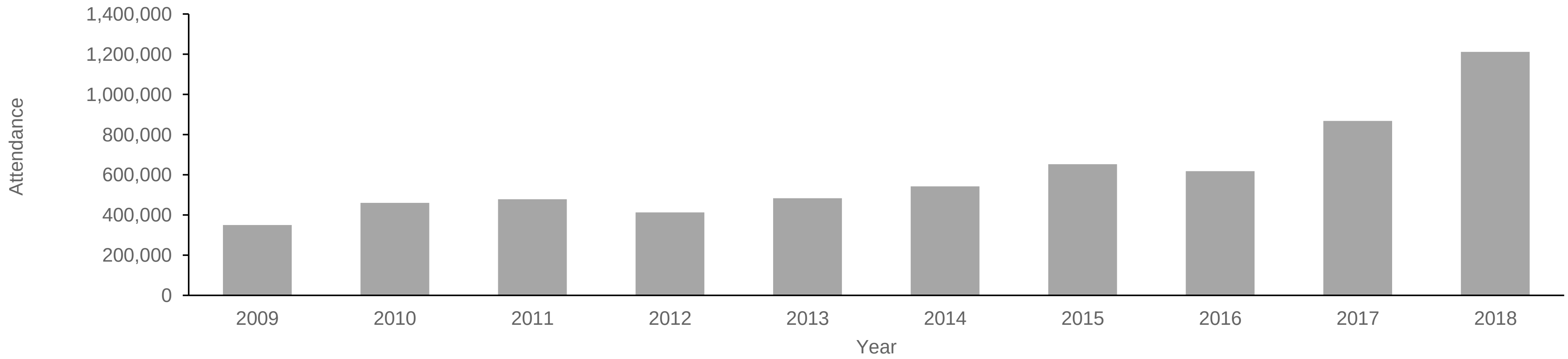
	Revenue		Attendance	
Year	**Revenue**	**% Growth in Revenue**	**Attendance**	**% Growth in Attendance**
2009	$18,103,869		351,189	
2010	$22,345,107	23.4%	460,793	31.2%
2011	$24,646,007	10.3%	478,993	3.9%
2012	$22,986,999	(6.7%)	413,160	(13.7%)
2013	$19,640,815	(14.6%)	484,343	17.2%
2014	$28,566,945	45.4%	542,736	12.1%
2015	$37,367,387	30.8%	653,358	20.4%
2016	$37,454,754	0.2%	618,451	(5.3%)
2017	$44,352,456	18.4%	868,922	40.5%
2018	$49,737,811	12.1%	1,212,219	39.5%

3 State Analysis
ACT/TAS/NT

Revenue – ACT/TAS/NT (2009-2018)



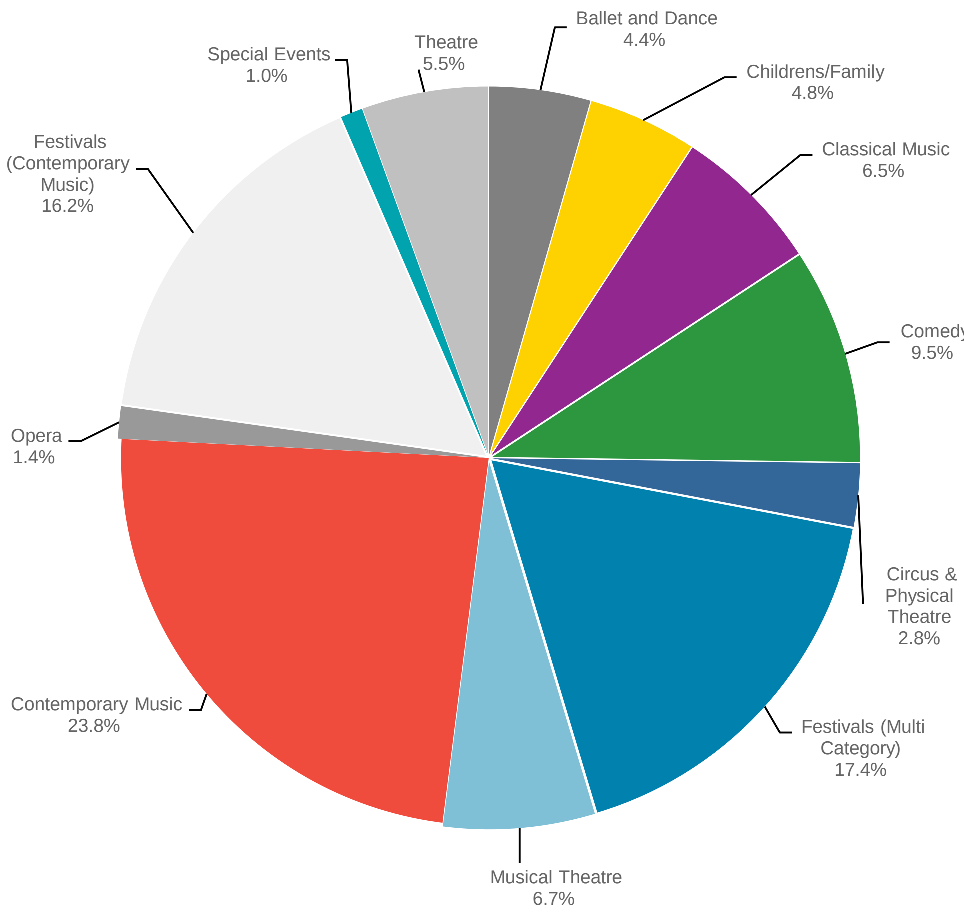
Total Attendance – ACT/TAS/NT (2009-2018)



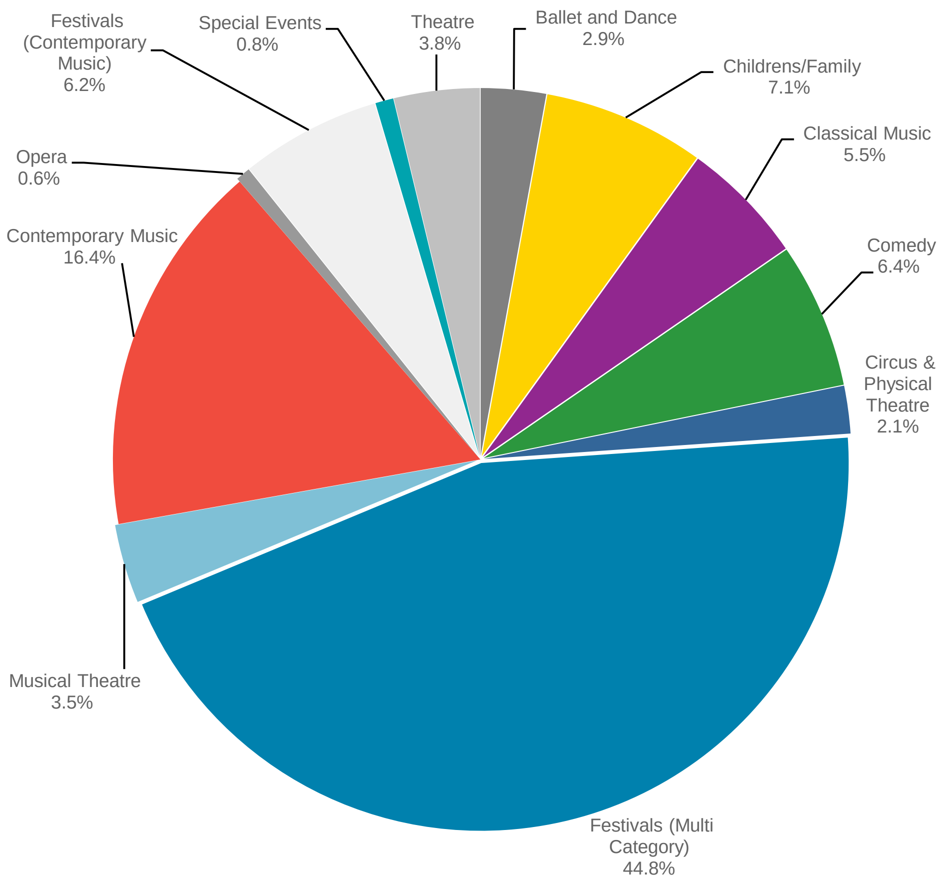
Note: ACT/TAS/NT revenue and attendance numbers have been combined for confidentiality purposes.

3 State Analysis
ACT/TAS/NT

ACT/TAS/NT Revenue by Category (2018)



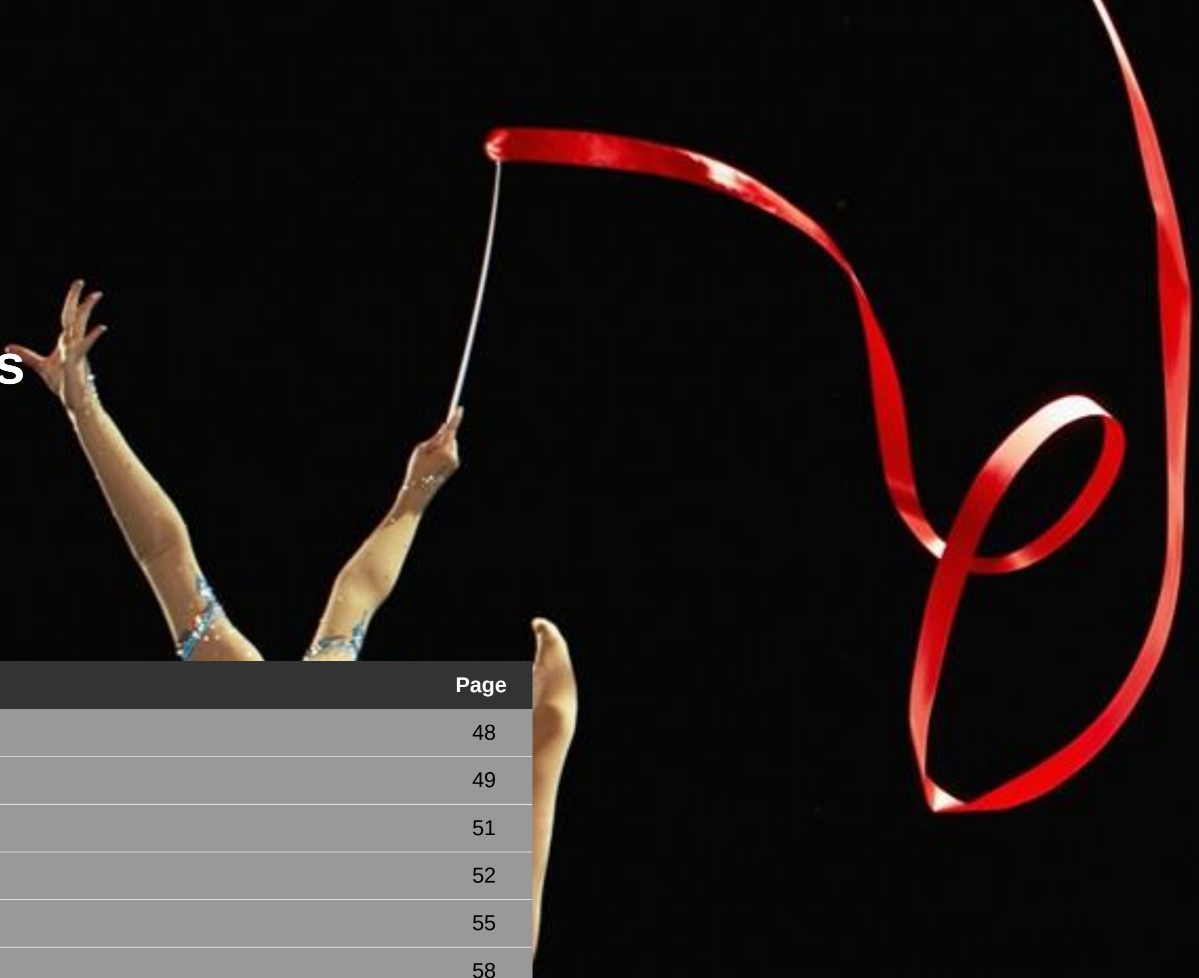
ACT/TAS/NT Attendance by Category (2018)



Note: ACT/TAS/NT revenue and attendance numbers have been combined for confidentiality purposes.

4

Category Analysis



4 Category Analysis
Total Revenue and Attendance by Category

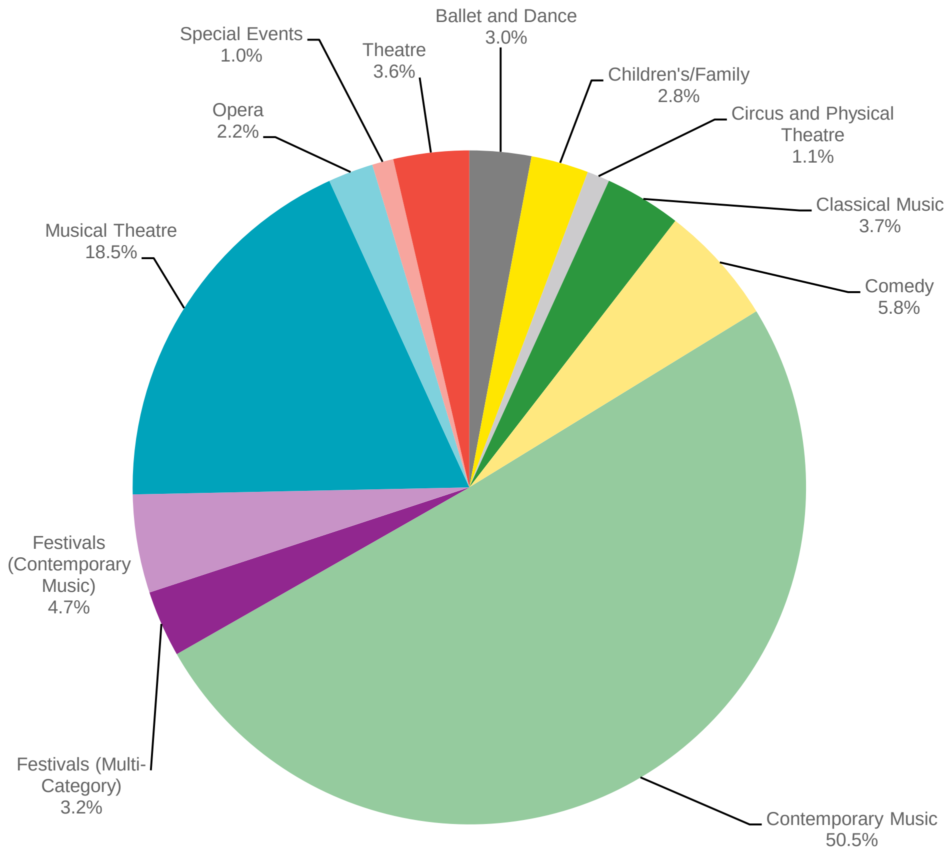
Total Revenue and Attendance by Category in 2018

	Revenue			Attendance		
Category	**Revenue**	**% Change in Revenue (from 2017)**	**Share of Industry 2018**	**Attendance**	**% Change in Attendance (from 2017)**	**Share of Industry 2018**
Ballet and Dance	$63,988,882	2.6%	3.0%	800,781	(1.2%)	3.0%
Children's/Family	$59,777,596	16.5%	2.8%	1,650,955	26.4%	6.3%
Circus and Physical Theatre	$23,410,423	(79.9%)	1.1%	450,446	(61.3%)	1.7%
Classical Music	$79,456,707	2.0%	3.7%	1,261,565	(4.3%)	4.8%
Comedy	$124,742,437	72.5%	5.8%	2,458,198	98.5%	9.4%
Contemporary Music	$1,092,275,549	32.2%	50.5%	10,088,329	19.2%	38.4%
Festivals (Multi-Category)	$68,972,653	26.2%	3.2%	2,577,932	38.1%	9.8%
Festivals (Contemporary Music)	$102,015,922	1.3%	4.7%	975,233	14.4%	3.7%
Musical Theatre	$400,199,798	(4.0%)	18.5%	3,917,532	(3.1%)	14.9%
Opera	$46,965,221	29.2%	2.2%	487,195	31.9%	1.9%
Special Events	$22,115,160	337.9%	1.0%	170,359	24.5%	0.6%
Theatre	$78,505,052	22.2%	3.6%	1,430,263	(1.9%)	5.4%
Total	**$2,162,425,399**	**14.8%**	**100.0%**	**26,268,788**	**14.1%**	**100.0%**

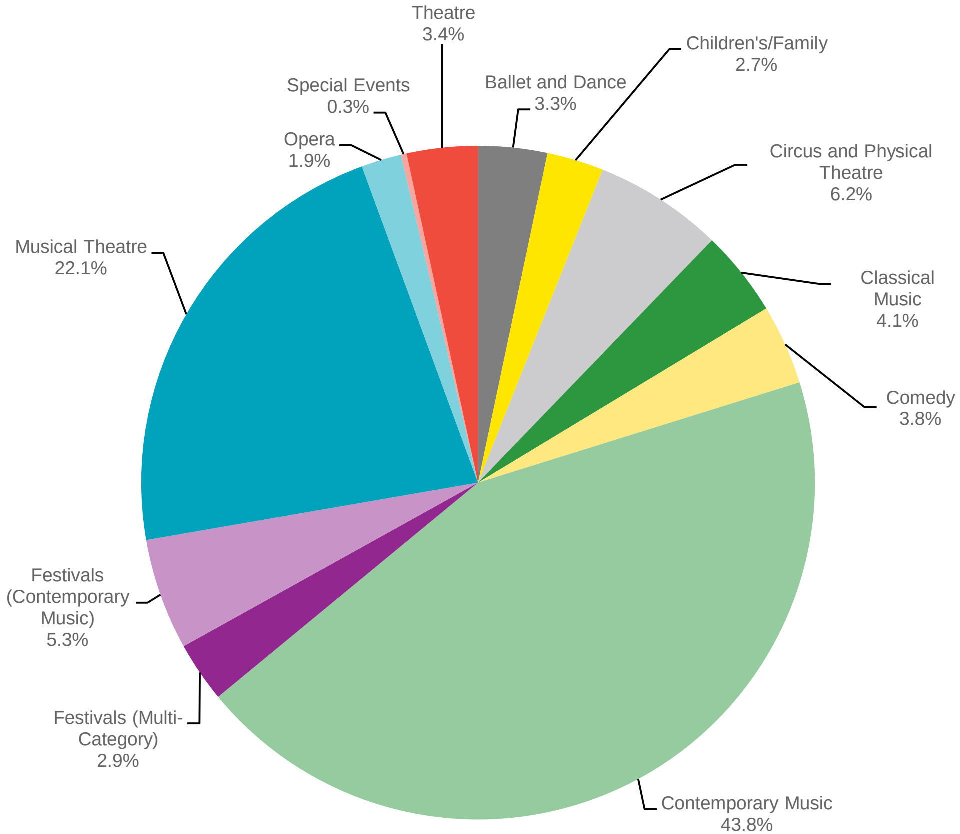
4 Category Analysis

Category Market Share Trends

Revenue by Category (2018)

