Live Performance Industry in Australia

2022 Ticket Attendance and Revenue Report
Final Report

Live Performance Australia

Reliance Restricted

11 December 2023

Image: *Terrain*, Bangarra Dance Theatre
Photo Credit: Daniel Boud

Building a better working world

Notice

Ernst & Young was engaged on the instructions of Live Performance Australia (LPA) to prepare the 2022 Live Performance Australia Ticket Attendance and Revenue Report ("Project"), in accordance with the contract dated 11 April 2023.

The results of Ernst & Young's work, including the assumptions and qualifications made in preparing the report, are set out in Ernst & Young's report dated 11 December 2023 ("Report"). The Report should be read in its entirety including the transmittal letter, 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 Ernst & Young since the date of the Report to update it.

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Ernst & Young
8 Exhibition Street
Melbourne VIC 3000 Australia
GPO Box 67 Melbourne VIC 3001

Tel: +61 3 9288 8000
Fax: +61 3 8650 7777
ey.com/au

Kim Tran
Live Performance Australia
15 - 17 Queen Street
Melbourne, VIC
3000

11 December 2023

2022 Live Performance Australia Ticket Attendance and Revenue Report

Dear Kim,

In accordance with our Engagement Agreement dated 11 April 2023 ("Agreement"), Ernst & Young ("we" or "EY") has been engaged by Live Performance Australia ("you", "LPA" or the "Client") to prepare the 2022 Live Performance Australia Ticket Attendance and Revenue Report ("Report"). The enclosed report sets out the outcomes of our work. You should read the Report in its entirety. A reference to the Report includes any part of the Report.

Purpose of our Report and restrictions on its use

Please refer to the Notice for the restrictions relating to the use of our Report. We understand that the deliverable by EY will be used for the purpose of understanding the ticket attendance and revenue in the Live Performance Industry in Australia in 2022 ("Purpose"). This Report was prepared on the specific instructions of LPA solely for the Purpose and should not be used or relied upon for any other purpose. This Report and its contents may not be quoted, referred to or shown to any other parties except as provided in the Agreement. We accept no responsibility or liability to any person other than to LPA or to such party to whom we have agreed in writing to accept a duty of care in respect of this Report, and accordingly if such other persons choose to rely upon any of the contents of this Report they do so at their own risk.

Nature and scope of our work

The scope of our work, including the basis and limitations, are detailed in our Agreement and in this Report. Our work commenced on 11 April 2023 and was completed on 11 December 2023. Therefore, our Report does not take account of events or circumstances arising after 11 December 2023 and we have no responsibility to update the Report for such events or circumstances.

In preparing this Report we have considered and relied upon information from a range of sources believed after due enquiry to be reliable and accurate. We have no reason to believe that any information supplied to us, or obtained from public sources, was false or that any material information has been withheld from us. We do not imply and it should not be construed that we have verified any of the information provided to us, or that our enquiries could have identified any matter that a more extensive examination might disclose. However, we have evaluated the information provided to us by the Client as well as other parties through enquiry, analysis and review and nothing has come to our attention to indicate the information provided was materially mis-stated or would not afford reasonable grounds upon which to base our Report.

We highlight that our analysis and Report do not constitute investment advice or a recommendation to you on a future course of action. Neither Ernst & Young nor any member or employee thereof undertakes responsibility in any way whatsoever to any person in respect of errors in this Report arising from incorrect information provided by LPA, related stakeholders or other information sources used. This letter should be read in conjunction with our Report, which is attached.

Thank you for the opportunity to work on this project.

Yours sincerely,

Matt Colston
Associate Partner
EY's Sports Events and Venues Advisory

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Executive Summary

1 Executive Summary

Following two years of COVID-19 impacts, the live performance industry indicated signs of recovery in 2022. This is largely attributable to pent-up demand and a backlog of events rescheduled throughout the pandemic. In 2022, revenue and attendance returned to levels similar to 2019, however they did not quite reach the highest levels recorded in 2018.

State highlights

All states/territories experienced positive growth in revenue and attendance between 2021 and 2022. VIC and NSW experienced the highest growth, as activity resumed following extended lockdowns in 2021 due to COVID-19.

Victoria

- VIC accounted for the highest market share of revenue (34.1%) and attendance (32.4%) in 2022.
- VIC experienced the highest year-on-year (y-o-y) increase in revenue by 333.3% (to $684.4m) and in attendance by 231.2% (to 7.9m) among all states and territories in 2022. This growth was anticipated given the impact of restrictions on the State.
- Contemporary Music contributed the highest share to VIC's overall revenue (34.1%) and attendance (34.3%) in 2022.

New South Wales

- NSW accounted for the second highest market share of revenue (33.7%) and attendance (30.0%) in 2022.
- NSW witnessed the second highest y-o-y increase in revenue by 211.3% (to $676.1m) and in attendance by 178.5% (to 7.3m) among all states and territories in 2022.
- Contemporary Music contributed the highest share to NSW's overall revenue (32.2%) and attendance (37.9%) in 2022.

Category highlights

All categories experienced y-o-y growth, with Contemporary Music and Festivals (Contemporary Music) witnessing the largest changes.

Contemporary Music

- Contemporary Music accounted for the largest market share of revenue (35.2%) and attendance (35.9%) in 2022, although market share has not returned to pre-pandemic levels.
- Contemporary Music revenue and attendance have not yet returned to pre-pandemic levels, despite witnessing the highest y-o-y increase in revenue by 387.1% (to $706.0m) and the second highest y-o-y increase in attendance by 218.5% (to 8.7m) among all categories in 2022.
- VIC and NSW combined generated 63.9% market share of revenue and a 62.6% market share of attendance in 2022.

Musical Theatre

- Musical Theatre accounted for the second largest market share of revenue (25.9%) and attendance (17.6%) in 2022.
- Musical Theatre witnessed the third highest y-o-y growth in revenue by 156.5% (to $519.0m) and in attendance by 139.2% (to 4.3m) among all categories in 2022.
- VIC and NSW combined generated around 79.3% market share of revenue and a 74.5% market share of attendance in 2022.

Highlights of the Live Performance Industry in 2022

Ticket Revenue	Attendance
$2.0bn in ticket revenue	24.2m in attendance
196% y-o-y growth	123% y-o-y growth
2.2% growth from 2019	1.5% growth from 2019

Contemporary Music experienced a significant increase in revenue and attendance between 2021 and 2022. With the removal of border restrictions, international touring acts returned to Australia, including Bruno Mars, Billy Joel, Guns N' Roses and Billie Eilish.

Festivals (Contemporary Music) experienced a significant increase in revenue and attendance between 2021 and 2022, driven by major festivals such as Splendour in the Grass, Bluesfest, CMC Rocks QLD, Spilt Milk and Listen Out.

Top events in Musical Theatre in 2022 included *Hamilton, The Phantom of the Opera, Rogers and Hammerstein's Cinderella* and *Frozen.*

In 2022, VIC and NSW remained the leading markets for the live performance industry, collectively representing 67.8% of the total industry's revenue and 62.4% of the total industry's attendance.

Key Findings

Overall Results

The live performance industry is recovering following two years of COVID-19 impacts. Consulting with LPA highlighted that influencing factors include pent-up demand, a backlog of events postponed throughout the pandemic and the rising cost of ticket prices to account for higher operating costs.

States and territories are recovering at different rates. The most significant growth during 2022 was seen in VIC and NSW. Activity resumed in both these markets, following extended lockdowns in 2021.

Key findings

- The two major markets for the live performance industry were VIC and NSW. They collectively accounted for 67.8% of Australia's live performance revenue and 62.4% of attendance in 2022.
- All states and territories experienced y-o-y growth in revenue and in attendance in 2022. VIC and NSW experienced the highest y-o-y growth in revenue and attendance in Australia.
- Contemporary Music experienced the highest y-o-y growth in revenue (387.1%) among all categories. The removal of border restrictions led to the return of international touring acts, including Bruno Mars, Billy Joel, Guns N' Roses and Billie Eilish.
- Contemporary Music and Musical Theatre represented the two largest categories, generating 35.2% and 25.9% of revenue respectively, and 35.9% and 17.6% of attendance respectively of the overall live performance market in 2022.
- Combined, Contemporary Music and Festivals (Contemporary Music) contributed 46.9% of nationwide revenue and 42.2% of nationwide attendance.
- Growth in revenue and attendance in any given year is mainly attributed to the increase in major tours or events, particularly international tours in the market that year.

Ticket Sales Revenue - $2.0bn

In 2022, the Australian live performance industry generated total ticket sales revenue of $2.0b, an increase of **195.7%** from 2021 and an increase of **2.2%** from 2019 (pre-COVID).

The y-o-y increase reflects an increase in the total number of paid tickets and the average ticket price in 2022.

Attendance – 24.2m

Approximately 24.2m tickets were issued in 2022, a 122.7% growth from 2021 and a 1.5% growth from 2019.

Of the 24.2m total tickets, the number of paid tickets issued was 22.1m (a significant increase from 9.8m tickets sold in 2021). The remaining 2.2m tickets issued in 2022 were complimentary, sponsor allocated and zero priced tickets.

Average ticket price - $90.96

The average ticket price increased by 31.8% from $69.02 in 2021 to $90.96 in 2022.

Contemporary Music witnessed the highest y-o-y increase in the average ticket price (by 53.2% to $87.01). Circus and Physical Theatre witnessed the largest y-o-y decline (by 10.1% to $77.15) in 2022, largely due to the absence of major tours, such as Cirque du Soleil.

Overall Results

Total attendance and ticket revenue 2004 - 2022

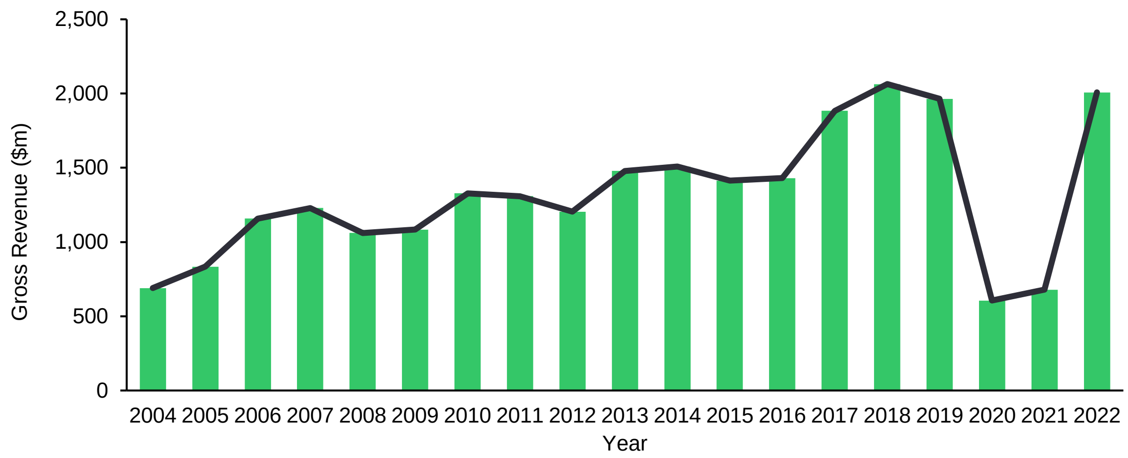
	Revenue		Attendance		Ticket Price	
Year	**Ticket Revenue ($)**	**Growth (%)**	**Total Attendance***	**Growth (%)**	**Average Ticket Price ($)****	**Growth (%)**
2004	$689,599,070	-	13,477,231	-	$55.13	-
2005	$834,337,206	21.0%	15,808,790	17.3%	$60.62	10.0%
2006	$1,158,064,526	38.8%	19,835,756	25.5%	$64.08	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^	$2,063,885,872	9.5%	25,788,548	12.0%	$96.61	6.6%
2019	$1,964,641,552	(4.8%)	23,864,415	(7.5%)	$92.89	(3.9%)
2020	$605,973,596	(69.2%)	7,761,710	(67.5%)	$87.14	(6.2%)
2021	$678,784,958	12.0%	10,877,839	40.1%	$69.02	(20.8%)
2022	$2,007,368,540	195.7%	24,227,035	122.7%	$90.96	31.8%

An analysis of longer term trends (see page 9) provides an indication of how the industry has performed in recent years. It is noted that data used to prepare the reports prior to 2008 was not provided in a disaggregated format. As such, EY was unable to validate the accuracy of the allocation of events in the years prior to 2008. The trend analysis has only been performed on data from 2008 to 2022. Further, these trends do not account for the inclusion of new data providers over time.

* Based on both paid and unpaid tickets ** Average Ticket Price is calculated based on paid tickets only ^ The 2018 data has been updated since the previous Report release to account for an error in the data received *** 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.

Overall Results

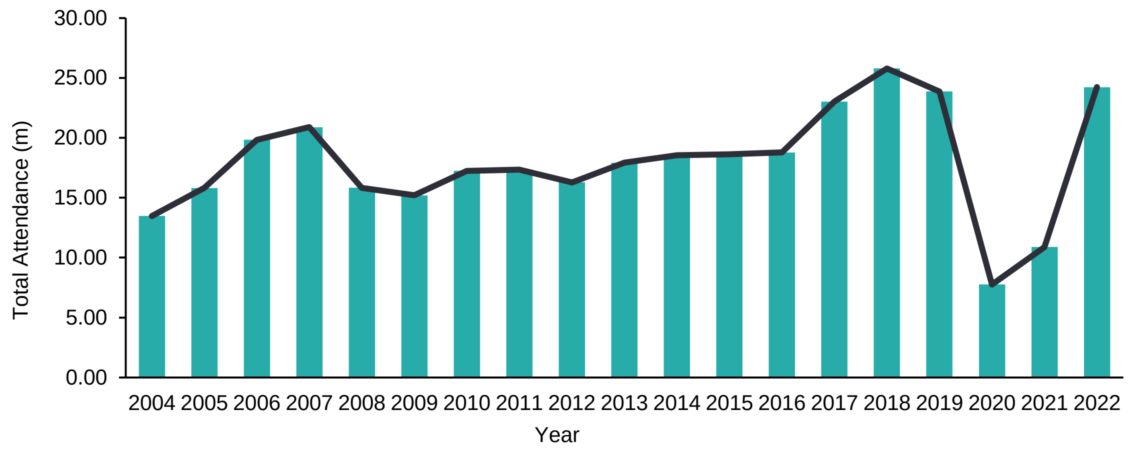
Gross Revenue ("Ticket Revenue") 2004 - 2022



Key Revenue Insights

- In 2022, overall industry revenue has grown year-over-year (y-o-y) by 195.7%. The industry has made a significant recovery in 2022, though has not matched 2018 figures.
- Revenue has grown at a compound annual growth rate (CAGR) of 4.7% over the period 2008 to 2022.
- In 2022, Contemporary Music experienced the highest y-o-y increase in revenue (387.1%) among all categories, followed by Festivals (Contemporary Music) (357.1%).
- All states and territories witnessed a y-o-y increase in revenue in 2022. VIC witnessed the highest y-o-y growth in revenue (by 333.3% to $684.4m), followed by NSW (by 211.3% to $676.1m).
- VIC and NSW witnessed significant growth in 2022, as these two major markets for the live performance industry were closed for extended periods due to COVID-19 restrictions over the past two years.

Attendance 2004 - 2022

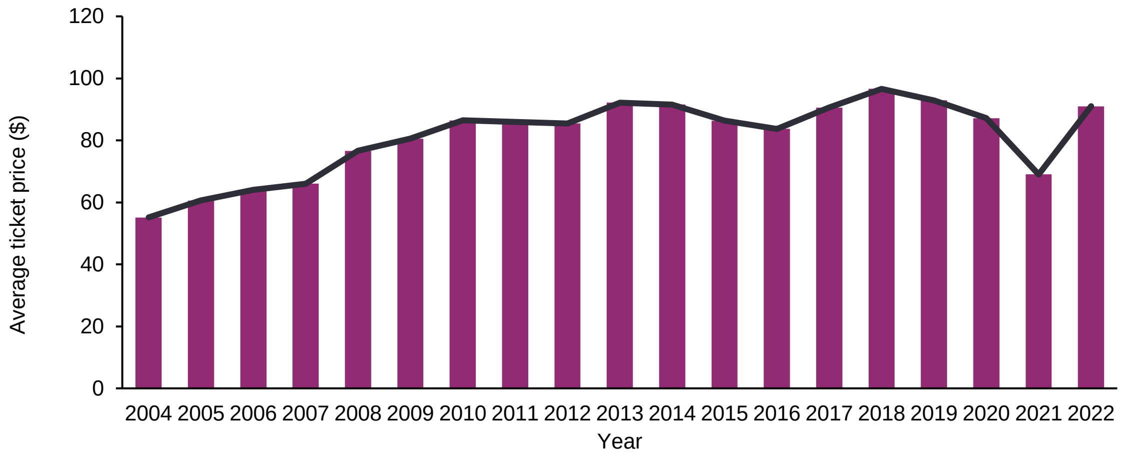


Key Attendance Insights

- Total attendance increased y-o-y by 122.7% from 10.9m in 2021 to 24.2m in 2022.
- Attendance has shown a remarkable improvement in 2022, marking the second-highest recorded attendance for the industry (with 2018 being the highest).
- Attendance has grown at a CAGR of 3.1% from 2008 to 2022.
- All states and territories witnessed a y-o-y increase in attendance in 2022.
- VIC experienced the highest y-o-y growth in attendance (231.2%), followed by NSW (178.5%).
- In 2022, the Festivals (Contemporary Music) category experienced the highest y-o-y increase (232.8%) among all categories, followed by Contemporary Music (218.5%).

Overall Results

Average ticket price 2004 - 2022



Key Average Ticket Price Insights

- The average ticket price increased by 18.8%, from $76.60 in 2008 to $90.96 in 2022.
- Increased operating costs across the live performance industry have contributed to rising ticket prices.
- The average ticket price has grown at a CAGR of 1.2% from 2008 to 2022.
- The average ticket price increased by 31.8% y-o-y, from $69.02 in 2021 to $90.96 in 2022.
- In 2022, Contemporary Music witnessed the highest y-o-y growth in average ticket price, at 53.2% growth.
- Festivals (Contemporary Music), followed by Musical Theatre, recorded the highest average ticket price among all the categories in 2022, at $169.53 and $128.02 respectively.

Overall State and Territory Results

Victoria (VIC) experienced significant growth in 2022, achieving the highest market share and y-o-y growth in revenue and attendance compared to other states and territories.

- **VIC** experienced the highest growth in revenue (by 333.3% to $684.4m) and in attendance (by 231.2% to 7.9m) between 2021 and 2022.
- All categories witnessed a y-o-y increase in revenue and in attendance in 2022. The growth in revenue was primarily driven by significant increases in revenue in **Festivals (Multi-Category)** (1919.6%), **Ballet and Dance** (643.6%), **Musical Theatre** (508.7%), **Contemporary Music** (500.1%), **Classical Music** (308.0%), **Festivals (Contemporary Music)** (274.2%), **Theatre** (162.3%), **Circus and Physical Theatre** (101.3%), **Comedy** (102.5%) and **Children's/Family** (96.7%).
- **Festivals (Multi-Category)** experienced a significant growth in revenue due to increase in attendance by 385.2% and increase in average ticket price. Major festivals included Rising Festival and Melbourne Fringe Festival.
- **Ballet and Dance** revenue increased primarily due to an increase in attendance by 416.5%, driven by events such as *Romeo and Juliet*, *Anna Karenina* and *Harlequinade.*
- **Musical Theatre** revenue increased primarily due to an increase in attendance by 499.0%. Top events included *Hamilton*, *The Phantom of the Opera*, *Rogers and Hammerstein's Cinderella*, *9 to 5: The Musical* and *Hairspray.*
- **Contemporary Music** revenue increased, largely attributable to an increase in attendance by 309.5%. Top events included performances by Billy Joel, Guns N' Roses and Billie Eilish.
- The growth in revenue in **Classical Music**, **Festivals (Contemporary Music)** and **Comedy** is primarily due to increases in attendance and the average ticket price. The growth in revenue in **Theatre**, **Circus and Physical Theatre** and **Children's/Family** is primarily due to a growth in attendance.

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New South Wales (NSW) experienced significant growth in 2022, marking the second highest y-o-y growth in revenue and attendance amongst all the states and territories in Australia.

- **NSW** experienced the second highest growth in revenue (by 211.3% to $676.1m) and in attendance (by 178.5% to 7.3m) between 2021 and 2022.
- All categories except **Circus and Physical Theatre** witnessed a y-o-y increase in revenue and in attendance in 2022.
- The growth in revenue was primarily driven by significant increases in revenue in **Festivals (Contemporary Music)** (1082.5%), **Festivals (Multi-Category)** (926.5%), **Contemporary Music** (617.9%) and **Special Events** (376.3%). This revenue was partially offset by a decline in revenue in **Circus and Physical Theatre** (51.0%).
- **Festivals (Contemporary Music)** revenue increased driven by growth in attendance by 665.8% and an increase in average ticket price. This growth can be largely attributed to major festivals such as Splendour in the Grass and Bluesfest.
- **Festivals (Multi-Category)** revenue increased, primarily due to an increase in attendance by 235.3% and an increase in the average ticket price. Top events included Vivid, Sydney Fringe Festival and Wanderer Festival.
- **Contemporary Music** revenue increased primarily due to an increase in attendance by 400.5%. Top events included performances by Bruno Mars, Billie Eilish and Guns N' Roses.
- **Special Events** revenue increased primarily due to an increase in attendance by 132.4%. Top events included *RuPaul's Drag Race* and *Hot Dub Rave Machine.*
- **Circus and Physical Theatre** revenue declined, primarily due to a decline in attendance by 37.2% and fall in average ticket price in 2022.

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Overall State and Territory Results

In 2022, Queensland (QLD) experienced significant y-o-y increases in both revenue and attendance. The revenue and attendance results surpass pre-pandemic levels. However, they have not yet reached the peak recorded in 2018.

- **QLD** experienced significant growth in revenue (by 128.0% to $303.0m) and in attendance (by 68.4% to 3.7m) between 2021 and 2022.
- Revenue growth was driven by significant increases in revenue in **Contemporary Music** (243.0%), **Festivals (Multi-Category)** (199.8%), **Festivals (Contemporary Music)** (193.4%) and **Classical Music** (121.3%). The revenue growth was partially offset by declines in revenue in **Opera** (31.6%) and **Theatre** (18.0%).
- **Contemporary Music** revenue primarily increased as a result of increases in attendance (117.1%) and the average ticket price. Top events included *Fridayz Live* and performances by Billie Eilish and Guns N' Roses.
- **Festivals (Multi-Category)** revenue increased primarily due to increases in attendance (67.8%) and average ticket price. Major festivals included Brisbane Festival, MELT Festival, Meatstock Toowoomba - The Music, Barbecue and Camping Festival; Mekka Wednesday; and The Long Sunset.
- **Festivals (Contemporary Music)** revenue increased, primarily due to an increase in attendance by 108.1% and an increase in the average ticket price. Top events included CMC Rocks, Spilt Milk and Listen Out Brisbane.
- **Classical Music** revenue increased, primarily due to an increase in attendance by 81.0% and an increase in the average ticket price. Top events included performances by Andrea Bocelli and 2CELLOS.
- **Opera** and **Theatre** revenue experienced a decline, primarily attributed to a decrease in attendance.

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Western Australia (WA) witnessed y-o-y growth in revenue and in attendance in 2022. However, the overall revenue and attendance results have not yet returned to pre-pandemic levels.

- **WA** experienced growth in revenue (by 88.9% to $160.6m) and in attendance (by 36.3% to 2.2m) between 2021 and 2022.
- Revenue growth was driven by significant increases in revenue in **Festivals (Contemporary Music)** (291.0%), **Contemporary Music** (245.0%), **Comedy** (159.5%) and **Classical Music** (33.6%). The growth in revenue was partially offset by the y-o-y decline in **Circus and Physical Theatre (66.4%), Children's/Family** (45.0%), **Theatre** (27.1%) **and Special Events** (14.1%).
- **Festivals (Contemporary Music)** experienced a significant increase in revenue driven by growth in attendance by 215.2%. Top events included festivals such as Listen Out Perth, Festival X Perth and Red Hot Summer Tour.
- **Contemporary Music** revenue increased largely due to increases in attendance (94.6%) and average ticket price. Top events included performances by Billie Eilish and Guns N' Roses.
- **Comedy** revenue increased given a growth in attendance by 144.7%. Top events included performances by Carl Barron and Jim Jefferies.
- **Classical Music** revenue increased despite a 4.3% decrease in attendance. This is due to an increase in the average ticket price. Top events included performances by Andrea Bocelli, the Ten Tenors and 2CELLOS.
- **Circus and Physical Theatre**, **Children's/Family**, **Theatre** and **Special Events** revenue declined as a result of a decrease in attendance in 2022.

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Overall State and Territory Results

South Australia (SA) witnessed y-o-y growth in revenue and in attendance in 2022. However, the overall revenue and attendance results have not yet returned to pre-pandemic levels.

- **SA** experienced growth in revenue (by 117.6% to $118.0m) and in attendance (by 52.6% to 2.1m) between 2021 and 2022.
- These results were primarily driven by the increases in revenue in **Special Events** (631.9%), **Musical Theatre** (557.6%), **Comedy** (433.5%), **Festivals (Contemporary Music)** (387.4%), **Contemporary Music** (229.6%) and **Opera** (90.4%). The growth in revenue was partially offset by the y-o-y declines in **Classical Music** (22.7%) and **Children's/Family** (15.2%).
- **Special Events** revenue increased primarily attributable to increases in attendance (226.2%) and average ticket price. Major events were *Hot Dub Rave Machine* and *RuPaul's Drag Race*.
- **Musical Theatre** revenue increased, primarily due to an increase in attendance (705.3%). Top events included *Frozen*, *9 to 5: The Musical* and *SIX the Musical*.
- **Comedy** revenue increased primarily due to an increase in attendance by 315.0%. Major events included performances by Carl Barron, Jim Jefferies and Chris Rock.
- **Festivals (Contemporary Music)** revenue increased, primarily due to increases in attendance (208.2%) and average ticket price. Major festivals included WOMADelaide, Harvest Rock and Spin Off Festival.
- **Contemporary Music** revenue increased, primarily due to an increase in attendance by 141.0%. Major events included Guns N' Roses, Rüfüs Du Sol and *Fridayz Live.* **Opera** revenue increased primarily driven by an increase in attendance (122.8%). Major events included *La Traviata* and *Boheme on the Beach*.
- **Classical Music** revenue declined, primarily driven by declines in attendance and average ticket price in 2022. **Children's/Family** revenue declined primarily as a result of decline in attendance in 2022.

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Due to their size, Australian Capital Territory (ACT), Tasmania and Northern Territory (NT) contributed the least to overall live performance revenue in Australia in 2022.

- **NT** witnessed a 32.1% y-o-y growth in revenue (to $6.9m) and a 11.2% y-o-y growth in attendance (to 0.1m) between 2021 and 2022.
- The growth in revenue was primarily driven by revenue growth in **Circus and Physical Theatre**, **Ballet and Dance** and **Contemporary Music** categories.
- **ACT** witnessed the third highest y-o-y growth in revenue (173.0% to $33.1m) and in attendance (86.8% to 0.4m) amongst all states and territories between 2021 and 2022.
- The growth in revenue was largely driven by revenue growth in **Circus and Physical Theatre**, **Festivals (Contemporary Music)**, **Musical Theatre**, **Contemporary Music** and **Ballet and Dance** categories.
- **Tasmania** experienced a 78.0% y-o-y growth in revenue (to $25.3m) and a 52.7% y-o-y growth in attendance (to 0.5m), between 2021 and 2022.
- The growth in revenue was driven by revenue growth in **Special Events**, **Children's/Family**, **Festivals (Multi-Category)**, **Contemporary Music** and **Theatre** categories.

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Overall State and Territory Results

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

- **VIC** represented the highest market share of revenue and attendance amongst all the states and territories in Australia, accounting for 34.1% and 32.4% of the national market share of revenue and attendance respectively in 2022. See p. 35,
- **NSW** recorded the second highest share of revenue and attendance, representing 33.7% and 30.0% of the national market share of revenue and attendance respectively in 2022. p. 32,
- Combined, **VIC** and **NSW** generated approximately 67.8% of Australia's live performance revenue and 62.4% of attendance in 2022. p. 24,
- National spend per capita in 2022 was $76.43. **VIC** and **NSW** held the top positions in spend per capita in 2022, with $102.08 (33.6% higher than national spend per capita) and $82.07 (7.4% higher than national spend per capita) respectively. p. 25

NSW and **VIC** usually account for the largest market share of revenue and attendance across categories in the previous years. Notable exceptions in 2022 included:

- In **Festivals (Multi-Category)**, **SA** and **NSW** combined accounted for the largest market share of revenue (52.3%), while **SA** and **WA** combined accounted for the largest market share of attendance (56.4%). Major annual festivals held in **SA**, **NSW** and **WA** included Adelaide Fringe, Fringe World Festival, Vivid and Sydney Fringe Festival.
- In **Festivals (Contemporary Music)**, **NSW** and **QLD** combined accounted for the largest market share of revenue (58.9%), while **NSW** and **VIC** combined accounted for the largest market share of attendance (55.3%). Major music festivals held in **NSW**, **QLD** and **VIC** included Splendour in the Grass, Bluesfest, CMC Rocks and Spilt Milk.
- In **Circus and Physical Theatre**, **VIC** and **QLD** combined accounted for the largest market share of revenue (70.1%) and attendance (69.4%). Top events in **VIC** and **QLD** included *Penn and Teller* and *Pink Flamingo - Glitz*.
- In **Special Events**, **VIC** and **QLD** combined accounted for the largest market share of revenue (53.4%) and attendance (72.4%).

2022 Analysis of Top 5 Categories and Top 3 Biggest Changes

Categories with highest industry share and biggest change y-o-y

Top 5 Categories - Revenue and Attendance 2022

Revenue 2022		
Category	Total Revenue	Industry Share
Contemporary Music	$705,953,566	35.2%
Musical Theatre	$519,021,175	25.9%
Festivals (Contemporary Music)	$234,410,442	11.7%
Comedy	$114,965,234	5.7%
Theatre	$111,362,004	5.5%

Attendance 2022		
Category	Total Attendance	Industry Share
Contemporary Music	8,699,785	35.9%
Musical Theatre	4,269,750	17.6%
Comedy	2,132,551	8.8%
Festivals (Multi-Category)	2,124,802	8.8%
Festivals (Contemporary Music)	1,537,353	6.3%

Top 5 Changes by Category 2021 - 2022

Biggest Increase in Revenue	
Category	Increase from 2021
Contemporary Music	387.1%
Festivals (Contemporary Music)	357.1%
Musical Theatre	156.5%

Biggest Decline in Revenue	
Category	Decrease from 2021
No decline	

Biggest Increase in Attendance	
Category	Increase from 2021
Festivals (Contemporary Music)	232.8%
Contemporary Music	218.5%
Musical Theatre	139.2%

Biggest Decline in Attendance	
Category	Decrease from 2021
No decline	

Overall Category Results

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

In 2022, the live performance industry made a strong recovery following the challenges faced in 2020 and 2021 due to COVID-19. This is due to a backlog of events and reopening of major markets (VIC and NSW).

Most categories witnessed significant growth in both revenue and attendance, effectively returning to pre-COVID levels of activity.

In 2022, all categories experienced a y-o-y increase in both revenue and attendance. Amongst them, **Contemporary Music**, **Musical Theatre**, **Festivals (Contemporary Music)**, **Comedy** and **Theatre** were significant contributors to the live performance industry; these categories experienced significant increases in revenue and attendance. An increase in ticket prices was common, largely attributable to increased operating costs across the live performance industry.