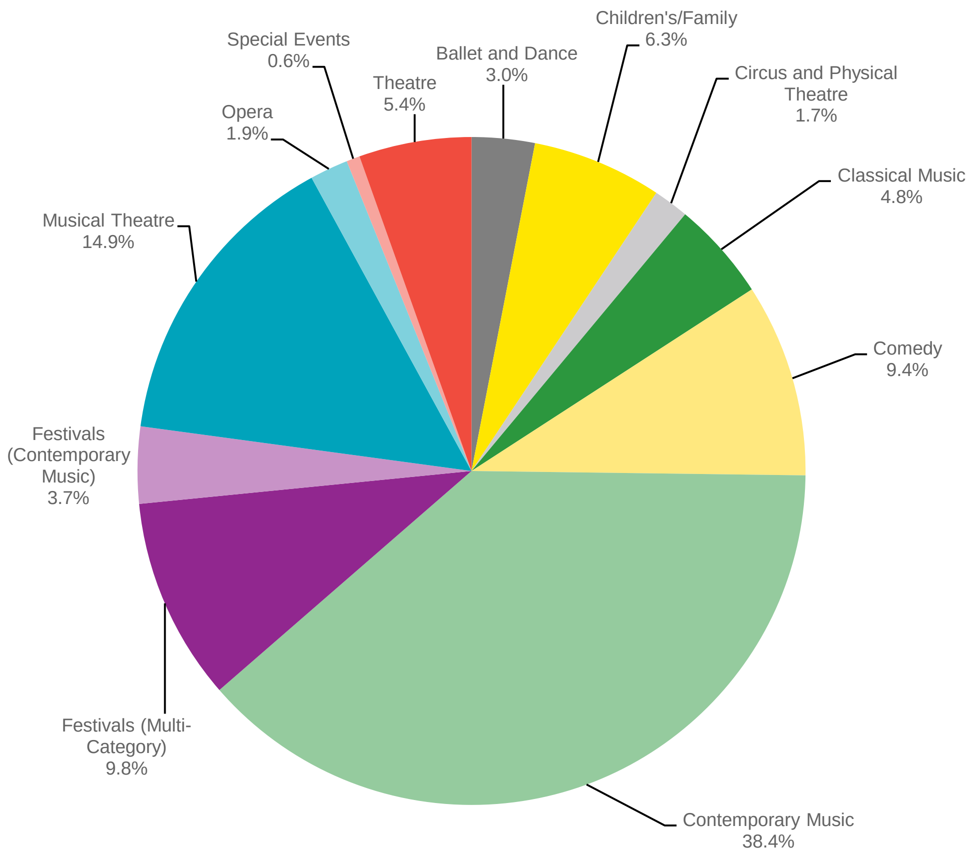


Revenue by Category (2017)

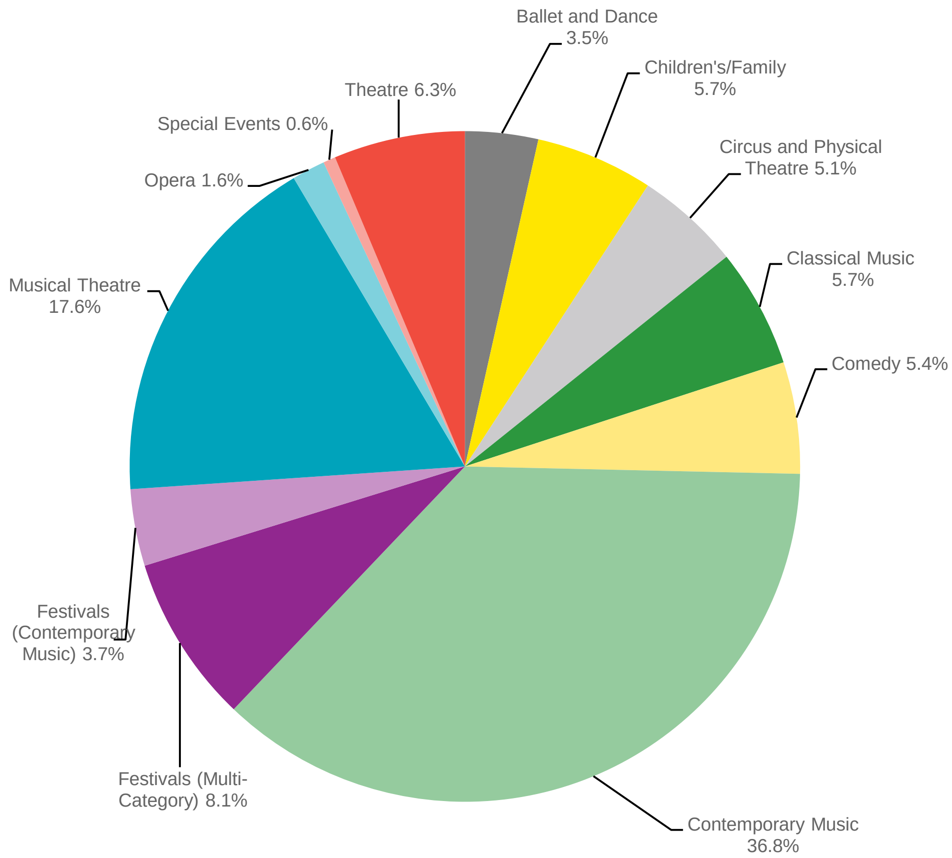


4 Category Analysis
Category Market Share Trends

Total Attendance by Category (2018)

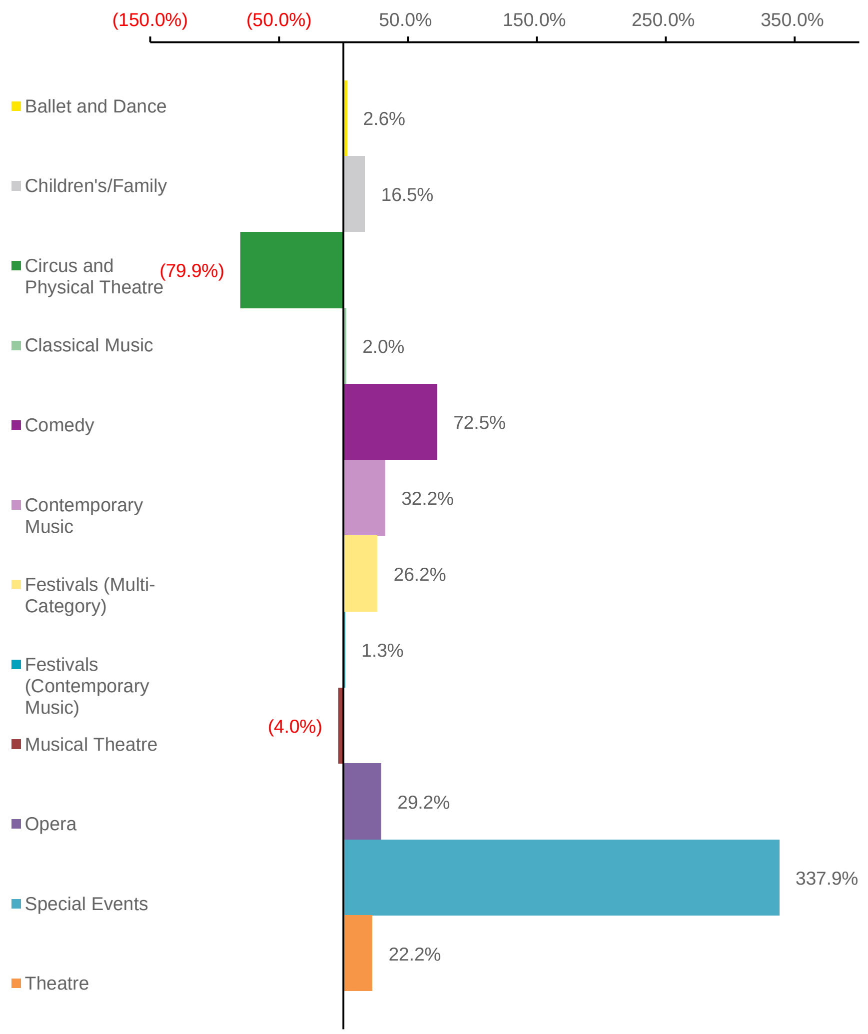


Total Attendance by Category (2017)

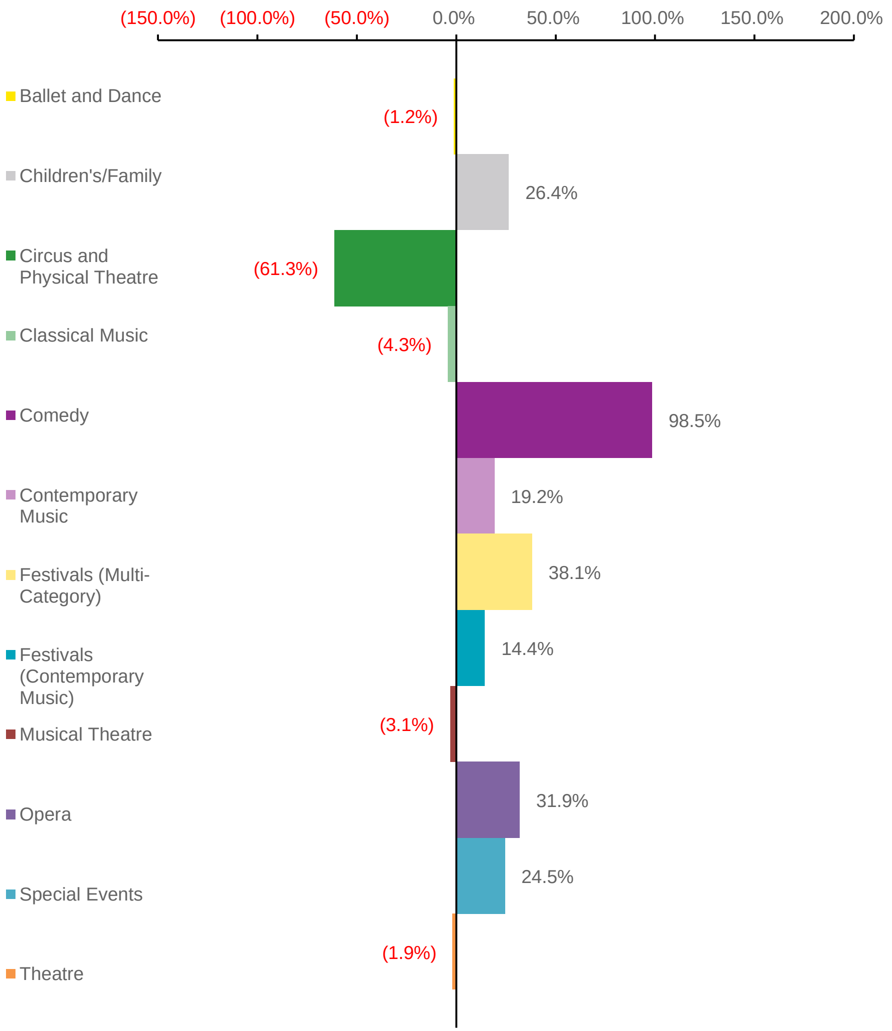


4 Category Analysis
Category Trends

Percentage Movement in Revenue by Category (2017-18)



Percentage Movement in Attendance by Category (2017-2018)



4 Category Analysis
Ballet and Dance

National Overview

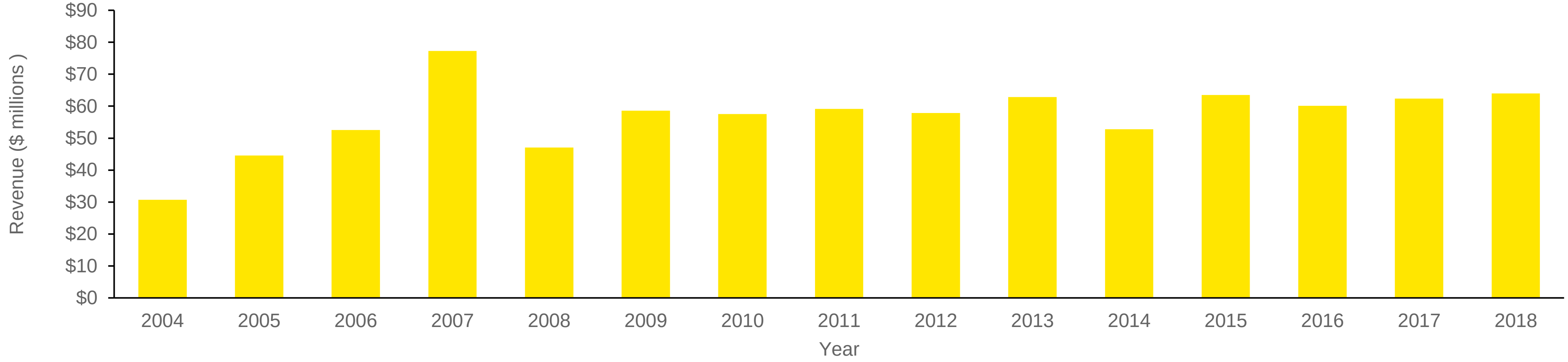
- The Ballet and Dance category experienced a y-o-y increase in revenue by 2.6% (from $62.3m in 2017 to $64.0m in 2018). Total attendance decreased by 1.2% (0.81m in 2017 to 0.80m in 2018). However, there was a y-o-y increase in average ticket price by 6.1% from $85.57 in 2017 to $90.81 in 2018. The revenue in Ballet and Dance was primarily driven by major performances such as *The Merry Widow*, *Cinderella, Spartacus, Murphy* and *Giselle.*
- In 2018, 66.1% of revenue and 64.1% of attendance in Ballet and Dance was generated through performances by AMPAG companies, such as The Australian Ballet, Sydney Dance Company, Bangarra Dance Theatre, Queensland Ballet and the West Australian Ballet. AMPAG Ballet and Dance category companies experienced a decrease in revenue by 3.4% and a decrease in attendance by 6.6% in 2018 as compared to 2017.
- In 2018, NSW, Victoria and Queensland generated the most revenue and attendance in this category, with a national market share of approximately 37.4%, 30.4% and 16.2% respectively in revenue and 31.9%, 27.0% and 19.4% respectively in attendance. These three states generated 84.1% of national Ballet and Dance revenue and 78.3% attendance in 2018.
- NT experienced the most significant y-o-y growth in revenue (224.7%) and attendance (141.8%) in Ballet and Dance, driven by major performances such as *Regional Tour: Coppelia, A Taste of Ireland - The Irish Music & Dance Sensation* and *Cinderella.*
- WA experienced the second most significant y-o-y growth in revenue (37.5%) and attendance (23.9%). The growth in revenue is driven by major performances including *The Nutcracker* and *Dracula.*

Ballet and Dance – Revenue and Attendance (2004 – 2018)

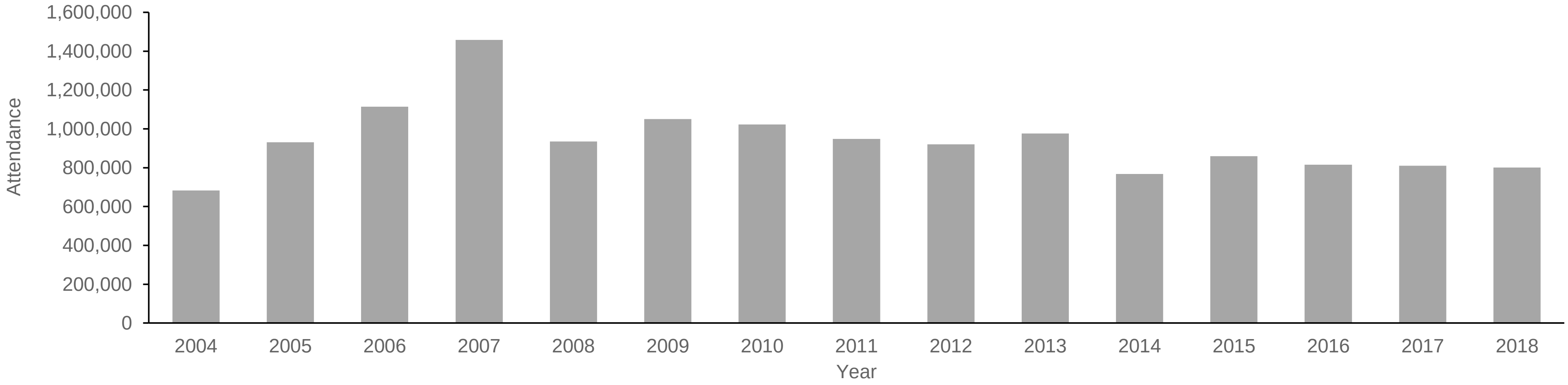
	Revenue		Attendance		Average Ticket Price	
Year	**Revenue**	**Growth (%)**	**Total Attendance**	**Growth (%)**	**Average Ticket Price**	**Growth (%)**
2004	$30,664,060	-	682,755	-	$50.07	-
2005	$44,563,085	45.3%	930,639	36.3%	$52.76	5.4%
2006	$52,523,644	17.9%	1,113,849	19.7%	$50.52	(4.2%)
2007	$77,287,071	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%
2016	$60,079,595	(5.4%)	815,458	(5.1%)	$82.59	(2.1%)
2017	$62,339,482	3.8%	810,483	(0.6%)	$85.57	3.6%
2018	$63,988,882	2.6%	800,781	(1.2%)	$90.81	6.1%

4 Category Analysis
Ballet and Dance

Ballet and Dance – Revenue (2004-2018)

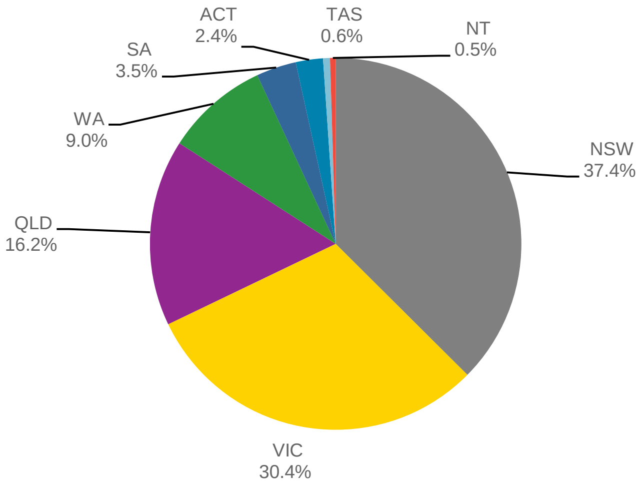


Ballet and Dance – Total Attendance (2004-2018)



4 Category Analysis
Ballet and Dance

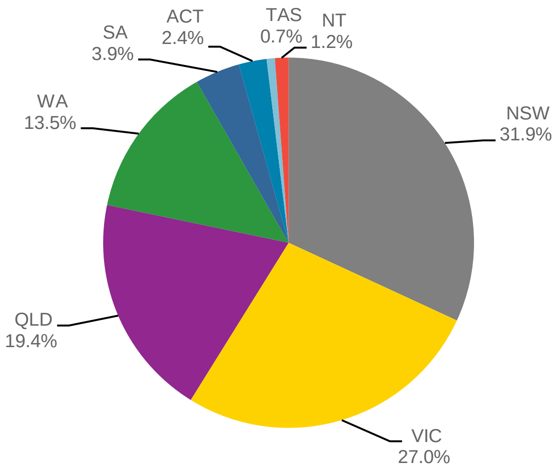
Ballet and Dance – Revenue by State/Territory