- **Contemporary Music** experienced the highest growth in revenue (by 387.1% to $706.0m) and the second highest growth in attendance (218.5% to 8.7m) amongst all categories in 2022. The increase in the average ticket price (by 53.2% to $87.01) further contributed to the growth in revenue. The category witnessed a substantial increase in revenue and attendance, a significant improvement from 2021 which had recorded the lowest figures since 2004, due to COVID-19 restrictions and uncertainties. Between 2004 and 2022, revenue in **Contemporary Music** has increased by 261.9% and attendance has increased by 217.8%. The growth in **Contemporary Music** in 2022 was primarily driven by performances of internationally renowned artists such as Bruno Mars, Billy Joel, Guns N' Roses and Billie Eilish. See p. 69
- **Musical Theatre** witnessed the third highest growth in revenue and in attendance amongst all categories, generating a 156.5% growth in revenue (to $519.0m) and 139.2% growth in attendance (to 4.3m) in 2022. The increase in the average ticket price (by 7.7% to $128.02) further contributed to the growth in revenue. This is the highest recorded revenue, attendance and average ticket price for **Musical Theatre**. Between 2004 and 2022, revenue in the **Musical Theatre** category has increased by 274.2% and attendance has increased by 131.1%. The growth in 2022 was primarily attributed to musicals such as *Hamilton*, *The Phantom of the Opera*, *Rogers and Hammerstein's Cinderella* and *Frozen.* See p. 78
- **Festivals (Contemporary Music)** experienced the second highest growth in revenue (by 357.1% to $234.4m) and the highest growth in attendance (232.8% to 1.5m) amongst all categories in 2022. The increase in the average ticket price (by 36.5% to $169.53) further contributed to the growth in revenue. In 2022, **Festivals (Contemporary Music)** experienced a strong turnaround, recording the highest revenue, attendance, and average ticket price in this category. Between 2004 and 2022, revenue in the **Festivals (Contemporary Music)** category has increased by 2500.2% and attendance has increased by 708.0%. Major festivals which contributed to the growth in revenue in 2022 were Splendour in the Grass, Bluesfest, CMC Rocks QLD, Spilt Milk and Listen Out. See p. 72
- **Comedy** experienced significant growth in revenue and in attendance amongst all categories, generating 128.6% growth in revenue (to $115.0m) and 82.0% growth in attendance (to 2.1m) in 2022. The increase in the average ticket price (by 28.1% to $57.92), further contributed to the growth in revenue. This is the second highest recorded revenue (with 2018 being the highest), and the third highest attendance (with 2018 and 2019 being the first and second highest) in the **Comedy** category. The top events in this category in 2022 were the Melbourne International Comedy Festival, Sydney Comedy Festival and performances by renowned comedians such as Hannah Gadsby, Chris Rock and Sooshi Mango comedy troupe. Between 2009 and 2022, revenue in the **Comedy** category has increased by 190.5% and attendance has increased by 177.3%. See p. 66
- **Theatre** experienced a significant increase in revenue by 107.9% (to $111.4m) and a significant increase in attendance by 106.1% (to 1.4m) in 2022. The increase in the average ticket price (by 2.9% to $91.13) further contributed to the growth in revenue in 2022. The growth was primarily driven by events such as *Harry Potter and the Cursed Child*, *The Picture of Dorian Gray*, *The Tempest* and *Strange Case of Doctor Jekyll & Mr Hyde*. Between 2004 and 2022, revenue in the **Theatre** category increased by 24.5% despite a decrease in attendance of 38.1%. This was due to an increase in the average ticket price of 107.7%. See p. 87

Overall Category Results

Classical Music, Ballet and Dance and Festivals (Multi-Category) witnessed increase in revenue driven by growth in attendance and average ticket price.

Children's/Family witnessed increase in revenue driven by growth in attendance, partially offset by a decline in the average ticket price.

- **Classical Music** experienced a significant increase in revenue by 134.2% (to $88.9m) and a significant increase in attendance by 97.5% (to 1.2m) in 2022. The increase in the average ticket price (by 21.2% to $92.41) further contributed to the growth in revenue in 2022. Major events in this category in 2022 included performances from artists like Andrea Bocelli, 2CELLOS, and Kadim Al Sahir, and events such as *Simone Young conducts Mahler 2* and *A Midsummer Night's Dream with Simone Young*. Between 2004 and 2022, revenue in the **Classical Music** category increased by 112.3% despite marginal increase in attendance by 10.7%. This was due to an increase in the average ticket price by 113.9%. See p. 63
- **Ballet and Dance** experienced significant growth in revenue and in attendance, generating 135.1% growth in revenue (to $63.3m) and 103.7% growth in attendance (to 0.7m) in 2022. The increase in the average ticket price (by 10.2% to $94.86) further contributed to the growth in revenue. In 2022, the **Ballet and Dance** category witnessed a strong turnaround, rebounding from its lowest values in 2020 and 2021, and returning to pre-COVID levels of activity. The top events in 2022 were *Romeo and Juliet*, *Anna Karenina*, *Kunstkamer* and *Instruments of Dance*. Between 2004 and 2022, the revenue increased by 106.6% despite a marginal increase in attendance by 8.5%. This was due to an increase in the average ticket price of 89.5%. See p. 54
- **Festivals (Multi-Category)** experienced an increase in revenue (by 86.1% to $70.1m) and attendance (by 36.7% to 2.1m) in 2022. The increase in the average ticket price (by 37.0% to $41.37) further contributed to the growth in revenue. This is the highest recorded revenue and attendance for **Festivals (Multi-Category)**. The growth in 2022 was primarily driven by festivals such as Adelaide Fringe, Rising Festival, Fringe World Festival (Perth) and Dark Mofo. Between 2004 and 2022, revenue in the **Festivals (Multi-Category)** category increased by 372.3% and attendance increased by 339.1%. See p. 75
- **Children's/Family** experienced an increase in revenue (by 40.1% to $48.1m) and attendance (by 41.6% to 1.5m) in 2022. The growth in revenue was partially offset by the decline in the average ticket price (by 2.9% to $35.05). The top events in this category in 2022 were *Disney on Ice*, The Wiggles, *Bluey's Big Play* and *Paw Patrol*. Between 2004 and 2022, the revenue in the **Children's/Family** category increased by 347.5% and attendance increased by 188.8%. See p. 57

Although Opera, Circus and Physical Theatre, and Special Events experienced revenue and attendance increases, they contributed the least to the live performance industry market share in 2022.

- **Opera** experienced an increase in revenue by 51.2% (to $23.7m) and an increase in attendance by 49.0% (to 0.2m) in 2022. The average ticket price increased marginally by 1.0% (to $120.17) in 2022. The activity has not yet returned to pre-COVID levels, as 2022 marked the third lowest recorded revenue and attendance in **Opera** since 2004 (with 2020 and 2021 being the lowest and second lowest, respectively). The top events in this category in 2022 were *La Traviata, Carmen* and *Madama Butterfly*. Between 2004 and 2022, revenue in the **Opera** category decreased by 62.2% and attendance decreased by 64.2%. However, the average ticket price increased by 10.4% over the same period. See p. 81
- **Circus and Physical Theatre** experienced the lowest growth in revenue and in attendance among all categories in 2022, with a 7.1% growth in revenue (to $22.7m) and a 19.8% growth in attendance (to 0.3m). The growth in revenue was partially offset by the decline in the average ticket price (by 10.1% to $77.15). The top events in this category in 2022 were *Penn and Teller*, *L'Hotel, Pink Flamingo - The Glitz* and *Infamous The Show*. Between 2009 and 2022, revenue in the **Circus and Physical Theatre** category increased by 164.2% and attendance increased by 64.6%. See p. 60
- **Special Events** experienced an increase in revenue (by 86.3% to $4.8m) and in attendance (by 81.6% to 0.1m) in 2022. The growth in revenue was partially offset by the decline in the average ticket price (by 5.2% to $39.35). The top events in this category in 2022 were *Carols By Candlelight* and *Dirty Dancing In Concert*. The **Special Events** category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place. See p. 84

Overall Category Results

Contemporary Music and Musical Theatre continue to be the top contributors to the overall live performance market in 2022.	► The top 5 categories accounted for approximately 84.0% of industry revenue and 74.3% of attendance in 2022 (**Contemporary Music, Musical Theatre, Festivals (Contemporary Music), Comedy** and **Theatre**). ► As with previous years, in 2022, **Contemporary Music** and **Musical Theatre** represented the two largest categories in the industry generating 35.2% and 25.9% of revenue respectively, and 35.9% and 17.6% of attendance respectively. Combined, these two categories account for 61.1% of the live performance industry in terms of revenue and 53.5% of attendance in 2022.	See p. 50

3 Introduction

Scope of Work and Approach

Defining our tasks performed and our approach

Scope of Work

EY was engaged by LPA for preparation of the 2022 Live Performance Australia Ticket Attendance and Revenue Report. For the purposes of this report, the live performance industry encompasses performances, productions, previews and concerts that are performed in front of a live and/or virtual audience.

The scope of our work included:

- Data collected on the number of ticket sales and associated revenue for the live performance industry in Australia ("2022 national data") from Data Providers. LPA provided assistance with collecting the data
- Analysis of the 2022 national data on an overall basis, in comparison to previous years, by states and territories and by event categories
- Incorporation of the data from a selection of larger regional venues into the report.

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

Approach

EY has compiled data from ticketing companies, self-ticketing venues, event promoters and National Performing Arts Partnership (NPAP) companies (collectively referred to in this study as the “Data Providers”). A list of the Data Providers is provided in Appendix A of this Report.

Based on the guidelines established by LPA, the Data Providers assigned ticketing data to defined event categories. In Appendix B of this Report, these event categories are described.

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 NPAP companies. This was to avoid double counting of revenue and attendance data.

EY received data directly from Data Providers. EY and Data Providers signed confidentiality agreements when requested. As a result, and consistent with our agreement, EY did not divulge disaggregated raw survey data or event-specific revenue or ticketing data to LPA.

Despite the fact that our scope of work did not encompass a detailed review of all data to determine the appropriateness of event and category allocations, obvious anomalies were identified by EY and they were corrected as part of our analysis in consultation with LPA. Examples of such anomalies included:

- Events which were wrongly classified were reallocated. For example, music festivals were reallocated to Festivals (Contemporary Music)
- Non live performance events such as sporting events, talk shows, fashion festivals, food festivals (that do not include music line ups), workshops, cinema screenings, award nights and graduation ceremonies were excluded
- Amateur events such as school performances, dance academy concerts and other community group performances were excluded.

Scope of Work and Approach

Limitations and report changes from previous years

Limitations

The information and analysis contained in this Report is based on ticketing data provided by Data Providers as outlined in Appendix A of this Report. We do not imply and it should not be construed that we have verified any of the information provided to us, or that our enquiries could have identified any matter that a more extensive examination might disclose.

As with previous studies, data on ticket revenue and attendances for the live performance industry were limited to those provided by the Data Providers. While national in reach, the coverage of this Report excludes events in some regional venues as well as contract-fee performances by NPAP 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 included the Report. LPA and EY are working towards improving the Report's inclusion of these events by increasing the regional providers' 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 in recent years, which included festivals such as Bluesfest and MONA (MONA FOMA Festival and Dark Mofo) addresses some previous 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 non-ticketed 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 covered in the Report are not included in the results. However, data from Oztix, Ticketek, Ticketmaster 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. 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 2022 data was compared against historical data sourced directly from Live Performance Australia's Live Performance Industry in Australia 2006 - 2021 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, data was compared from 2008 to 2022. Inconsistencies may exist in the data collection methodology between the surveys performed in these years, and for previous surveys (where more detailed event specific information was not requested).

Changes in the report compared to previous years

- In 2016, the term Festivals (Single-Category) was renamed Festivals (Contemporary Music) (by LPA) and is currently referred to as Festivals (Contemporary Music).
- New Data Providers in 2022 were 'Perth Festival', 'Sydney Fringe Festival' and 'Australian Digital Concert Hall'.

State Analysis

2022 Revenue and Attendance by State/Territory

Revenue and Attendance by State/Territory — 2021 and 2022

	Revenue				Attendance			
State/Territory	Revenue	Share of Industry (2022)	Share of Industry (2021)	Change in Revenue from 2021	Tickets	Share of Industry (2022)	Share of Industry (2021)	Change in Attendance from 2021
New South Wales	$676,123,998	33.7%	32.0%	211.3%	7,264,274	30.0%	24.0%	178.5%
Victoria	$684,355,036	34.1%	23.3%	333.3%	7,856,954	32.4%	21.8%	231.2%
Queensland	$303,028,944	15.1%	19.6%	128.0%	3,728,420	15.4%	20.4%	68.4%
Western Australia	$160,568,169	8.0%	12.5%	88.9%	2,221,876	9.2%	15.0%	36.3%
South Australia	$117,992,021	5.9%	8.0%	117.6%	2,083,672	8.6%	12.5%	52.6%
Australian Capital Territory	$33,063,416	1.6%	1.8%	173.0%	396,477	1.6%	2.0%	86.8%
Tasmania	$25,303,434	1.3%	2.1%	78.0%	537,534	2.2%	3.2%	52.7%
Northern Territory	$6,933,522	0.3%	0.8%	32.1%	137,828	0.6%	1.1%	11.2%
Total	**$2,007,368,540**	**100.0%**	**100.0%**	**195.7%**	**24,227,035**	**100.0%**	**100.0%**	**122.7%**

Analysis

- In 2022, the live performance industry across Australia experienced a y-o-y increase in both revenue (195.7%) and attendance (122.7%).
- Victoria has the highest industry share of revenue (34.1%) and highest share of attendance (32.4%) in Australia.

2022 Population and Per Capita Results

Per Capita Results 2022

State/Territory	Population (2022) (m) – *as per Australian Bureau of Statistics*	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	8.24	31.4%	33.7%	30.0%	$82.07
Victoria	6.70	25.5%	34.1%	32.4%	$102.08
Queensland	5.38	20.5%	15.1%	15.4%	$56.34
Western Australia	2.83	10.8%	8.0%	9.2%	$56.83
South Australia	1.83	7.0%	5.9%	8.6%	$64.33
Australian Capital Territory	0.46	1.8%	1.6%	1.6%	$71.74
Tasmania	0.57	2.2%	1.3%	2.2%	$44.27
Northern Territory	0.25	1.0%	0.3%	0.6%	$27.72
Total	**26.26**	**100.0%**	**100.0%**	**100.0%**	**$76.43**

Per capita results

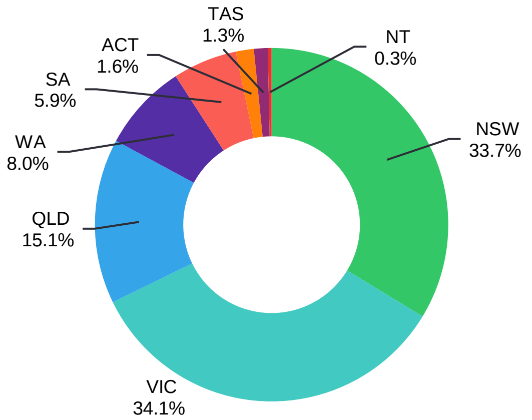
A comparison of each state and territory's share of the live performance industry against population provides insight into spend per capita, as well as the concentration of the industry relative to where people live. The above table shows that NSW and VIC command a larger share of revenue compared to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

Comments

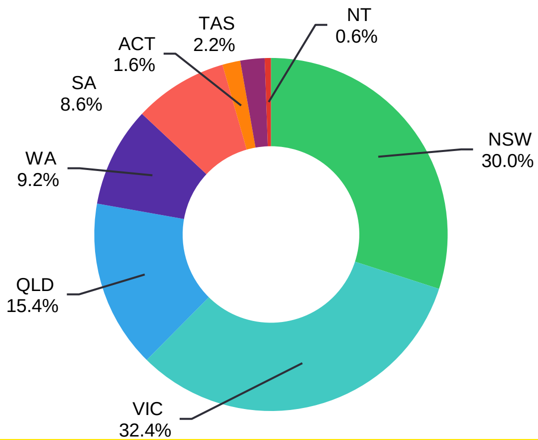
- The state and territory breakdowns do not take into account people who travel from interstate or overseas to attend a live performance. Industry share only accounts for the state or territory in which the performance took place. As such, the revenue and attendance of the performance are fully attributed to the state in which the performance is held. This is particularly relevant for categories such as Musical Theatre where musicals open their season in a particular state and often attract significant audience visitation from outside that state.
- VIC and NSW continued to account for the highest share in industry revenue and attendance respectively, due to the following reasons:
  - Some of Australia's largest performing arts companies are based in NSW and Victoria with 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 have been successful in attracting major live performance events to these States.
- VIC ($102.08) and NSW ($82.07) hold top positions in per capita spend amongst all states and territories in 2022. VIC and NSW are the only states that are above the national per capita spend ($76.43).

2022 Revenue and Attendance Breakdown

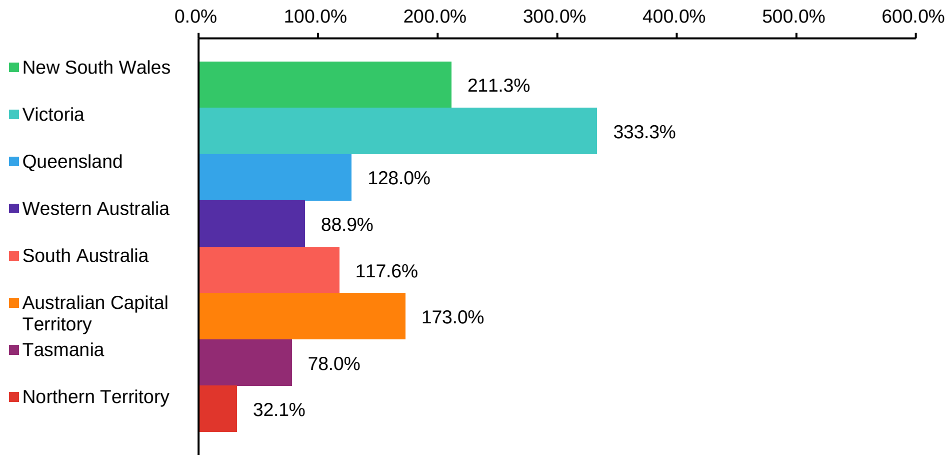
Market Share (Revenue) by State/Territory — 2022



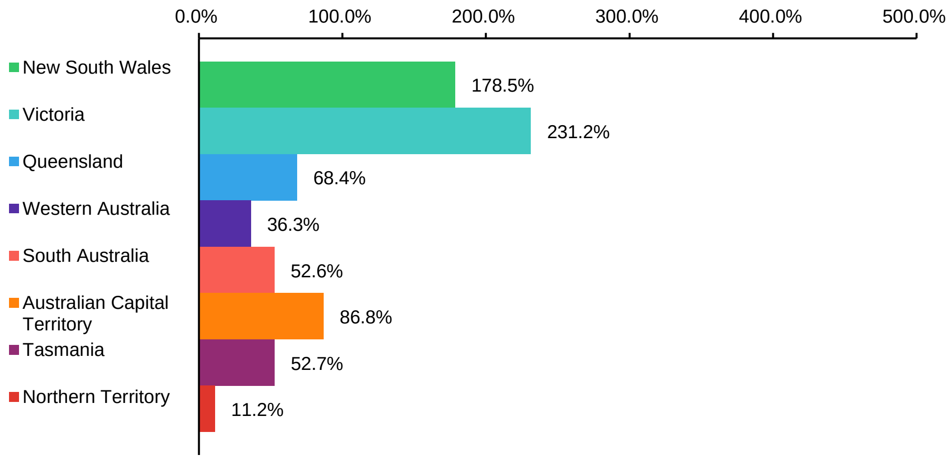
Market Share (Attendance) by State/Territory — 2022



Percentage Movement in Revenue by State/Territory — 2021 → 22



Percentage Movement in Attendance by State/Territory — 2021 → 22



2022 Revenue by Category and State/Territory

Revenue by Category and State/Territory 2022

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$25,176,982	$20,077,796	$8,151,897	$5,624,877	$2,425,494	$1,014,749	$489,914	$381,965	**$63,343,674**
Children's/Family	$18,114,887	$12,758,723	$8,692,948	$2,508,192	$2,811,174	$966,271	$1,952,346	$249,938	**$48,054,479**
Circus & Physical Theatre	$4,968,320	$5,429,351	$10,507,200	$257,490	$195,763	$375,262	$182,874	$807,440	**$22,723,700**
Classical Music	$33,266,488	$23,870,637	$11,848,662	$12,479,614	$4,413,877	$1,788,838	$1,171,968	$82,401	**$88,922,485**
Comedy	$29,124,585	$47,423,061	$16,620,289	$9,500,019	$5,846,291	$3,764,932	$1,888,055	$798,002	**$114,965,234**
Contemporary Music	$217,586,514	$233,579,231	$126,429,645	$71,052,161	$38,151,103	$8,409,160	$8,941,547	$1,804,205	**$705,953,566**
Festivals (Multi-Category)	$12,908,119	$10,913,575	$6,067,529	$10,542,834	$23,742,709	$69,824	$5,573,063	$284,483	**$70,102,136**
Festivals (Contemporary Music)	$87,305,513	$45,627,474	$50,827,850	$16,503,905	$17,800,056	$10,858,674	$3,420,737	$2,066,232	**$234,410,442**
Musical Theatre	$202,923,468	$208,480,701	$56,459,347	$27,954,536	$18,861,950	$3,543,937	$481,788	$315,448	**$519,021,175**
Opera	$14,878,865	$4,694,518	$793,427	$1,439,861	$1,564,714	$173,465	$117,241	-	**$23,662,092**
Special Events	$641,227	$1,353,746	$1,234,552	$454,441	$336,736	$242,308	$563,262	$21,282	**$4,847,553**
Theatre	$29,229,030	$70,146,223	$5,395,597	$2,250,239	$1,842,154	$1,855,996	$520,640	$122,126	**$111,362,004**
Total	**$676,123,998**	**$684,355,036**	**$303,028,944**	**$160,568,169**	**$117,992,021**	**$33,063,416**	**$25,303,434**	**$6,933,522**	**$2,007,368,540**

Analysis

- In 2022, Contemporary Music and Musical Theatre represented the two largest categories in the industry generating 35.2% and 25.9% of the overall revenue, respectively. Contemporary Music and Festivals (Contemporary Music) witnessed the highest y-o-y growth in revenue with increases of 387.1% and 357.1%, respectively.

2022 Attendance by Category and State/Territory

Attendance by Category and State/Territory 2022

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	246,742	211,626	100,354	102,741	47,654	13,084	9,121	9,250	**740,572**
Children's/Family	542,428	396,805	238,968	118,215	87,319	32,374	61,128	10,661	**1,487,898**
Circus & Physical Theatre	69,276	77,740	148,727	5,617	4,357	6,106	4,557	9,935	**326,315**
Classical Music	359,289	374,726	153,041	172,493	67,288	22,679	24,037	2,093	**1,175,646**
Comedy	447,430	1,054,088	294,064	161,168	74,154	59,153	28,223	14,271	**2,132,551**
Contemporary Music	2,750,406	2,696,754	1,588,695	860,725	511,744	116,216	151,192	24,053	**8,699,785**
Festivals (Multi-Category)	224,571	293,985	178,452	306,012	892,146	1,737	188,323	39,576	**2,124,802**
Festivals (Contemporary Music)	510,325	339,624	327,693	118,012	119,385	74,619	27,713	19,982	**1,537,353**
Musical Theatre	1,491,645	1,688,762	523,999	303,229	215,188	34,776	7,118	5,033	**4,269,750**
Opera	128,360	44,320	11,453	18,967	18,485	1,829	2,072	-	**225,486**
Special Events	13,999	29,853	73,690	9,101	5,983	2,490	7,666	169	**142,951**
Theatre	479,803	648,671	89,284	45,596	39,969	31,414	26,384	2,805	**1,363,926**
Total	**7,264,274**	**7,856,954**	**3,728,420**	**2,221,876**	**2,083,672**	**396,477**	**537,534**	**137,828**	**24,227,035**

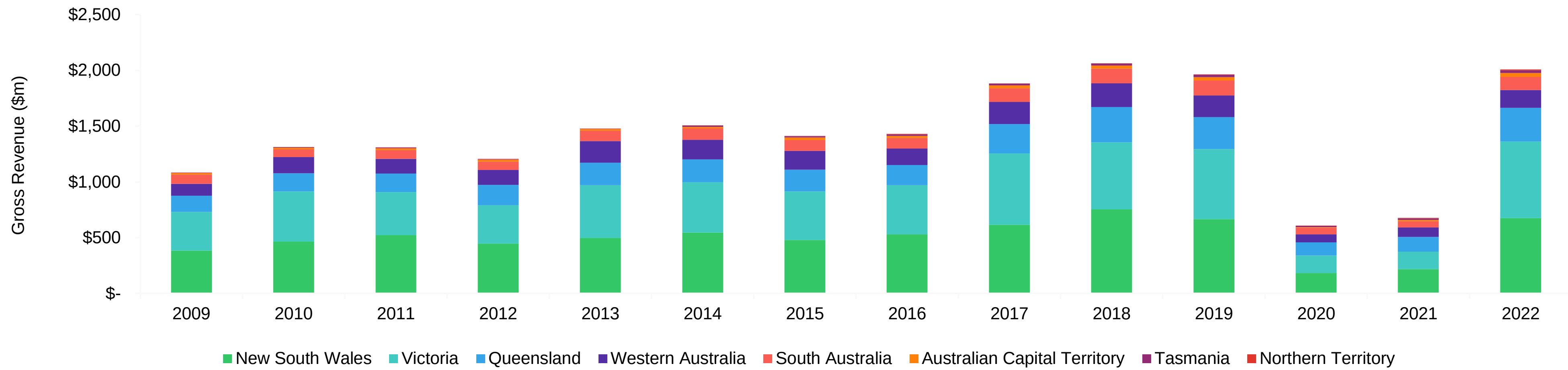
Analysis

- In 2022, Contemporary Music and Musical Theatre represented the two largest categories in the industry generating 35.9% and 17.6% of the overall attendance respectively. Festivals (Contemporary Music) witnessed the highest y-o-y increase in attendance (232.8%), followed by Contemporary Music (218.5%).

State/Territory Revenue and Attendance

Revenue by State/Territory

2009 → 2022



Attendance by State/Territory

2009 → 2022

State/Territory Revenue and Attendance

Revenue by State/Territory

2009 → 2022

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	$600,318,261**	$317,179,536	$211,421,549	$131,560,865	$27,848,747	$18,965,730	$2,923,333	**$2,063,885,872**
2019	$666,736,971	$627,378,900	$286,191,954	$194,184,329	$133,455,773	$31,517,432	$22,522,431	$2,653,762	**$1,964,641,552**
2020	$182,518,521	$158,294,023	$116,868,728	$72,739,451	$59,698,701	$5,700,108	$9,304,123	$849,939	**$605,973,596**
2021	$217,159,216	$157,935,937	$132,908,255	$84,984,114	$54,221,032	$12,112,793	$14,216,098	$5,247,513	**$678,784,958**
2022	$676,123,998	$684,355,036	$303,028,944	$160,568,169	$117,992,021	$33,063,416	$25,303,434	$6,933,522	**$2,007,368,540**

Analysis

- Victoria represented the highest market share of revenue amongst all the states and territories in Australia, accounting for 34.1% of the national market share of revenue in 2022.

* The 2015 LPA Ticket and Revenue 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. ** This figure has been updated since the 2018 report release to account for an error in the data received.

State/Territory Revenue and Attendance

Attendance by State/Territory

2009 → 2022

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	7,519,194**	3,840,497	2,772,963	2,212,725	405,899	738,444	67,876	**25,788,548**
2019	7,164,995	7,408,467	3,477,020	2,648,785	2,317,420	431,706	350,977	65,045	**23,864,415**
2020	1,960,925	1,546,959	1,260,436	1,287,780	1,393,346	101,081	186,150	25,035	**7,761,710**
2021	2,608,375	2,371,989	2,213,863	1,630,414	1,365,079	212,210	351,977	123,932	**10,877,839**
2022	7,264,274	7,856,954	3,728,420	2,221,876	2,083,672	396,477	537,534	137,828	**24,227,035**

Analysis

- Victoria represented the highest market share of attendance amongst all the states and territories in Australia, accounting for 32.4% of the national market share of attendance in 2022.

* 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. ** This figure has been updated since the 2018 report release to account for an error in the data received.

NSW Analysis

NSW Revenue and Attendance

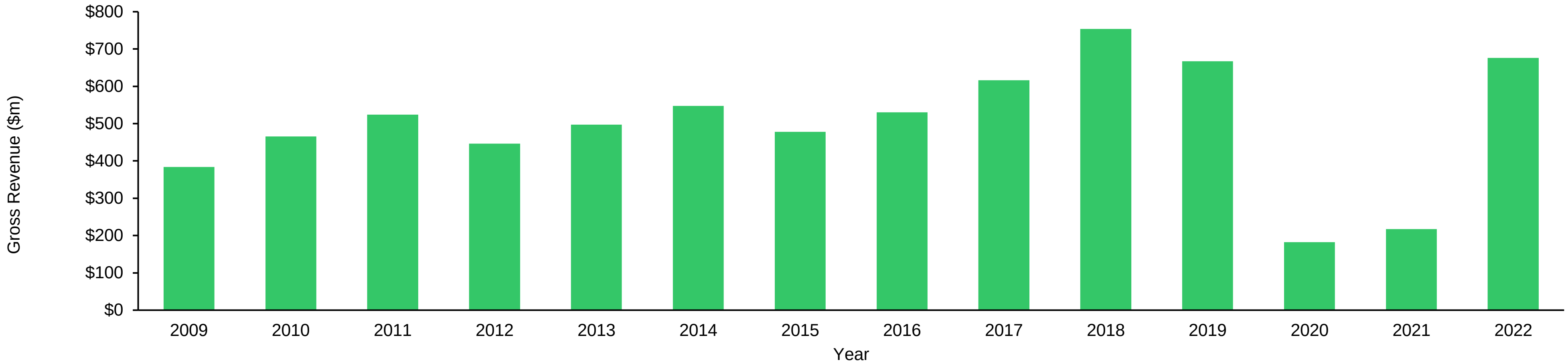
- In 2022, NSW generated $676.1m in revenue and recorded 7.3m in attendance, showcasing a significant 211.3% y-o-y increase in revenue and 178.5% y-o-y increase in attendance. The easing and eventual removal of COVID-19 restrictions allowed live performance activities (including the backlog of postponed events) to resume.
- NSW's revenue and attendance results are similar to pre-pandemic levels. However, they have not yet reached the highest levels recorded in 2018.
- NSW accounted for the second largest industry share of revenue (33.7%) and attendance (30.0%) in 2022.
- The NSW spend per capita in 2022 was $82.07, second highest among all states and territories in Australia and higher than the national average.
- Contemporary Music contributed the highest share to NSW’s overall revenue and attendance, with a share of 32.2% and 37.9% respectively.
- The y-o-y increase in revenue and attendance was driven primarily by the following categories:
  - Festivals (Contemporary Music) experienced an increase in revenue by 1082.5%, contributed by growth in attendance by 665.8% and increase in average ticket price. This growth can be largely attributed to the success of festivals such as Splendour in the Grass and Bluesfest.
  - Festivals (Multi-Category) witnessed an increase in revenue (926.5%), primarily due to increase in attendance (235.3%) and average ticket price. The top events included Vivid, Sydney Fringe Festival and Wanderer Festival.
  - Contemporary Music witnessed an increase in revenue (617.9%) and attendance (400.5%), primarily driven by performances from Bruno Mars, Billie Eilish and Guns N’ Roses.
  - Special Events revenue increased by 373.6% with an increase in attendance by 132.4%, primarily driven by events such as *Rupaul's Drag Race* and *Hot Dub Rave Machine.*
- The growth in revenue was slightly offset by y-o-y decline in Circus and Physical Theatre (51.0%).

	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$383,713,353	-	5,176,385	-
2010	$465,761,849	21.4%	5,818,163	12.4%
2011	$523,903,477	12.5%	6,331,001	8.8%
2012	$446,063,403	(14.9%)	5,795,757	(8.5%)
2013	$497,463,659	11.5%	5,865,914	1.2%
2014	$547,173,799	10.0%	6,132,827	4.6%
2015	$478,077,501	(12.6%)	5,592,686	(8.8%)
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%
2019	$666,736,971	(11.5%)	7,164,995	(13.0%)
2020	$182,518,521	(72.6%)	1,960,925	(72.6%)
2021	$217,159,216	19.0%	2,608,375	33.0%
2022	$676,123,998	211.3%	7,264,274	178.5%

NSW Analysis

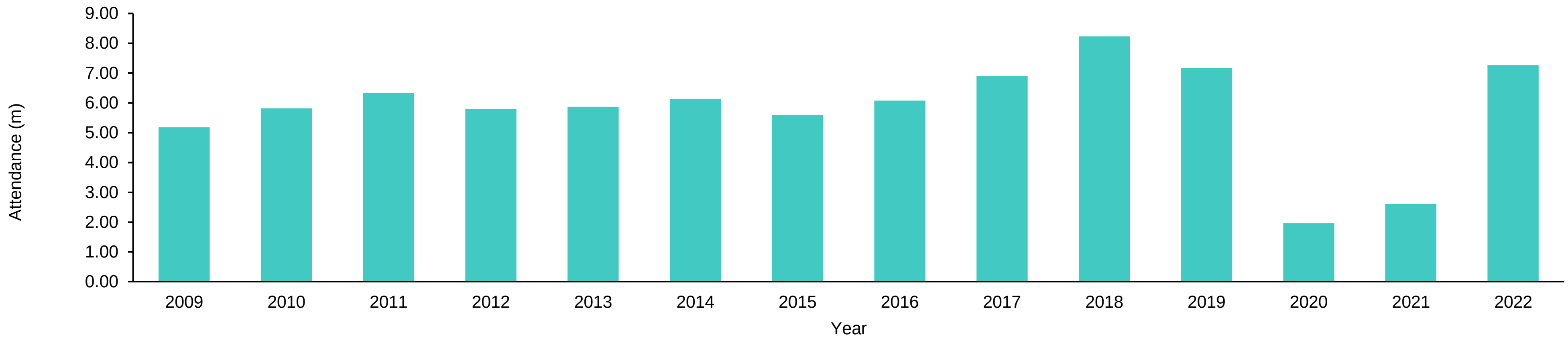
Revenue – NSW

2009 → 2022



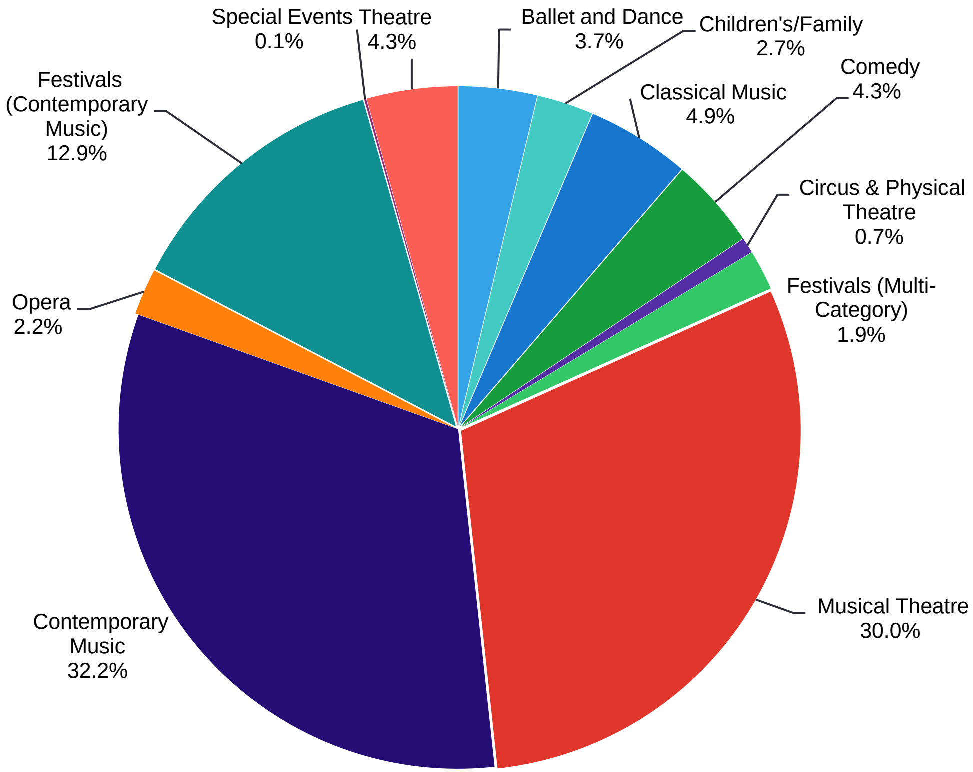
Attendance – NSW

2009 → 2022

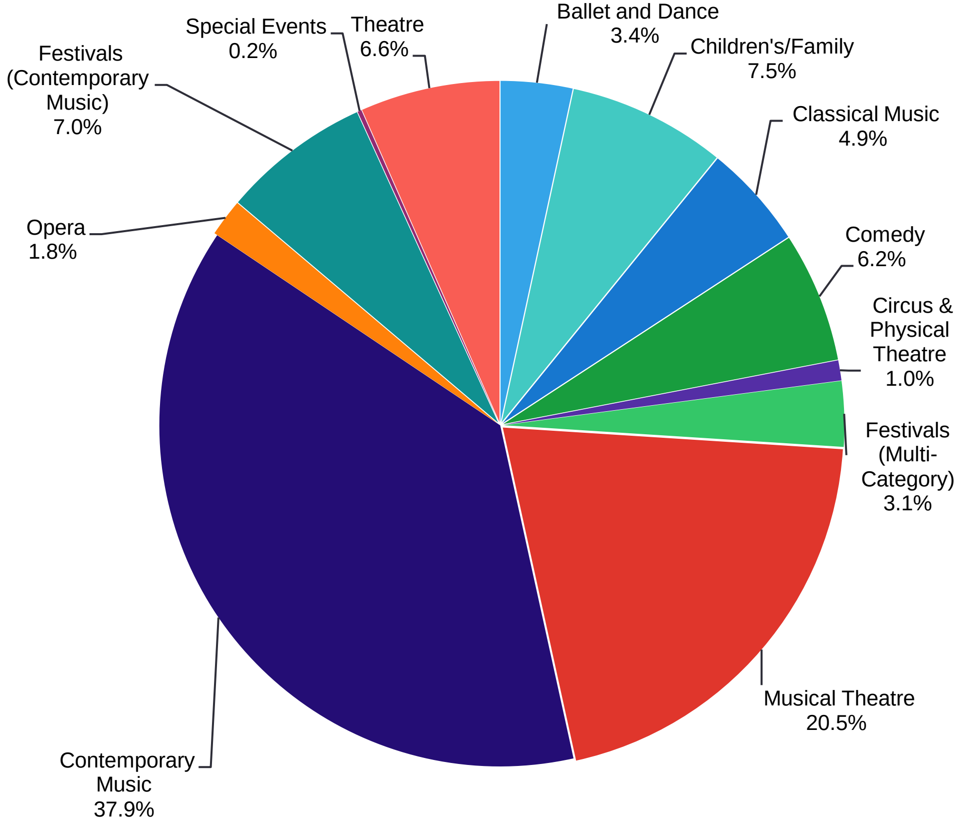


NSW Analysis

NSW Revenue by Category — 2022



NSW Attendance by Category — 2022



VIC Analysis

VIC Revenue and Attendance

- Victoria generated $684.4m in revenue and recorded 7.9m in attendance in 2022. These results are the highest recorded in Victoria, reflecting the backlog of postponed events and increase in ticket prices to cover increased production costs.
- In 2022, Victoria secured the largest market share of industry of both revenue (34.1%) and attendance (32.4%) among all states and territories in Australia.
- Victoria spend per capita in 2022 was $102.08, highest among all states and territories in Australia and higher than the national average.
- Contemporary Music contributed the highest share of revenue (34.1%) and the highest share of attendance (34.3%) among all the live performance categories in Victoria.
- In 2022, Victoria witnessed the highest increase in revenue (333.3%) and attendance (231.2%) among all the states and territories in Australia, primarily driven by :
  - Festivals (Multi-Category) witnessed a significant growth in revenue by 1919.6% due to increases in attendance (385.2%) and average ticket price. Major festivals that contributed significantly to Victoria included Rising Festival and Melbourne Fringe Festival.
  - Ballet and Dance revenue increased significantly by 643.6%, primarily due to an increase in attendance by 416.5%, driven by events such as *Romeo and Juliet, Anna Karenina* and *Harlequinade*.
  - Musical Theatre revenue increased significantly by 508.7%, primarily due to an increase in attendance by 499.0%. The growth was primarily driven by *Hamilton*, *The Phantom of the Opera, Rogers and Hammerstein's Cinderella, 9 to 5: The Musical* and *Hairspray.*
  - Contemporary Music revenue increased significantly by 500.1%, primarily due to an increase in attendance by 309.5%, driven by performances from Billy Joel, Guns N' Roses and Billie Eilish.
  - Other categories which experienced notable revenue increases in 2022 included Classical Music (308.0%), Festivals (Contemporary Music) (274.2%), Theatre (162.3%), Circus and Physical Theatre (101.3%), Comedy (102.5%) and Children's/Family (96.7%).

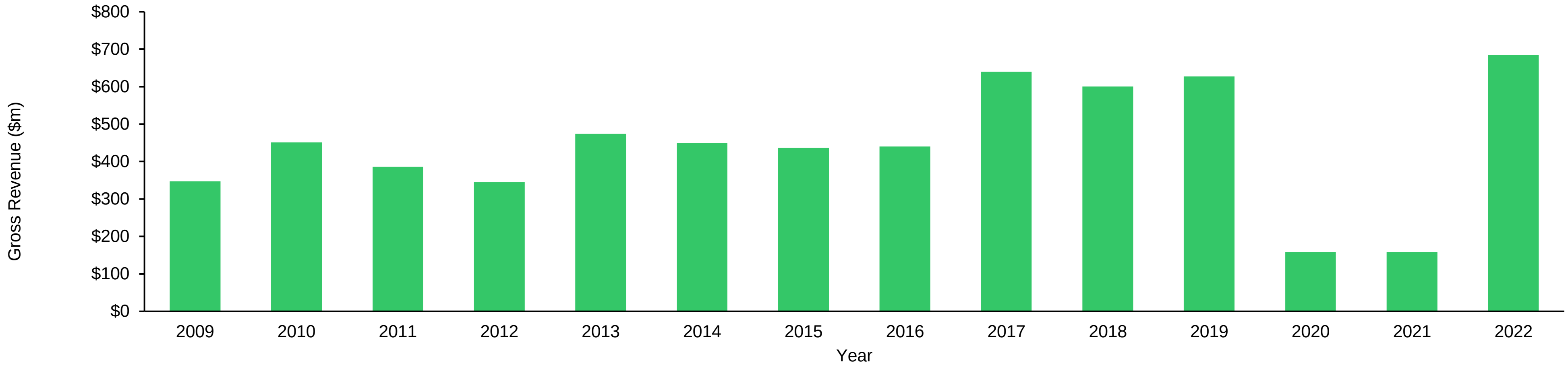
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$347,305,100	-	4,744,449	-
2010	$451,053,035	29.9%	5,820,603	22.7%
2011	$385,643,996	(14.5%)	5,359,749	(7.9%)
2012	$344,389,414	(10.7%)	4,916,559	(8.3%)
2013	$473,516,913	37.5%	5,607,475	14.1%
2014	$450,034,039	(5.0%)	5,318,537	(5.2%)
2015	$436,933,907	(2.9%)	5,548,412	4.3%
2016	$440,330,153	0.8%	5,431,066	(2.1%)
2017	$639,876,934	45.3%	7,364,313	35.6%
2018^	$600,318,261	(6.2%)	7,519,194	2.1%
2019	$627,378,900	4.5%	7,408,467	(1.5%)
2020	$158,294,023	(74.8%)	1,546,959	(79.1%)
2021	$157,935,937	(0.2%)	2,371,989	53.3%
2022	$684,355,036	333.3%	7,856,954	231.2%

^ This figure has been updated since the 2018 report release to account for an error in the data received.

VIC Analysis

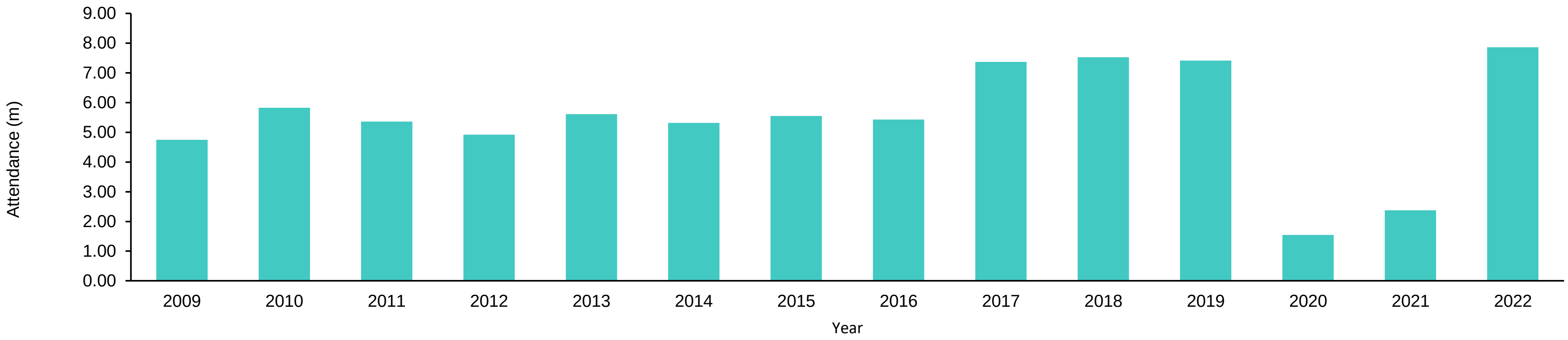
Revenue – VIC

2009 → 2022



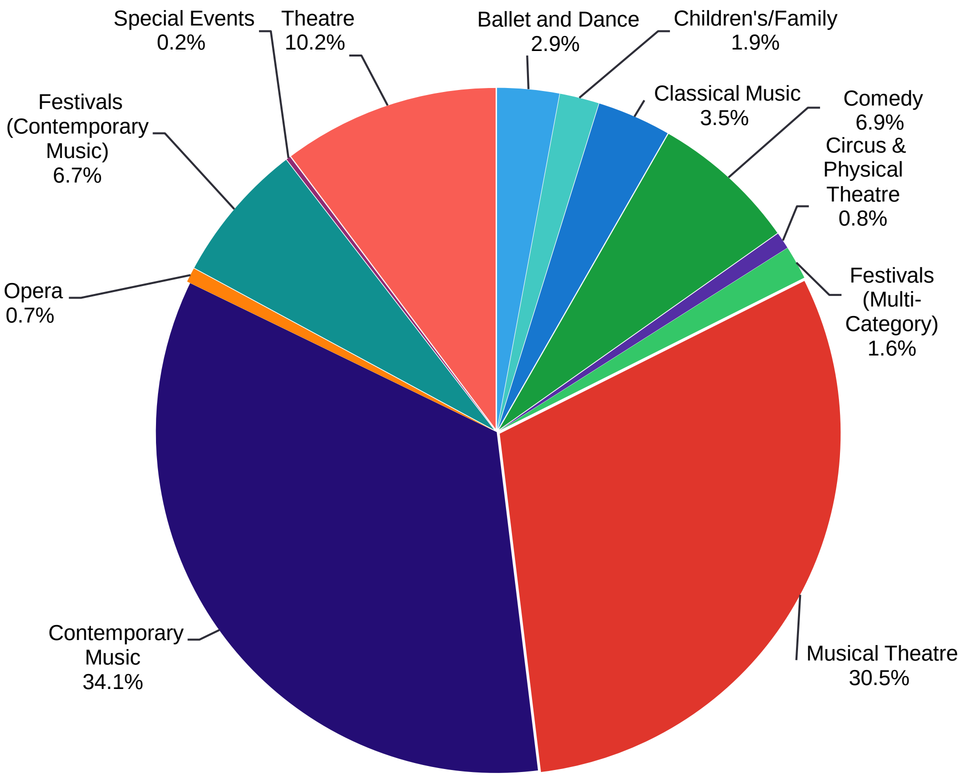
Attendance – VIC

2009 → 2022

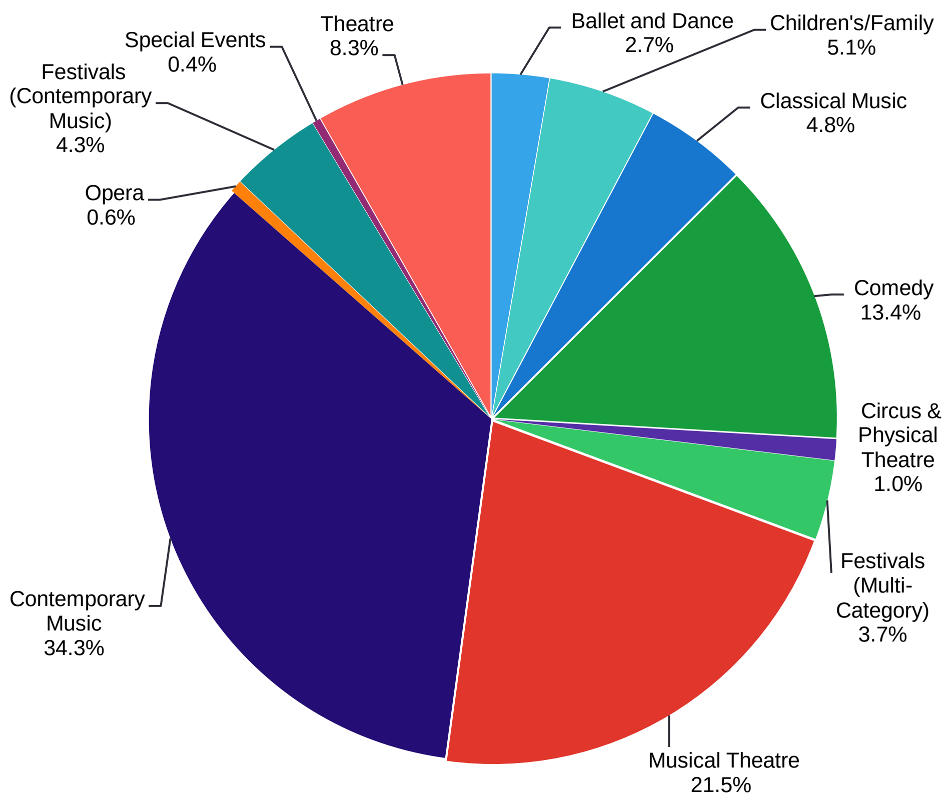


VIC Analysis

VIC Revenue by Category 2022



VIC Attendance by Category 2022



QLD Analysis

QLD Revenue and Attendance

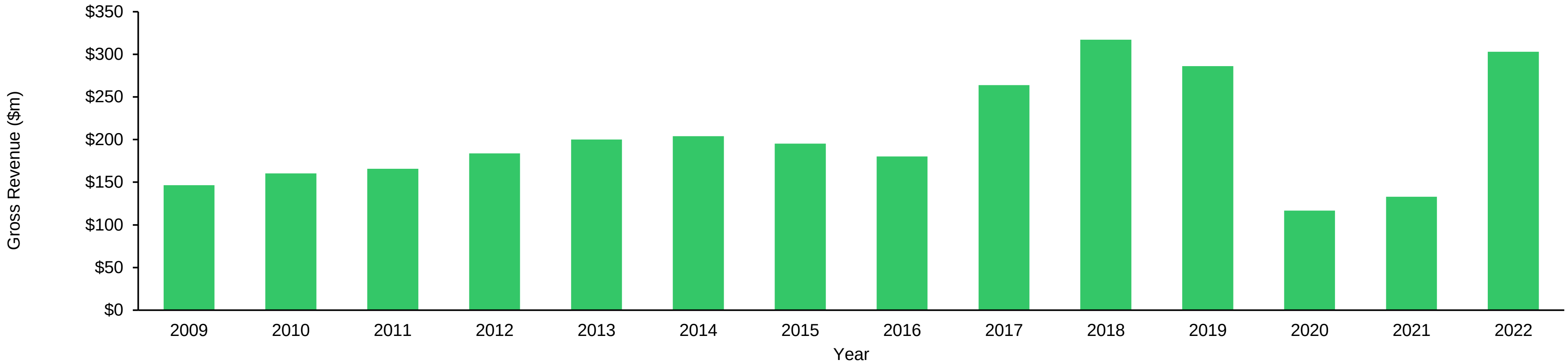
- QLD reported $303.0m in revenue and 3.7m in attendance in 2022, a growth of 128.0% and 68.4% y-o-y respectively. These revenue and attendance results surpass pre-pandemic levels, however, they have not yet reached the peak recorded in 2018.
- QLD accounted for the third largest industry share of revenue (15.1%) and attendance (15.4%) in 2022, below QLD's share of the Australian population.
- QLD spend per capita was $56.34 in 2022, below the national average.
- Contemporary Music contributed the highest share of revenue (41.7%) and the highest share of attendance (42.6%) among all the live performance categories in QLD.
- The growth in revenue and attendance was primarily driven by the following categories as compared to 2021:
  - Contemporary Music witnessed a significant growth in revenue (243.0%) driven by increases in attendance (117.1%) and average ticket price. Top events included *Fridayz Live* and performances by Billie Eilish and Guns N' Roses.
  - Festivals (Multi-Category) witnessed a significant growth in revenue (199.8%) driven by an increase in attendance (67.8%) and increase in average ticket price. Major festivals included Brisbane Festival, MELT Festival, Meatstock Toowoomba - The Music, Barbecue and Camping Festival; Mekka Wednesday; and The Long Sunset.
  - Festivals (Contemporary Music) witnessed a 193.4% growth in revenue, driven by an increase in attendance by 108.1% and an increase in the average ticket price. Major festivals were CMC Rocks, Spilt Milk and Listen Out Brisbane.
  - Classical Music witnessed an increase in revenue (121.3%) driven by increases in attendance (81.0%) and average ticket price. Top events included performances by Andrea Bocelli and 2CELLOS.
- The growth in revenue was partially offset by the y-o-y decline in Opera (31.6%) and Theatre (18.0%) due to decline in attendance.

	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$146,567,867	-	2,006,608	-
2010	$160,520,942	9.5%	2,043,327	1.8%
2011	$165,840,931	3.3%	2,150,329	5.2%
2012	$183,775,420	10.8%	2,302,462	7.1%
2013	$200,178,524	8.9%	2,318,207	0.7%
2014	$203,918,468	1.9%	2,661,632	14.8%
2015	$195,336,838	(4.2%)	2,914,530	9.5%
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%
2019	$286,191,954	(9.8%)	3,477,020	(9.5%)
2020	$116,868,728	(59.2%)	1,260,436	(63.7%)
2021	$132,908,255	13.7%	2,213,863	75.6%
2022	$303,028,944	128.0%	3,728,420	68.4%

QLD Analysis

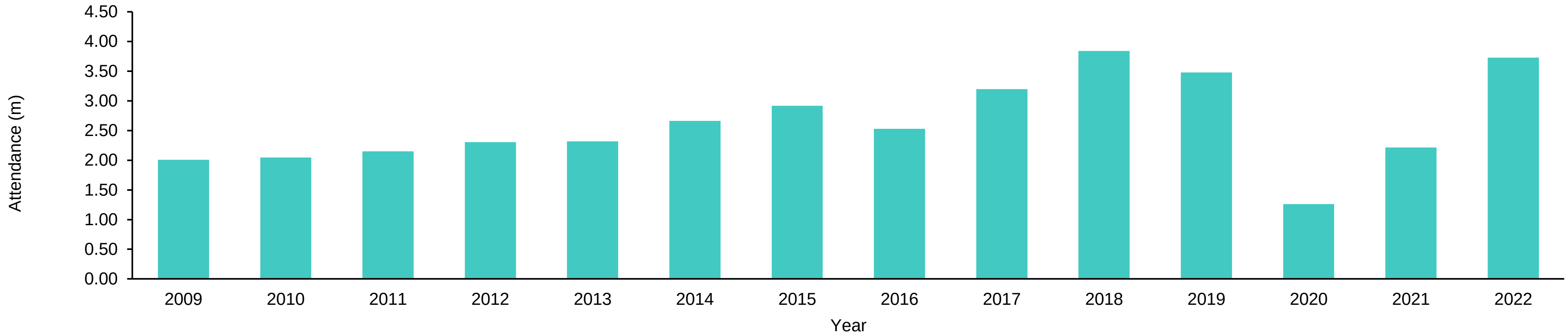
Revenue – QLD

2009 → 2022



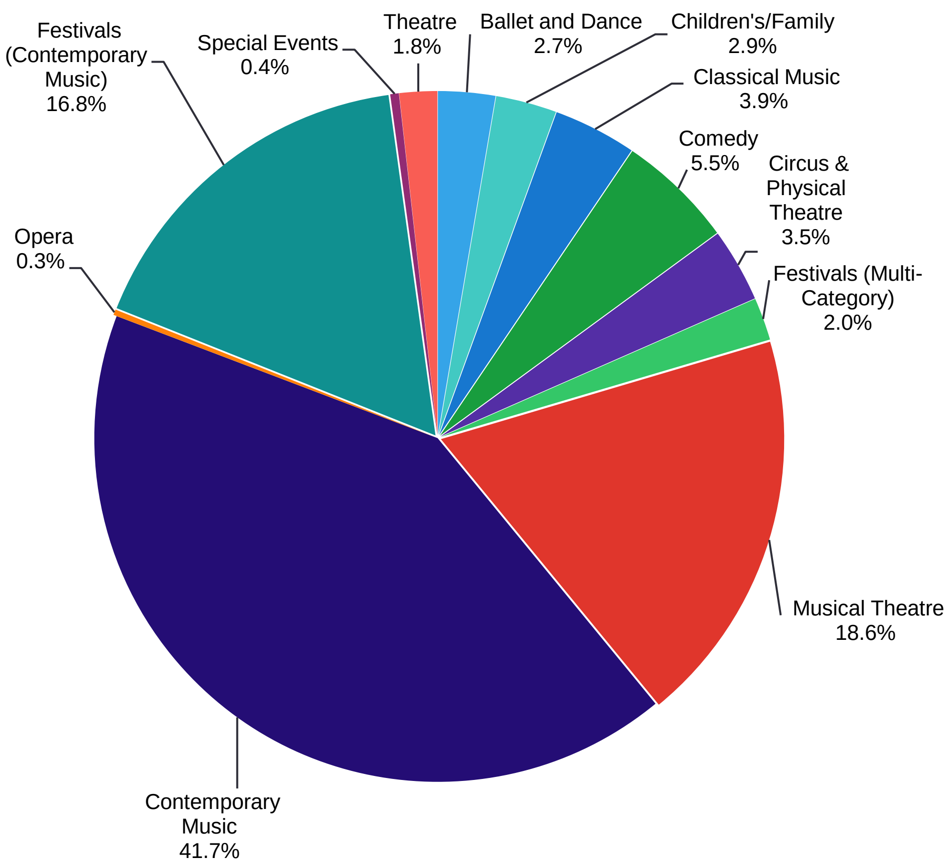
Attendance – QLD

2009 → 2022

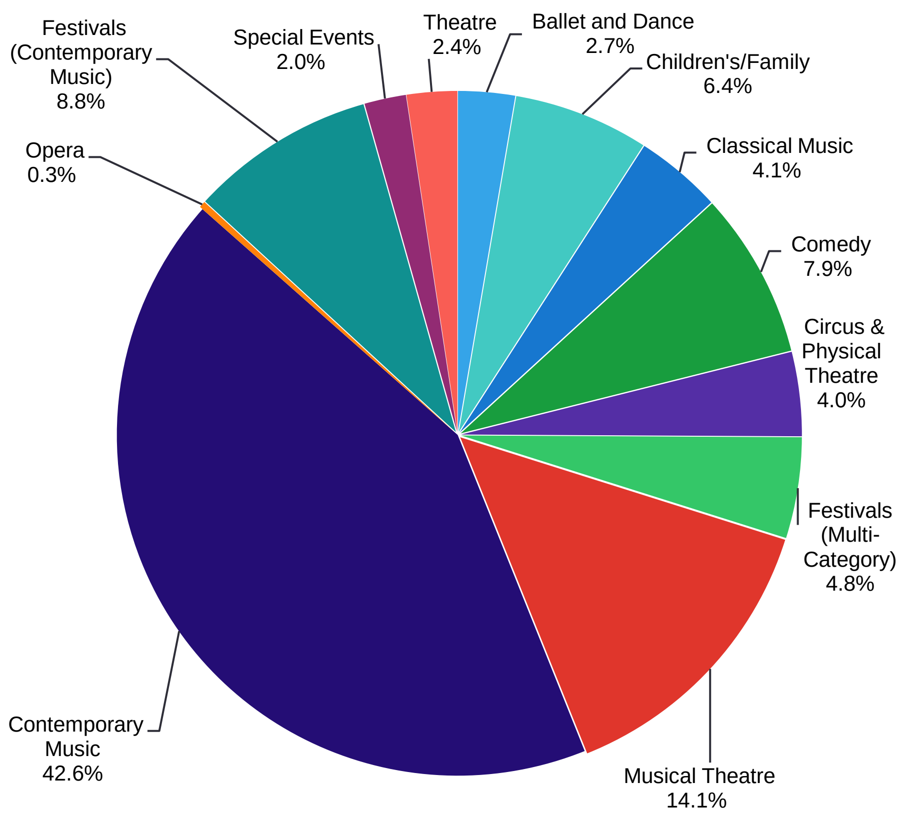


QLD Analysis

QLD Revenue by Category 2022



QLD Attendance by Category 2022



WA Analysis

WA Revenue and Attendance

- WA generated $160.6m in revenue and recorded 2.2m in attendance in 2022. These results have not yet returned to pre-pandemic levels.
- WA contributed 8.0% of the total industry's revenue and accounted for 9.2% of the total attendance, slightly below WA's share of the Australian population.
- In 2022, WA spend per capita was $56.83, below the national average.
- In 2022, Contemporary Music contributed the highest share of WA's total revenue (44.3%) and total attendance (38.7%).
- WA witnessed a y-o-y growth in revenue (88.9%) and attendance (36.3%) in 2022. The growth in revenue was primarily driven by the following categories compared to 2021:
  - Festivals (Contemporary Music) experienced a significant increase in revenue by 291.0% driven by growth in attendance by 215.2%. This was primarily driven by festivals such as Listen Out Perth, Festival X Perth and Red Hot Summer Tour.
  - Contemporary Music revenue increased by 245.0%, primarily driven by increases in attendance (94.6%) and average ticket price in 2022. Top events included performances by Billie Eilish and Guns N' Roses.
  - Comedy experienced an increase in revenue (159.5%) and attendance (144.7%) primarily driven by performances by Carl Barron and Jim Jefferies.
  - Classical Music witnessed a 33.6% increase in revenue despite a 4.3% decrease in attendance. This is due to an increase in average ticket price. Top events included performances by Andrea Bocelli, 2CELLOS and the Ten Tenors.
- The growth in revenue was partially offset by the y-o-y decline in Circus and Physical Theatre (66.4%), Children's/Family (45.0%), Theatre (27.1%) and Special Events (14.1%), primarily due to the decline in attendance in 2022.