Ballet and Dance – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$23,961,603	37.4%	4.9%
VIC	$19,475,016	30.4%	(5.5%)
QLD	$10,373,905	16.2%	(8.0%)
WA	$5,740,264	9.0%	37.5%
SA	$2,229,354	3.5%	32.6%
ACT	$1,513,560	2.4%	29.1%
TAS	$386,449	0.6%	(21.3%)
NT	$308,732	0.5%	224.7%
Total	$63,988,882	100.0%	2.6%

Ballet and Dance – Attendance by State/Territory



Ballet and Dance – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	255,424	31.9%	(7.2%)
VIC	215,833	27.0%	(10.7%)
QLD	155,518	19.4%	5.9%
WA	108,015	13.5%	23.9%
SA	31,323	3.9%	22.5%
ACT	19,493	2.4%	(1.1%)
TAS	5,694	0.7%	(45.1%)
NT	9,481	1.2%	141.8%
Total	**800,781**	**100.0%**	**(1.2%)**

4 Category Analysis
Children’s/Family Events

National Overview

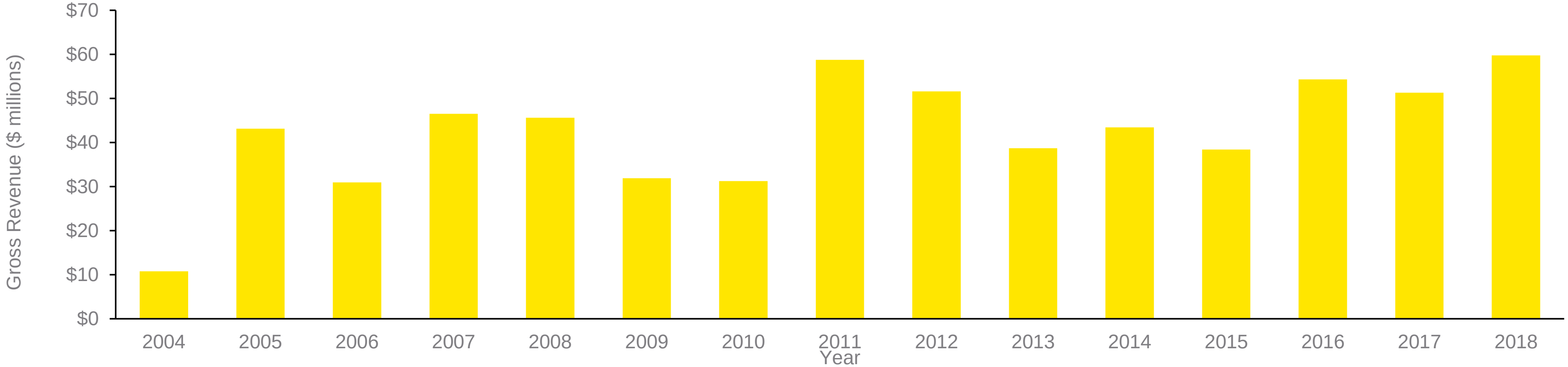
- Children’s/Family Events experienced a y-o-y growth in revenue and attendance in 2018. The revenue in this category increased by 16.5% from $51.3m in 2017 to $59.8m in 2018, and attendance increased by 26.4% from 1.3m in 2017 to 1.7m in 2018. The growth in revenue is partially offset by the decline in the average ticket price by 4.1% from $42.35 in 2017 to $40.63 in 2018.
- The revenue in this category was primarily driven by national tours of major events that attracted large audiences including *Disney on Ice*, The Wiggles, Paw Patrol and *The 78-Storey Treehouse.*
- In 2018, NSW and Victoria generated the most revenue and attendance in this category, with a national market share of approximately 36.7% and 26.3% respectively in revenue and 41.3% and 25.2% respectively in attendance. These two states combined generated 63.1% of national Children’s/Family category revenue and 66.5% of attendance in 2018.
- In 2018, in Children’s/Family category, all the states have shown y-o-y growth in revenue and all the states except ACT have shown y-o-y growth in attendance.
- TAS experienced the most significant y-o-y growth in revenue (253.2%) and attendance (97.8%) in Children’s/Family category, driven by major performances such as *Deadly 60 Down Under, George’s Marvellous Medicine* and *Peppa Pig.*
- NT experienced the second most significant y-o-y growth in revenue (109.6%) and attendance (80.6%). The growth in revenue is driven by major performances including those by The Wiggles, *Deadly 60 Down Under, The Gruffalo* and *The 78-Storey Treehouse*.

Children's/Family Events – Revenue and Attendance (2004 – 2018)

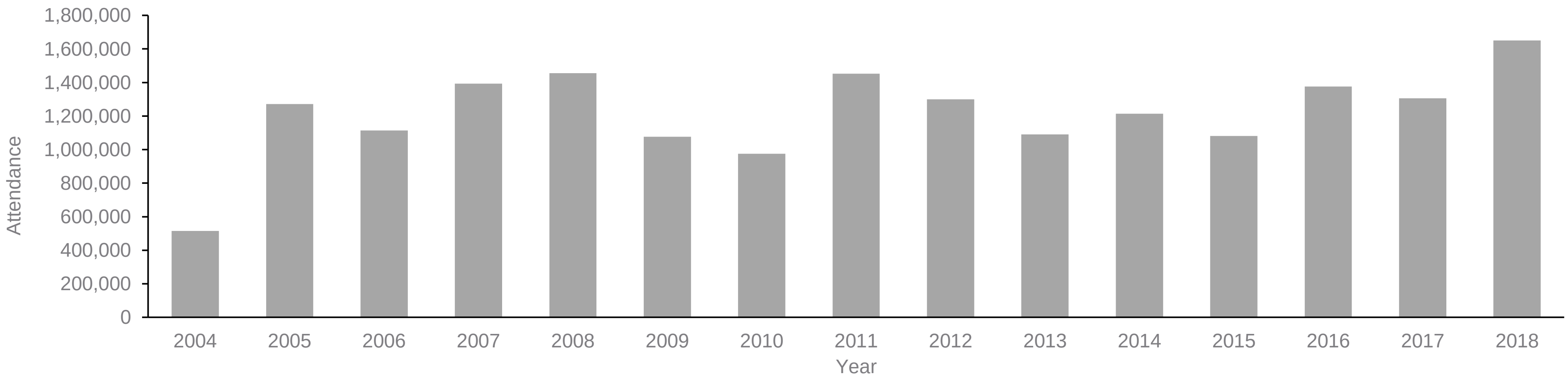
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$10,737,662	-	515,276	-	$21.25	-
2005	$43,108,863	301.5%	1,271,239	146.7%	$35.52	67.1%
2006	$30,944,086	(28.2%)	1,114,427	(12.3%)	$28.96	(18.5%)
2007	$46,535,403	50.4%	1,393,942	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%
2016	$54,316,058	41.6%	1,376,254	27.3%	$42.87	9.5%
2017	$51,308,258	(5.5%)	1,305,672	(5.1%)	$42.35	(1.2%)
2018	$59,777,596	16.5%	1,650,955	26.4%	$40.63	(4.1%)

4 Category Analysis
Children's/Family Events

Children's/Family Events – Revenue (2004-2018)

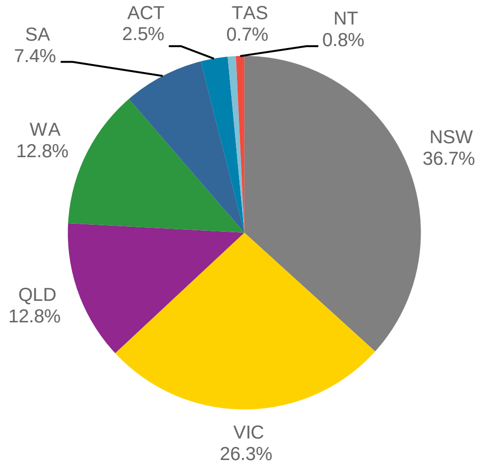


Children's/Family Events – Total Attendance (2004-2018)



4 Category Analysis
Children's/Family Events

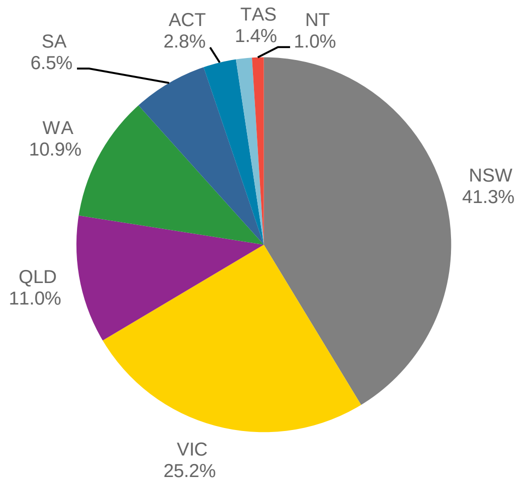
Children's/Family Events – Revenue by State/Territory



Children's/Family Events – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$21,951,451	36.7%	23.9%
VIC	$15,744,846	26.3%	8.8%
QLD	$7,645,865	12.8%	4.3%
WA	$7,652,153	12.8%	21.4%
SA	$4,408,044	7.4%	18.0%
ACT	$1,474,759	2.5%	5.1%
TAS	$446,312	0.7%	253.2%
NT	$454,166	0.8%	109.6%
Total	**$59,777,596**	**100.0%**	**16.5%**

Children's/Family Events – Attendance by State/Territory



Children's/Family Events – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	681,988	41.3%	52.1%
VIC	415,329	25.2%	13.8%
QLD	181,983	11.0%	5.0%
WA	179,166	10.9%	9.1%
SA	106,551	6.5%	28.3%
ACT	46,642	2.8%	(8.6%)
TAS	22,694	1.4%	97.8%
NT	16,602	1.0%	80.6%
Total	**1,650,955**	**100.0%**	**26.4%**

4 Category Analysis
Circus and Physical Theatre

National Overview

- The Circus and Physical Theatre category experienced the highest y-o-y decline in both revenue and in attendance in 2018.
- It experienced a y-o-y decline of 79.9% in revenue from $116.5m in 2017 to $23.4m in 2018 and a decline in attendance by 61.3% from 1.17m in 2017 to 0.5m in 2018.
- Additionally, the decline in revenue is contributed by the y-o-y decrease in average ticket price by 44.1% from $109.04 in 2017 to $60.96 in 2018.
- This category can be variable depending on the presence or absence of major tours by international companies in any given year, particularly Cirque du Soleil. In 2018, there were no Cirque du Soleil tours.
- Major events in this category in 2018 included performances by The Illusionists, Circus Rio, and *Limbo Unhinged.*
- ACT and NT are the only states which have experienced y-o-y growth in revenue in this category in 2018. ACT witnessed a y-o-y increase in revenue by 37.5% and growth in attendance by 42.7%. The major event in this category in the ACT was *The Illusionists: Direct from Broadway.* NT witnessed an increase in revenue by 24.7% and growth in attendance by 36.3%. The major event in this category in the NT was *Cosentino – Live*.

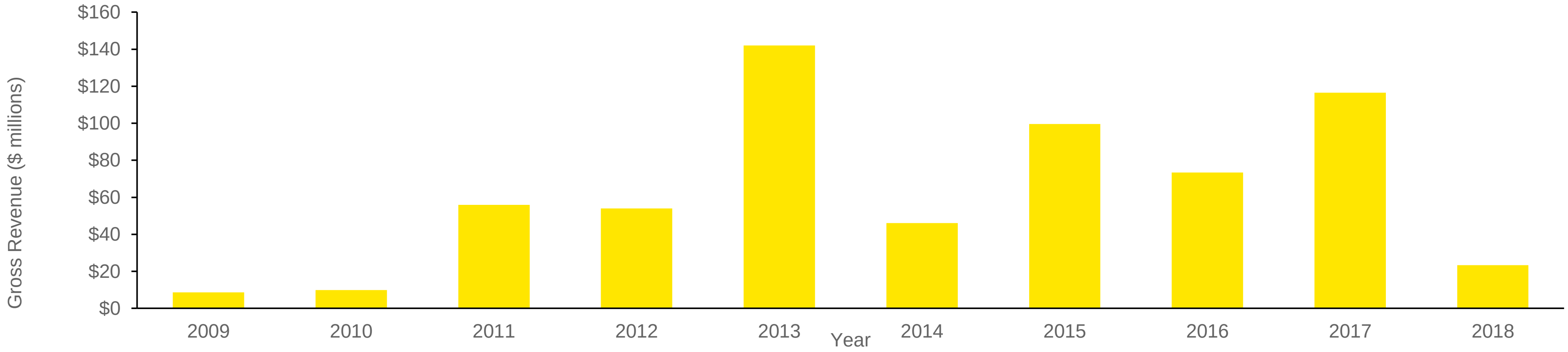
Circus and Physical Theatre – Revenue and Attendance (2009 – 2018)

	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$8,601,990	-	198,274	-	$47.98	-
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%
2016	$73,439,491	(26.2%)	838,980	(13.9%)	$96.56	(11.7%)
2017	$116,542,574	58.7%	1,165,111	38.9%	$109.04	12.9%
2018	$23,410,423	(79.9%)	450,446	(61.3%)	$60.96	(44.1%)

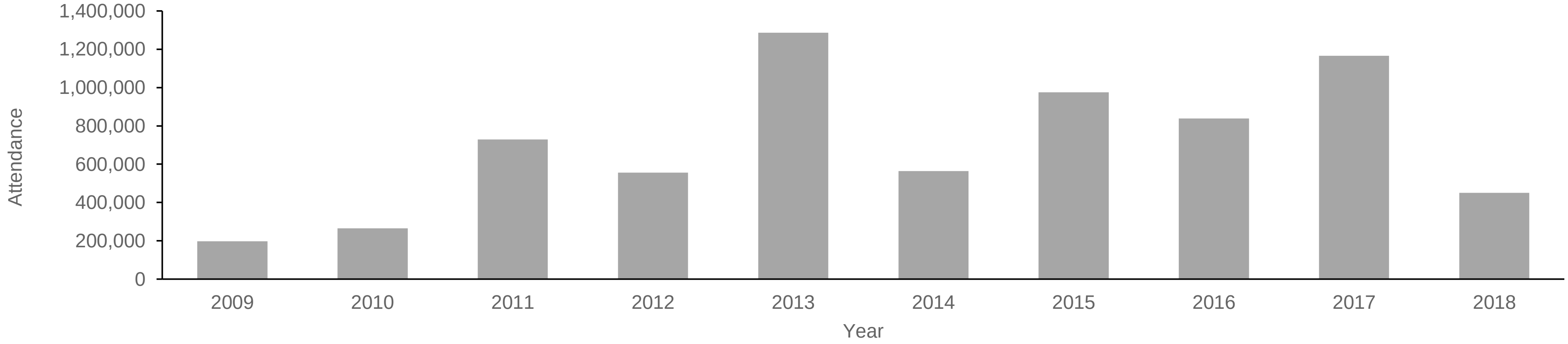
Note: Data is provided from 2009 as the category was only introduced in the 2009 Survey. Prior to 2009, such events were included in the Theatre or Children's/Family categories.

4 Category Analysis
Circus and Physical Theatre

Circus and Physical Theatre – Revenue (2009-2018)

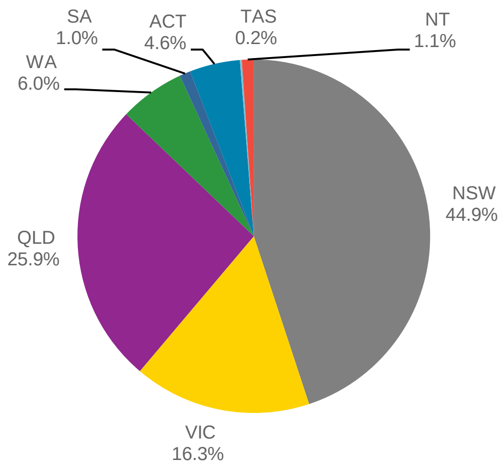


Circus and Physical Theatre – Total Attendance (2009-2018)



4 Category Analysis
Circus and Physical Theatre

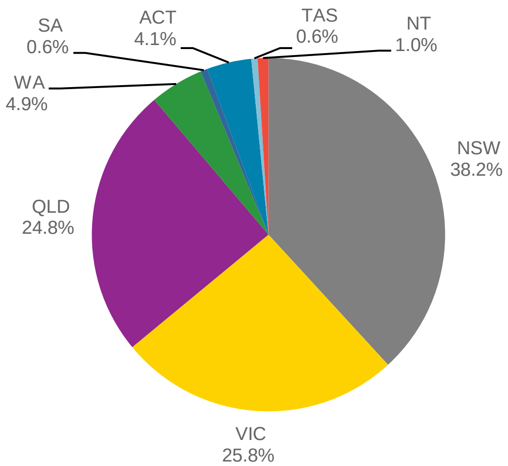
Circus and Physical Theatre – Revenue by State/Territory



Circus and Physical Theatre – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$10,516,692	44.9%	(55.4%)
VIC	$3,806,008	16.3%	(90.8%)
QLD	$6,072,764	25.9%	(60.2%)
WA	$1,401,980	6.0%	(95.0%)
SA	$237,402	1.0%	(96.8%)
ACT	$1,080,265	4.6%	37.5%
TAS	$40,584	0.2%	(31.6%)
NT	$254,727	1.1%	24.7%
Total	**$23,410,423**	**100.0%**	**(79.9%)**

Circus and Physical Theatre – Attendance by State/Territory



Circus and Physical Theatre – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	171,927	38.2%	(24.8%)
VIC	116,431	25.8%	(72.2%)
QLD	111,677	24.8%	(23.7%)
WA	22,153	4.9%	(92.1%)
SA	2,867	0.6%	(96.2%)
ACT	18,374	4.1%	42.7%
TAS	2,597	0.6%	110.5%
NT	4,420	1.0%	36.3%
Total	**450,446**	**100.0%**	**(61.3%)**

4 Category Analysis
Classical Music

National Overview

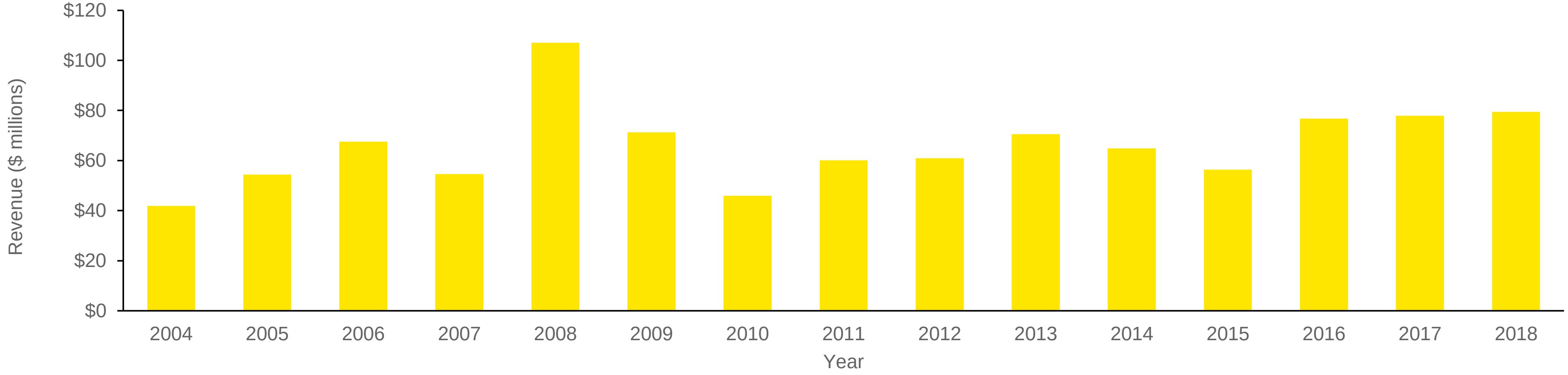
- Classical Music experienced a marginal y-o-y increase in revenue by 2.0% from $77.9m in 2017 to $79.5m in 2018, despite a y-o-y decrease in attendance by 4.3% from 1.32m in 2017 to 1.26m in 2018. The growth in revenue is primarily attributed to the y-o-y increase in average ticket price by 2.6% from $77.12 in 2017 to $79.13 in 2018.
- 2018 recorded the second highest revenue (2008 being the highest) and the fourth highest attendance (after 2006, 2008 and 2017) in the Classical Music category. The top events in the Classical Music category in 2018 were André Rieu, Staatskapelle Berlin, Anne-Sophie Mutter, Beethoven *Nine* and *Yundi Touch of Chopin*.
- Similar to previous years, most of the revenue (66.0%) and attendance (70.6%) in this category was generated through performances by AMPAG companies in 2018. This includes the Adelaide Symphony Orchestra, Australian Brandenburg Orchestra, Australian Chamber Orchestra, Melbourne Symphony Orchestra, Musica Viva Australia, Orchestra Victoria, Queensland Symphony Orchestra, Sydney Symphony Orchestra, Tasmanian Symphony Orchestra and West Australian Symphony Orchestra. AMPAG companies at an overall level experienced a y-o-y decline in revenue by 0.7% and a y-o-y decline in attendance by 3.2% in 2018.
- NT experienced the highest y-o-y increase in revenue (63.5%) and attendance (58.1%) among all the state. However, its impact is minimal as it represented only 0.1% in revenue and 0.3% in attendance of the overall market share in the Classical Music category. Top performances included those by Darwin Symphony Orchestra and Roger Woodward.