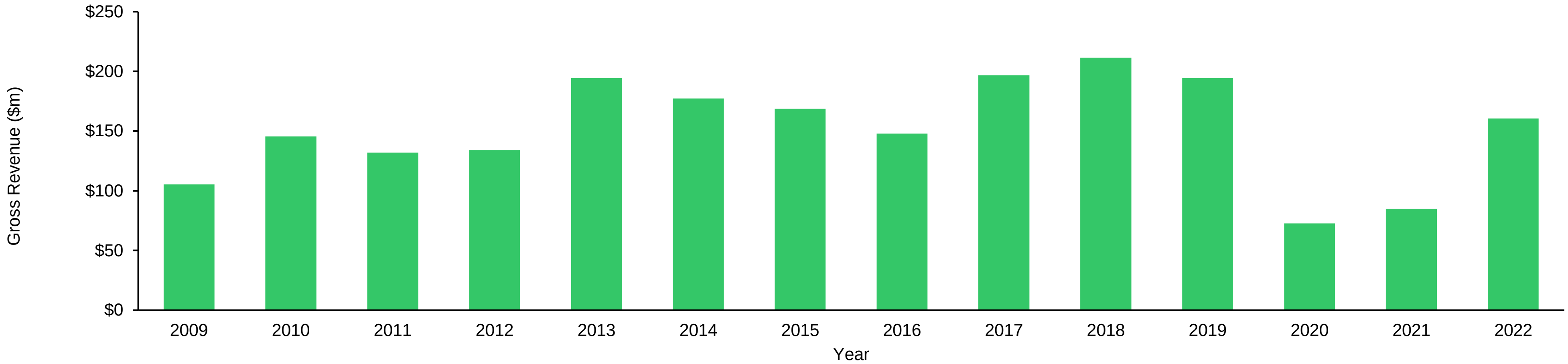
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$105,312,778	-	1,468,882	-
2010	$145,479,374	38.1%	1,879,408	27.9%
2011	$131,936,782	(9.3%)	1,788,262	(4.8%)
2012	$134,131,622	1.7%	1,791,795	0.2%
2013	$194,312,089	44.9%	2,153,483	20.2%
2014	$177,326,653	(8.7%)	2,266,435	5.2%
2015*	$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%
2019	$194,184,329	(8.2%)	2,648,785	(4.5%)
2020	$72,739,451	(62.5%)	1,287,780	(51.4%)
2021	$84,984,114	16.8%	1,630,414	26.6%
2022	$160,568,169	88.9%	2,221,876	36.3%

** 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.*

WA Analysis

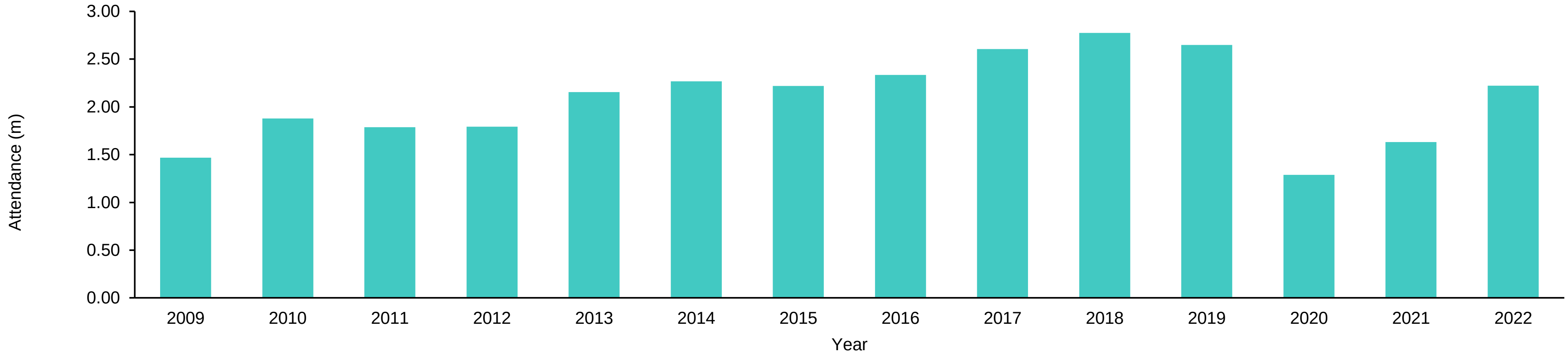
Revenue – WA

2009 → 2022



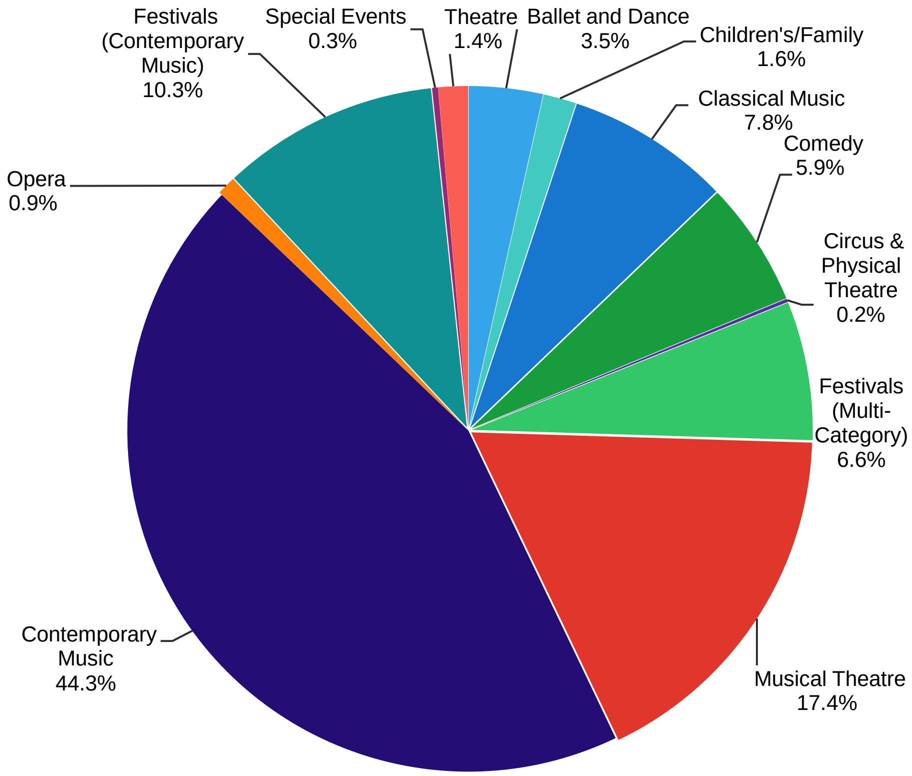
Attendance – WA

2009 → 2022

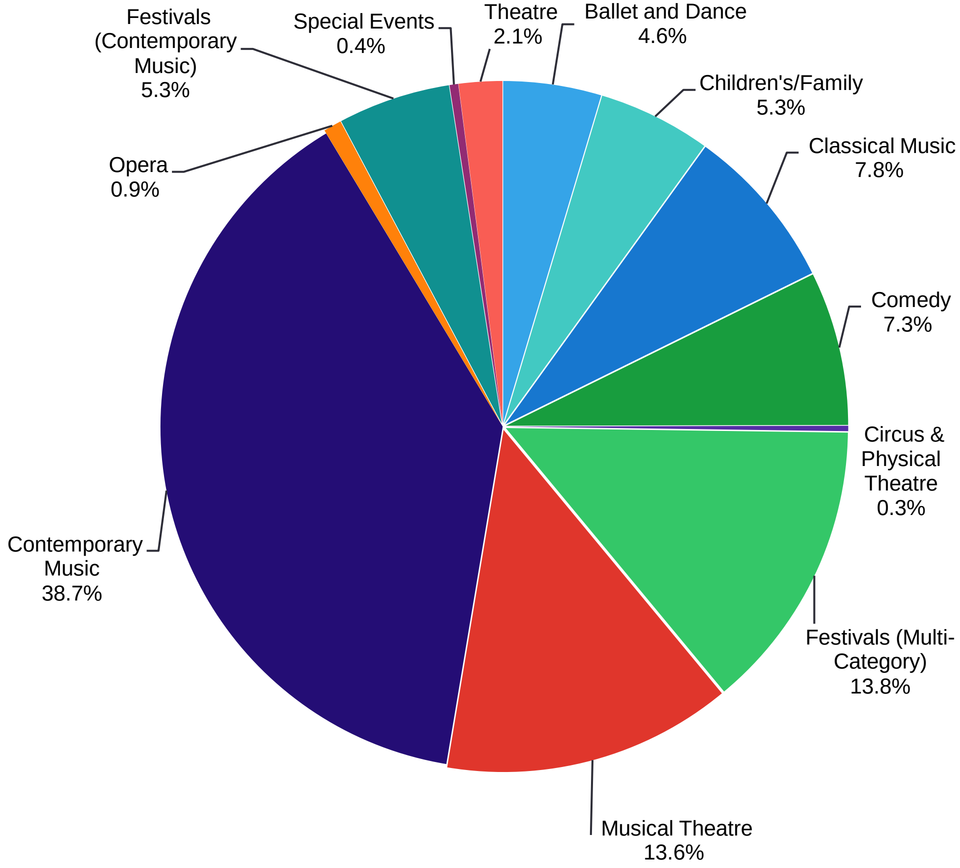


WA Analysis

WA Revenue by Category 2022



WA Attendance by Category 2022



SA Analysis

SA Revenue and Attendance

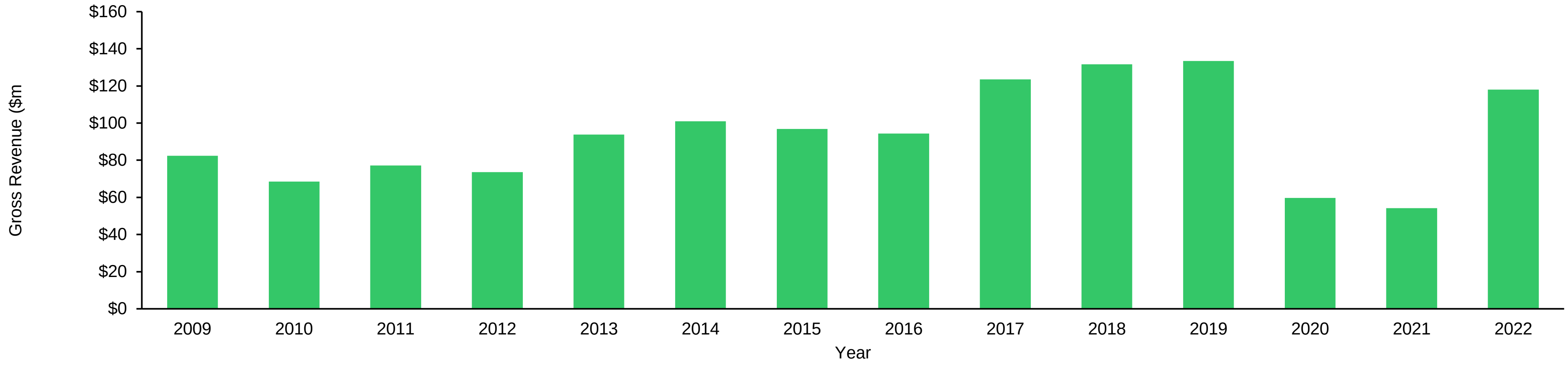
- In 2022, SA generated $118.0m in revenue and recorded 2.1m in attendance. These revenue and attendance results have not yet returned to pre-pandemic levels.
- SA per capita spend in 2022 was $64.33, below the national average.
- In 2022, Contemporary Music contributed the highest share of SA's total revenue (32.3%), and Festivals (Multi-Category) contributed the highest share of SA's total attendance (42.8%).
- In 2022, SA represented 5.9% of the industry's total revenue share and contributed 8.6% to the industry's total attendance share.
- SA witnessed a y-o-y increase in revenue (117.6%) and attendance (52.6%) in 2022, primarily contributed by the growth in the following categories:
  - Special Events experienced a significant growth in revenue (631.9%), primarily attributable to increases in attendance (226.2%) and average ticket price. Major events were *Hot Dub Rave Machine* and *Rupaul's Drag Race*.
  - Musical Theatre experienced a significant growth in revenue (557.6%), primarily driven by an increase in attendance (705.3%). Major events included *Frozen*, *9 to 5: The Musical* and *SIX the Musical*.
  - Comedy witnessed a 433.5% growth in revenue and a 315.0% growth in attendance. Major events included performances by Carl Barron, Jim Jefferies and Chris Rock.
  - Festivals (Contemporary Music) witnessed a significant growth in revenue (387.4%), due to increases in attendance (208.2%) and average ticket price. Major festivals included WOMADelaide, Harvest Rock and Spin Off Festival.
  - Contemporary Music witnessed 229.6% increase in revenue and 141.0% increase in attendance. Major events included Guns N' Roses, Rüfüs Du Sol and *Fridayz Live.*
  - Opera experienced an increase in revenue (90.4%), primarily driven by an increase in attendance (122.8%). Major events included *La Traviata* and *Boheme on the Beach*.
- The growth in revenue was partially offset by the y-o-y decline in Classical Music (22.7%) and Children's/Family (15.2%).

	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$82,326,982	-	1,449,260	-
2010	$68,538,320	(16.7%)	1,035,243	(28.6%)
2011	$77,215,957	12.7%	1,237,386	19.5%
2012	$73,536,693	(4.8%)	1,053,997	(14.8%)
2013	$93,864,893	27.6%	1,497,204	42.1%
2014	$100,944,048	7.5%	1,614,267	7.8%
2015	$96,804,782	(4.1%)	1,699,529	5.3%
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%
2019	$133,455,773	1.4%	2,317,420	4.7%
2020	$59,698,701	(55.3%)	1,393,346	(39.9%)
2021	$54,221,032	(9.2%)	1,365,079	(2.0%)
2022	$117,992,021	117.6%	2,083,672	52.6%

SA Analysis

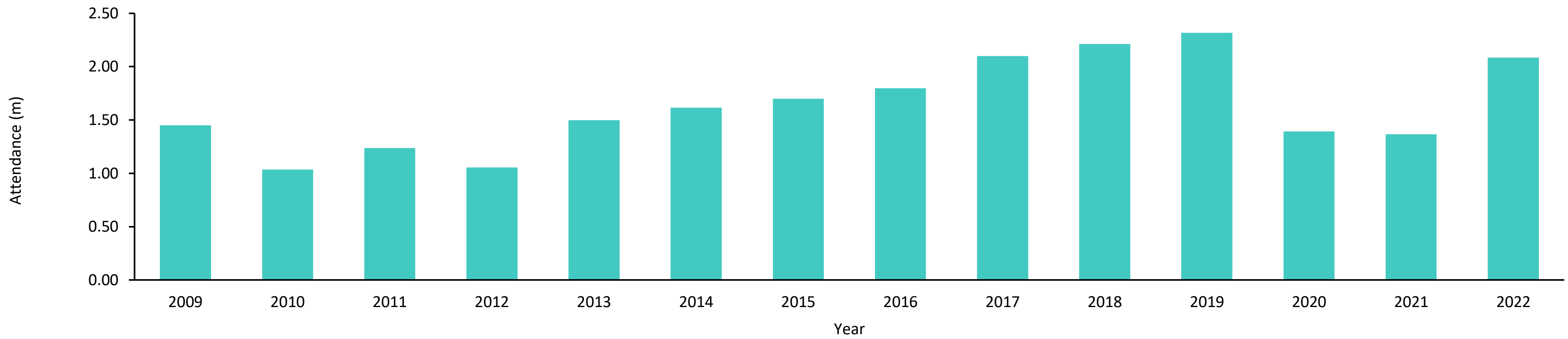
Revenue – SA

2009 → 2022



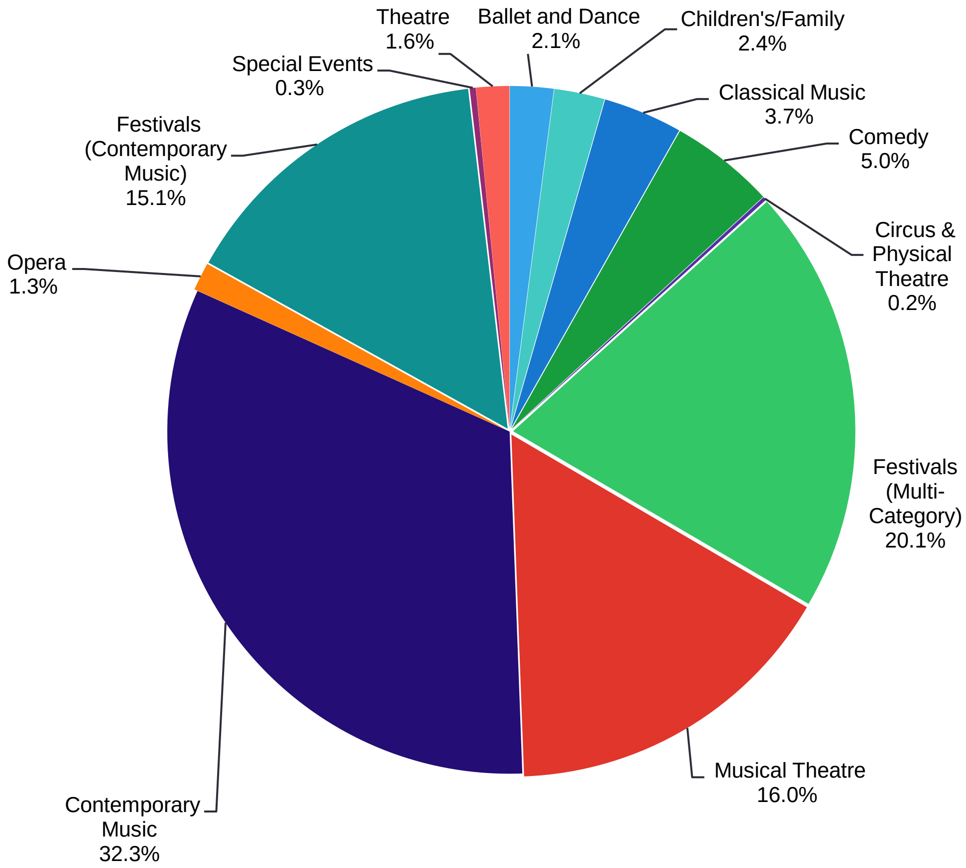
Attendance – SA

2009 → 2022

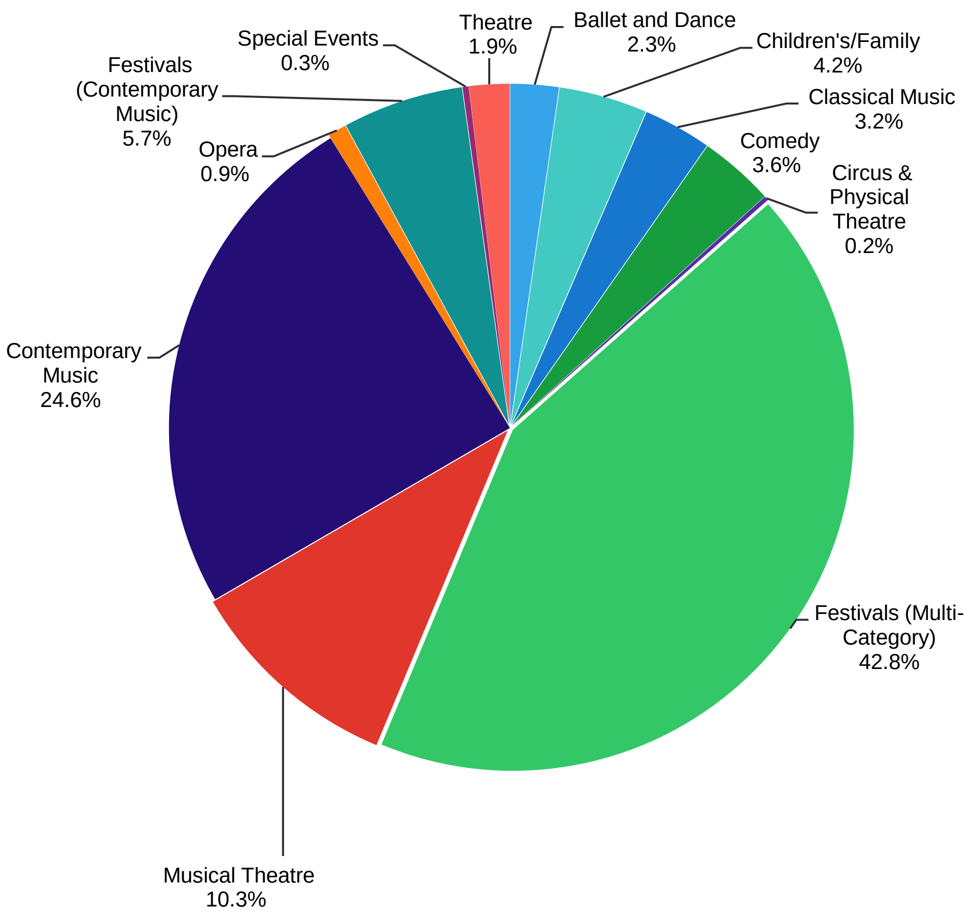


SA Analysis

SA Revenue by Category 2022



SA Attendance by Category 2022



ACT/TAS/NT Analysis

ACT/TAS/NT Revenue and Attendance

- In 2022, ACT/TAS/NT revenue increased by 106.8% to $65.3m and attendance increased by 55.8% to 1.1m. Together, they contributed 3.3% of industry share of revenue and 4.4% of industry share of attendance in 2022.
- Contemporary Music was the highest contributor to revenue (29.3%) and attendance (27.2%) in ACT/TAS/NT.
- ACT witnessed the third highest y-o-y growth in revenue (173.0% to $33.1m) and in attendance (86.8% to 0.4m) amongst all states and territories in 2022, with $71.74 per capita spend in 2022.
  - This was driven by significant y-o-y growth in revenue in the Circus and Physical Theatre, Festivals (Contemporary Music), Musical Theatre, Contemporary Music and Ballet and Dance categories.
  - Top events included Spilt Milk, *Summernats 34, SIX the Musical* and Groovin the Moo.
- TAS witnessed a 78.0% y-o-y growth in revenue (to $25.3m) and a 52.7% y-o-y growth in attendance (to 0.5m), with a per capita spend of $44.27 in 2022.
  - This was driven by significant y-o-y growth in revenue in the Special Events, Children's/Family, Festivals (Multi-Category), Contemporary Music and Theatre categories.
  - Top events included Dark Mofo, *Disney on Ice* and MONA FOMA.
- NT witnessed a 32.1% y-o-y growth in revenue (to $6.9m) and a 11.2% y-o-y growth in attendance (to 0.1m) in 2022.
  - NT had the lowest per capita spend of $27.72 in 2022, which may be due to a large number of free events being held in the NT.
  - The growth in revenue was primarily driven by an increase in Circus and Physical Theatre, Ballet and Dance and Contemporary Music categories.
  - Top events included Bassinthegrass, *Infamous The Show* and Crowded House.

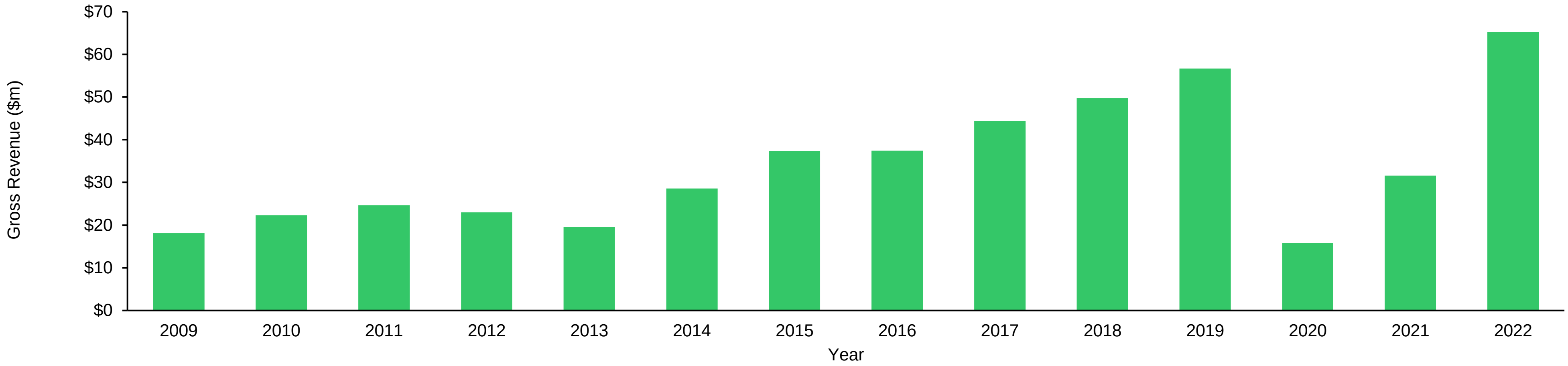
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$18,103,869	-	351,189	-
2010	$22,345,107	23.4%	460,793	31.2%
2011	$24,646,007	10.3%	478,993	3.9%
2012	$22,986,999	(6.7%)	413,160	(13.7%)
2013	$19,640,815	(14.6%)	484,343	17.2%
2014	$28,566,945	45.4%	542,736	12.1%
2015	$37,367,387	30.8%	653,358	20.4%
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%
2019	$56,693,625	14.0%	847,728	(30.1%)
2020	$15,854,170	(72.0%)	312,266	(63.2%)
2021	$31,576,404	99.2%	688,119	120.4%
2022	$65,300,372	106.8%	1,071,839	55.8%

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

ACT/TAS/NT Analysis

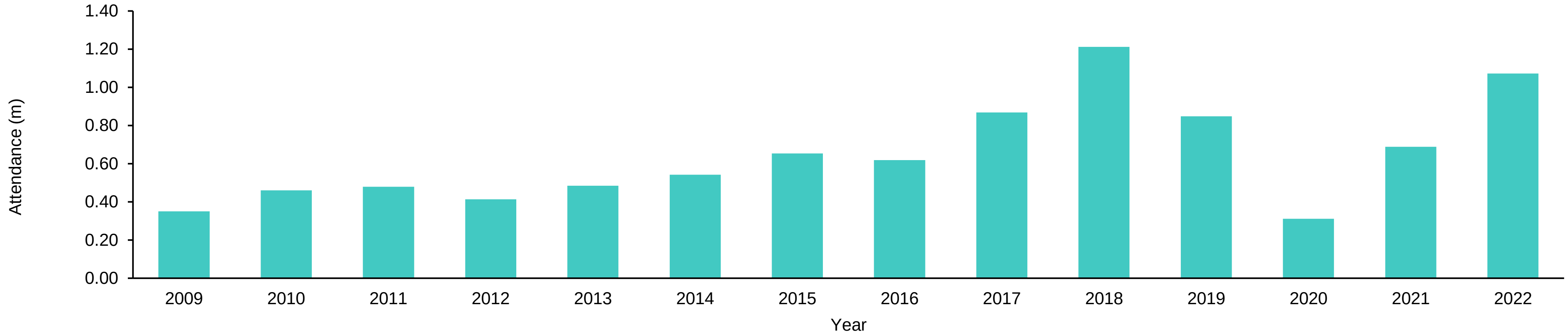
Revenue – ACT/TAS/NT

2009 → 2022



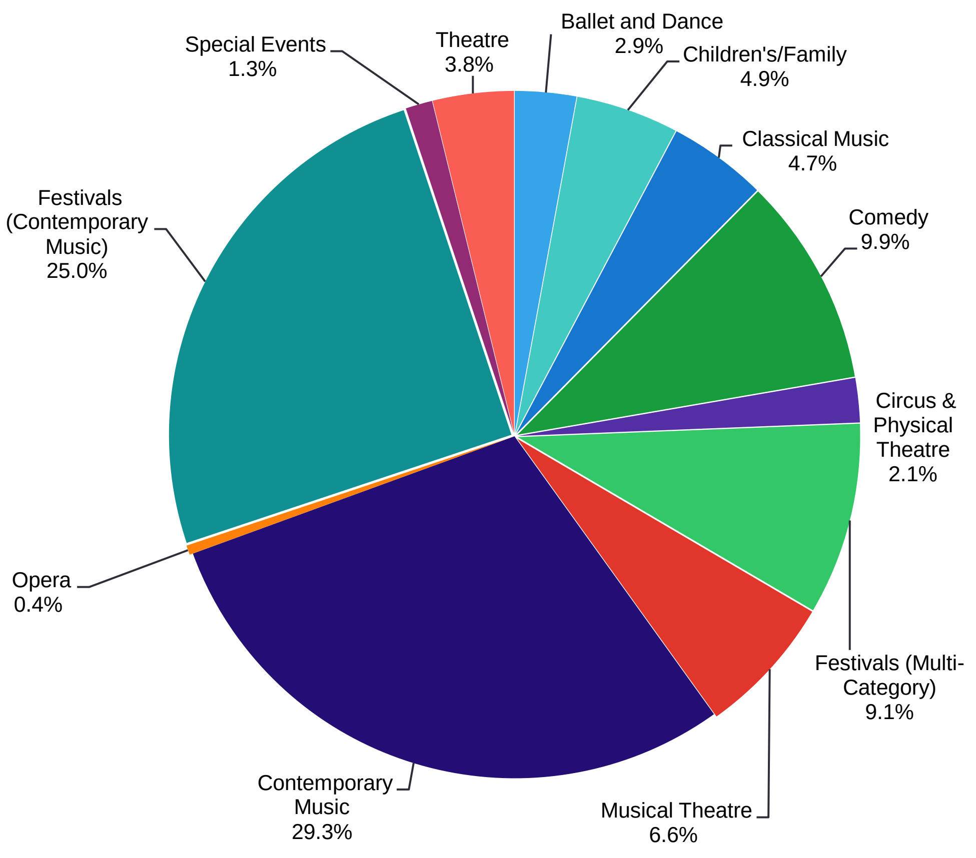
Attendance – ACT/TAS/NT

2009 → 2022

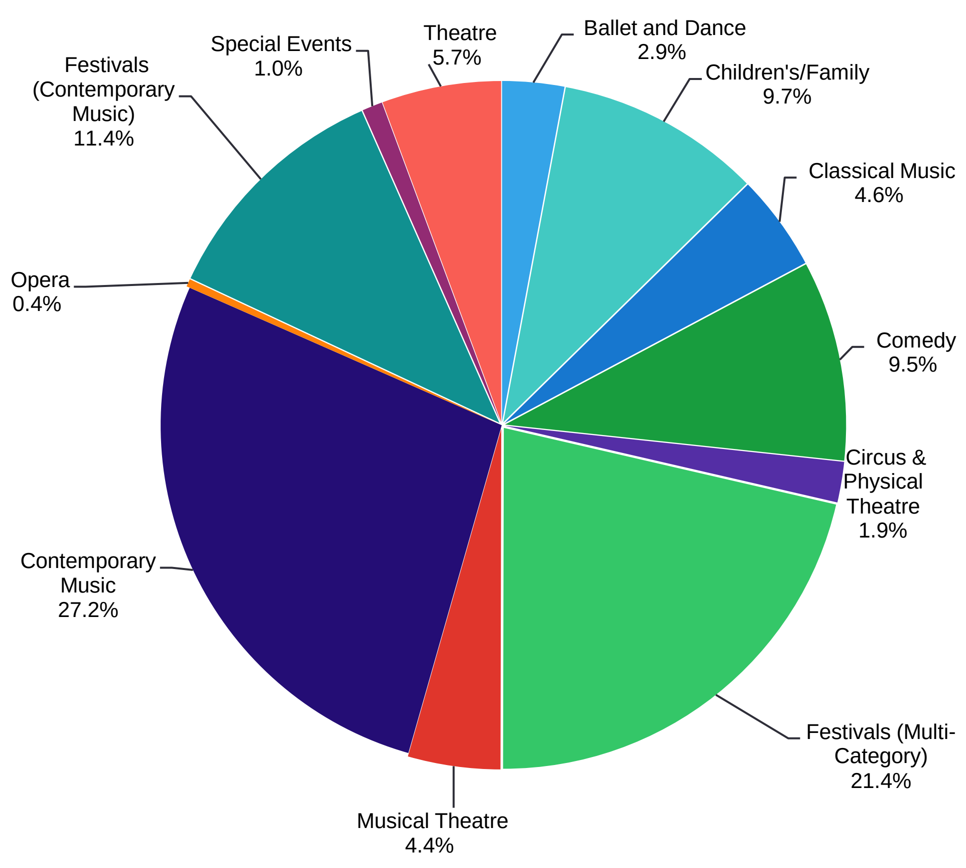


ACT/TAS/NT Analysis

ACT/TAS/NT Revenue by Category 2022



ACT/TAS/NT Attendance by Category 2022



5

Category Analysis

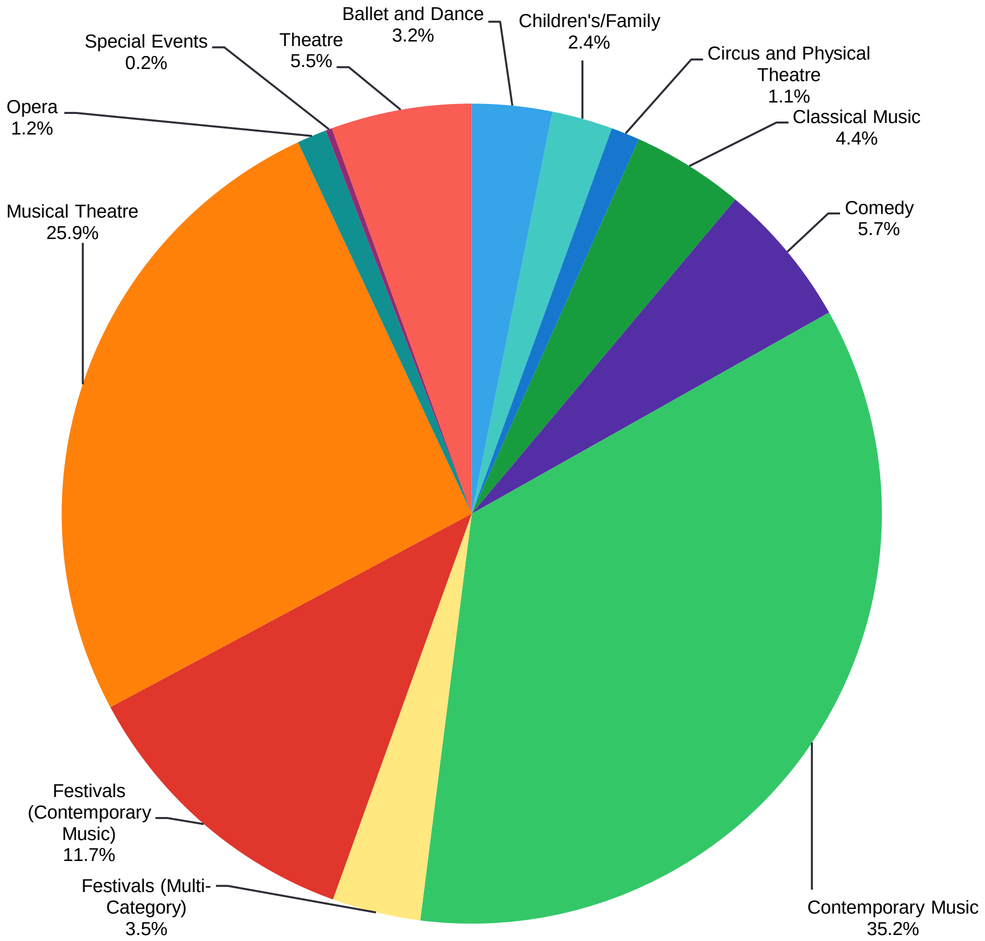
Total Revenue and Attendance by Category

Revenue and Attendance by Category 2022

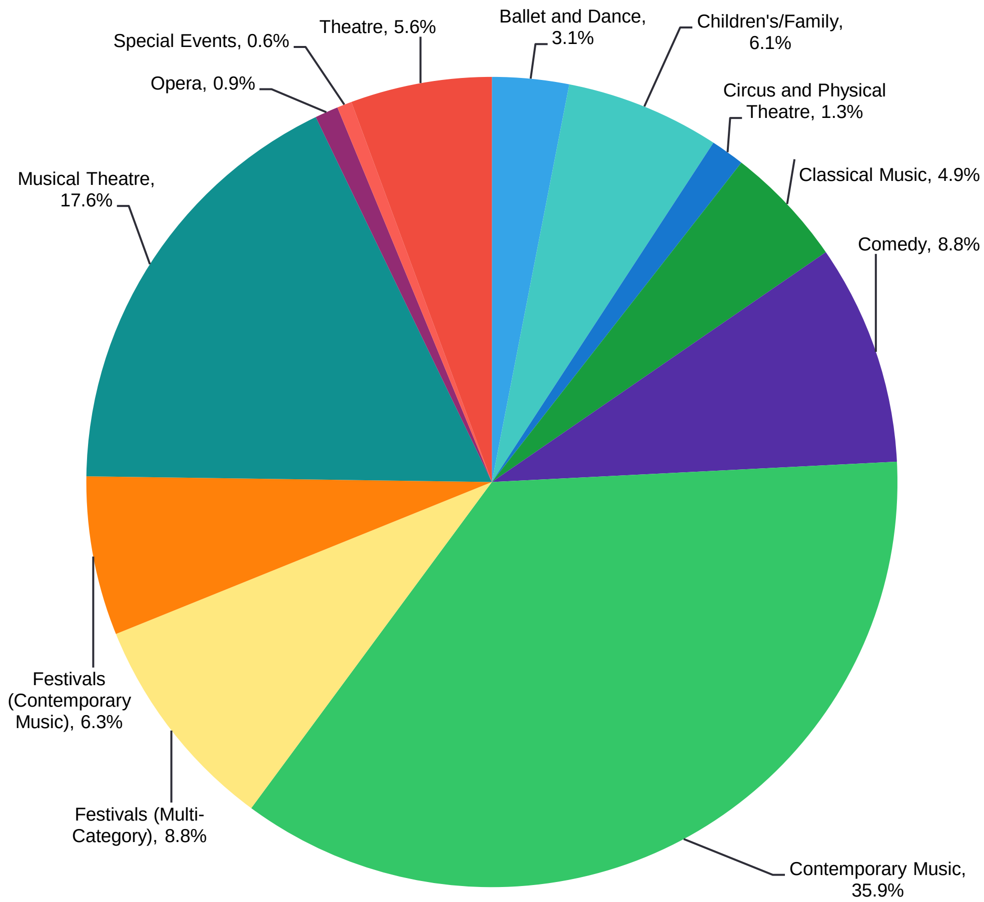
	Revenue			Attendance		
Category	Revenue	% Change in Revenue (from 2021)	Share of Industry	Tickets	% Change in Attendance (from 2021)	Share of Industry
Ballet and Dance	$63,343,674	135.1%	3.2%	740,572	103.7%	3.1%
Children's/Family	$48,054,479	40.1%	2.4%	1,487,898	41.6%	6.1%
Circus and Physical Theatre	$22,723,700	7.1%	1.1%	326,315	19.8%	1.3%
Classical Music	$88,922,485	134.2%	4.4%	1,175,646	97.5%	4.9%
Comedy	$114,965,234	128.6%	5.7%	2,132,551	82.0%	8.8%
Contemporary Music	$705,953,566	387.1%	35.2%	8,699,785	218.5%	35.9%
Festivals (Multi-Category)	$70,102,136	86.1%	3.5%	2,124,802	36.7%	8.8%
Festivals (Contemporary Music)	$234,410,442	357.1%	11.7%	1,537,353	232.8%	6.3%
Musical Theatre	$519,021,175	156.5%	25.9%	4,269,750	139.2%	17.6%
Opera	$23,662,092	51.2%	1.2%	225,486	49.0%	0.9%
Special Events	$4,847,553	86.3%	0.2%	142,951	81.6%	0.6%
Theatre	$111,362,004	107.9%	5.5%	1,363,926	106.1%	5.6%
Total	**$2,007,368,540**	**195.7%**	**100.0%**	**24,227,035**	**122.7%**	**100.0%**

Total Revenue and Attendance by Category

Revenue by Category 2022

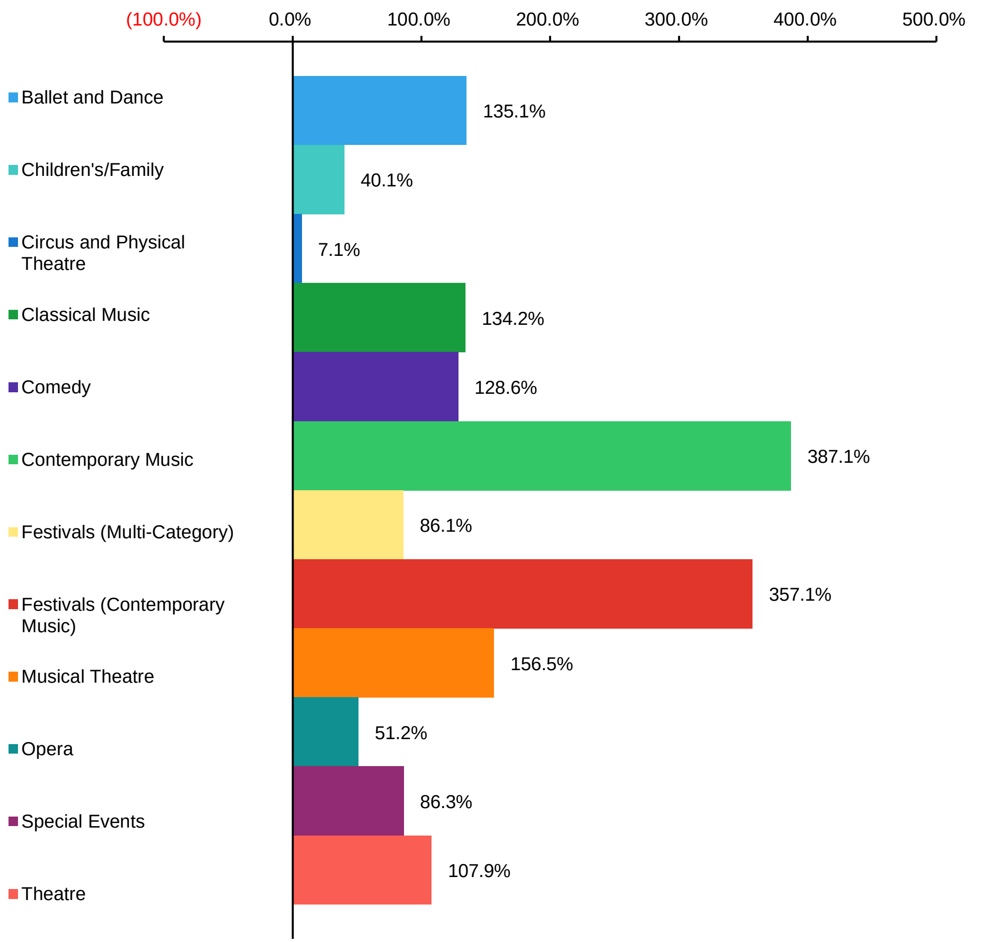


Attendance by Category 2022

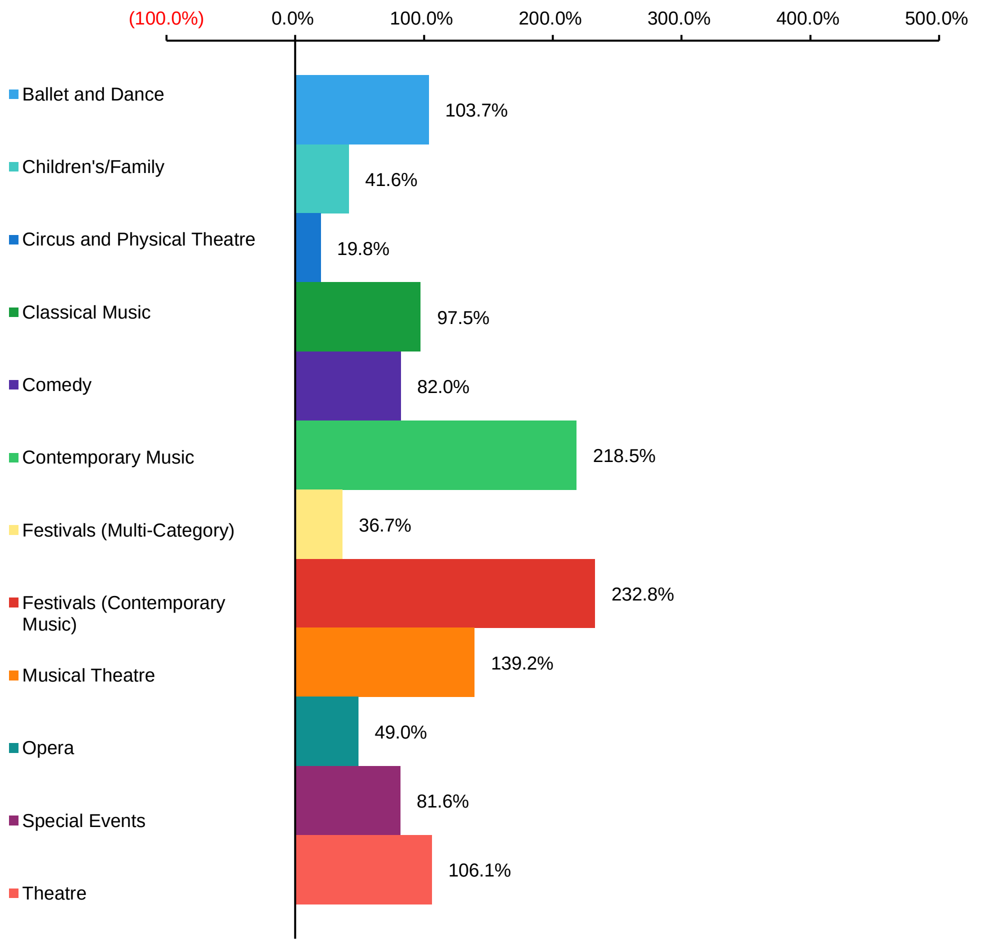


Total Revenue and Attendance by Category

Percentage Movement in Revenue by Category 2021 → 22



Percentage Movement in Attendance by Category 2021 → 22



Ballet and Dance

National Overview

- In 2022, Ballet recorded $63.3m in revenue and over 740,000 attendances. The results have almost, but not yet, returned to pre-pandemic levels.
- The Ballet and Dance category witnessed the fourth highest y-o-y growth in revenue by 135.1% (from $26.9m in 2021 to $63.3m in 2022) and the fifth highest y-o-y growth in attendance amongst all categories by 103.7% (0.4m in 2021 to 0.7m in 2022). An increase in the average ticket price by 10.2% y-o-y (from $86.08 in 2021 to $94.86 in 2022) also contributed to the growth in revenue.
- The revenue in Ballet and Dance was primarily driven by major performances such as *Romeo and Juliet*, *Anna Karenina*, *Kunstkamer* and *Instruments of Dance*.
- In 2022, 68.6% of revenue and 62.2% of attendance in Ballet and Dance was generated through performances by NPAP companies, such as The Australian Ballet and Orchestra, Sydney Dance Company, Bangarra Dance Theatre, Queensland Ballet and the West Australian Ballet. NPAP Ballet and Dance category companies experienced a significant increase in revenue by 96.4% and attendance by 76.6% in 2022 compared to 2021.
- In 2022, NSW and VIC generated the most revenue and attendance in this category. NSW and VIC held a national market share of approximately 39.7% and 31.7% respectively in revenue and 33.3% and 28.6% respectively in attendance. These two states together generated 71.4% of national Ballet and Dance revenue and 61.9% attendance in 2022.
- In 2022, all states and territories showed a y-o-y growth in revenue and all states and territories except QLD showed a y-o-y growth in in attendance. VIC experienced highest y-o-y growth in revenue (643.6%) and in attendance (416.5%) in Ballet and Dance, driven by performances such as *Romeo and Juliet*, *Anna Karenina*, *Harlequinade* and *Kunstkamer*.
- NT experienced the second highest y-o-y growth in revenue (319.4%) and third highest y-o-y growth in attendance (109.4%). The growth in revenue was driven by major performances including Australian Ballet Regional Tour and *Beauty & the Beast*.
- NSW witnessed the third highest y-o-y growth in revenue (198.9%) and the second highest y-o-y growth in attendance (186.2%), driven by performances such as *Romeo and Juliet*, *Anna Karenina*, *Kunstkamer* and *Instruments of Dance*.

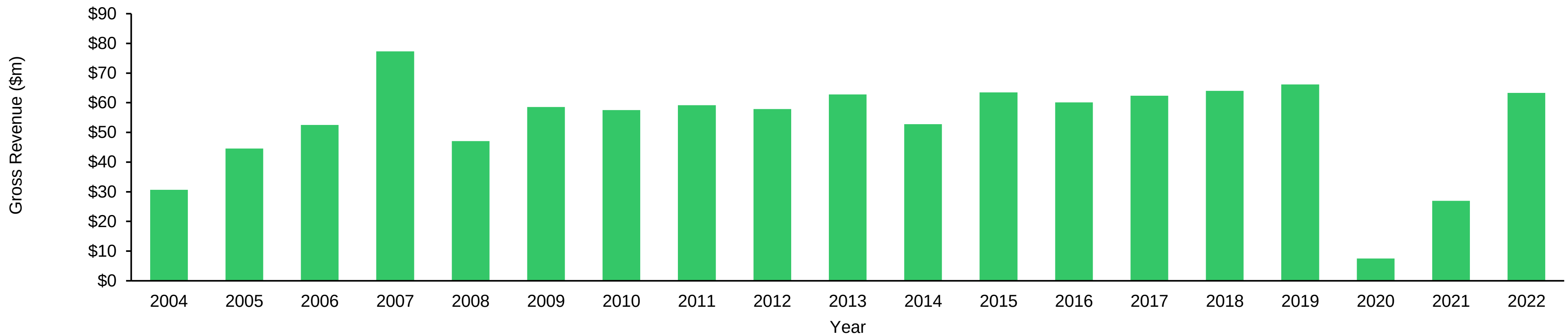
Revenue and Attendance 2004 → 2022

	Revenue		Attendance		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%
2019	$66,158,598	3.4%	803,472	0.3%	$92.17	1.5%
2020	$7,534,678	(88.6%)	137,389	(82.9%)	$59.64	(35.3%)
2021	$26,942,483	257.6%	363,505	164.6%	$86.08	44.3%
2022	$63,343,674	135.1%	740,572	103.7%	$94.86	10.2%

Ballet and Dance

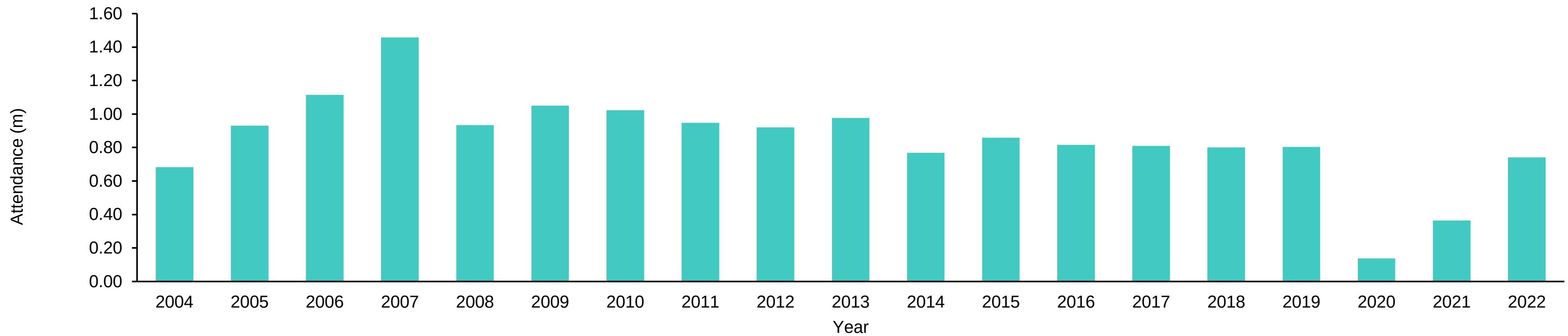
Ballet and Dance – Revenue

2004 → 2022



Ballet and Dance – Total Attendance

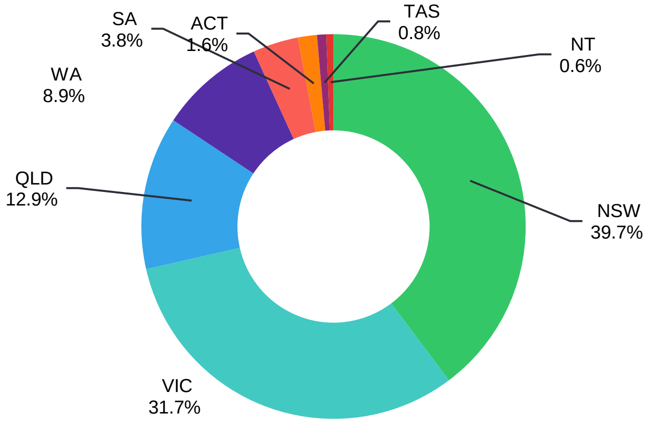
2004 → 2022



Ballet and Dance

Revenue by State/Territory

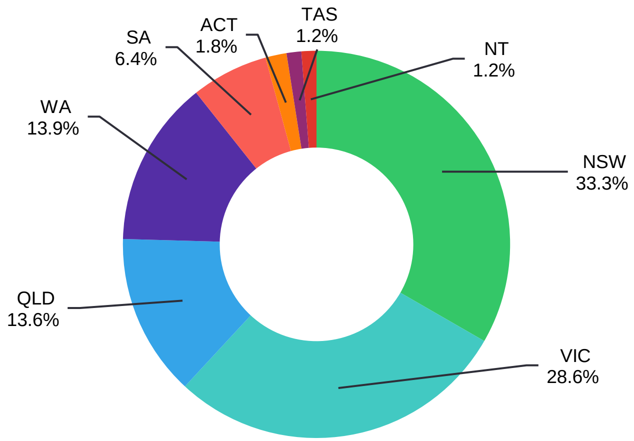
2004 → 2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$25,176,982	39.7%	8.5%
VIC	$20,077,796	31.7%	21.7%
QLD	$8,151,897	12.9%	(15.9%)
WA	$5,624,877	8.9%	(10.5%)
SA	$2,425,494	3.8%	(3.3%)
ACT	$1,014,749	1.6%	(0.3%)
TAS	$489,914	0.8%	(0.4%)
NT	$381,965	0.6%	0.3%
Total	**$63,343,674**	**100.0%**	

Attendance by State/Territory

2004 → 2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	246,742	33.3%	9.6%
VIC	211,626	28.6%	17.3%
QLD	100,354	13.6%	(18.1%)
WA	102,741	13.9%	(7.6%)
SA	47,654	6.4%	(0.2%)
ACT	13,084	1.8%	(0.7%)
TAS	9,121	1.2%	(0.3%)
NT	9,250	1.2%	-
Total	**$740,572**	**100.0%**	

Children's/Family

National Overview

- Children's/Family recorded $48.1m in revenue and almost 1.5m attendances. While these results surpass pre-pandemic levels, they do not yet match the peak recorded in 2018.
- Children's/Family witnessed a y-o-y growth in revenue by 40.1% (from $34.3m in 2021 to $48.1m in 2022) and a y-o-y growth in attendance by 41.6% (from 1.1m in 2021 to 1.5m in 2022).
- The growth in revenue was partially offset by the y-o-y decline in average ticket price by 2.9% (from $36.10 in 2021 to $35.05 in 2022).
- The revenue in this category was primarily driven by events such as *Disney on Ice*, *The Wiggles*, *Bluey's Big Play, Paw Patrol and Roald Dahl's The Twits*.
- In 2022, NSW, VIC and QLD together generated the most revenue and attendance in this category, with a national market share of approximately 37.7%, 26.6% and 18.1% respectively in revenue and 36.5%, 26.7% and 16.1% respectively in attendance. These three states combined generated 82.3% of national Children's/Family category revenue and 79.2% of attendance in 2022.
- In 2022, ACT, WA and SA witnessed a y-o-y decline in revenue and attendance, while NT witnessed a y-o-y decline in revenue in this category.
- TAS experienced the highest y-o-y growth in revenue (872.9%) and in attendance (163.8%). The growth in revenue was primarily driven by *Disney on Ice* event.
- NSW witnessed the second highest y-o-y growth in revenue (100.3%) and the third highest y-o-y growth in attendance (76.1%), driven by major performances such as *Disney on Ice*, The Wiggles and *Paw Patrol*.
- VIC experienced the third highest y-o-y growth in revenue (96.7%) and the second highest y-o-y growth in attendance (133.7%). The growth in revenue was driven by major performances including *Disney on Ice*, The Wiggles and *Bluey's Big Play*.

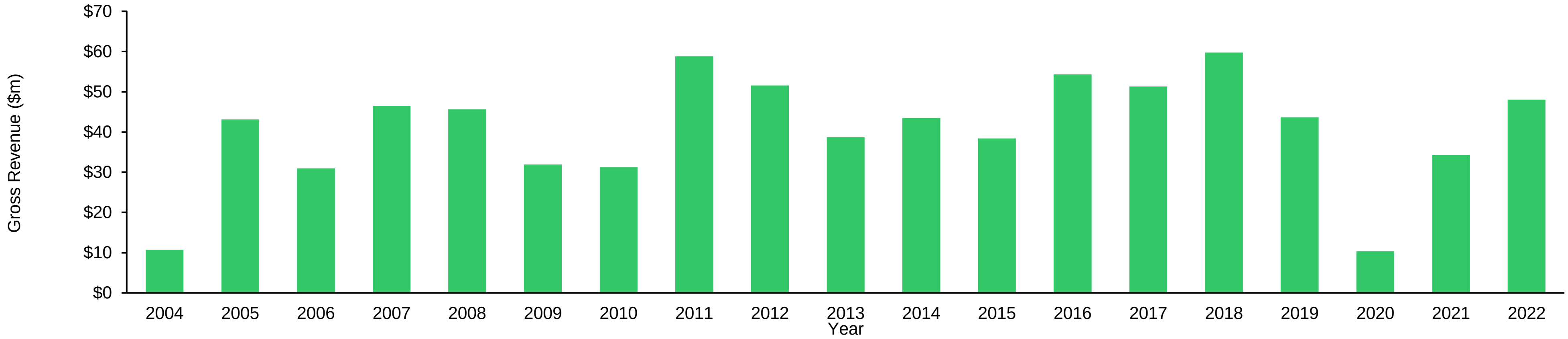
Revenue and Attendance 2004 → 2022

	Revenue		Attendance		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%)
2019	$43,649,235	(27.0%)	1,172,129	(29.0%)	$41.08	1.1%
2020	$10,396,875	(76.2%)	378,053	(67.7%)	$30.33	(26.2%)
2021	$34,298,281	229.9%	1,050,643	177.9%	$36.10	19.0%
2022	$48,054,479	40.1%	1,487,898	41.6%	$35.05	(2.9%)

Children's/Family

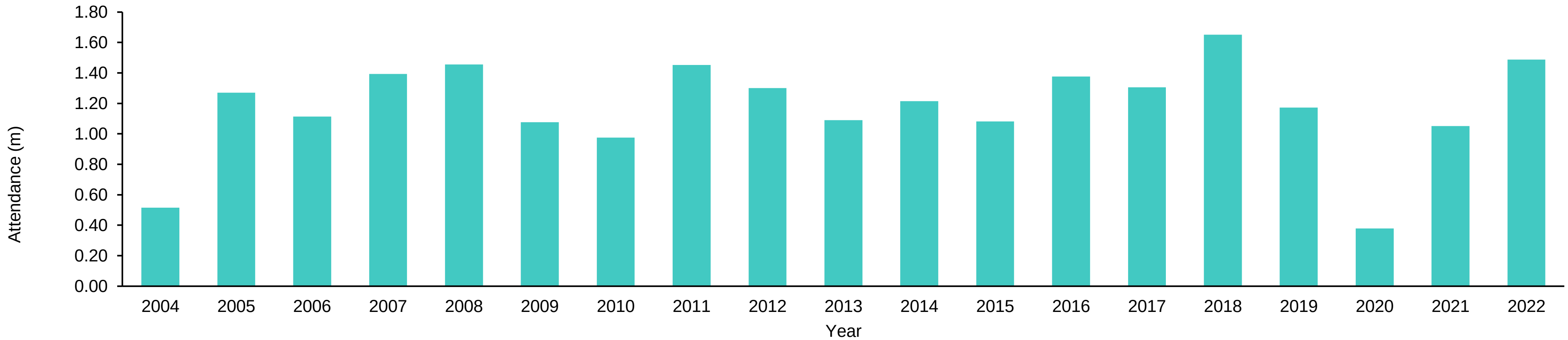
Children's/Family – Revenue

2004 → 2022



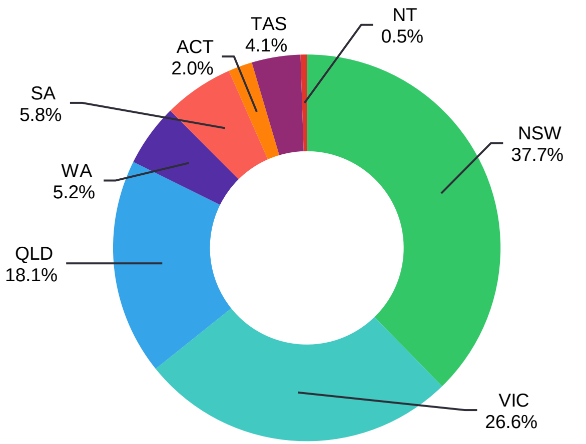
Children's/Family – Total Attendance

2004 → 2022



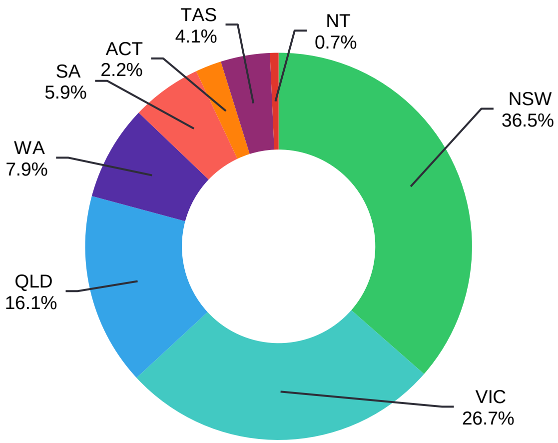
Children's/Family

Revenue by State/Territory 2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$18,114,887	37.7%	11.3%
VIC	$12,758,723	26.6%	7.6%
QLD	$8,692,948	18.1%	(4.7%)
WA	$2,508,192	5.2%	(8.1%)
SA	$2,811,174	5.8%	(3.8%)
ACT	$966,271	2.0%	(5.6%)
TAS	$1,952,346	4.1%	3.5%
NT	$249,938	0.5%	(0.3%)
Total	$48,054,479	100.0%	

Attendance by State/Territory 2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	542,428	36.5%	7.1%
VIC	396,805	26.7%	10.5%
QLD	238,968	16.1%	(4.9%)
WA	118,215	7.9%	(4.7%)
SA	87,319	5.9%	(5.2%)
ACT	32,374	2.2%	(4.5%)
TAS	61,128	4.1%	1.9%
NT	10,661	0.7%	(0.2%)
Total	**1,487,898**	100.0%	

Circus and Physical Theatre

National Overview

- In 2022, Circus and Physical Theatre recorded $22.7m in revenue and 326,315 attendances. These results have not returned to pre-pandemic levels.
- In 2022, Circus and Physical Theatre witnessed the lowest y-o-y growth in revenue by 7.1% (from $21.2m in 2021 to $22.7m in 2022) and the lowest y-o-y growth in attendance by 19.8% (from 0.3m in 2021 to 0.3m in 2022), among all categories.
- The growth in revenue was partially offset by a y-o-y decline in average ticket price by 10.1% (from $85.78 in 2021 to $77.15).
- Circus and Physical Theatre contributed 1.1% to the total industry share of revenue and 1.3% to the total attendance in 2022.
- Top events in this category included *Penn and Teller*, *L'Hotel*, *Pink Flamingo - The Glitz* and *Infamous The Show*.
- 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 2022, there were no *Cirque du Soleil* tours.
- In 2022, QLD, VIC and NSW together generated the most revenue and attendance in this category, with a national market share of approximately 46.2%, 23.9% and 21.9% respectively in revenue and 45.6%, 23.8% and 21.2% respectively in attendance. These three states combined generated 92.0% of national Circus and Physical Theatre category revenue and 90.6% of attendance in 2022.
- In 2022, ACT and NT witnessed the highest and second highest y-o-y increases in revenue and attendance respectively. However, their contribution to the overall revenue and attendance in this category is low. Top events in ACT and NT were *The Empire Strips Back* and *Infamous The Show* respectively.
- VIC witnessed the third highest y-o-y increase in both revenue and attendance, driven by performances such as *Penn and Teller*, *Oracle* and *Celtic Illusion Reimagined*.
- TAS witnessed a significant y-o-y increase in revenue and attendance, attributed to the absence of Circus and Physical Theatre events in TAS in 2021.