Classical Music – Revenue and Attendance (2004 – 2018)

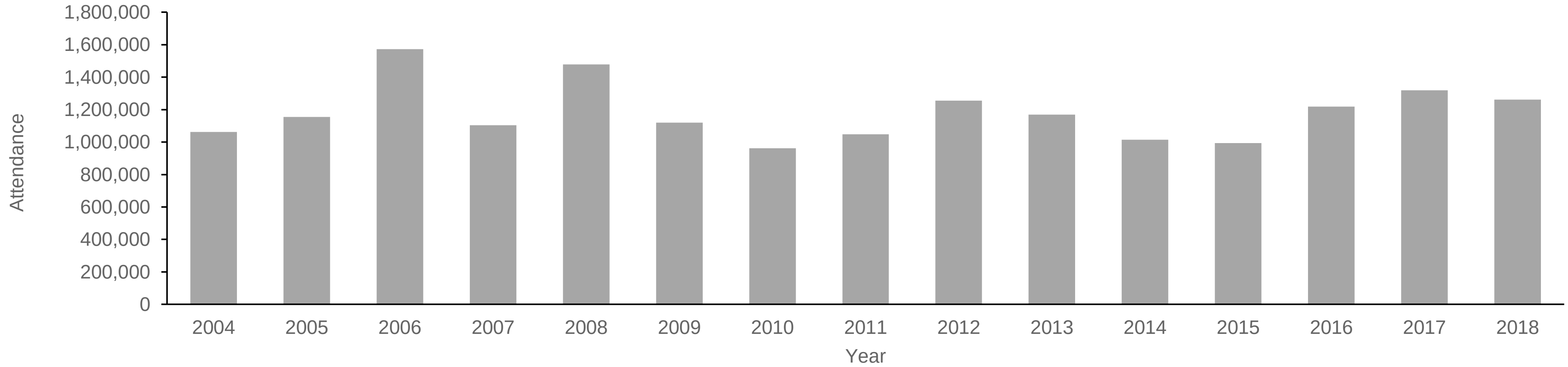
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$41,875,659	-	1,062,071	-	$43.21	-
2005	$54,395,768	29.9%	1,154,340	8.7%	$52.95	22.5%
2006	$67,568,915	24.2%	1,571,748	36.2%	$46.93	(11.4%)
2007	$54,615,181	(19.2%)	1,104,146	(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%)
2016	$76,764,404	36.1%	1,219,293	22.7%	$78.43	9.7%
2017	$77,883,209	1.5%	1,318,421	8.1%	$77.12	(1.7%)
2018	$79,456,707	2.0%	1,261,565	(4.3%)	$79.13	2.6%

4 Category Analysis
Classical Music

Classical Music – Revenue (2004-2018)

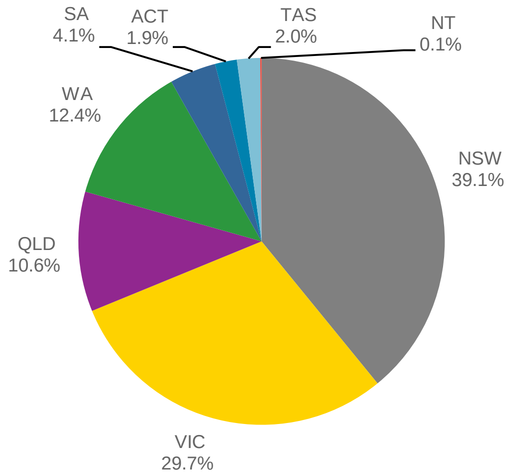


Classical Music – Total Attendance (2004-2018)



4 Category Analysis
Classical Music

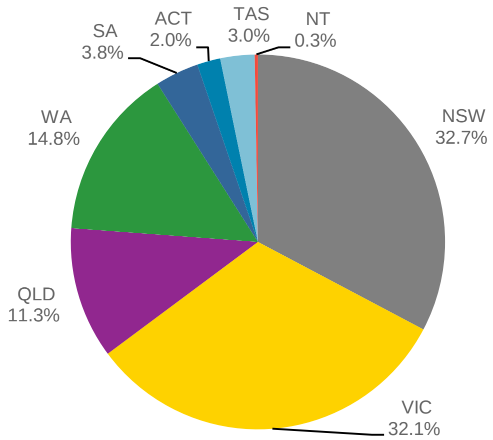
Classical Music – Revenue by State/Territory



Classical Music – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$31,061,325	39.1%	(2.1%)
VIC	$23,616,779	29.7%	3.4%
QLD	$8,388,908	10.6%	(3.8%)
WA	$9,876,702	12.4%	18.5%
SA	$3,261,627	4.1%	(11.3%)
ACT	$1,534,053	1.9%	29.2%
TAS	$1,622,584	2.0%	21.2%
NT	$94,729	0.1%	63.5%
Total	**$79,456,707**	**100.0%**	**2.0%**

Classical Music – Attendance by State/Territory



Classical Music – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	412,985	32.7%	(3.6%)
VIC	404,820	32.1%	(8.6%)
QLD	143,137	11.3%	(2.2%)
WA	186,885	14.8%	13.5%
SA	47,522	3.8%	(25.5%)
ACT	25,382	2.0%	8.0%
TAS	37,330	3.0%	(19.7%)
NT	3,504	0.3%	58.1%
Total	**1,261,565**	**100.0%**	**(4.3%)**

4 Category Analysis

Comedy

National Overview

- Comedy witnessed the second highest y-o-y growth in revenue and the highest growth in attendance amongst all categories, generating 72.5% growth in revenue from $72.3m in 2017 to $124.7m in 2018 and 98.5% growth in attendance from 1.2m in 2017 to 2.4m in 2018.
- Additional ticketing providers submitted data in the reporting period, helping to explain the growth in Comedy revenue and attendance.
- Additionally, a significant y-o-y increase of the average ticket price by 83.3% (from $62.32 in 2017 to $114.20 in 2018) contributed to the increase in revenue.
- This is the highest recorded revenue and attendance for Comedy since the introduction of this category in the Report in 2009.
- The growth in Comedy in 2018 was primarily driven by the success of the Melbourne International Comedy Festival, Perth Comedy Festival, major high-profile comedians that headlined tours in 2018 such as Kevin Hart, Jim Jefferies, Trevor Noah and Russell Peters, and events such as *For the Love of Mrs. Brown.*
- Victoria is the highest contributor to Comedy, both in revenue and in attendance, representing 34.7% of the market share in revenue and 44.1% of the total attendance in 2018.
- VIC and NSW together contributed 61.1% of the total market share of revenue and 66.0% of total attendance in 2018.
- In 2018, all states and territories experienced y-o-y growth in revenue, while all states and territories except NT witnessed y-o-y growth in attendance.
- TAS witnessed the highest y-o-y growth in revenue (484.5%) and in attendance (342.1%) in 2018. The major events were performances by the renowned comedians Lano & Woodley and Carl Barron. However, its impact is minimal as it represented only 1.1% in revenue and 1.0% in attendance of the overall market share in the Comedy category.

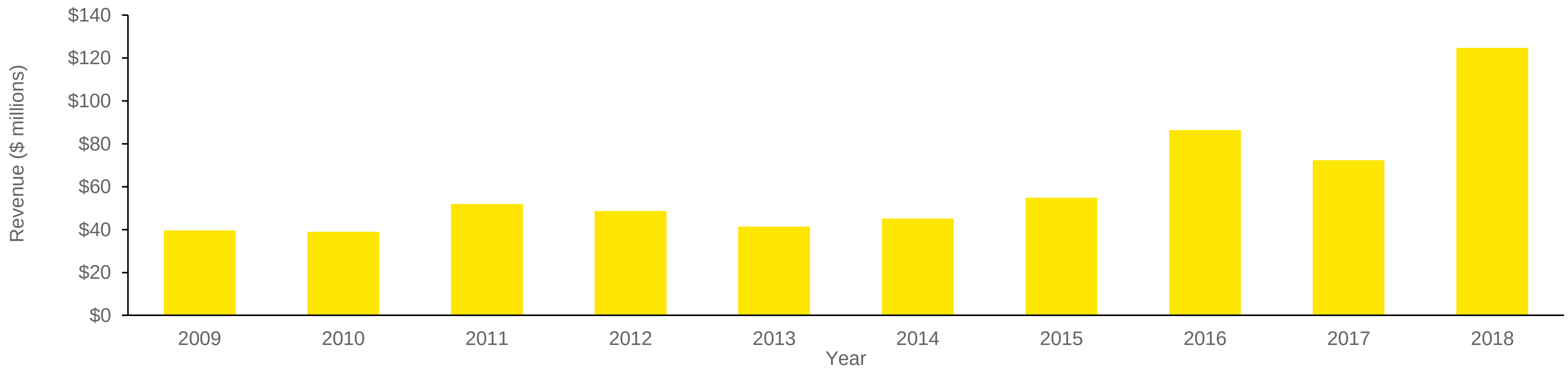
Note: Data is provided from 2009 as the category was only introduced in the 2009 Survey. Prior to 2009, such events were included in the Theatre or former Festivals (Single-Category) genre.

Comedy– Revenue and Attendance (2009 – 2018)

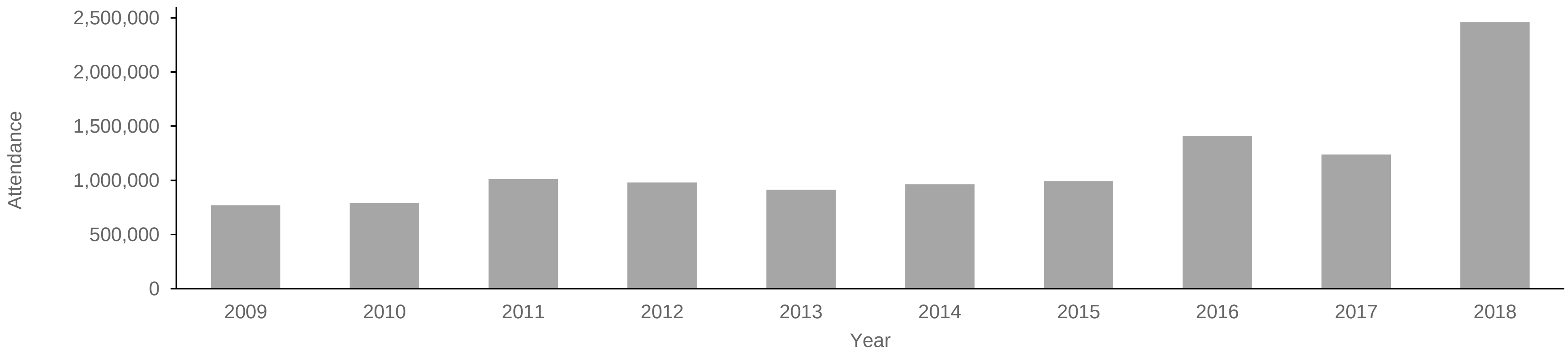
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$39,570,117	-	769,058	-	$44.07	-
2010	$39,048,164	(1.3%)	792,713	3.1%	$51.53	16.9%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	(6.4%)	981,035	(3.0%)	$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%
2016	$86,382,773	57.3%	1,409,299	42.0%	$65.54	9.0%
2017	$72,306,243	(16.3%)	1,238,460	(12.1%)	$62.32	(4.9%)
2018	$124,742,437	72.5%	2,458,198	98.5%	$114.20	83.3%

4 Category Analysis
Comedy

Comedy – Revenue (2009-2018)

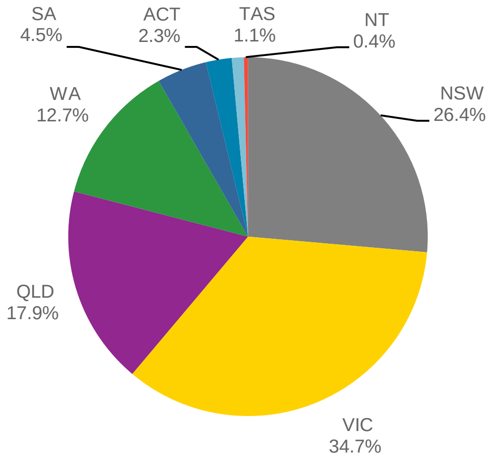


Comedy – Total Attendance (2009-2018)



4 Category Analysis
Comedy

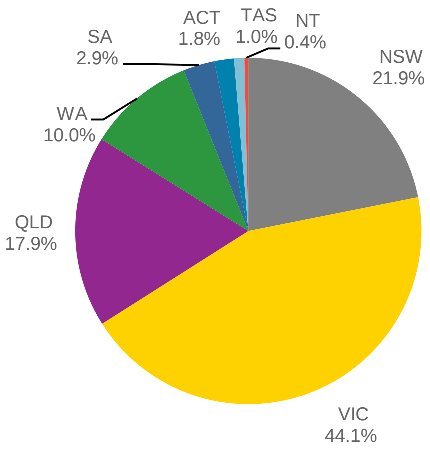
Comedy – Revenue by State/Territory



Comedy – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$32,917,904	26.4%	46.7%
VIC	$43,339,714	34.7%	58.7%
QLD	$22,356,424	17.9%	154.1%
WA	$15,810,158	12.7%	64.0%
SA	$5,610,840	4.5%	142.0%
ACT	$2,906,314	2.3%	158.1%
TAS	$1,338,125	1.1%	484.5%
NT	$462,958	0.4%	1.8%
Total	**$124,742,437**	**100.0%**	**72.5%**

Comedy – Attendance by State/Territory



Comedy – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	537,662	21.9%	78.5%
VIC	1,084,856	44.1%	85.4%
QLD	439,544	17.9%	177.3%
WA	246,547	10.0%	85.9%
SA	72,112	2.9%	246.3%
ACT	44,865	1.8%	76.2%
TAS	23,631	1.0%	342.1%
NT	8,981	0.4%	(4.0%)
Total	**2,458,198**	**100.0%**	**98.5%**

National Overview

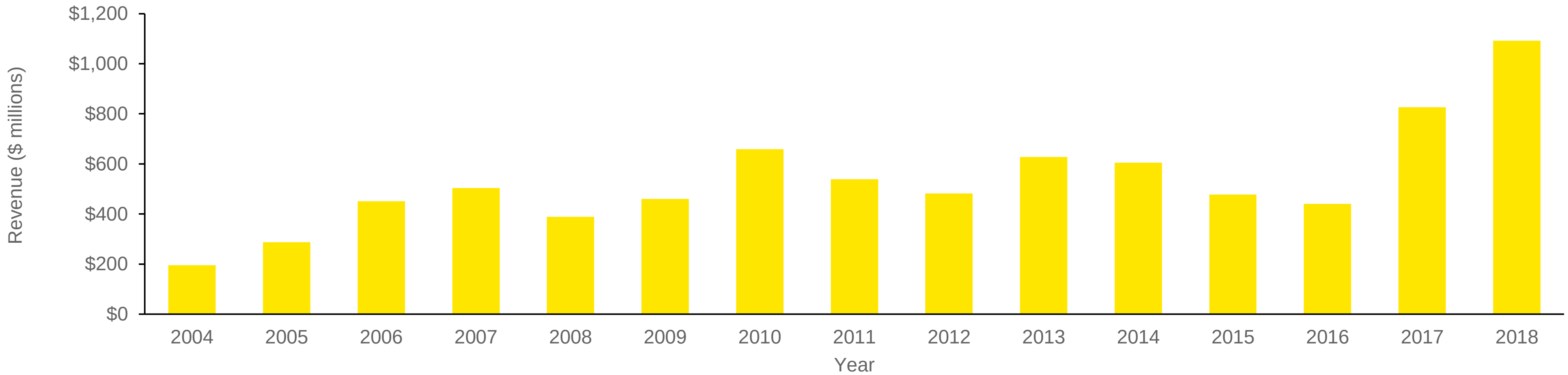
- In 2018, revenue in the Contemporary Music category recorded a y-o-y growth of 32.2%, from $826.1m in 2017 to $1.1b in 2018 and 19.2% y-o-y growth in attendance, from 8.5m in 2017 to 10.1m in 2018. Additionally, a y-o-y increase in the average ticket price by 11.4%, from $105.73 in 2017 to $117.77 in 2018 contributed to the increase in revenue.
- Contemporary Music continues to be the top contributor to the live performance market share. Contemporary Music generated approximately a 50.5% market share of revenue and 38.1% market share of attendance of the overall live performance events in 2018. This is the highest recorded market share in revenue and second highest market share in attendance (2010 being the highest) for Contemporary Music since 2004.
- The annual variability of this category strongly reflects the number of high-profile international artists that tour in any given year, particularly the number of stadium tours that attract large audiences.
- Major international artists that toured Australia in 2018 included Pink, Ed Sheeran, Bruno Mars, Taylor Swift, Celine Dion, Katy Perry and Michael Buble. Major bands, including Bon Jovi and Foo Fighters, also performed.
- Growth in Contemporary Music revenue was primarily due to a number of prominent acts with arena or stadium tours that attracted large crowds and toured to most of the five major cities in 2018.
- Victoria generated the largest market share in revenue (37.3%) and attendance (33.2%) in Contemporary Music, outperforming NSW.
- NSW and Victoria combined generated 68.5% market share in revenue (31.2% and 37.3%) and 64.9% share in attendance (31.7% and 33.2%) in 2018. NSW and Victoria witnessed a y-o-y increase in revenue by 26.1% and 59.1%, and growth in attendance by 16.0% and 34.8% respectively.
- Note: These figures do not include music festivals, which are categorised under Festivals (Contemporary Music).