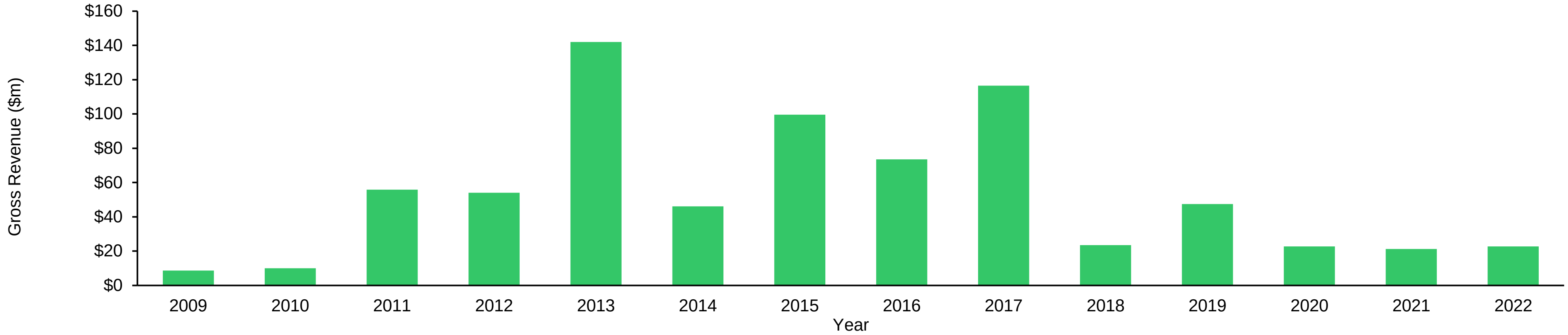
Revenue and Attendance 2009 → 2022

	Revenue		Attendance		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%)
2019	$47,447,405	102.7%	639,135	41.9%	$80.08	31.4%
2020	$22,693,371	(52.2%)	274,977	(57.0%)	$89.48	11.7%
2021	$21,220,702	(6.5%)	272,413	(0.9%)	$85.78	(4.1%)
2022	$22,723,700	7.1%	326,315	19.8%	$77.15	(10.1%)

Circus and Physical Theatre

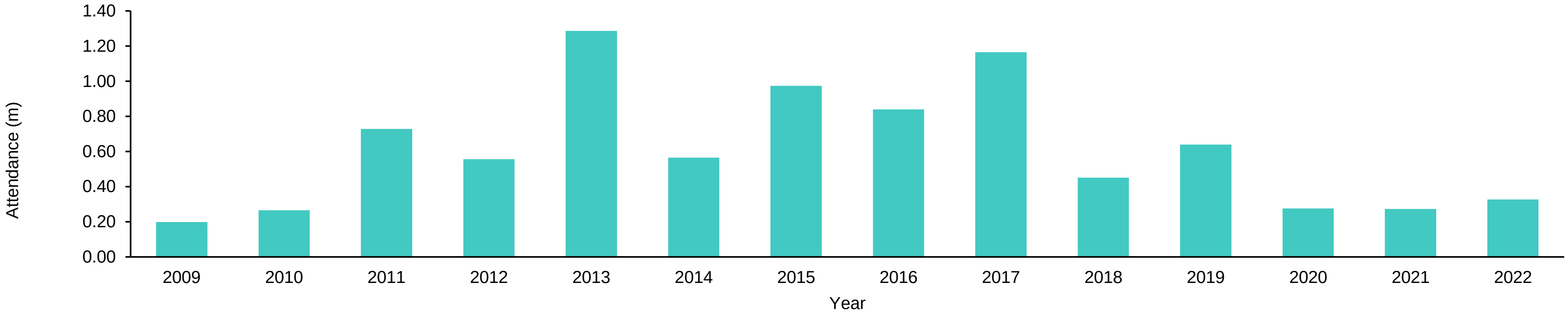
Circus and Physical Theatre – Revenue

2009 → 2022



Circus and Physical Theatre – Total Attendance

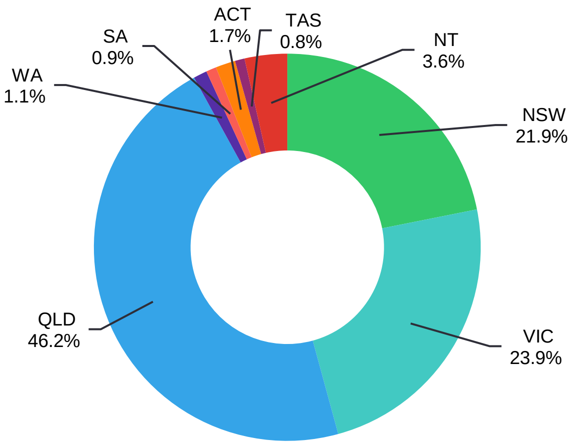
2009 → 2022



Circus and Physical Theatre

Revenue by State/Territory

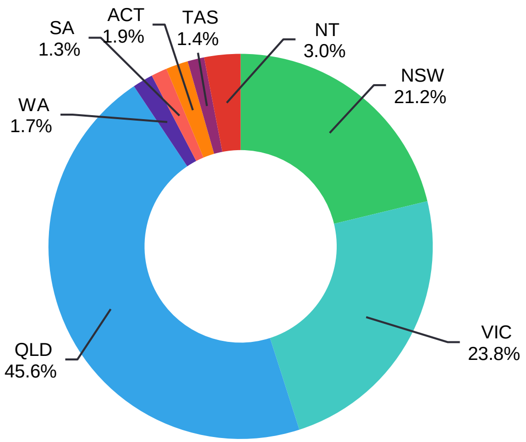
2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$4,968,320	21.9%	(25.9%)
VIC	$5,429,351	23.9%	11.2%
QLD	$10,507,200	46.2%	12.0%
WA	$257,490	1.1%	(2.5%)
SA	$195,763	0.9%	0.1%
ACT	$375,262	1.7%	1.6%
TAS	$182,874	0.8%	0.8%
NT	$807,440	3.6%	2.7%
Total	**$22,723,700**	**100.0%**	

Attendance by State/Territory

2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	69,276	21.2%	(19.2%)
VIC	77,740	23.8%	13.9%
QLD	148,727	45.6%	3.2%
WA	5,617	1.7%	(3.3%)
SA	4,357	1.3%	0.0%
ACT	6,106	1.9%	1.8%
TAS	4,557	1.4%	1.4%
NT	9,935	3.0%	2.3%
Total	**326,315**	**100.0%**	

Classical Music

National Overview

- Classical Music generated $88.9m in revenue and 1.2m attendances. The revenue result is the highest recorded for this category, however the attendance result has not returned to pre-pandemic levels.
- Classical Music witnessed a significant y-o-y increase in revenue by 134.2% (from $38.0m in 2021 to $88.9m in 2022) and a significant y-o-y increase in attendance by 97.5% (from 0.6m in 2021 to 1.2m in 2022). The average ticket price has increased by 21.2% (from $76.26 in 2021 to $92.41 in 2022), which further contributed to the growth in revenue.
- The revenue in this category was primarily driven by performances by artists such as Andrea Bocelli, 2CELLOS, and Kadim Al Sahir, where the ticket price is much higher than other classical music events. Events such as *Simone Young conducts Mahler 2* and *A Midsummer Night's Dream* with *Simone Young* were also key contributors to Classical Music revenue.
- Similar to previous years, performances by NPAP companies contributed significantly to the revenue (47.2%) and attendance (59.1%) in this category in 2022. NPAP companies include Adelaide Symphony Orchestra, Australian Brandenburg Orchestra, Australian Chamber Orchestra, Melbourne Symphony Orchestra, Musica Viva Australia, Opera Queensland, Orchestra Victoria, Queensland Symphony Orchestra, Sydney Symphony Orchestra, Tasmanian Symphony Orchestra and West Australian Symphony Orchestra.
- In 2022, NSW and VIC generated the most revenue and attendance in this category, with a national market share of approximately 37.4% and 26.8% respectively in revenue and 30.6% and 31.9% respectively in attendance. These two states combined generated 64.3% of the overall revenue and 62.4% of the overall attendance in this category.
- Top events in NSW and VIC included performances by Andrea Bocelli, 2CELLOS and Kadim Al Sahir and events such as *Simone Young conducts Mahler 2* and *A Midsummer Night's Dream with Simone Young*.
- In 2022, all states and territories except for SA and NT witnessed y-o-y growth in revenue, and all states and territories except for WA, SA and NT witnessed y-o-y growth in attendance in this category.
- VIC witnessed the highest y-o-y growth in both revenue (308.0%) and attendance (294.0%), while NSW experienced the second-highest y-o-y growth in revenue (245.1%) and attendance (191.4%).

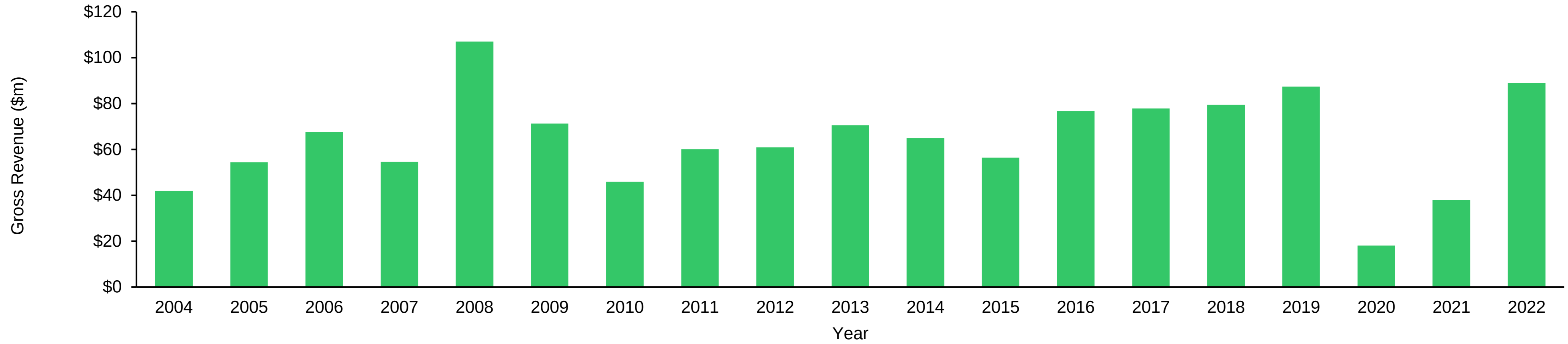
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		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%
2019	$87,333,188	9.9%	1,316,235	4.3%	$81.35	2.8%
2020	$18,111,125	(79.3%)	289,888	(78.0%)	$81.75	0.5%
2021	$37,973,064	109.7%	595,349	105.4%	$76.26	(6.7%)
2022	$88,922,485	134.2%	1,175,646	97.5%	$92.41	21.2%

Classical Music

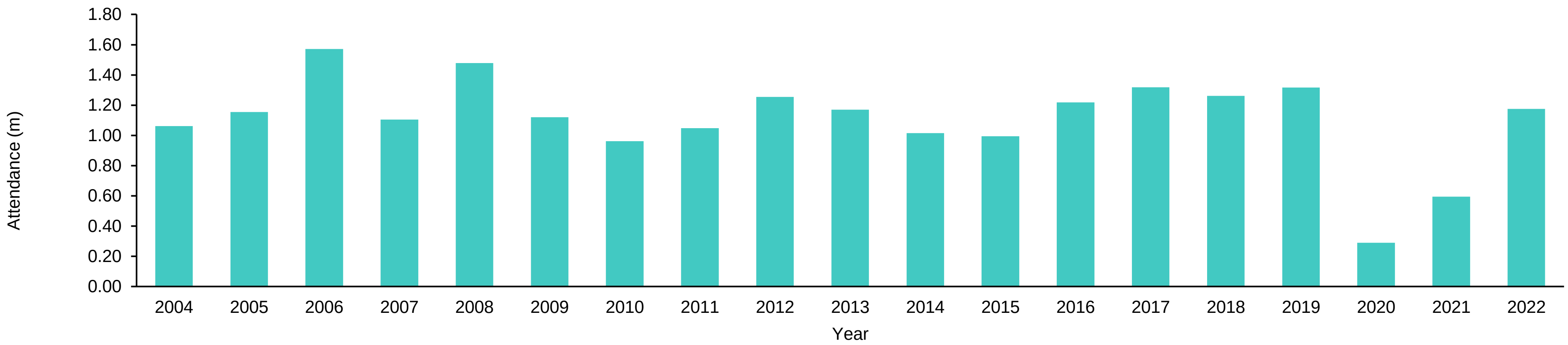
Classical Music – Revenue

2004 → 2022



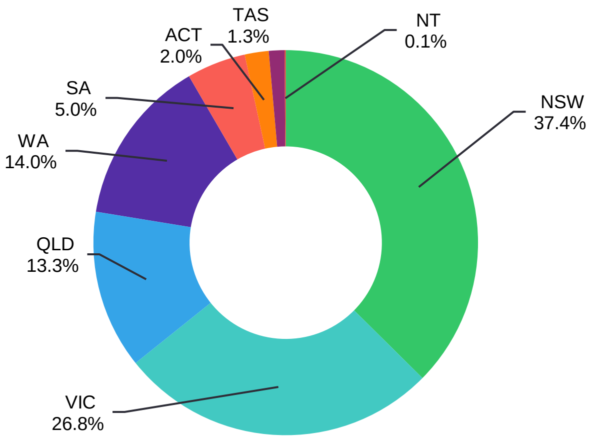
Classical Music – Total Attendance

2004 → 2022



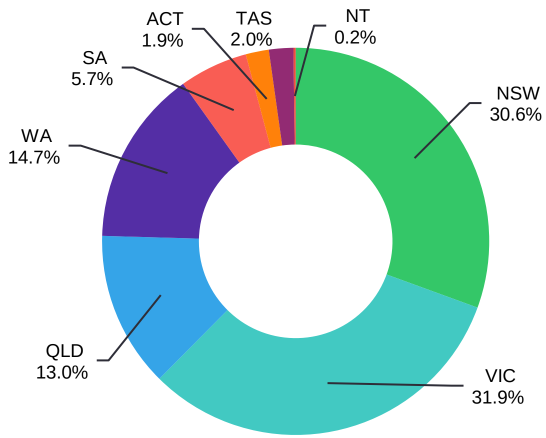
Classical Music

Revenue by State/Territory 2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$33,266,488	37.4%	12.0%
VIC	$23,870,637	26.8%	11.4%
QLD	$11,848,662	13.3%	(0.8%)
WA	$12,479,614	14.0%	(10.6%)
SA	$4,413,877	5.0%	(10.1%)
ACT	$1,788,838	2.0%	(0.4%)
TAS	$1,171,968	1.3%	(1.3%)
NT	$82,401	0.1%	(0.3%)
Total	**$88,922,485**	**100.0%**	

Attendance by State/Territory 2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	359,289	30.6%	9.8%
VIC	374,726	31.9%	15.9%
QLD	153,041	13.0%	(1.2%)
WA	172,493	14.7%	(15.6%)
SA	67,288	5.7%	(7.2%)
ACT	22,679	1.9%	-
TAS	24,037	2.0%	(1.3%)
NT	2,093	0.2%	(0.4%)
Total	**1,175,646**	**100.0%**	

Comedy

National Overview

- Comedy recorded $115.0m in revenue and over 2.1m attendances. These results are similar to pre-pandemic levels, however, have not yet matched the peak recorded in 2018.
- Comedy experienced a significant y-o-y growth in revenue by 128.6% (from $50.3m in 2021 to $115.0m in 2022) and in attendance by 82.0% (from 1.2m in 2021 to 2.1m in 2022).
- The average ticket price increased by 28.1% (from $45.20 in 2021 to $57.92 in 2022), which further contributed to the growth in revenue.
- Comedy generated 5.7% of the overall live performance revenue and 8.8% of the overall live performance attendance in 2022.
- In 2022, the growth in Comedy was primarily driven by the Melbourne International Comedy Festival, Sydney Comedy Festival and performances by renowned comedians such as Hannah Gadsby, Chris Rock, Jim Jefferies, Carl Barron and Sooshi Mango comedy troupe.
- In 2022, VIC and NSW generated the most revenue and attendance in this category, with a national market share of approximately 41.2% and 25.3% respectively in revenue and 49.4% and 21.0% respectively in attendance. These two states combined generated 66.6% of the overall revenue and 70.4% of the overall attendance in this category.
- In 2022, all states and territories experienced y-o-y growth in revenue and attendance in this category.
- SA witnessed the highest y-o-y growth in revenue (433.5%) and in attendance (315.0%) in 2022. The growth in SA revenue was driven by performances by renowned comedians such as Carl Barron, Jim Jefferies and Chris Rock.
- NSW witnessed the second highest y-o-y increase in revenue (274.1%) and in attendance (199.8%). Top events included Sydney Comedy Festival and performances by renowned comedians such as Chris Rock, Carl Barron and Sooshi Mango comedy troupe.

Revenue and Attendance 2009 → 2022

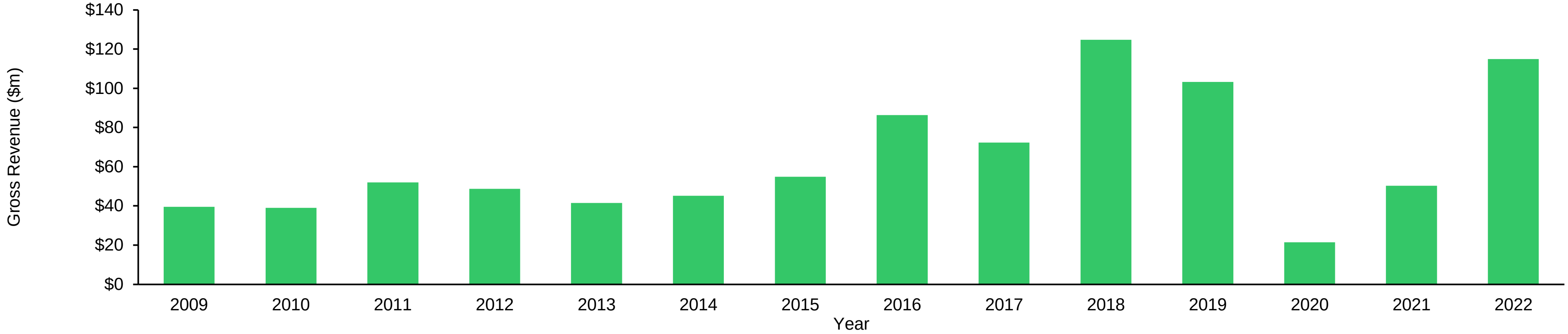
	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2009	$39,570,117	-	769,058	-	$44.07	-
2010	$39,048,164	(1.3%)	792,713	3.1%	$51.53	16.9%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	(6.4%)	981,035	(3.0%)	$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%
2019	$103,216,361	(17.3%)	2,172,296	(11.6%)	$52.62	(53.9%)
2020	$21,489,790	(79.2%)	338,448	(84.4%)	$68.88	30.9%
2021	$50,301,163	134.1%	1,171,696	246.2%	$45.20	(34.4%)
2022	$114,965,234	128.6%	2,132,551	82.0%	$57.92	28.1%

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 former Festivals (Single-Category) genre.

Comedy

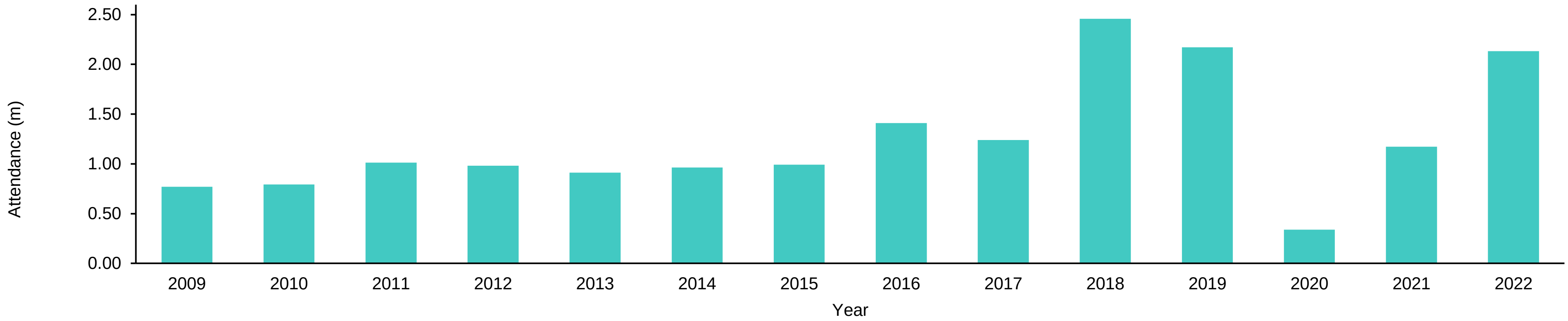
Comedy – Revenue

2009 → 2022



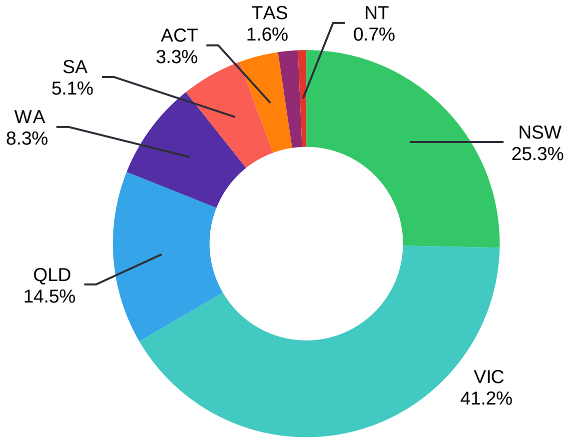
Comedy – Total Attendance

2009 → 2022



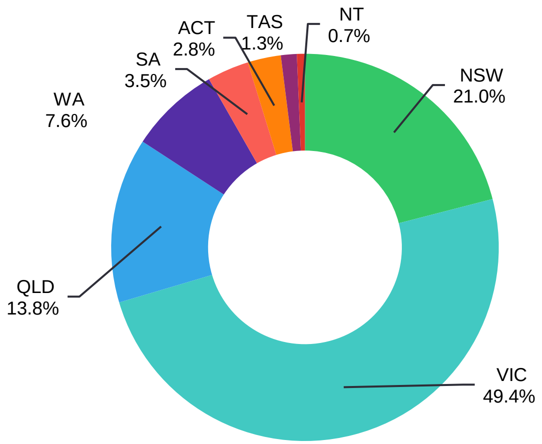
Comedy

Revenue by State/Territory — 2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$29,124,585	25.3%	9.9%
VIC	$47,423,061	41.2%	(5.3%)
QLD	$16,620,289	14.5%	(5.5%)
WA	$9,500,019	8.3%	1.0%
SA	$5,846,291	5.1%	2.9%
ACT	$3,764,932	3.3%	(1.6%)
TAS	$1,888,055	1.6%	(0.9%)
NT	$798,002	0.7%	(0.4%)
Total	**$114,965,234**	**100.0%**	

Attendance by State/Territory — 2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	447,430	21.0%	8.2%
VIC	1,054,088	49.4%	(8.2%)
QLD	294,064	13.8%	(2.3%)
WA	161,168	7.6%	1.9%
SA	74,154	3.5%	2.0%
ACT	59,153	2.8%	(0.7%)
TAS	28,223	1.3%	(0.7%)
NT	14,271	0.7%	(0.2%)
Total	**2,132,551**	**100.0%**	

Contemporary Music

National Overview

- Contemporary Music category witnessed the highest y-o-y increase in revenue by 387.1% (from $144.9m in 2021 to $706.0m in 2022) and the second highest y-o-y increase in attendance by 218.5% (from 2.7m in 2021 to 8.7m in 2022) among all the categories in 2022. The average ticket price has increased by 53.2% (from $56.81 in 2021 to $87.01 in 2022), which further contributed to the growth in revenue.
- In contrast to the challenges faced in 2020 and 2021 (which resulted in Contemporary Music recording the lowest revenue, attendance, and average ticket price in 2021 since 2004), there has been a remarkable turnaround in 2022. The 2022 revenue result has not yet returned to pre-pandemic levels, as major tours (including by international artists) only resumed in the second half of 2022.
- Major events in this category in 2022 were performances by Bruno Mars, Billy Joel, Guns N' Roses and Billie Eilish.
- Contemporary Music continued to be a significant contributor to the live performance market share, accounting for the largest market share in both revenue (35.2%) and attendance (35.9%) within the overall live performance industry in 2022.
- 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.
- In 2022, VIC and NSW generated the most revenue and attendance in this category, with a national market share of approximately 33.1% and 30.8% respectively in revenue and 31.0% and 31.6% respectively in attendance. These two states generated 63.9% of overall revenue and 62.6% of attendance in this category in 2022.
- In 2022, all states and territories experienced y-o-y growth in revenue and attendance in this category.
- In 2022, NSW witnessed the highest y-o-y growth in revenue (617.9%) and in attendance (400.5%), driven by performances by major artists such as Bruno Mars, Billie Eilish, and Guns N' Roses. VIC witnessed the second highest y-o-y increase in revenue (500.1%) and in attendance (309.5%).

Note: These figures do not include music festivals, which are categorised under Festivals (Contemporary Music).

Revenue and Attendance 2004 → 2022

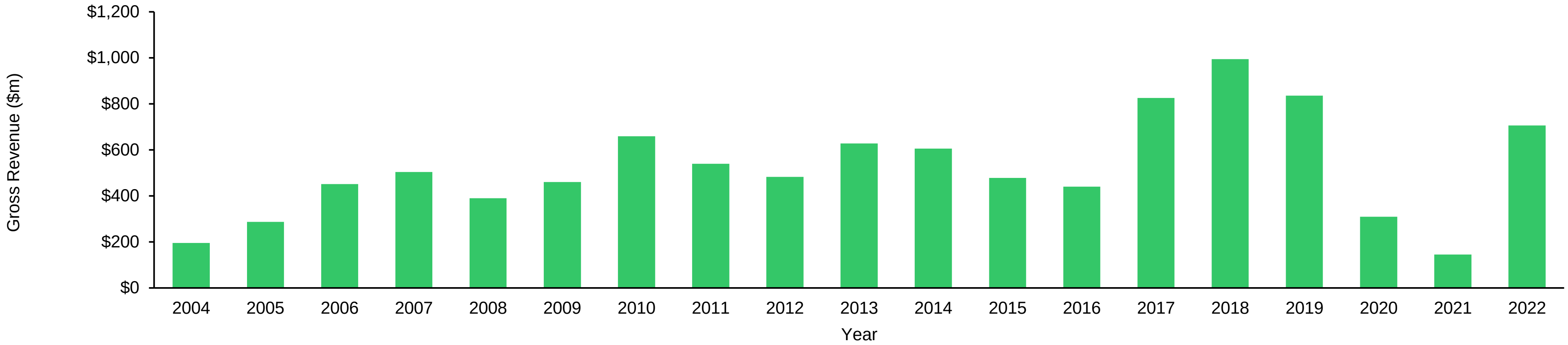
	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$195,058,791	-	2,737,873	-	$77.09	-
2005	$287,201,319	47.2%	3,924,276	43.3%	$83.37	8.1%
2006	$450,855,531	57.0%	5,295,988	35.0%	$92.78	11.3%
2007	$503,240,419	11.6%	5,975,561	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^	$993,736,022	20.3%	9,608,089	13.5%	$112.91	6.8%
2019	$835,544,629	(15.9%)	8,290,100	(13.7%)	$109.54	(3.0%)
2020	$309,203,112	(63.0%)	2,872,206	(65.4%)	$115.82	5.7%
2021	$144,938,333	(53.1%)	2,731,661	(4.9%)	$56.81	(51.0%)
2022	$705,953,566	387.1%	8,699,785	218.5%	$87.01	53.2%

^ This figure has been updated since the previous Report release to account for an error in the data received

Contemporary Music

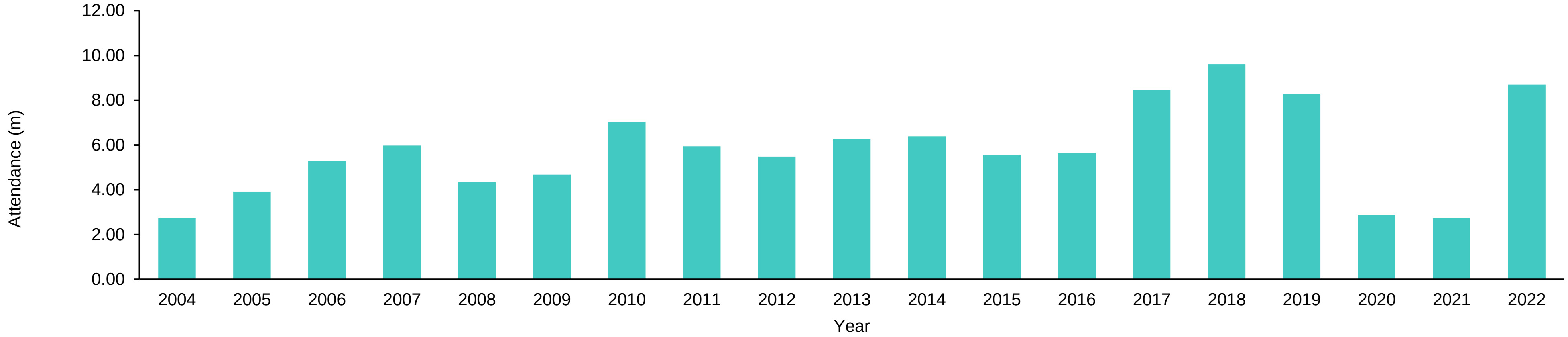
Contemporary Music – Revenue

2004 → 2022



Contemporary Music – Total Attendance

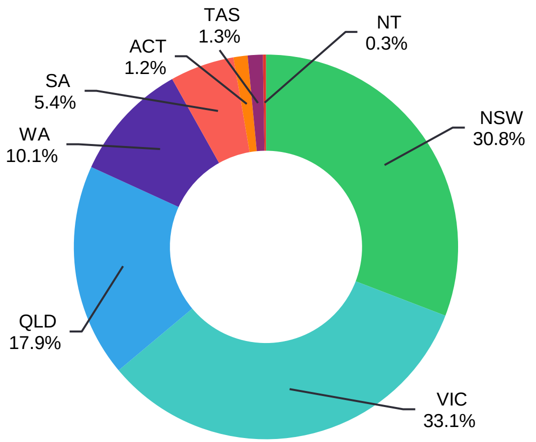
2004 → 2022



Contemporary Music

Revenue by State/Territory

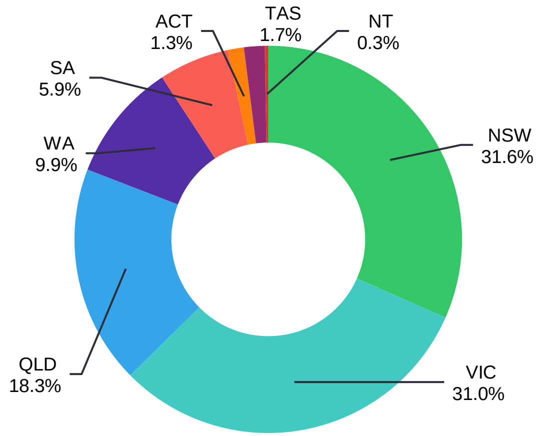
2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$217,586,514	30.8%	9.9%
VIC	$233,579,231	33.1%	6.2%
QLD	$126,429,645	17.9%	(7.5%)
WA	$71,052,161	10.1%	(4.1%)
SA	$38,151,103	5.4%	(2.6%)
ACT	$8,409,160	1.2%	(0.7%)
TAS	$8,941,547	1.3%	(1.1%)
NT	$1,804,205	0.3%	(0.1%)
Total	**$705,953,566**	**100.0%**	

Attendance by State/Territory

2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	2,750,406	31.6%	11.5%
VIC	2,696,754	31.0%	6.9%
QLD	1,588,695	18.3%	(8.5%)
WA	860,725	9.9%	(6.3%)
SA	511,744	5.9%	(1.9%)
ACT	116,216	1.3%	(0.4%)
TAS	151,192	1.7%	(1.2%)
NT	24,053	0.3%	(0.2%)
Total	**8,699,785**	**100.0%**	

Festivals (Contemporary Music)

National Overview

- Festivals (Contemporary Music) recorded over $243m in revenue and over 1.5m attendances. These results have surpassed pre-pandemic levels and are the highest ever recorded for this category.
- Relative to other categories, Festivals (Contemporary Music) witnessed the second highest y-o-y increase in revenue by 357.1% (from $51.3m in 2021 to $234.4m in 2022) and the highest y-o-y increase in attendance by 232.8% (from 0.5m in 2021 to 1.5m in 2022).
- The average ticket price has increased by 36.5% (from $124.16 in 2021 to $169.53 in 2022), which further contributed to the growth in revenue.
- The remarkable turnaround is attributable to pent up demand and the backlog of postponed contemporary music festivals.
- Festivals (Contemporary Music) contributed 11.7% to the total industry share of revenue and 6.3% to the total attendance in 2022. The revenue was primarily driven by festivals such as Splendour in the Grass, Bluesfest, CMC Rocks QLD, Spilt Milk and Listen Out.
- In 2022, NSW, QLD and VIC generated the most revenue and attendance in this category, with a national market share of approximately 37.2%, 21.7% and 19.5% respectively in revenue and 33.2%, 21.3% and 22.1% respectively in attendance. These three states generated 78.4% of overall revenue and 76.6% of attendance in this category in 2022.
- Major festivals that took place in NSW were Splendour in the Grass and Bluesfest. Major festivals that took place in QLD were CMC Rocks QLD and Spilt Milk. Major festivals that took place in VIC were Spilt Milk, Good Things Festival and Falls Melbourne.
- All states and territories except TAS witnessed a y-o-y increase in revenue and all states and territories except TAS and NT witnessed a y-o-y increase in attendance in 2022.
- ACT followed by NSW witnessed the highest y-o-y increases in revenue and attendance in 2022. Top festivals in ACT included Spilt Milk and Groovin the Moo.