Contemporary Music – Revenue and Attendance (2004 – 2018)

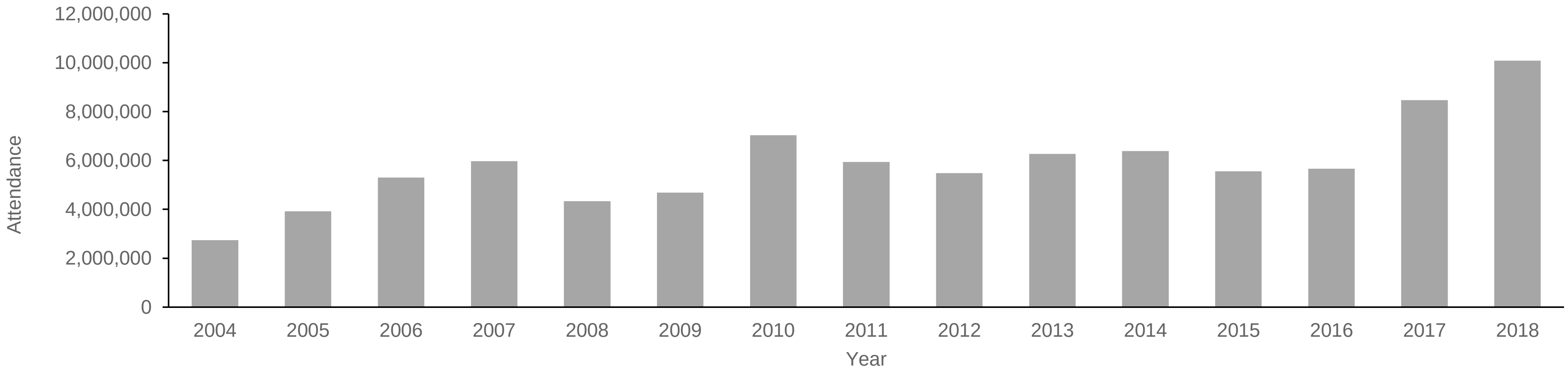
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$195,058,791		2,737,873		$77.09	
2005	$287,201,319	47.2%	3,924,276	43.3%	$83.37	8.1%
2006	$450,855,531	57.0%	5,295,988	35.0%	$92.78	11.3%
2007	$503,240,419	11.6%	5,975,561	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%)
2016	$440,083,629	(7.9%)	5,658,753	1.9%	$85.35	(11.4%)
2017	$826,050,167	87.7%	8,464,739	49.6%	$105.73	23.9%
2018	$1,092,275,549	32.2%	10,088,329	19.2%	$117.77	11.4%

4 Category Analysis
Contemporary Music

Contemporary Music – Revenue (2004-2018)

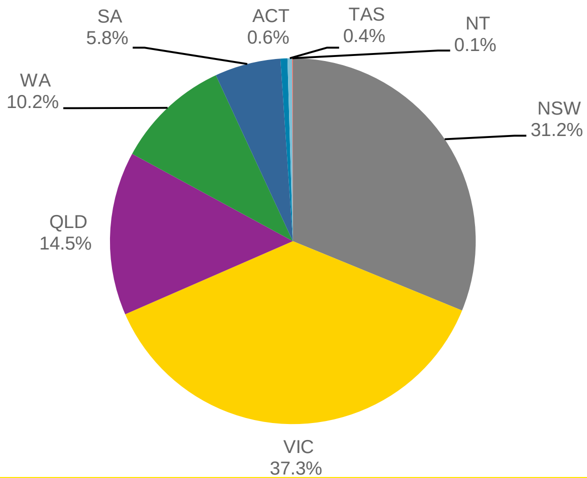


Contemporary Music – Total Attendance (2004-2018)



4 Category Analysis
Contemporary Music

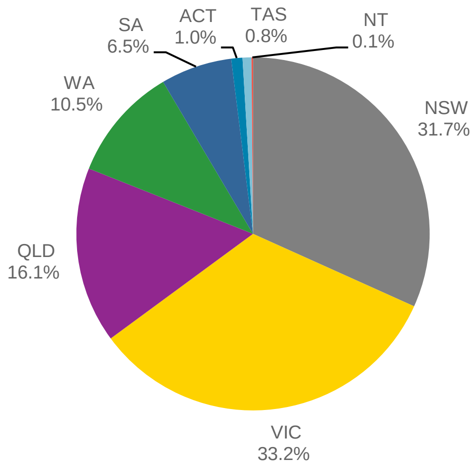
Contemporary Music – Revenue by State/Territory



Contemporary Music – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$340,686,456	31.2%	26.1%
VIC	$407,042,962	37.3%	59.1%
QLD	$157,984,632	14.5%	17.6%
WA	$111,025,831	10.2%	20.9%
SA	$63,691,069	5.8%	10.3%
ACT	$6,704,281	0.6%	(6.8%)
TAS	$4,517,088	0.4%	(33.8%)
NT	$623,231	0.1%	(70.4%)
Total	**$1,092,275,549**	**100.0%**	**32.2%**

Contemporary Music – Attendance by State/Territory



Contemporary Music – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	3,200,941	31.7%	16.0%
VIC	3,346,873	33.2%	34.8%
QLD	1,626,621	16.1%	12.2%
WA	1,056,419	10.5%	12.8%
SA	658,155	6.5%	5.8%
ACT	103,480	1.0%	5.8%
TAS	82,329	0.8%	(6.0%)
NT	13,511	0.1%	(54.1%)
Total	**10,088,329**	**100.0%**	**19.2%**

4 Category Analysis
Festivals (Multi-Category)

National Overview

- In 2018, Festivals (Multi-Category) witnessed a y-o-y increase in revenue by 26.2% from $54.6m in 2017 to $68.9m in 2018, with a significant y-o-y increase in attendance by 38.1% from 1.9m in 2017 to 2.6m in 2018.
- The increase in revenue is primarily attributed to y-o-y increase in the average ticket price by 10.7% from $36.62 in 2017 to $40.52 in 2018.
- Festivals (Multi-Category) contributed 3.2% of the total share in revenue and 9.8% of the total share in attendance in 2018.
- In 2018, the major contributing events in this category were Adelaide Fringe, Fringe World Festival, The Falls Music & Arts Festival, WOMADelaide, Dark Mofo, VIVID Festival and MONA FOMA.
- SA and WA generated the majority of revenue and attendance in this category, with a combined 56.6% market share of revenue and 54.0% of attendance in 2018.
- ACT witnessed a significant y-o-y increase in revenue and attendance by 1184.5% and 1455.7% respectively, primarily attributed to the increase in number of events in this category that took place in ACT in 2018.
- In 2018, NSW witnessed a y-o-y increase of 134.2% in revenue with 29.9% y-o-y increase in attendance. The major contributor to its revenue was The Falls Music & Arts Festival.
- SA experienced a y-o-y decline in revenue by 2.0% despite a moderate y-o-y increase in attendance by 2.5% in this category. It was primarily attributed to the y-o-y fall in average ticket prices. Major festivals in SA included Adelaide Fringe and WOMADelaide.
- VIC saw a significant y-o-y increase in revenue of 73.5%, with a significant y-o-y growth in attendance by 199.0% in 2018. Major festivals that took place in VIC were The Falls Music & Arts Festival, Melbourne Fringe Festival and Melbourne International Arts Festival.

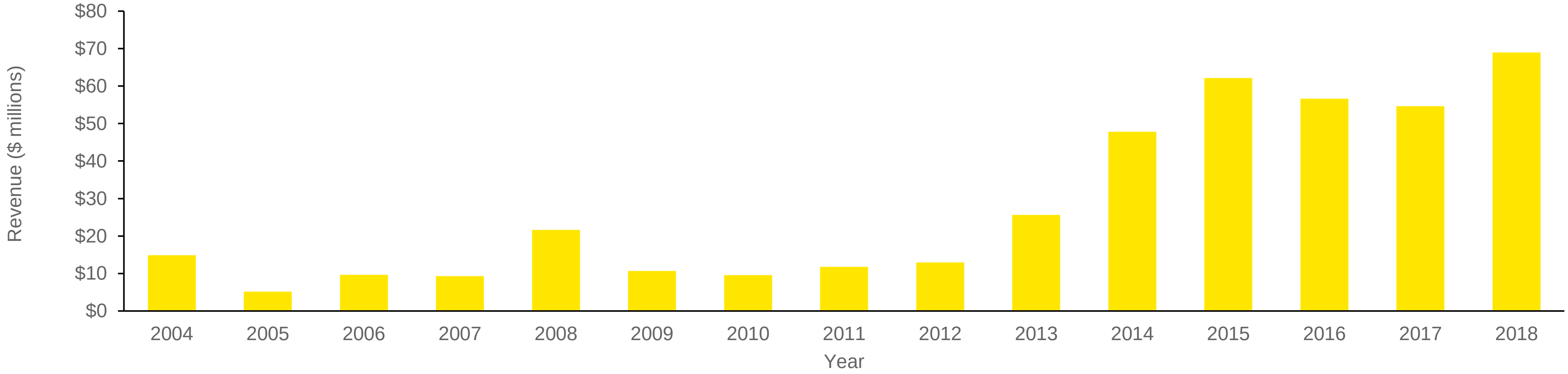
Festivals (Multi-Category) – Revenue and Attendance (2004 – 2018)

	Revenue		Attendance		Average Ticket Price	
Year	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	$62,162,178	30.0%	1,486,599	40.3%	$50.32	3.9%
2016	$56,641,751	(8.9%)	1,549,007	4.2%	$39.57	(21.4%)
2017	$54,635,677	(3.5%)	1,866,148	20.5%	$36.62	(7.5%)
2018	$68,972,653	26.2%	2,577,932	38.1%	$40.52	10.7%

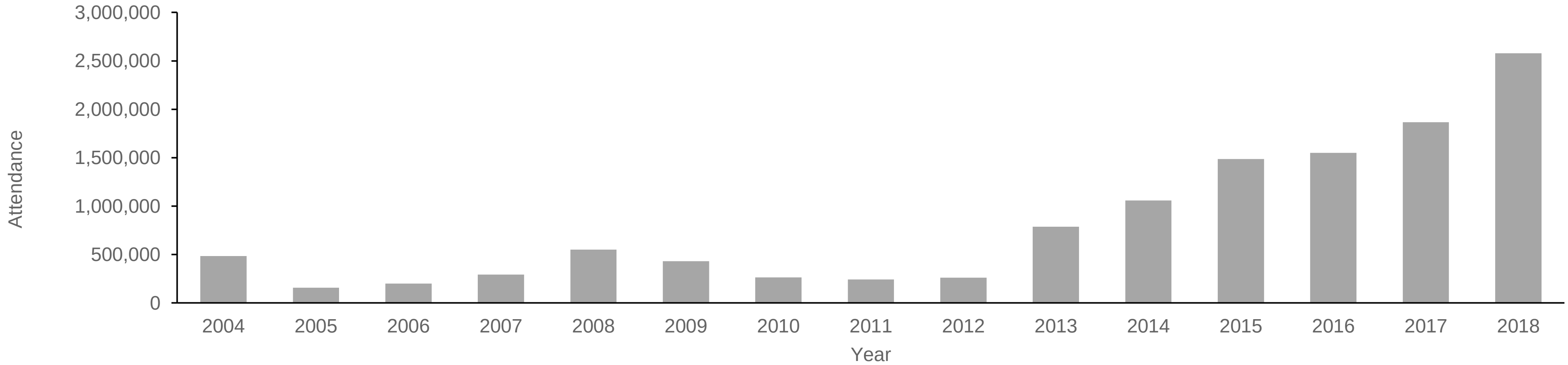
4 Category Analysis

Festivals (Multi-Category)

Festivals (Multi-Category) – Revenue (2004-2018)

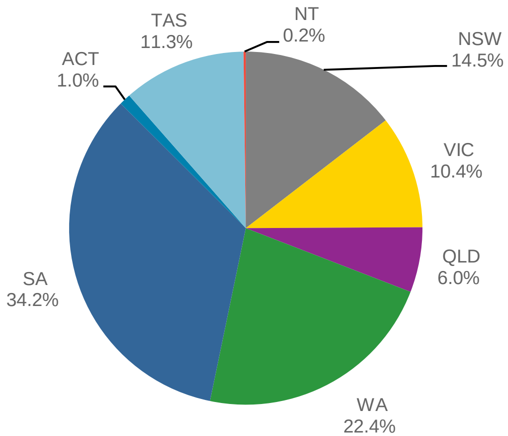


Festivals (Multi-Category) – Total Attendance (2004-2018)



4 Category Analysis
Festivals (Multi-Category)

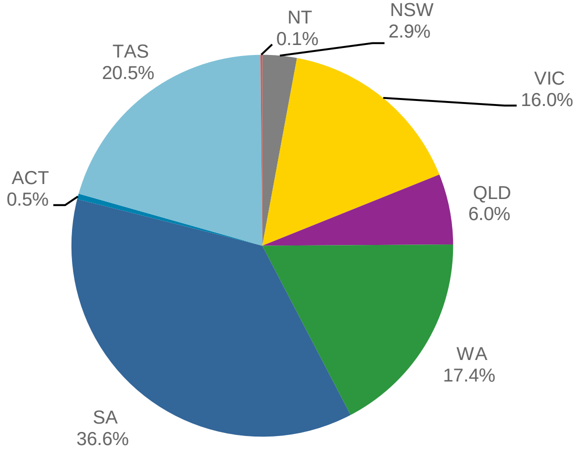
Festivals (Multi-Category) – Revenue by State/Territory



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

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$10,029,869	14.5%	134.2%
VIC	$7,158,235	10.4%	73.5%
QLD	$4,108,529	6.0%	33.0%
WA	$15,431,437	22.4%	12.8%
SA	$23,606,040	34.2%	(2.0%)
ACT	$723,442	1.0%	1184.5%
TAS	$7,773,362	11.3%	49.6%
NT	$141,740	0.2%	7.5%
Total	**$68,972,653**	**100.0%**	**26.2%**

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



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

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	75,028	2.9%	29.9%
VIC	412,691	16.0%	199.0%
QLD	154,139	6.0%	76.5%
WA	449,793	17.4%	9.7%
SA	942,968	36.6%	2.5%
ACT	12,088	0.5%	1455.7%
TAS	527,390	20.5%	112.5%
NT	3,835	0.1%	3.5%
Total	**2,577,932**	**100.0%**	**38.1%**

4 Category Analysis

Festivals (Contemporary Music)

National Overview

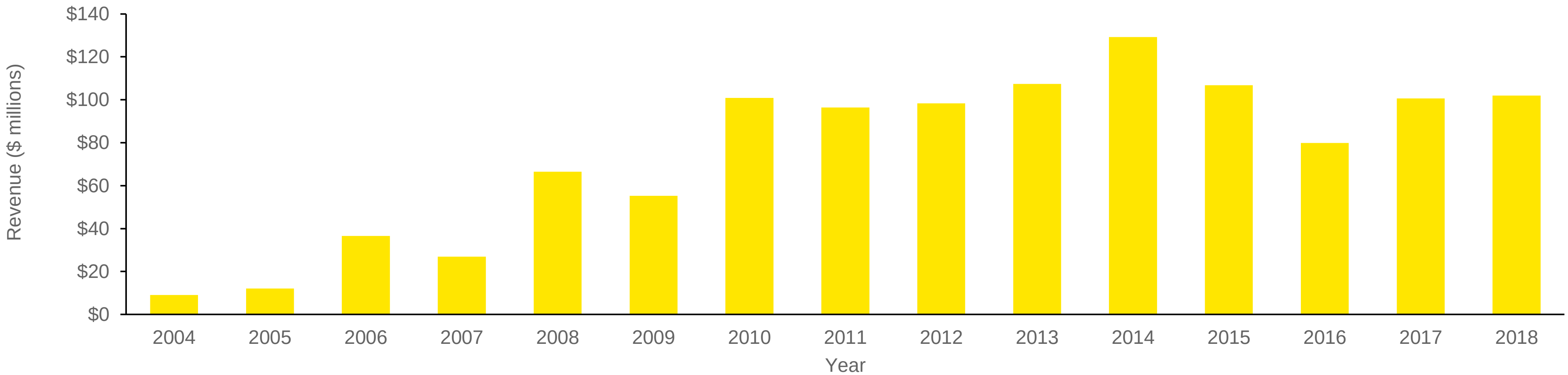
- The Festivals (Contemporary Music) category experienced a marginal y-o-y increase in revenue by 1.3%, from $100.7m in 2017 to $102.0m in 2018 and 14.4% y-o-y growth in attendance, from 0.85m in 2017 to 1.0m in 2018.
- The average ticket price increased by 3.9%, from $126.68 in 2017 to $131.58 in 2018.
- Festivals (Contemporary Music) contributed 4.7% of the total share in revenue and 3.7% of the total share in attendance in 2018.
- NSW is the major state contributor in Festivals (Contemporary Music) with a 51.2% share in revenue and 42.8% share in attendance in 2018. Major events that took place included Splendour in the Grass, Bluesfest, Groovin' the Moo and Listen Out.
- Queensland was the second major contributor (after NSW) with a 19.2% share in revenue and a 21.0% share in attendance in 2018. Major events that took place in Queensland were CMC Rocks QLD, Good Things Festival and Big Pineapple Music Festival.
- QLD experienced the highest y-o-y increase in revenue (42.3%) and second highest increase in attendance (37.4%) among all the states and territories. The increase in revenue is also contributed by the significant increase in the average ticket price. SA experienced the second highest y-o-y increase in revenue (37.4%) and highest increase in attendance (57.5%) among all the states and territories in 2018. The increase in revenue is also driven by the increase in the average ticket price.
- VIC experienced the third highest increase in revenue (11.9%) and attendance (15.2%) among all the states and territories. Major events that took place included Groovin' the Moo, Good Things Festival and St. Jerome's Laneway Festival.

Festivals (Contemporary Music)– Revenue and Attendance (2004 – 2018)

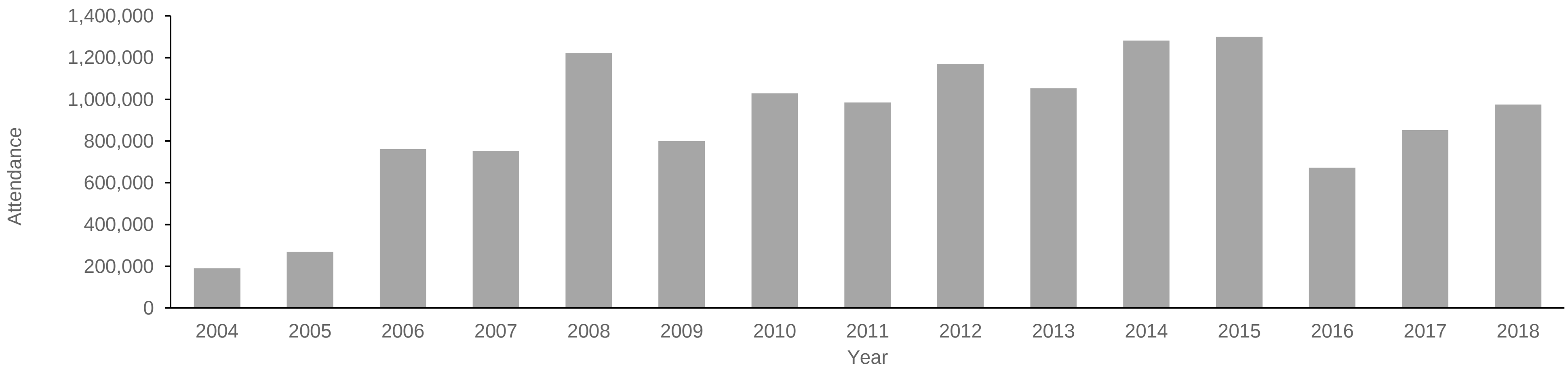
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$9,015,128	-	190,260	-	$54.69	-
2005	$12,128,384	34.5%	269,208	41.5%	$63.05	15.3%
2006	$36,576,877	201.6%	761,920	183.0%	$50.93	(19.2%)
2007	$26,972,082	(26.3%)	753,247	(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%)
2016	$79,865,326	(25.2%)	672,771	(48.2%)	$125.60	6.7%
2017	$100,657,080	26.0%	852,628	26.7%	$126.68	0.9%
2018	$102,015,922	1.3%	975,233	14.4%	$131.58	3.9%

4 Category Analysis
Festivals (Contemporary Music)

Festivals (Contemporary Music) – Revenue (2004-2018)

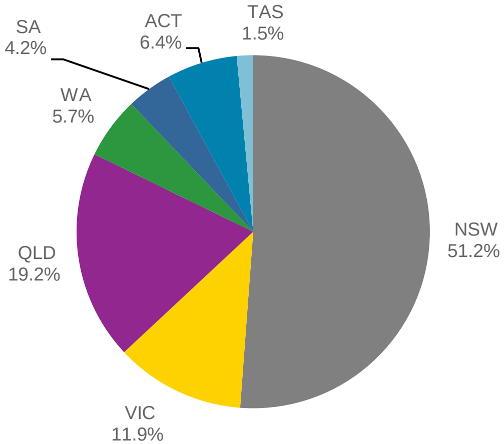


Festivals (Contemporary Music) – Total Attendance (2004-2018)



4 Category Analysis
Festivals (Contemporary Music)

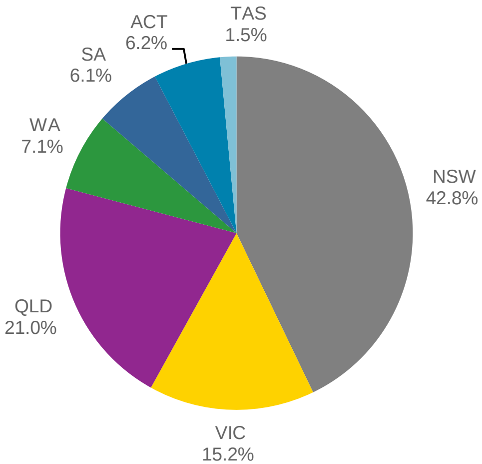
Festivals (Contemporary Music) – Revenue by State/Territory



Festivals (Contemporary Music) – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$52,212,514	51.2%	(5.2%)
VIC	$12,105,653	11.9%	(9.1%)
QLD	$19,568,697	19.2%	42.3%
WA	$5,765,510	5.7%	(21.0%)
SA	$4,281,552	4.2%	37.4%
ACT	$6,557,521	6.4%	1.9%
TAS	$1,524,474	1.5%	(8.2%)
NT	-	-	(100.0%)
Total	**$102,015,922**	**100.0%**	**1.3%**

Festivals (Contemporary Music) – Attendance by State/Territory



Festivals (Contemporary Music) – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	417,828	42.8%	6.8%
VIC	148,502	15.2%	16.3%
QLD	205,055	21.0%	37.4%
WA	69,580	7.1%	(5.2%)
SA	59,541	6.1%	57.5%
ACT	60,016	6.2%	22.0%
TAS	14,711	1.5%	(37.9%)
NT	-	-	(100.0%)
Total	**975,233**	**100.0%**	**14.4%**

4 Category Analysis
Musical Theatre

National Overview

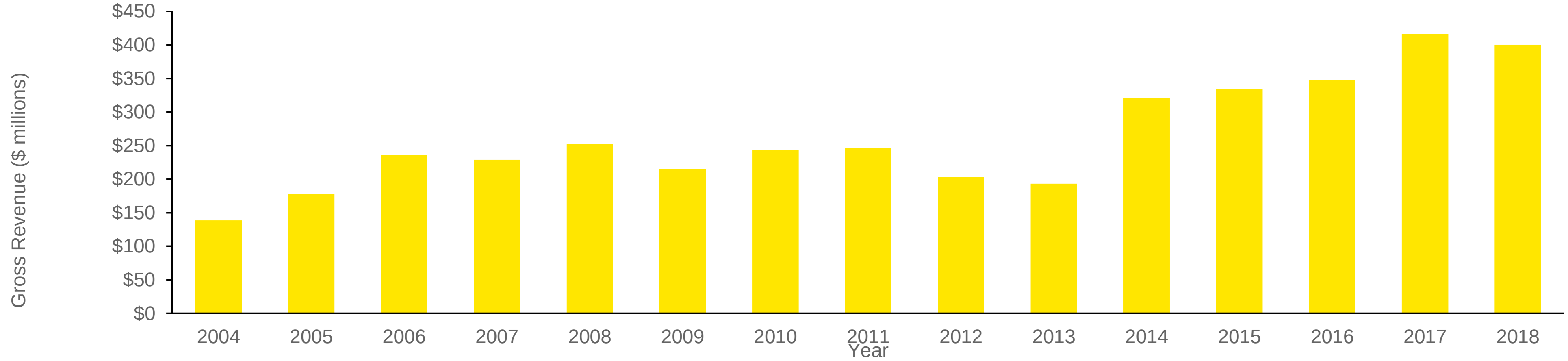
- The Musical Theatre category experienced a y-o-y decline of 4.0% in revenue from $416.8m in 2017 to $400.2m and decrease in attendance by 3.1% from 4.0m in 2017 to 3.9m in 2018. The average ticket price declined marginally by 0.7% from $109.66 in 2017 to $108.85 in 2018. Top events in this category in 2018 were *The Book of Mormon, Aladdin, Beautiful: The Carole King Musical, Evita, Dream Lover: The Bobby Darin Story* and *Priscilla, Queen of the Desert.*
- Musical Theatre is the second largest category, generating 18.5% of revenue and 14.9% of attendance within the overall live performance industry in 2018. NSW and VIC accounts for the major revenue and attendance in this category. NSW and VIC commands a market share of 38.4% and 32.6% in revenue, while their market share in attendance was 36.3% and 33.3% respectively. Combined they generated around a 71.0% market share of revenue and a 69.8% market share of attendance in 2018.
- NSW experienced a y-o-y increase of 31.2% in revenue and 19.2% y-o-y growth in attendance. Major musicals that performed in NSW included *The Book of Mormon*, *Evita, Grease – The Arena Experience,* Green Day's *American Idiot* and *Calamity Jane.*
- VIC recorded a significant y-o-y decline of 36.6% in revenue and 31.9% y-o-y decline in attendance in this category. The decline in revenue and attendance may be explained by the closure of the Princess Theatre for refurbishment and the movement of *The Book of Mormon* to NSW.
- Major musicals that performed in Victoria included *Beautiful: The Carole King Musical, Dream Lover: The Bobby Darin Story, Aladdin* and *Evita.*
- NT experienced a significant y-o-y growth of 4621.0% in revenue and 3408.2% growth in attendance. However, its impact was minimal, as it contributed only 0.1% market share of revenue and a 0.1% market share of attendance.
- WA witnessed the second highest y-o-y increase in revenue (58.0%) and second highest y-o-y increase in attendance (89.1%) among all the states and territories. The top event in this category was *Aladdin*.

Musical Theatre – Revenue and Attendance (2004 – 2018)

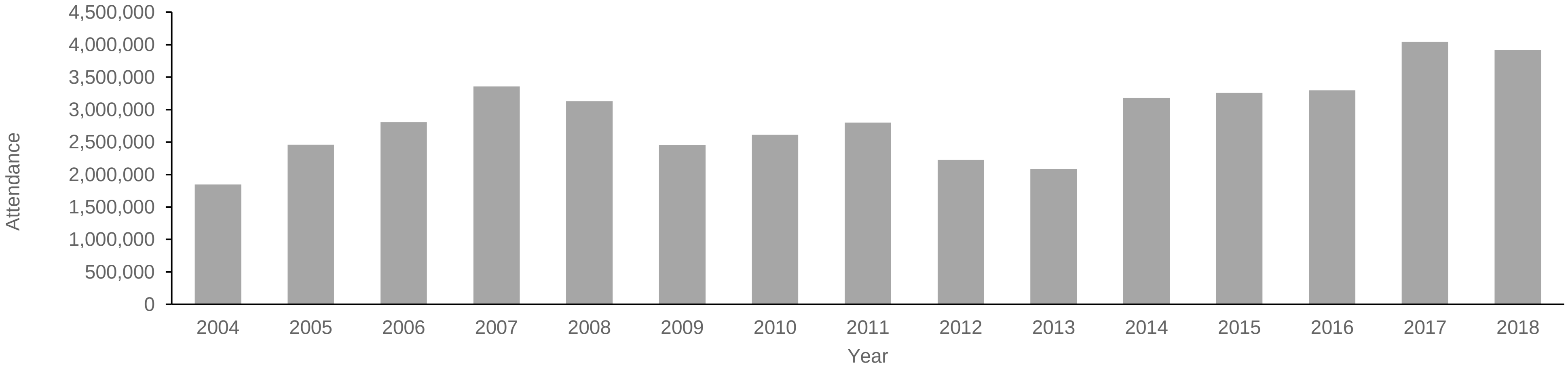
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$138,718,880	-	1,847,505	-	$76.34	-
2005	$178,032,172	28.3%	2,460,314	33.2%	$76.01	(0.4%)
2006	$235,922,584	32.5%	2,806,153	14.1%	$86.18	13.4%
2007	$228,854,618	(3.0%)	3,358,727	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%
2016	$347,684,296	3.8%	3,298,051	1.2%	$111.21	2.9%
2017	$416,802,525	19.9%	4,041,827	22.6%	$109.66	(1.4%)
2018	$400,199,798	(4.0%)	3,917,532	(3.1%)	$108.85	(0.7%)

4 Category Analysis
Musical Theatre

Musical Theatre – Revenue (2004-2018)

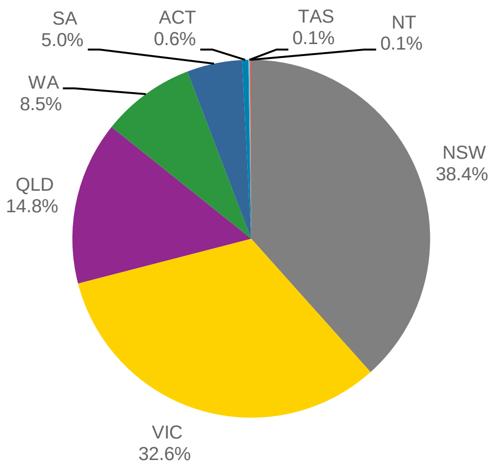


Musical Theatre – Total Attendance (2004-2018)



4 Category Analysis
Musical Theatre

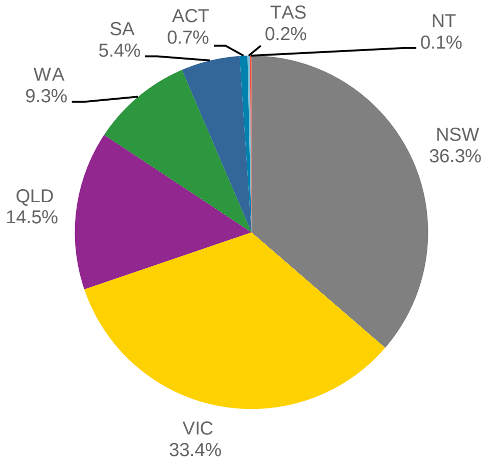
Musical Theatre – Revenue by State/Territory



Musical Theatre – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$153,597,132	38.4%	31.2%
VIC	$130,451,023	32.6%	(36.6%)
QLD	$59,055,742	14.8%	12.7%
WA	$33,823,171	8.5%	58.0%
SA	$19,962,343	5.0%	23.4%
ACT	$2,300,167	0.6%	(43.9%)
TAS	$593,310	0.1%	-
NT	$416,910	0.1%	4,621.0%
Total	**$400,199,798**	**100.0%**	**(4.0%)**

Musical Theatre – Attendance by State/Territory



Musical Theatre – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	1,423,492	36.3%	19.2%
VIC	1,309,917	33.4%	(31.9%)
QLD	568,959	14.5%	6.6%
WA	362,969	9.3%	89.1%
SA	210,103	5.4%	33.9%
ACT	27,970	0.7%	(33.8%)
TAS	8,965	0.2%	-
NT	5,157	0.1%	3408.2%
Total	**3,917,532**	**100.0%**	**(3.1%)**

4 Category Analysis
Opera

National Overview

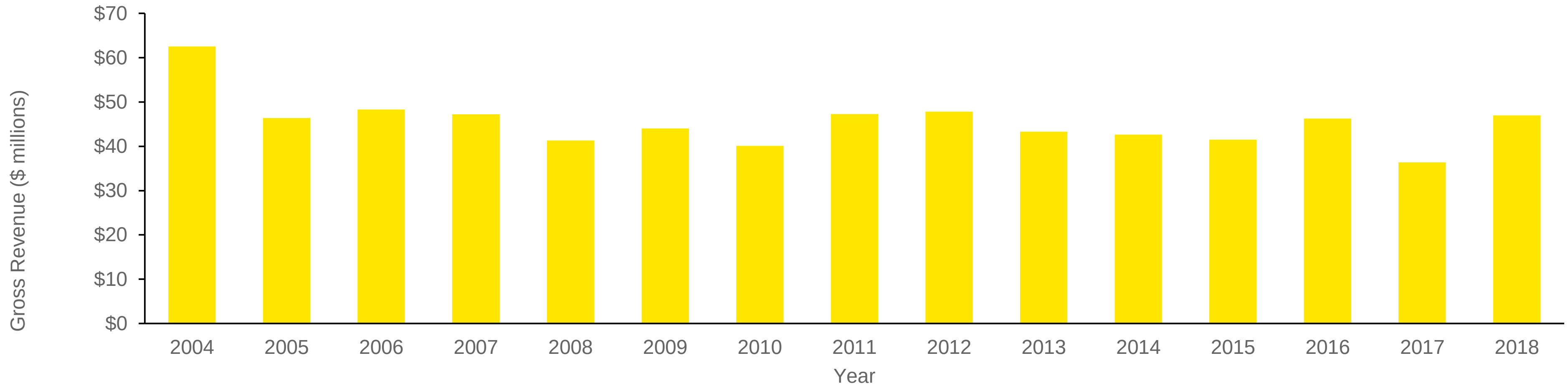
- Opera experienced a y-o-y growth in revenue by 29.2% and an increase in attendance by 31.9% in 2018. Additionally, the marginal y-o-y increase in average ticket price by 7.5%, from $115.42 in 2017 to $124.11 in 2018 also contributed to the increase in revenue.
- 93.9% of revenue and 81.9% of attendance in the Opera category was generated through performances by AMPAG companies including Opera Australia, Opera Queensland, West Australian Opera, Victorian Opera and the State Opera of South Australia. AMPAG companies at an overall level experienced a y-o-y increase in Opera revenue by 28.2% and a y-o-y increase in attendance by 19.5%.
- Major opera performances in 2018 included *La Bohème, The Merry Widow, Aida, Carmen, La Traviata* and *Rigoletto.*
- NSW and Victoria generated the majority of Opera revenue and attendance, with a combined 89.5% of revenue market share (70.8% and 18.7% respectively) and 86.2% of attendance market share (65.5% and 20.7% respectively) in 2018.
- NSW recorded an increase in revenue by 26.1% and an increase in attendance by 49.6%, while Victoria recorded an increase in revenue by 44.2% and 49.7% growth in attendance in 2018 as compared to 2017.
- ACT witnessed the highest y-o-y growth in revenue (331.9%) and TAS witnessed the highest y-o-y growth in attendance (253.8%) in 2018. Growth in the ACT and TAS was primarily due to the fact that Opera Australia toured both these jurisdictions in 2018.