Revenue and Attendance

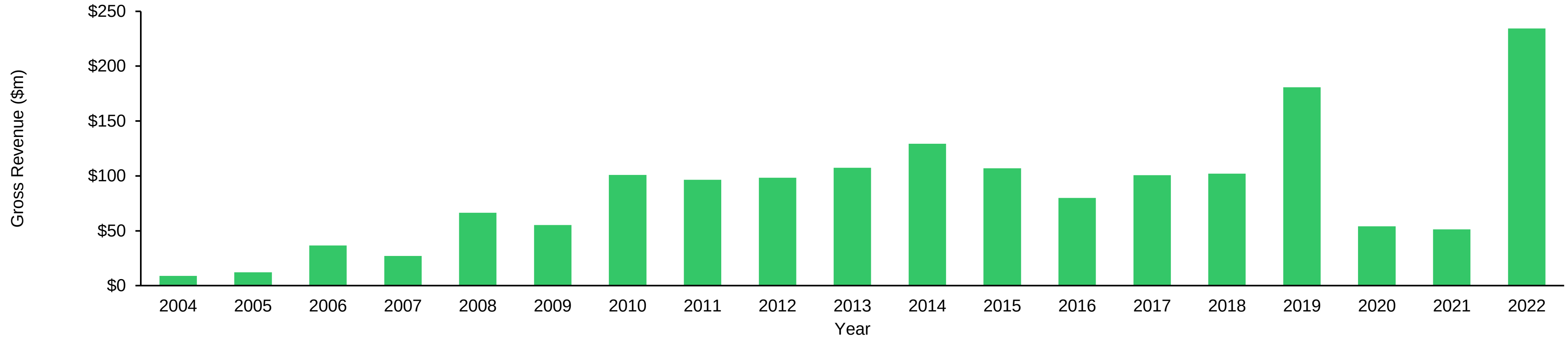
2004 → 2022

	Revenue		Attendance		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%
2019	$180,852,859	77.3%	1,447,836	48.5%	$147.86	12.4%
2020	$54,174,572	(70.0%)	437,472	(69.8%)	$142.33	(3.7%)
2021	$51,279,951	(5.3%)	461,949	5.6%	$124.16	(12.8%)
2022	$234,410,442	357.1%	1,537,353	232.8%	$169.53	36.5%

Festivals (Contemporary Music)

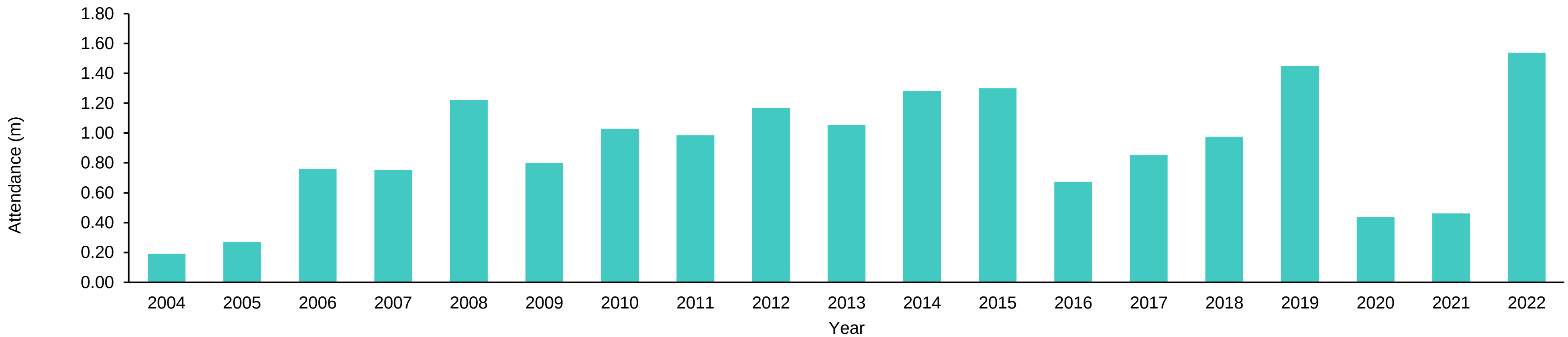
Festivals (Contemporary Music) - Revenue

2004 → 2022



Festivals (Contemporary Music) - Total Attendance

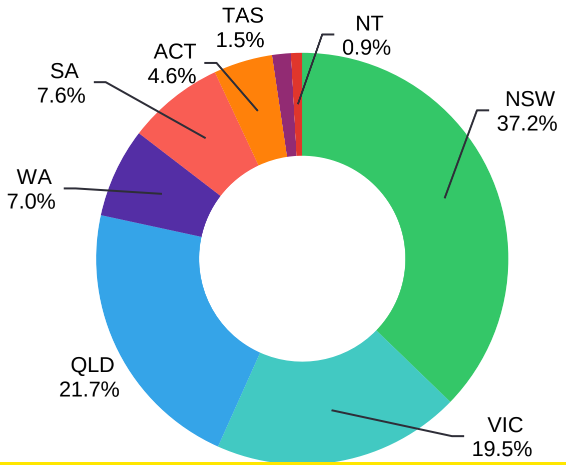
2004 → 2022



Festivals (Contemporary Music)

Revenue by State/Territory

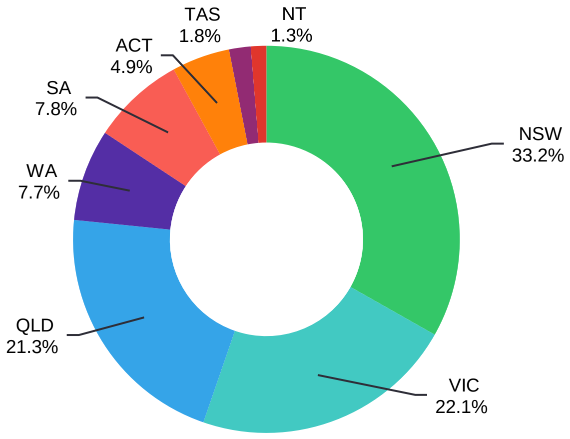
2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$87,305,513	37.2%	22.8%
VIC	$45,627,474	19.5%	(4.3%)
QLD	$50,827,850	21.7%	(12.1%)
WA	$16,503,905	7.0%	(1.2%)
SA	$17,800,056	7.6%	0.5%
ACT	$10,858,674	4.6%	3.2%
TAS	$3,420,737	1.5%	(5.8%)
NT	$2,066,232	0.9%	(3.1%)
Total	**$234,410,442**	**100.0%**	

Attendance by State/Territory

2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	510,325	33.2%	18.8%
VIC	339,624	22.1%	(0.1%)
QLD	327,693	21.3%	(12.8%)
WA	118,012	7.7%	(0.4%)
SA	119,385	7.8%	(0.6%)
ACT	74,619	4.9%	3.4%
TAS	27,713	1.8%	(5.0%)
NT	19,982	1.3%	(3.2%)
Total	**1,537,353**	**100.0%**	

Festivals (Multi-Category)

National Overview

- Festivals (Multi-Category) recorded over $70m in revenue and over 2.1m attendances. These results are on par with pre-pandemic levels.
- Festivals (Multi-Category) experienced a y-o-y increase in revenue by 86.1% (from $37.7m in 2021 to $70.1m in 2022) and a y-o-y increase in attendance by 36.7% (from 1.6m in 2021 to 2.1m in 2022). New data providers in this category contributed to the growth in revenue and attendance.
- The average ticket price has increased by 37.0% (from $30.20 in 2021 to $41.37 in 2022), which further contributed to the growth in revenue.
- In 2022, the major contributing events in this category were Adelaide Fringe, Rising Festival, Fringe World Festival (Perth) and Dark Mofo.
- Festivals (Multi-Category) contributed 3.5% of the total share in revenue and 8.8% of the total share in attendance in 2022.
- In 2022, SA and NSW generated the majority of revenue with a national market share of 33.9% and 18.4% respectively, while SA and WA accounted for the largest share of attendance with a national market share of 42.0% and 14.4% respectively in this category.
- Major festivals in SA and NSW included Adelaide Fringe, Vivid, Sydney Fringe Festival, Wanderer Festival and Oktoberfest.
- VIC witnessed the highest y-o-y increase in revenue (1919.6%) and in attendance (385.2%) in 2022. Major contributors to its revenue were Rising Festival and Melbourne Fringe Festival.
- NSW witnessed the second highest y-o-y increase in revenue (926.5%) and in attendance (235.3%).
- In 2022, all states and territories except NT witnessed y-o-y increases in revenue, while all states and territories except NT and WA witnessed y-o-y increases in attendance.

Revenue and Attendance

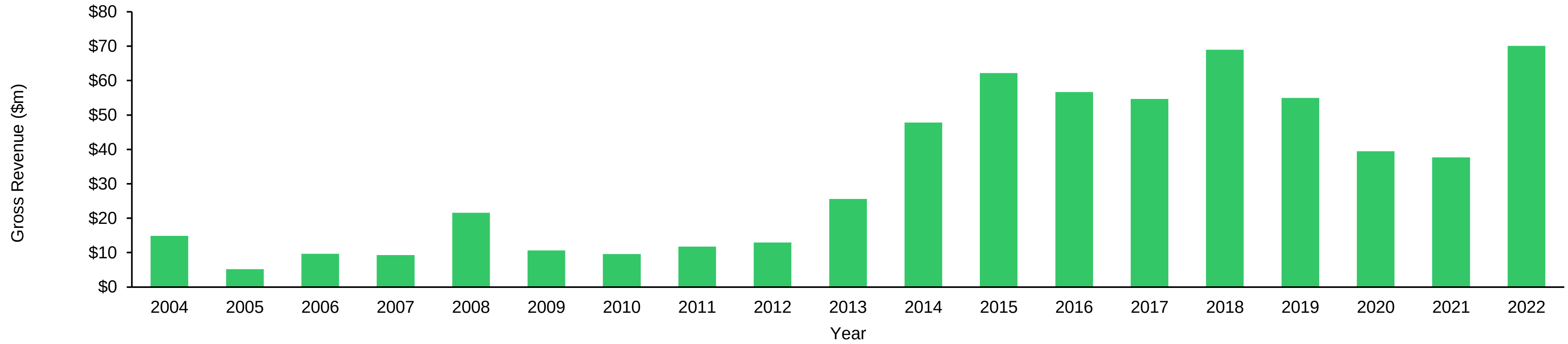
2004 → 2022

	Revenue		Attendance		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%
2019	$54,984,915	(20.3%)	2,174,359	(15.7%)	$33.31	(17.8%)
2020	$39,493,105	(28.2%)	1,567,551	(27.9%)	$28.66	(14.0%)
2021	$37,673,034	(4.6%)	1,554,151	(0.9%)	$30.20	5.4%
2022	$70,102,136	86.1%	2,124,802	36.7%	$41.37	37.0%

Festivals (Multi-Category)

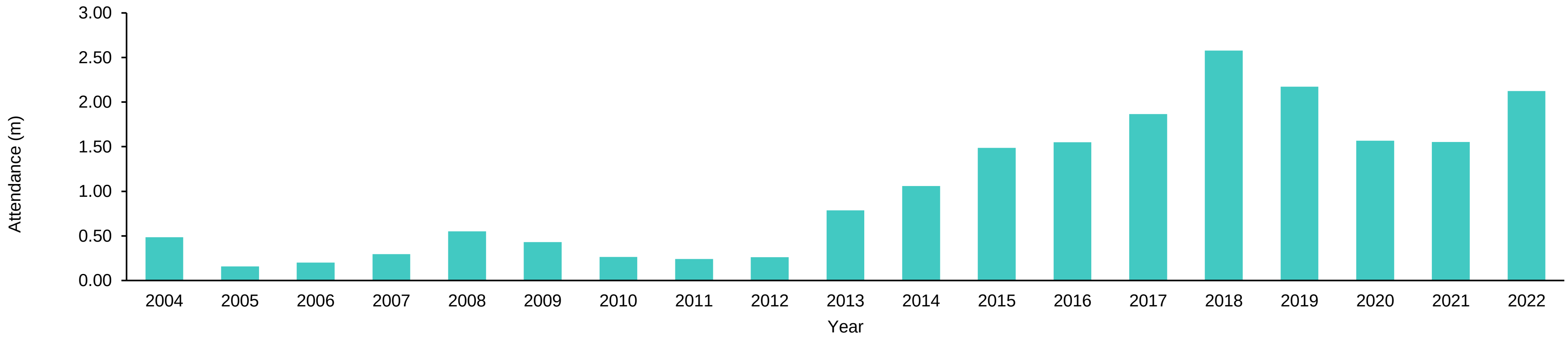
Festivals (Multi-Category) – Revenue

2004 → 2022



Festivals (Multi-Category) – Total Attendance

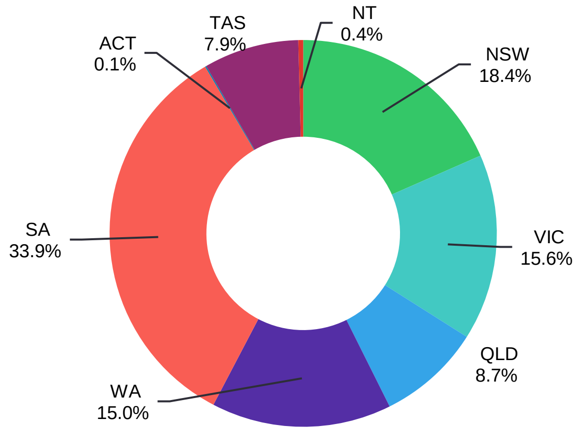
2004 → 2022



Festivals (Multi-Category)

Revenue by State/Territory

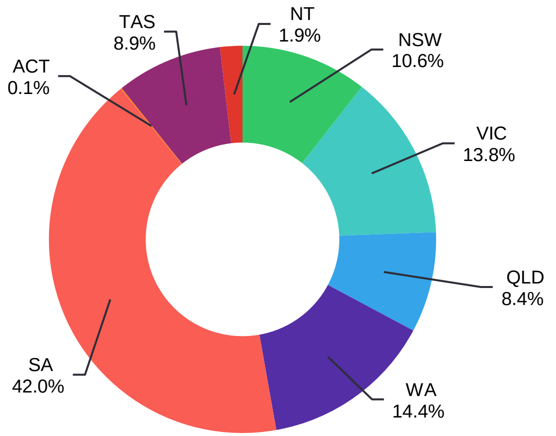
2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$12,908,119	18.4%	15.1%
VIC	$10,913,575	15.6%	14.1%
QLD	$6,067,529	8.7%	3.3%
WA	$10,542,834	15.0%	(10.5%)
SA	$23,742,709	33.9%	(22.9%)
ACT	$69,824	0.1%	0.1%
TAS	$5,573,063	7.9%	3.8%
NT	$284,483	0.4%	(3.1%)
Total	$70,102,136	100.0%	

Attendance by State/Territory

2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	224,571	10.6%	6.3%
VIC	293,985	13.8%	9.9%
QLD	178,452	8.4%	1.6%
WA	306,012	14.4%	(7.0%)
SA	892,146	42.0%	(9.4%)
ACT	1,737	0.1%	0.1%
TAS	188,323	8.9%	0.4%
NT	39,576	1.9%	(1.8%)
Total	2,124,802	100.0%	

Musical Theatre

National Overview

- Musical Theatre recorded nearly $520m in revenue and nearly 4.3m attendances. These results surpassed pre-pandemic levels and are the highest recorded for this category.
- These strong results reflect the backlog of musical theatre productions that could not proceed during 2020 and 2021, plus productions which were scheduled to proceed prior to the pandemic.
- Musical Theatre witnessed the third highest y-o-y growth in revenue by 156.5% (from $202.3m in 2021 to $519.0m in 2022) and in attendance by 139.2% (from 1.8m in 2021 to 4.3m in 2022), relative to other categories. The average ticket price increased by 7.7% (from $118.88 in 2021 to $128.02 in 2022), which further contributed to the growth in revenue.
- Top events in this category in 2022 were *Hamilton*, *The Phantom of the Opera*, *Rogers and Hammerstein's Cinderella* and *Frozen*.
- Musical Theatre continued to be a significant contributor to the live performance market share, accounting for the second largest market share in both revenue (25.9%) and attendance (17.6%) within the overall live performance industry in 2022.
- VIC and NSW accounted for the major revenue and attendance in this category. VIC and NSW command a market share of 40.2% and 39.1% in revenue, while their market share in attendance was 39.6% and 34.9% respectively. Combined they generated around 79.3% market share of revenue and a 74.5% market share of attendance in 2022.
- Major events in NSW included *The Phantom of the Opera* and *Rogers and Hammerstein's Cinderella*.
- Major events in VIC included *Hamilton*, *The Phantom of the Opera* and *9 to 5: The Musical.*
- In 2022, ACT witnessed the highest y-o-y increase in revenue (933.9%) and in attendance (551.1%). Major musicals that performed in ACT included *SIX the Musical* and *Girl From The North Country*.
- SA and VIC witnessed the second and third highest y-o-y increases in revenue and attendance respectively.
- All states and territories except TAS witnessed a y-o-y growth in revenue and in attendance in 2022.

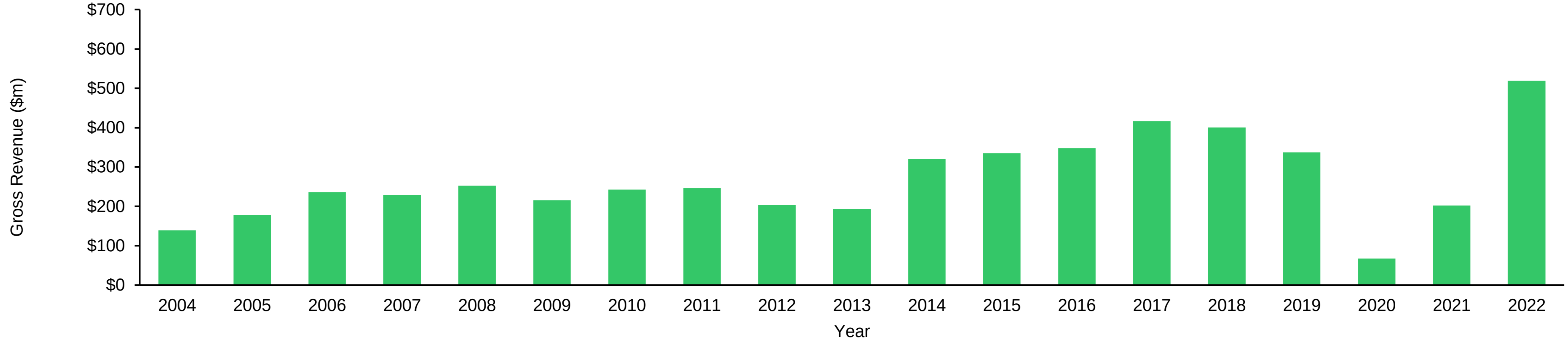
Revenue and Attendance 2004 → 2022

	Revenue		Attendance		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%)
2019	$337,338,257	(15.7%)	3,451,543	(11.9%)	$104.33	(4.2%)
2020	$67,051,689	(80.1%)	729,099	(78.9%)	$99.07	(5.0%)
2021	$202,342,943	201.8%	1,784,772	144.8%	$118.88	20.0%
2022	$519,021,175	156.5%	4,269,750	139.2%	$128.02	7.7%

Musical Theatre

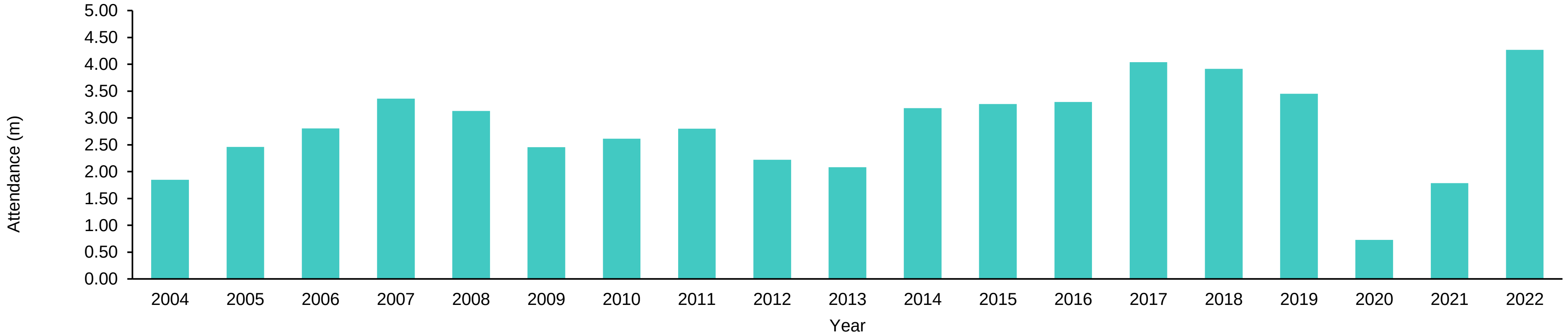
Musical Theatre – Revenue

2004 → 2022



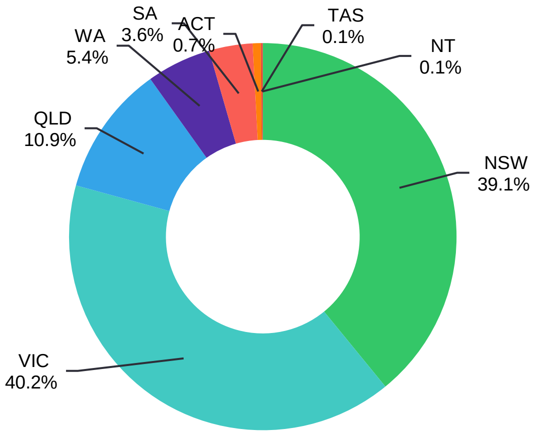
Musical Theatre – Total Attendance

2004 → 2022



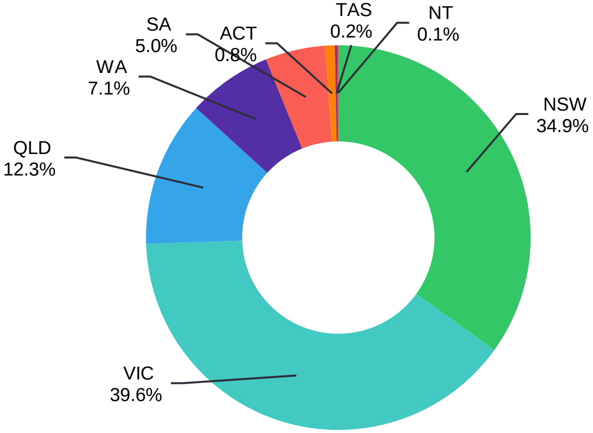
Musical Theatre

Revenue by State/Territory 2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$202,923,468	39.1%	(15.5%)
VIC	$208,480,701	40.2%	23.2%
QLD	$56,459,347	10.9%	(3.9%)
WA	$27,954,536	5.4%	(5.5%)
SA	$18,861,950	3.6%	2.2%
ACT	$3,543,937	0.7%	0.5%
TAS	$481,788	0.1%	(1.2%)
NT	$315,448	0.1%	0.1%
Total	**$519,021,175**	**100.0%**	

Attendance by State/Territory 2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	1,491,645	34.9%	(13.7%)
VIC	1,688,762	39.6%	23.8%
QLD	523,999	12.3%	(5.9%)
WA	303,229	7.1%	(6.7%)
SA	215,188	5.0%	3.5%
ACT	34,776	0.8%	0.5%
TAS	7,118	0.2%	(1.7%)
NT	5,033	0.1%	0.1%
Total	**4,269,750**	**100.0%**	

Opera

National Overview

- Opera witnessed a y-o-y increase in revenue by 51.2% (to $23.7m) and a y-o-y increase in attendance by 49.0% (to 0.2m) in 2022. The average ticket price increased slightly y-o-y by 1.0% (from $118.94 in 2021 to $120.17 in 2022).
- Opera has not yet returned to pre-COVID activity, with 2022 marking the third lowest result (2020 and 2021 being the lowest and second lowest) in this category since 2004.
- Major Opera performances in 2022 included *La Traviata*, *Carmen* and *Madama Butterfly*.
- Similar to previous years, performances by NPAP companies including Opera Australia, Opera Queensland, West Australian Opera, Victorian Opera and the State Opera of South Australia contributed the majority to the overall revenue (88.0%) and attendance (89.8%) in this category in 2022.
- In 2022, NSW and VIC generated the most revenue and attendance in this category, with a national market share of approximately 62.9% and 19.8% respectively in revenue and 56.9% and 19.7% respectively in attendance. These two states generated 82.7% of overall revenue and 76.6% of attendance in this category in 2022.
- In 2022, SA witnessed the highest y-o-y growth in revenue (90.4%) and in attendance (122.8%). The top event in SA was *La Traviata*.
- NSW witnessed the second highest y-o-y growth in revenue (71.1%) and in attendance (93.4%). Major Opera performances in NSW included *La Traviata*, *Carmen* and *Madama Butterfly*.
- Victoria witnessed a y-o-y increase in revenue (46.3%) and in attendance (20.4%). The top events were *La Traviata* and *Lohengrin*.
- ACT and QLD witnessed y-o-y declines in revenue and attendance in 2022. Additionally, there were no Opera events held in NT in 2022.