Opera – Revenue and Attendance (2004 – 2018)

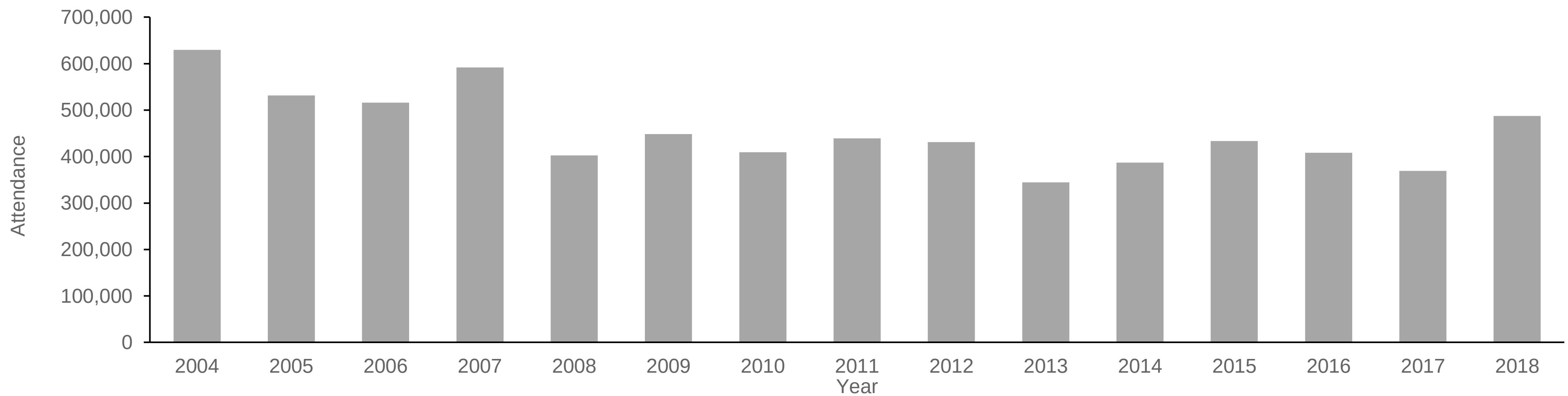
Revenue			Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$62,562,433		629,808		$108.88	
2005	$46,390,544	(25.8%)	531,595	(15.6%)	$94.38	(13.3%)
2006	$48,331,324	4.2%	515,927	(2.9%)	$102.40	8.5%
2007	$47,249,031	(2.2%)	591,605	14.7%	$85.28	(16.7%)
2008	$41,316,885	(12.6%)	402,549	(32.0%)	$114.46	34.2%
2009	$44,044,808	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%)
2016	$46,247,521	11.4%	407,965	(5.8%)	$145.80	20.1%
2017	$36,349,186	(21.4%)	369,228	(9.5%)	$115.42	(20.8%)
2018	$46,965,221	29.2%	487,195	31.9%	$124.11	7.5%

4 Category Analysis
Opera

Opera – Revenue (2004-2018)

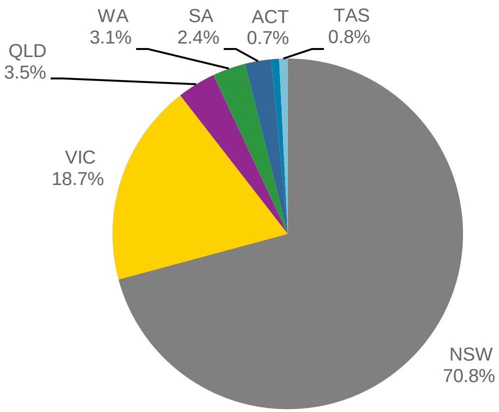


Opera – Total Attendance (2004-2018)



4 Category Analysis
Opera

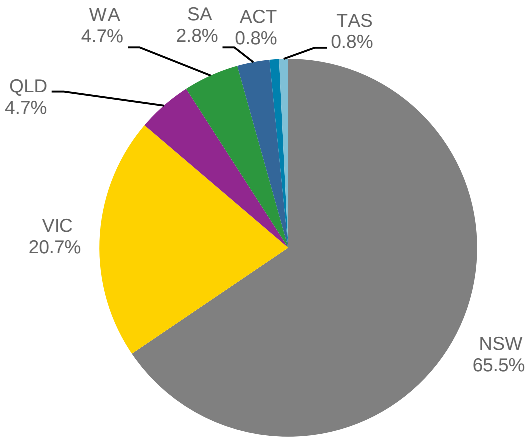
Opera – Revenue by State/Territory



Opera – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$33,255,696	70.8%	26.1%
VIC	$8,774,040	18.7%	44.2%
QLD	$1,662,128	3.5%	7.9%
WA	$1,432,881	3.1%	(12.7%)
SA	$1,136,667	2.4%	114.6%
ACT	$336,571	0.7%	331.9%
TAS	$367,238	0.8%	277.3%
NT	-	-	-
Total	**$46,965,221**	**100.0%**	**29.2%**

Opera – Attendance by State/Territory



Opera – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	319,228	65.5%	49.6%
VIC	100,880	20.7%	49.7%
QLD	22,790	4.7%	(44.8%)
WA	23,095	4.7%	(32.8%)
SA	13,469	2.8%	57.3%
ACT	3,954	0.8%	248.1%
TAS	3,779	0.8%	253.8%
NT	-	-	(100.0%)
Total	**487,195**	**100.0%**	**31.9%**

4 Category Analysis

Special Events

National Overview

- Similar to previous years, the Special Events category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.
- Special Events experienced the highest y-o-y growth in revenue and the fourth highest y-o-y growth in attendance amongst all categories, generating 337.9% growth in revenue and 24.5% growth in attendance in 2018.
- The growth in revenue was primarily attributed to a significant increase in the average ticket price by 202.8%, from $50.43 in 2017 to $152.70 in 2018.
- Top events in this category in 2018 were special events presented as part of the Gold Coast Commonwealth Games, the Mardi Gras Party, Nitro Circus, *Bill Murray, Jan Vogler and Friends* and *Crossing Over with John Edward.*
- QLD and NSW contributed 56.7% and 30.5% of the overall market share in revenue and 46.7% and 30.8% of the overall market share in attendance in this category in 2018. Combined QLD and NSW generated 87.2% of the overall revenue and 77.5% of the overall attendance in this category.
- QLD experienced the highest y-o-y growth in revenue (1414.6%) and second highest y-o-y growth in attendance (235.9%). The largest contributor to revenue and attendances to special events in QLD were those presented as part of the Gold Coast Commonwealth Games.
- NSW witnessed a y-o-y increase in revenue by 380.7% and 21.2% y-o-y growth in attendance. The growth in revenue in 2018 was primarily driven by the Mardi Gras Party.

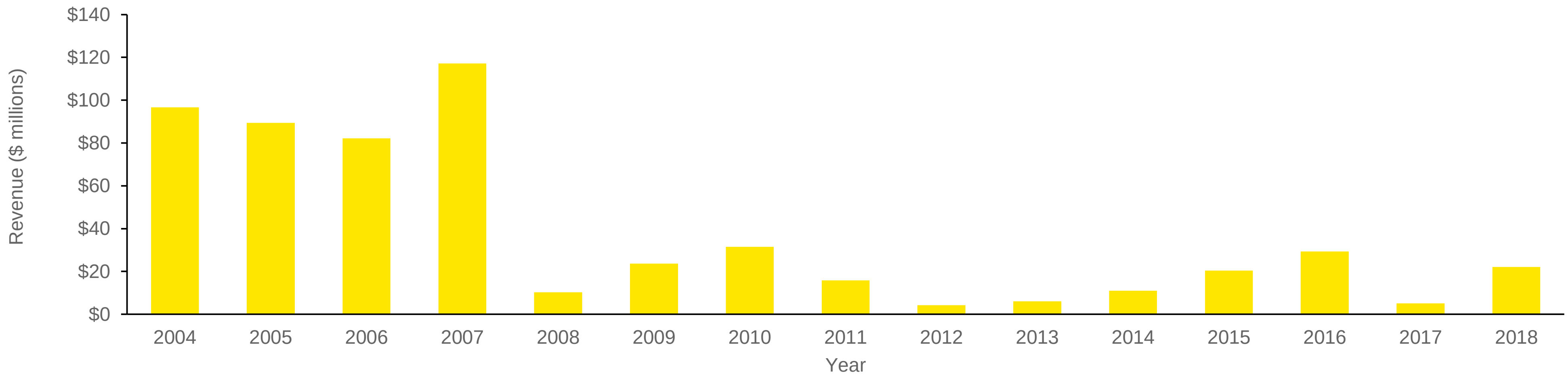
Special Events – Revenue and Attendance (2004 – 2018)

	Revenue		Attendance		Average Ticket Price	
Year	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%)
2016	$29,310,579	44.1%	185,104	(66.8%)	$170.90	304.4%
2017	$5,049,945	(82.8%)	136,871	(26.1%)	$50.43	(70.5%)
2018	$22,115,160	337.9%	170,359	24.5%	$152.70	202.8%

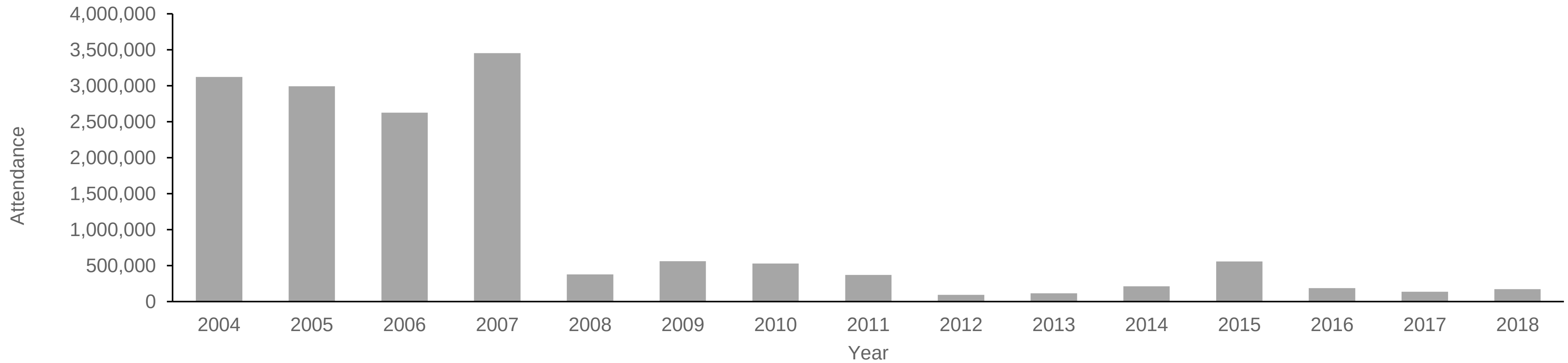
Note: This report includes tickets and sales revenue generated by the Dinosaur Discovery Special Event held in QLD in 2015. Investigations have noted that this event should have been an excluded event.

4 Category Analysis
Special Events

Special Events – Revenue (2004-2018)

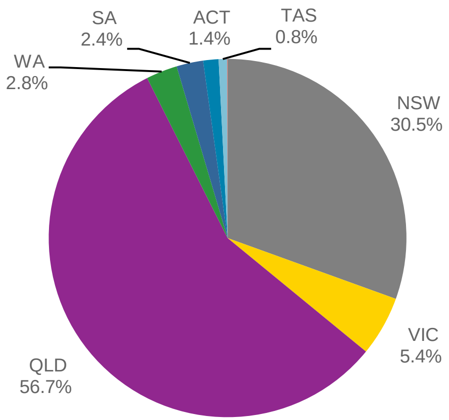


Special Events – Total Attendance (2004-2018)



4 Category Analysis
Special Events

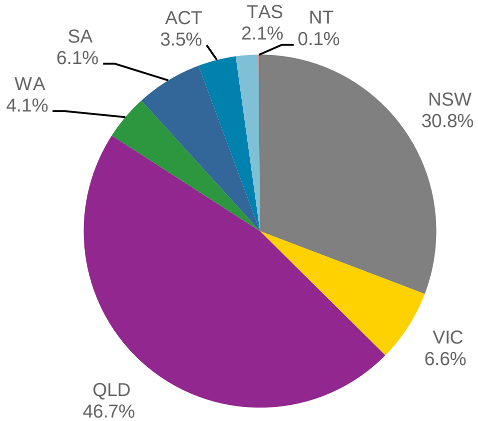
Special Events – Revenue by State/Territory



Special Events – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$6,747,994	30.5%	380.7%
VIC	$1,196,312	5.4%	(22.9%)
QLD	$12,529,378	56.7%	1414.6%
WA	$624,261	2.8%	(6.5%)
SA	$533,142	2.4%	49.5%
ACT	$306,852	1.4%	58.1%
TAS	$169,957	0.8%	244.5%
NT	$7,265	0.0%	-
Total	**$22,115,160**	**100.0%**	**337.9%**

Special Events – Attendance by State/Territory



Special Events – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	52,453	30.8%	21.2%
VIC	11,292	6.6%	(70.5%)
QLD	79,530	46.7%	235.9%
WA	7,061	4.1%	(67.3%)
SA	10,365	6.1%	48.2%
ACT	5,910	3.5%	145.3%
TAS	3,513	2.1%	418.1%
NT	235	0.1%	-
Total	**170,359**	**100.0%**	**24.5%**

4 Category Analysis
Theatre

National Overview

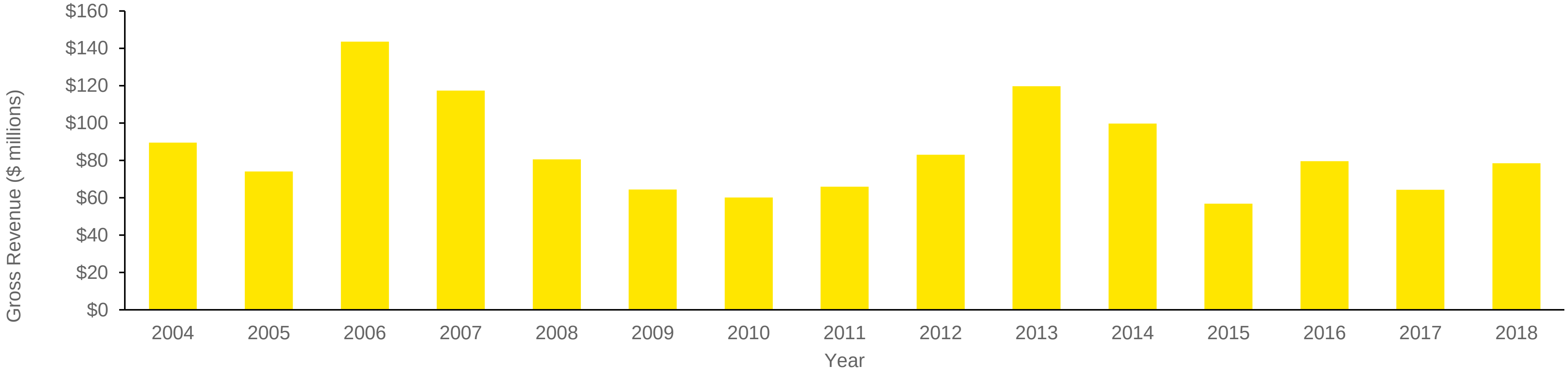
- Theatre witnessed a y-o-y increase in revenue by 22.2% (from $64.2m in 2017 to $78.5m in 2018) and a y-o-y decrease in attendance by 1.9%, from 1.46m in 2017 to 1.43m in 2018.
- The average ticket price increased by 29.8% from $49.24 in 2017 to $63.91 in 2018.
- 68.8% of the revenue and 66.0% of the attendance in Theatre was generated through performances by AMPAG companies such as Sydney Theatre Company, Melbourne Theatre Company, Belvoir, Bell Shakespeare, Black Swan State Theatre Company, Malthouse Theatre, Queensland Theatre and the State Theatre Company of South Australia.
- Top events in this category in 2018 were *The Curious Incident of the Dog in the Night-Time, An Ideal Husband, Twelfth Night* and *The Resistible Rise of Arturo Ui.*
- NSW and VIC generated the majority of revenue and attendance, with a combined 80.1% of market share in revenue (46.8% and 33.3% respectively) and 77.9% of market share in attendance (47.7% and 30.2% respectively).
- NT and ACT witnessed the highest y-o-y growth in revenue (247.5% and 126.7% respectively) among all the jurisdictions, which may be explained by touring theatre productions.
- VIC, WA and SA witnessed a y-o-y decline in revenue in 2018. All states and territories except NSW, QLD and the ACT witnessed a y-o-y decline in attendance in 2018.

Theatre – Revenue and Attendance (2004 – 2018)

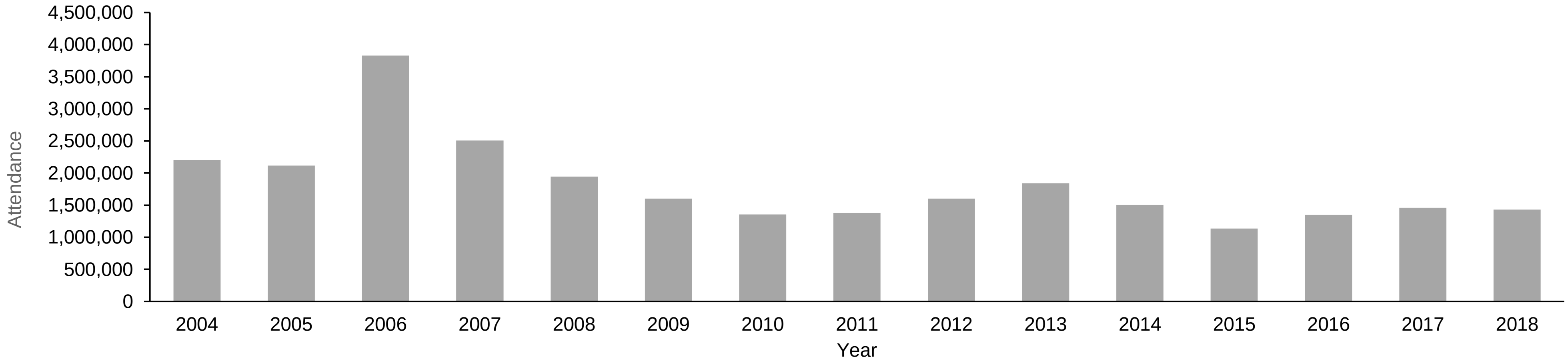
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$89,417,616	-	2,202,812	-	$43.87	-
2005	$73,988,892	(17.3%)	2,117,854	(3.9%)	$38.04	(13.3%)
2006	$143,564,232	94.0%	3,828,254	80.8%	$39.42	3.6%
2007	$117,382,525	(18.2%)	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	$64,440,541	(19.9%)	1,602,591	(17.6%)	$46.58	(0.7%)
2010	$60,151,139	(6.7%)	1,354,336	(15.5%)	$51.47	10.5%
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%)
2016	$79,584,271	40.0%	1,351,653	19.1%	$66.51	17.1%
2017	$64,217,536	(19.3%)	1,457,962	7.9%	$49.24	(26.0%)
2018	$78,505,052	22.2%	1,430,263	(1.9%)	$63.91	29.8%

4 Category Analysis
Theatre

Theatre – Revenue (2004-2018)

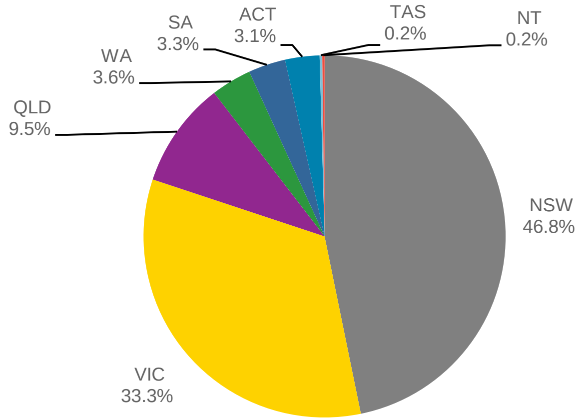


Theatre – Total Attendance (2004-2018)



4 Category Analysis
Theatre

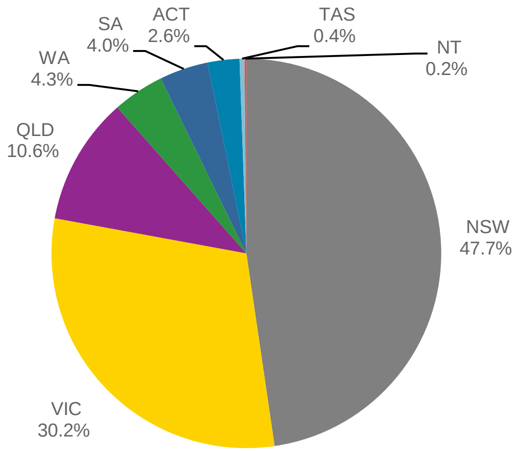
Theatre – Revenue by State/Territory



Theatre – Revenue by State/Territory

State/ Territory	Revenue	Market Share Proportion	Change from 2017 (%)
NSW	$36,729,214	46.8%	58.3%
VIC	$26,147,201	33.3%	(2.5%)
QLD	$7,432,565	9.5%	13.8%
WA	$2,837,201	3.6%	(24.0%)
SA	$2,602,787	3.3%	(3.2%)
ACT	$2,410,961	3.1%	126.7%
TAS	$186,247	0.2%	42.5%
NT	$158,875	0.2%	247.5%
Total	$78,505,052	100.0%	22.2%

Theatre – Attendance by State/Territory



Theatre – Attendance by State/Territory

State/ Territory	Attendance	Market Share Proportion	Change from 2017 (%)
NSW	681,994	47.7%	23.7%
VIC	432,010	30.2%	(19.2%)
QLD	151,544	10.6%	7.7%
WA	61,280	4.3%	(43.8%)
SA	57,749	4.0%	(27.2%)
ACT	37,725	2.6%	10.4%
TAS	5,811	0.4%	(0.1%)
NT	2,150	0.2%	(28.4%)
Total	1,430,263	100.0%	(1.9%)