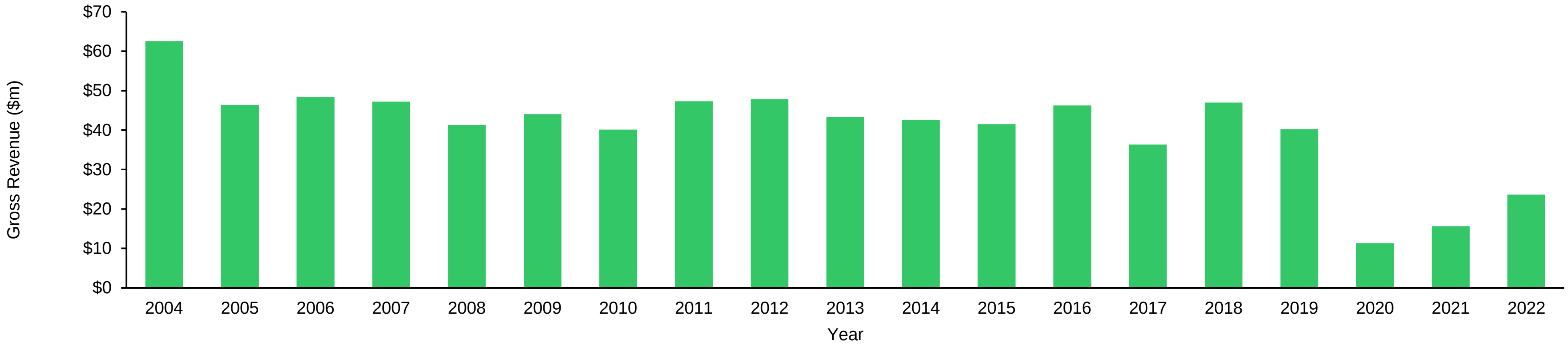
Revenue and Attendance 2004 → 2022

	Revenue		Attendance		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%
2019	$40,201,835	(14.4%)	435,525	(10.6%)	$113.83	(8.3%)
2020	$11,313,725	(71.9%)	147,982	(66.0%)	$87.47	(23.2%)
2021	$15,649,421	38.3%	151,299	2.2%	$118.94	36.0%
2022	$23,662,092	51.2%	225,486	49.0%	$120.17	1.0%

Opera

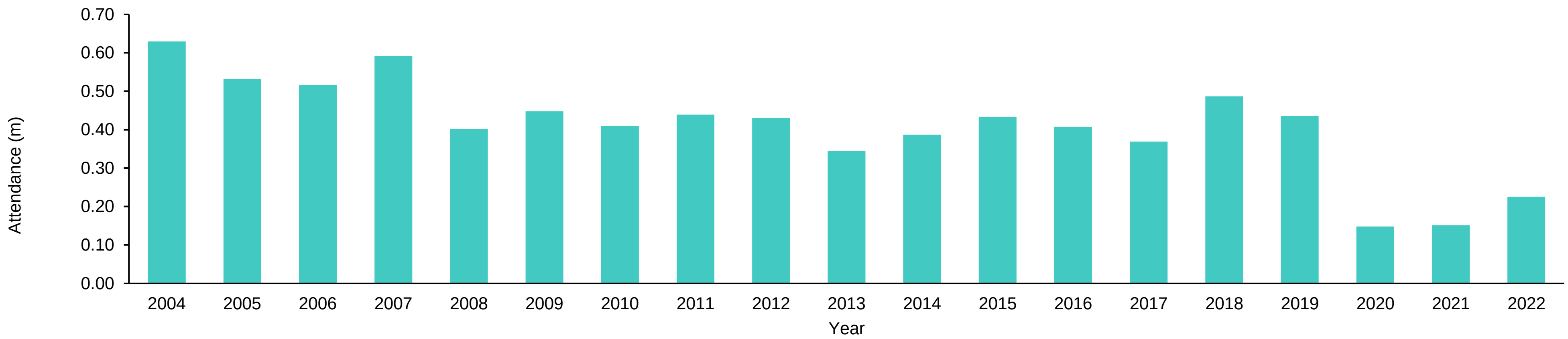
Opera – Revenue

2004 → 2022



Opera – Total Attendance

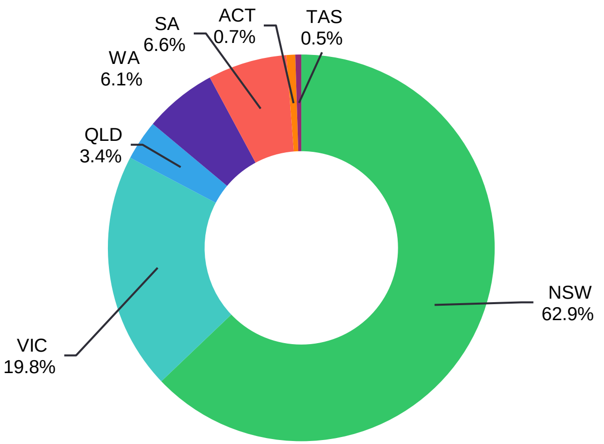
2004 → 2022



Opera

Revenue by State/Territory

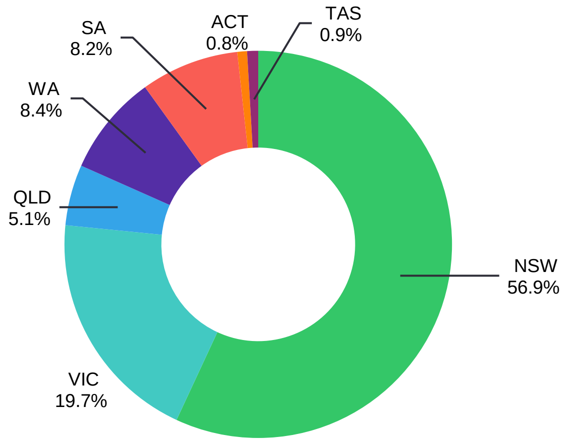
2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$14,878,865	62.9%	7.3%
VIC	$4,694,518	19.8%	(0.7%)
QLD	$793,427	3.4%	(4.1%)
WA	$1,439,861	6.1%	(2.7%)
SA	$1,564,714	6.6%	1.4%
ACT	$173,465	0.7%	(1.5%)
TAS	$117,241	0.5%	0.5%
NT	-	-	(0.2%)
Total	**$23,662,092**	**100.0%**	

Attendance by State/Territory

2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	128,360	56.9%	13.1%
VIC	44,320	19.7%	(4.7%)
QLD	11,453	5.1%	(6.7%)
WA	18,967	8.4%	(3.4%)
SA	18,485	8.2%	2.7%
ACT	1,829	0.8%	(1.6%)
TAS	2,072	0.9%	0.9%
NT	-	-	(0.3%)
Total	**225,486**	**100.0%**	

Special Events

National Overview

- Special Events experienced a significant y-o-y increase in revenue by 86.3% (from $2.6m in 2021 to $4.8m in 2022) and in attendance by 81.6% (from 78.7k in 2021 to 0.1m in 2022).
- The growth in revenue was partially offset by the y-o-y decline in average ticket price by 5.2% (from $41.51 in 2021 to $39.35 in 2022).
- The top events in this category in 2022 were *Carols By Candlelight* and *Dirty Dancing In Concert*.
- In 2022, VIC and QLD generated the most revenue and attendance in this category, with a national market share of approximately 27.9% and 25.5% respectively in revenue and 20.9% and 51.5% respectively in attendance. These two states generated 53.4% of overall revenue and 72.4% of attendance in this category in 2022.
- The top events in QLD included *Dirty Dancing In Concert* and *Rupaul's Drag Race*. The top events in Victoria included *Carols By Candlelight* and *Rupaul's Drag Race*.
- In 2022, all states and territories except WA and NT witnessed a y-o-y growth in revenue and in attendance.
- In 2022, TAS experienced the highest y-o-y growth in revenue (4381.4%) and in attendance (1662.3%), followed by SA and NSW. ACT also witnessed significant y-o-y increase in revenue and in attendance, considering there were no events held in ACT in this category in 2021.
- The Special Events category was particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.

Revenue and Attendance

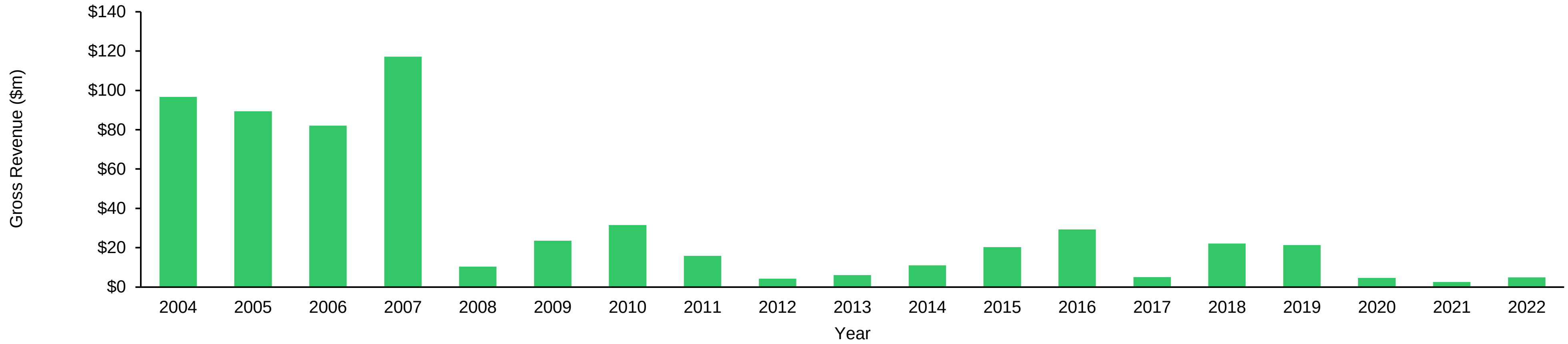
2004 → 2022

	Revenue		Attendance		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%
2019	$21,352,158	(3.5%)	430,873	152.9%	$71.68	(53.1%)
2020	$4,644,130	(78.2%)	166,777	(61.3%)	$55.40	(22.7%)
2021	$2,602,427	(44.0%)	78,708	(52.8%)	$41.51	(25.1%)
2022	$4,847,553	86.3%	142,951	81.6%	$39.35	(5.2%)

Special Events

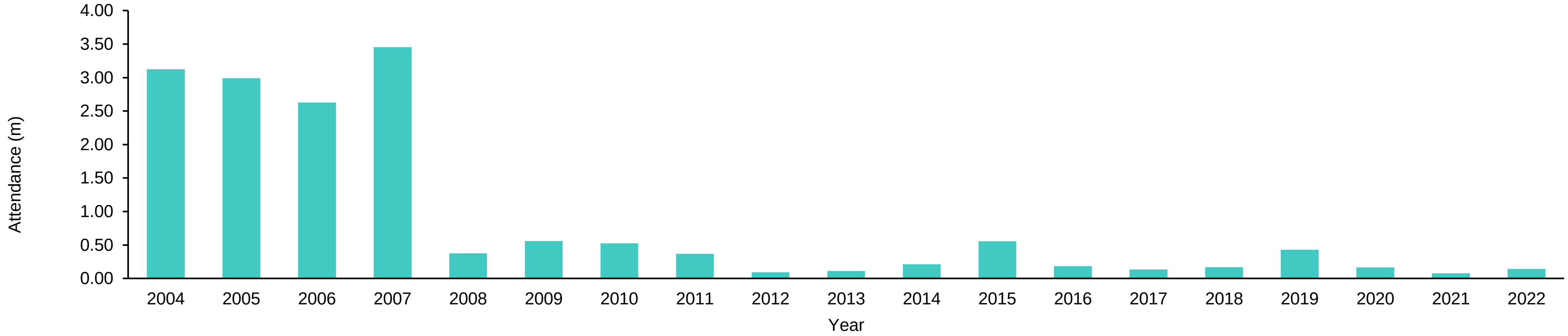
Special Events – Revenue

2004 → 2022



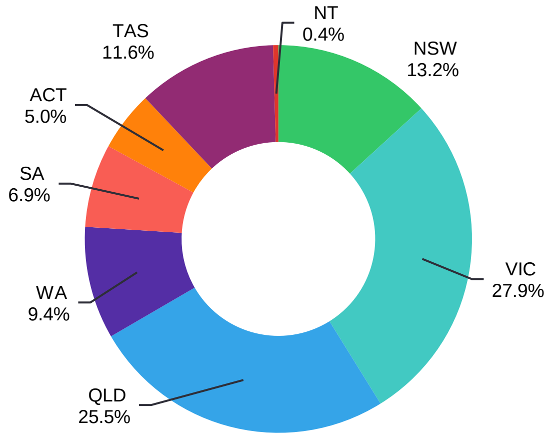
Special Events – Total Attendance

2004 → 2022



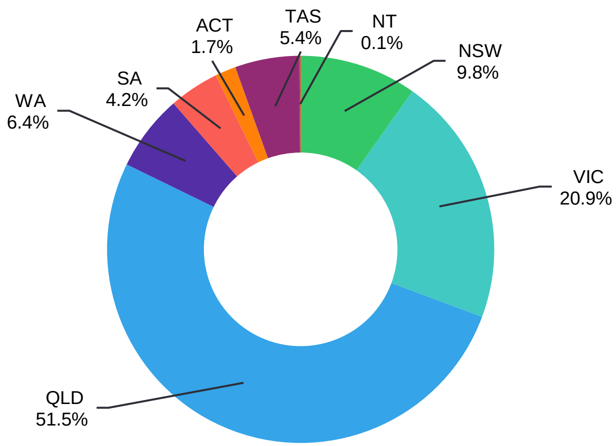
Special Events

Revenue by State/Territory 2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$641,227	13.2%	8.0%
VIC	$1,353,746	27.9%	(7.8%)
QLD	$1,234,552	25.5%	(10.0%)
WA	$454,441	9.4%	(10.9%)
SA	$336,736	6.9%	5.2%
ACT	$242,308	5.0%	5.0%
TAS	$563,262	11.6%	11.1%
NT	$21,282	0.4%	(0.5%)
Total	**$4,847,553**	**100.0%**	

Attendance by State/Territory 2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	13,999	9.8%	2.1%
VIC	29,853	20.9%	(2.6%)
QLD	73,690	51.5%	1.4%
WA	9,101	6.4%	(8.5%)
SA	5,983	4.2%	1.9%
ACT	2,490	1.7%	1.7%
TAS	7,666	5.4%	4.8%
NT	169	0.1%	(0.9%)
Total	**142,951**	**100.0%**	

Theatre

National Overview

- Theatre experienced a significant y-o-y growth in revenue by 107.9% (from $53.6m in 2021 to $111.4m in 2022) and in attendance by 106.1% (from 0.7m in 2021 to 1.4m in 2022). The average ticket price has slightly increased y-o-y by 2.9% (from $88.56 in 2021 to $91.13 in 2022), which further contributed to the growth in revenue.
- While 2022 saw Theatre revenue and attendance increase, they have not yet returned to the peak witnessed in 2019.
- The key events that contributed to Theatre's growth in 2022 included *Harry Potter and the Cursed Child*, *The Picture of Dorian Gray*, *The Tempest* and *Strange Case of Doctor Jekyll & Mr Hyde*.
- Theatre accounted for 5.5% of the overall live performance revenue and 5.6% of the total attendance in 2022.
- 35.3% of the revenue and 46.6% of the attendance in 2022 were generated through performances by NPAP companies such as Sydney Theatre Company, Melbourne Theatre Company, Belvoir, Bell Shakespeare, Black Swan State Theatre Company, Queensland Theatre and the State Theatre Company of South Australia.
- VIC generated the highest revenue and attendance in this category, with a national market share of approximately 63.0% in revenue and 47.6% in attendance in 2022. This was largely attributed to *Harry Potter and the Cursed Child*.
- NSW generated the second highest revenue and attendance in this category, with a national market share of approximately 26.2% in revenue and 35.2% in attendance. Top events in NSW included *The Picture of Dorian Gray*, *The Tempest* and *Strange Case of Doctor Jekyll & Mr Hyde*.
- Combined VIC and NSW generated 89.2% of overall revenue and 82.7% of attendance in this category in 2022.
- All states and territories except QLD and WA witnessed a y-o-y increase in revenue and attendance in 2022.
- VIC witnessed the highest y-o-y growth in revenue (162.3%) and second highest y-o-y growth in attendance (217.2%). TAS witnessed the second highest y-o-y growth in revenue (156.9%) and the highest y-o-y growth in attendance (537.1%).

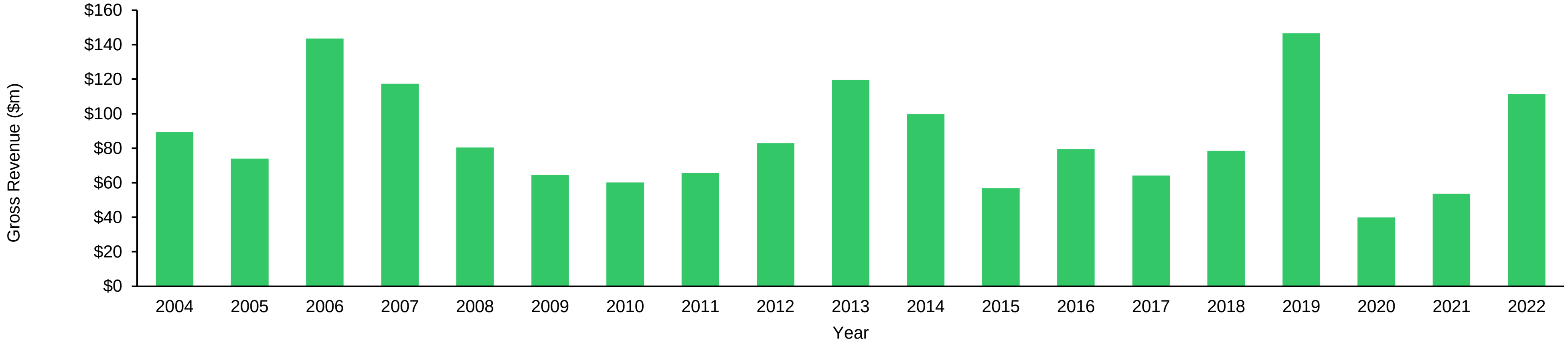
Revenue and Attendance 2004 → 2022

	Revenue		Attendance		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%
2019	$146,562,112	86.7%	1,530,912	7.0%	$108.07	69.1%
2020	$39,867,422	(72.8%)	421,868	(72.4%)	$105.14	(2.7%)
2021	$53,563,159	34.4%	661,694	56.8%	$88.56	(15.8%)
2022	$111,362,004	107.9%	1,363,926	106.1%	$91.13	2.9%

Theatre

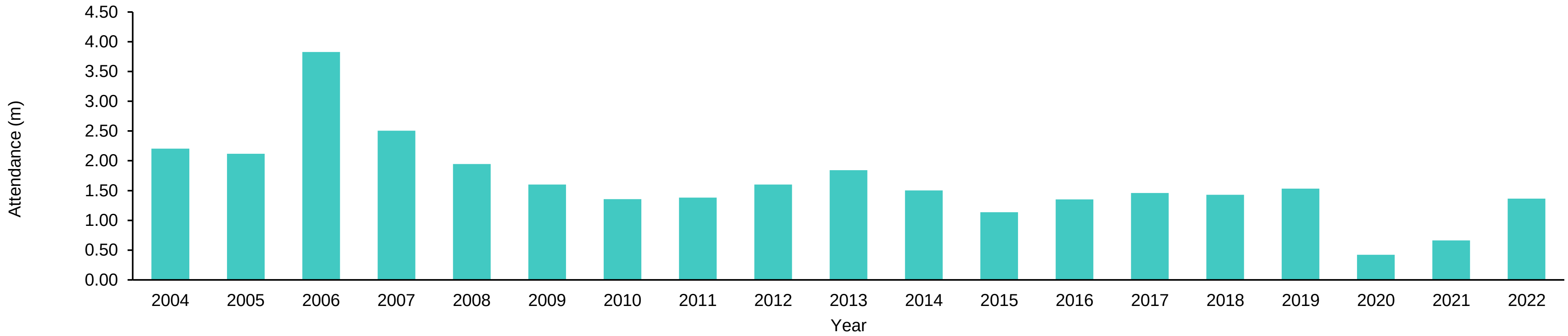
Theatre – Revenue

2004 → 2022



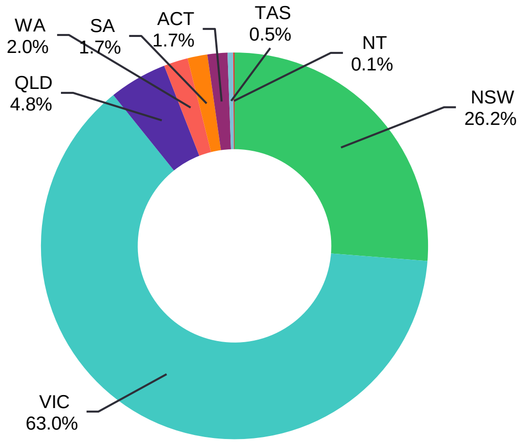
Theatre – Total Attendance

2004 → 2022



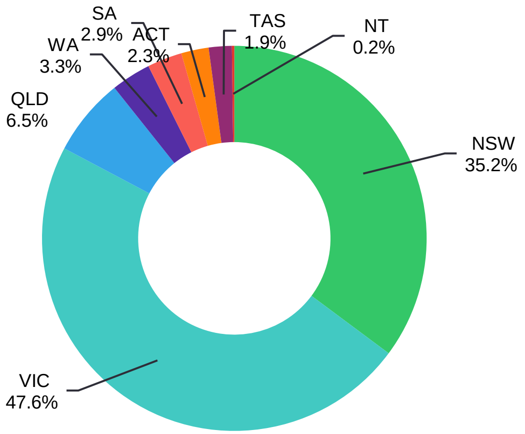
Theatre

Revenue by State/Territory 2022



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2021 (%)
NSW	$29,229,030	26.2%	0.4%
VIC	$70,146,223	63.0%	13.1%
QLD	$5,395,597	4.8%	(7.4%)
WA	$2,250,239	2.0%	(3.7%)
SA	$1,842,154	1.7%	(1.5%)
ACT	$1,855,996	1.7%	(0.9%)
TAS	$520,640	0.5%	0.1%
NT	$122,126	0.1%	-
Total	**$111,362,004**	**100.0%**	

Attendance by State/Territory 2022



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2021 (%)
NSW	479,803	35.2%	3.7%
VIC	648,671	47.6%	16.6%
QLD	89,284	6.5%	(10.6%)
WA	45,596	3.3%	(7.4%)
SA	39,969	2.9%	(2.9%)
ACT	31,414	2.3%	(0.5%)
TAS	26,384	1.9%	1.3%
NT	2,805	0.2%	(0.1%)
Total	**1,363,926**	**100.0%**	

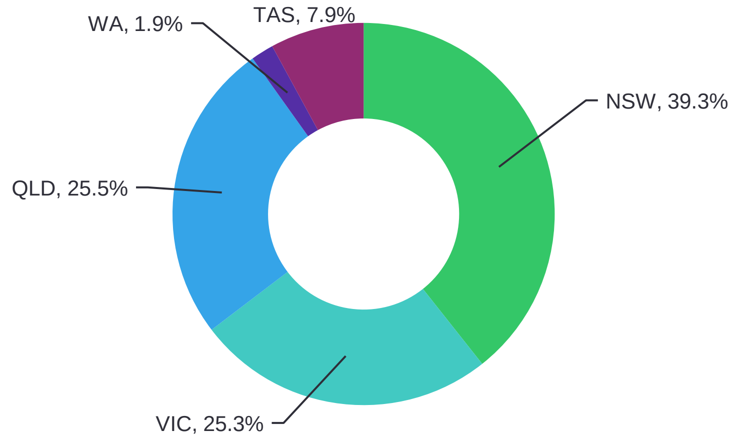
6 Regional Data Providers

Analysis by State - 2022

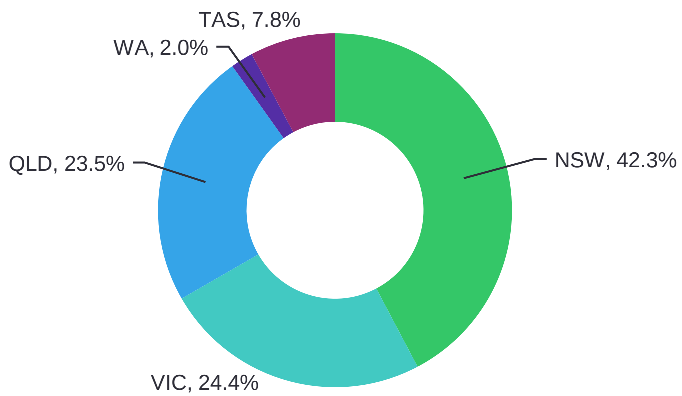
	Revenue	Attendance			
Category	Total Ticket Revenue	Paid	Zero-Priced	Comps	Total
NSW	18,002,555	330,538	340	23,834	354,712
VIC	11,575,192	194,700	817	9,379	204,896
QLD	11,664,587	185,737	3,168	7,975	196,880
WA	882,169	14,543	-	2,639	17,182
TAS	3,632,284	61,483	49	3,969	65,501
Total	**45,756,787**	**787,001**	**4,374**	**47,796**	**839,171**

- In 2022, NSW accounted for the highest market share in both revenue (39.3%) and attendance (42.3%) in Australia. NSW reported $18.0m in revenue and 0.4m in attendance. 93.2% of the total tickets issued were paid tickets and the remaining were complimentary and zero priced tickets. Top events were *The Wharf Revue* and *Friends! The Musical Parody*.
- QLD recorded the second highest market share in revenue (25.5%) and the third highest market share in attendance (23.5%). QLD reported $11.7m in revenue and 0.2m in attendance in 2022. Out of the total tickets issued, 94.3% were paid tickets and the rest were complimentary and zero-priced tickets. Top events included *Come From Away* and *Shen Yun.*
- VIC recorded the third highest market share in revenue (25.3%) and second highest market share in attendance (24.4%) in Australia. VIC reported $11.6m in revenue and 0.2m in attendance. Out of the total tickets issued, 95.0% were paid tickets and the remaining were complimentary and zero-priced tickets. Top events were *David Strassman in The Chocolate Diet* and Sooshi Mango.
- TAS represented 7.9% of the market share in revenue and 7.8% of the market share in attendance. TAS reported $3.6m in revenue and 65.5k in attendance in 2022. Out of the total tickets issued, 61.5k were paid tickets and the rest were zero priced and complimentary tickets. Top events included *Swan Lake* and Lano and Woodley.
- WA represented 1.9% of the market share in revenue and 2.0% of the market share in attendance. WA reported $0.9m in revenue and 17.2k in attendance in 2022. Out of the total tickets issued, 14.5k were paid tickets and the rest were zero priced and complimentary tickets.

Market Share (Revenue) by State/Territory 2022



Market Share (Attendance) by State/Territory 2022

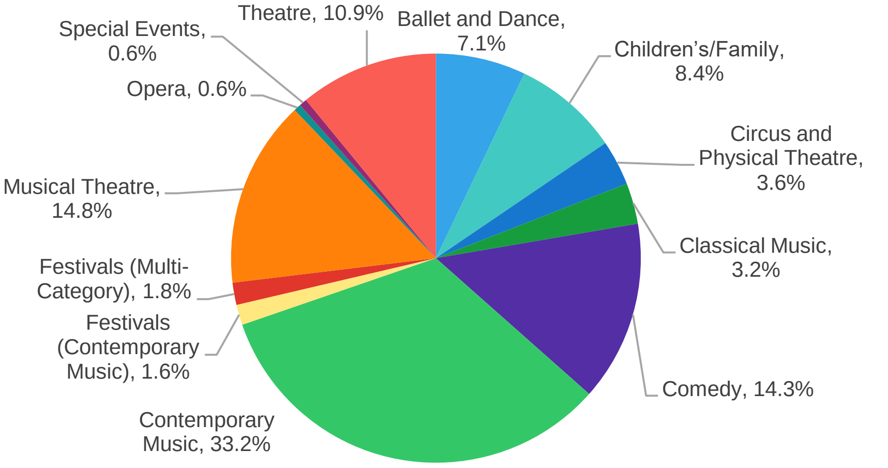


Analysis by Category - 2022

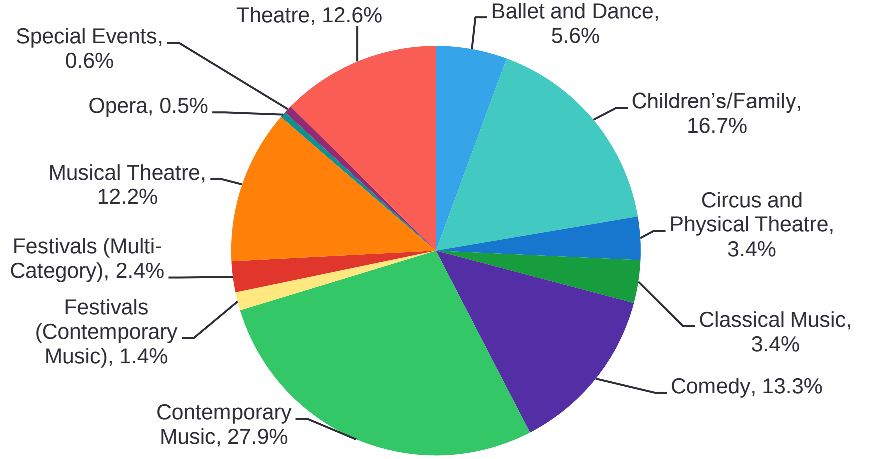
	Revenue	Attendance			
Category	**Total Ticket Revenue**	**Paid**	**Zero-Priced**	**Comps**	**Total**
Ballet and Dance	3,248,520	44,592	304	2,193	47,089
Children's/Family	3,841,190	132,668	547	7,089	140,304
Circus and Physical Theatre	1,633,884	26,284	672	1,621	28,577
Classical Music	1,481,213	26,112	116	2,148	28,376
Comedy	6,520,841	108,466	240	2,784	111,490
Contemporary Music	15,175,860	223,181	1,491	9,368	234,040
Festivals (Contemporary Music)	735,065	10,644	64	1,412	12,120
Festivals (Multi-Category)	803,733	16,486	99	3,837	20,422
Musical Theatre	6,777,025	95,801	353	5,906	102,060
Opera	259,165	3,609	73	340	4,022
Special Events	274,464	4,950	116	143	5,209
Theatre	5,005,825	94,208	299	10,955	105,462
Total	**45,756,787**	**787,001**	**4,374**	**47,796**	**839,171**

- Contemporary Music represented the highest market share in revenue (33.2%) and in attendance (27.9%). This category reported $15.2m in revenue and 0.2m in attendance. Major events included performances by L.A.B, Crowded House and Jack Johnson.
- Musical Theatre represented the second highest market share in revenue (14.8%) and fifth highest market share in attendance (12.2%). This category reported $6.8m in revenue and 0.1m in attendance. Top events included *Come From Away* and *Friends! The Musical Parody.*
- Comedy represented the third highest market share in revenue (14.3%) and in attendance (13.3%). This category reported $6.5m in revenue and 0.1m in attendance. Top events included *GC Laughs* and *David Strassman in The Chocolate Diet.*
- Opera, Special Events and Festivals (Contemporary Music) categories contributed the least to revenue and attendance.

Market Share (Revenue) by Category 2022



Market Share (Attendance) by Category 2022



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Appendices

Appendix A - Data Providers

The following companies were identified by LPA and provided both revenue and attendance data to EY for the 2022 calendar year.

Total revenue comprised of revenue sourced from paid tickets only (i.e. it excludes sponsorships), while the attendance data provided and applied in the analysis included both paid and non-paid tickets. Average ticket price data was calculated based on paid tickets only. For NPAP companies, the revenue included both single ticket sales as well as subscription revenue.

Regular Providers

- Adelaide Festival Centre
- Adelaide Fringe festival
- Araluen Arts Centre
- Arts and Culture Trust (formerly Perth Theatre Trust)
- Arts Centre Melbourne
- NPAP Companies (refer below table)
- Australian Digital Concert Hall
- Brisbane Powerhouse
- Blue Room Theatre
- Canberra Theatre Centre
- Darwin Entertainment Centre / Ntix
- Fringe World Festival
- Hayes Theatre Co
- Melbourne Fringe Festival
- Melbourne International Arts Festival (Rising Festival)
- Melbourne International Comedy Festival
- Melbourne Recital Centre
- MONA (MONA FOMA Festival and Dark Mofo)
- Oztix
- Perth Concert Hall (WA Venues and Events)
- Perth Festival
- Queensland Performing Arts Centre
- Sydney Opera House
- Sydney Fringe Festival
- The Ticket Group (Moshtix)
- Ticketek Pty Ltd
- Ticketmaster Pty Ltd
- WOMADelaide

Regional Providers

- Albury Entertainment Centre
- Bathurst Memorial Entertainment Centre
- Bunbury Regional Entertainment Centre
- Capital Venues and Events (Bendigo)
- Dubbo Regional Theatre and Convention Centre
- Frankston Arts Centre
- Geelong Arts Centre
- Gippsland Performing Arts Centre
- Glen Street Theatre
- Home of the Arts (HOTA)
- Ipswich Civic Centre
- Karralyka Centre
- Mackay Entertainment & Convention Centre
- Merrigong Theatre
- Mildura Arts Centre
- Riverside Theatre
- Rockhampton Regional Council – Pilbeam theatre
- Seymour Theatre
- Tamworth Regional Council
- The Events Centre, Caloundra
- Theatre North
- Theatre Royal

NPAP Companies

- Adelaide Symphony Orchestra
- Australian Brandenburg Orchestra
- Australian Chamber Orchestra
- Back to Back Theatre
- Bangarra Dance Theatre
- Bell Shakespeare
- Belvoir
- Black Swan State Theatre Company
- Circa Contemporary Circus
- Dancenorth Australia
- Griffin Theatre Company
- Malthouse Theatre
- Marrugeku
- Melbourne Symphony Orchestra
- Melbourne Theatre Company
- Musica Viva Australia
- 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
- Terrapin
- The Australian Ballet and Orchestra
- Victorian Opera
- West Australian Ballet Company
- West Australian Opera
- West Australian Symphony Orchestra
- Windmill Theatre Company

Appendix B - Event Category Description

Type of Events

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 that 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 another category will be allocated to their respective category (e.g. comedy, theatre and dance)
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 by LPA
^This category was renamed in 2011, having been renamed "non-Classical Music" in prior years

Appendix C - Abbreviations & Definitions

Key Abbreviations

Abbreviation	Definition
$	Australian Dollar
%	Percentage
b	Billion
c.	Circa
EY	Ernst & Young
i.e.	That is
k	Thousand
LPA	Live Performance Australia
m	million
NPAP	National Performing Arts Partnership
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
CAGR	Compound Annual Growth Rate

Note: Growth / Decline, where not mentioned specifically, was calculated on a y-o-y basis.

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