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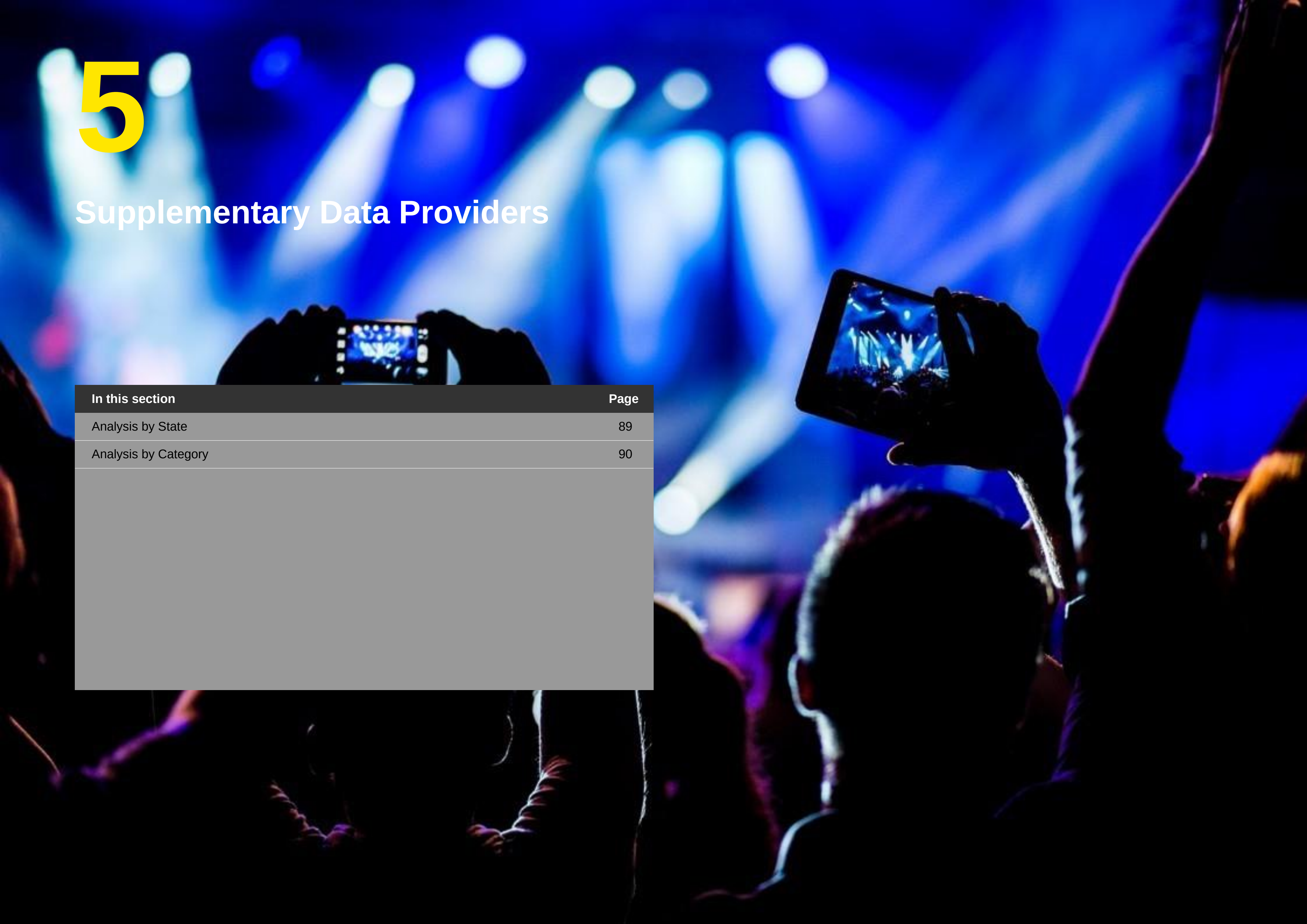
Supplementary Data Providers

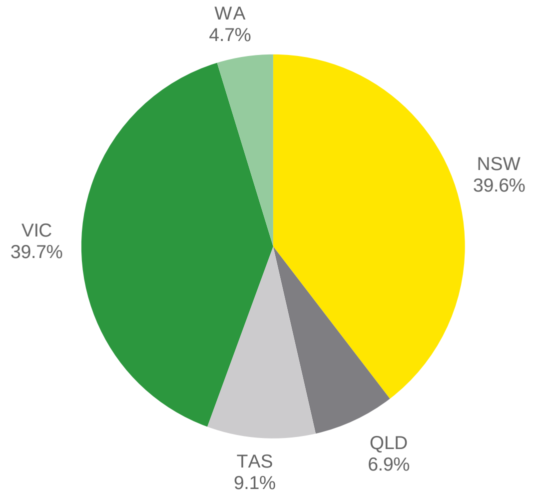


5 Supplementary Data Providers
Analysis by State

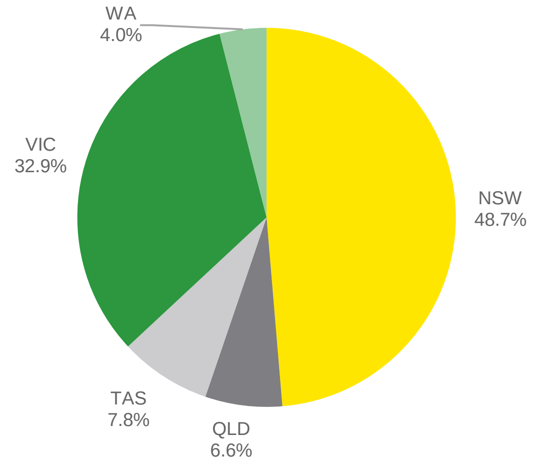
Category	Attendance				Revenue
	Paid	Zero-Priced	Comps	Total	Total Ticket Revenue
NSW	219,908	60,954	23,715	304,577	9,478,145
QLD	39,214	-	1,923	41,137	1,641,627
TAS	45,857	-	3,169	49,026	2,189,625
VIC	192,814	56	13,217	206,087	9,504,533
WA	23,048	-	1,957	25,005	1,131,234
Total	520,841	61,010	43,981	625,832	23,945,164

- In 2018, Victoria (VIC) had the largest market share in revenue (39.7%) and second-largest market share in attendance (32.9%). VIC generated $9.5m in revenue and recorded 0.2m in attendance. Out of the total tickets issued, 0.2m were paid tickets and the rest were complimentary and zero-priced tickets. Top performances included the *Wiggle Wiggle Wiggle!* Tour, Barry Humphires, Shen Yun, Jimmy Barnes and In The Mood.
- In 2018, New South Wales (NSW) had the second largest market share in terms of revenue (39.6%) and highest market share in attendance (48.7%) among all the states and territories. NSW reported $9.5m in revenue and 0.3m in attendance. Out of the total tickets issued, 0.2m were paid tickets and the rest were complimentary and zero-priced tickets. Top events were *Shrek, Limbo Unhinged, Legally Blonde* and *The Wharf Revue.*
- Combined, VIC and NSW represent around 79.3% of the market share in revenue and 81.6% of total attendance.
- QLD represents 6.9% of market share in revenue and 6.6% of market share in attendance. QLD reported $1.6m in revenue and 41.1k in attendance. Out of the total tickets issued, 39.2k were paid tickets and rest were complimentary and zero-priced tickets. TAS represents 9.1% of market share in revenue and 7.8% of market share in attendance. TAS reported $2.2m in revenue and 49.0k in attendance. Of the total tickets issued, 45.9k were paid tickets and rest were complimentary and zero-priced tickets.
- WA represents 4.7% of market share in revenue and 4.0% of market share in attendance. WA reported $1.1m in revenue and 25.1k in attendance. Out of the total tickets issued 23.0k were paid tickets and the rest were complimentary and zero-priced tickets.

Market Share (Revenue) by State/Territory 2018



Market Share (Attendance) by State/Territory 2018

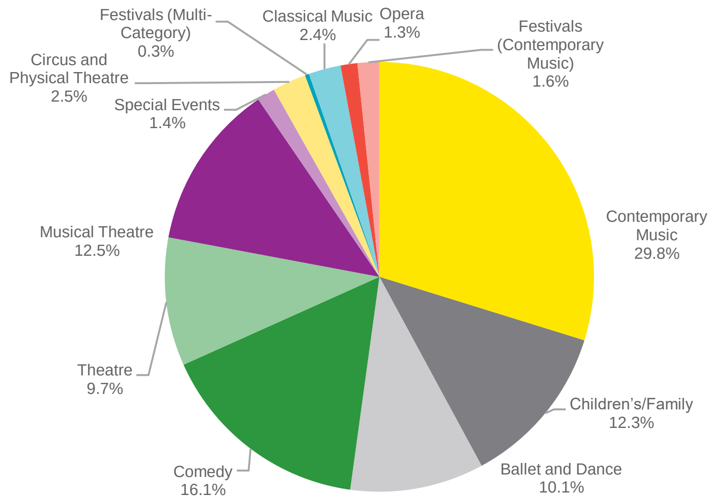


5 Supplementary Data Providers
Analysis by Category

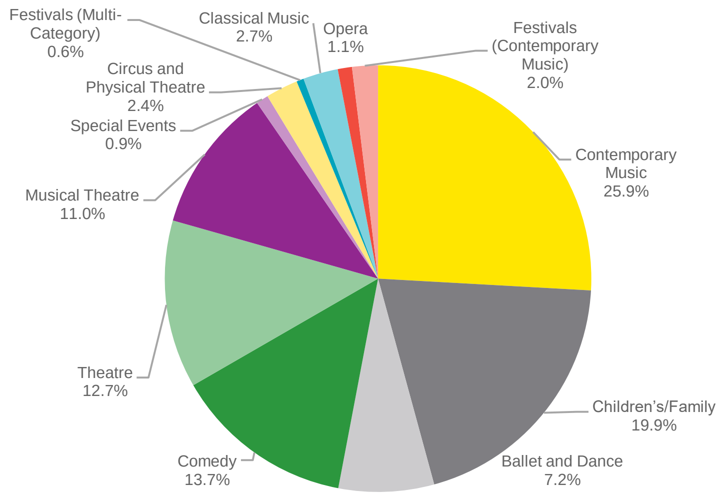
Category	Attendance				Revenue
	Paid	Zero-Priced	Comps	Total	Total Ticket Revenue
Contemporary Music	140,770	12,361	8,847	161,978	7,130,382
Children's/Family	111,432	5,311	7,652	124,395	2,949,618
Ballet and Dance	38,048	4,475	2,738	45,261	2,413,602
Comedy	71,846	10,379	3,406	85,631	3,859,256
Theatre	57,509	10,300	11,815	79,624	2,310,874
Musical Theatre	55,403	9,789	3,652	68,844	2,995,306
Special Events	5,505	3	279	5,787	327,976
Circus and Physical Theatre	6,429	7,259	1,619	15,307	609,790
Festivals (Multi Category)	2,446	659	345	3,450	73,461
Classical Music	15,340	172	1,075	16,587	581,586
Opera	6,401	18	315	6,734	301,349
Festivals (Contemporary Music)	9,712	284	2,238	12,234	391,964
Total	520,841	61,010	43,981	625,832	23,945,164

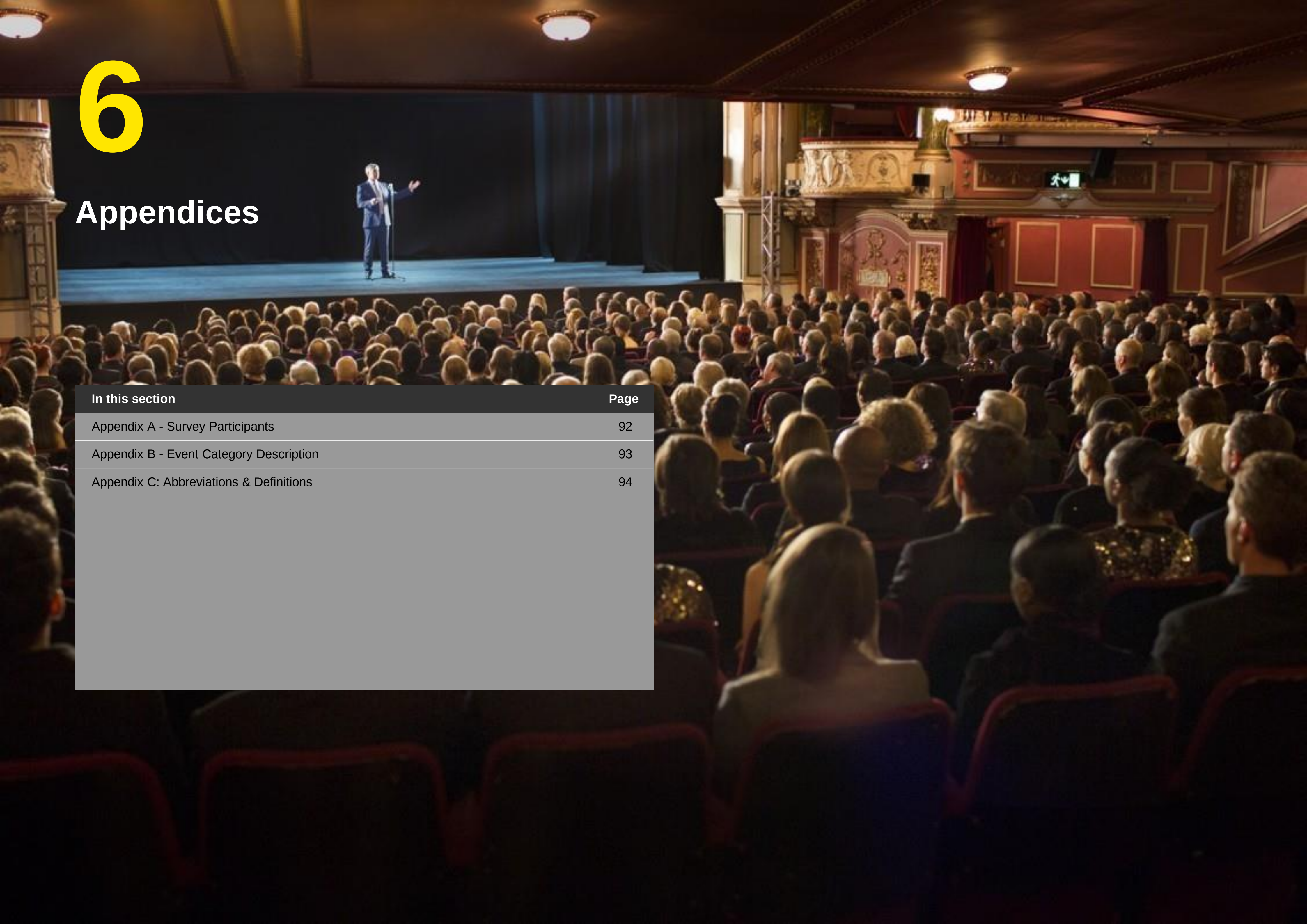
- Contemporary Music represents the highest market share in revenue (29.8%) and in attendance (25.9%). This category reported $7.1m in revenue and 0.2m in attendance. Top performances included *In The Mood, APIA Good Times* Tour, Ben Folds and Jimmy Barnes' *Working Class Man* Tour.
- Comedy represents the second highest market share in revenue (16.1%) and third highest market share in attendance (13.6%). This category reported $3.9m in revenue and 85.6k in attendance. Top events in this category included performances from Lano & Woodley, Carl Barron, Bill Bailey and Jimmy Carr.
- Musical Theatre represents the third highest market share in revenue (12.5%) and fifth highest market share in attendance (11%). This category reported $3.0m in revenue and 68.8k in attendance. It generates more revenue than most categories with higher attendance, due to the higher than average ticket price in this category.
- Festivals (Multi Category), Opera and Special Events categories contributed the least to revenue and attendance.

Market Share (Revenue) by Category 2018



Market Share (Attendance) by Category 2018





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Appendices

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Appendix A - Survey Participants

The following companies were identified by LPA and provided both revenue and attendance data to EY for the 2018 calendar year. Revenue comprised 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. Average ticket price data was calculated based on paid tickets only.

The Adelaide Festival Centre Trust
Araluen Arts Centre (NT)
Arts Centre Melbourne
Adelaide Fringe
Arts Projects Australia (WOMAdelaide)
Bluesfest
Blue Room Theatre
Brisbane Powerhouse
Canberra Ticketing
Darwin Entertainment Centre (Ntix)
Fringe World Festival (Perth)
Hayes Theatre Co
Melbourne Fringe Festival
Melbourne Recital Centre
Melbourne International Comedy Festival
MONA (MONA FOMA and Dark Mofo)
Oztix
Perth Concert Hall
Perth Theatre Trust
Queensland Performing Arts Centre
Secret Sounds
Sydney Opera House
The Ticket Group (previously Moshtix)
Ticketmaster
Ticketek

Supplementary Data Providers

Albury Entertainment Centre
Bathurst Memorial Entertainment Centre
Bunbury Regional Entertainment Centre
Capital Venues and Events (Bendigo)
Cardinia Cultural Centre
Dubbo Regional Theatre and Convention Centre
Frankston Arts Centre
Geelong Performing Arts Centre
Glen Street Theatre
Illawarra Performing Arts Centre
Ipswich Civic Centre
Karralyka Centre
Mildura Arts Centre
Pilbeam Theatre (Rockhampton Regional Council)
Riverside Theatre
Tamworth Regional Council
Theatre North
Theatre Royal

In regard to the Australia Council, data was limited to the Australian Major Performing Arts Group (AMPAG) companies. For these AMPAG companies, the revenue includes both single ticket sales as well as subscription revenue. The AMPAG companies were:

Adelaide Symphony Orchestra
The Australian Ballet
Australian Brandenburg Orchestra
Australian Chamber Orchestra
Bangarra Dance Theatre
Bell Shakespeare
Belvoir
Black Swan State 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
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

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Appendix B - Event Category Description

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 (e.g. Adelaide Fringe or Perth International Arts Festival). Food and music festivals are only included if a music line up is involved.
Festivals (Contemporary Music)	Festivals/events which contain a number of events that predominately fall into the category of Contemporary Music (e.g. Bluesfest). Festivals that are not Contemporary Music but belong in one category will be allocated to their respective category (e.g. comedy, theatre, dance etc.)
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

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

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Appendix C: Abbreviations & Definitions

Abbreviation	Definition
$	Australian Dollar
%	Percentage
AMPAG	Australian Major Performing Arts Group
APACA	Australian Performing Arts Centres Association
b	Billion
c.	Circa
EY	Ernst & Young
i.e.	That is
k	Thousand
LPA	Live Performance Australia
m/million	million
NSW	New South Wales
VIC	Victoria
QLD	Queensland
WA	Western Australia
SA	South Australia
ACT	Australian Capital Territory
NT	Northern Territory
TAS	Tasmania
y-o-y	Year over year
Total Attendance	Based on both paid and unpaid tickets
Average Ticket Price	Average Ticket Prices are calculated based only on paid tickets
CAGR	Compound Annual Growth Rate
MICF	Melbourne International Comedy Festival

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