Live Performance Industry in Australia

2013 Ticket Attendance and Revenue Survey
Live Performance Australia

29 July 2014

Building a better
working world

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29 July 2014

Private and confidential

Dear Evelyn

Live Performance Industry in Australia: Ticket attendance and revenue survey

Further to the agreement between Ernst & Young (EY) and Live Performance Australia, we are pleased to present you with the final report for the 2013 Ticket Attendance and Revenue Survey Report (the "report"). We understand that the information contained within the report is to be used by Live Performance Australia as part of its own annual publication.

Restrictions on the report use

The report may be relied upon by Live Performance Australia for the purpose of publishing the Ticket Attendance and Revenue Survey Report only. It should not be relied upon for any other purpose.

EY disclaims all liability to any party for all costs, loss, damage and liability that the third party may suffer or incur arising from or relating to or in any way connected with the provision of the deliverables to the third party without our prior written consent. Any commercial decisions taken by Live Performance Australia are not within the scope of our duty of care and in making such decisions you should take into account the limitations of the scope of our work and other factors, commercial and otherwise, of which you should be aware of from the sources other than our work. Please refer to Section 5 of this report for terms of use and reliance on our report by third parties.

Basis of our work

Our work in connection with this Survey is of a different nature to that of an audit. We have relied on ticketing data that was individually supplied to us from the various ticketing companies, venues, event promoters and the Australia Council on behalf of the Australian Major Performing Arts Group (AMPAG). We have not independently verified, or accept any responsibility or liability for independently verifying, any such information nor do we make any representation as to the accuracy or completeness of the information. We accept no liability for any loss or damage, which may result from your reliance on any research, analyses or information so supplied.

If you would like to clarify any aspect of this study or discuss other related matters then please do not hesitate to contact me on (03) 9655 2551 or Matt Colston on (03) 9288 8628.

Yours sincerely

Dr David A Cochrane
Partner

Matt Colston
Director

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Key findings

Background

This report presents the findings of ticket attendances and revenues for the Live Performance Industry for the 2013 calendar year. This follows on from the previous annual ticketing studies published by LPA since 2004, and by LPA in partnership with Ernst & Young (EY) since 2006. The Live Performance Industry encompasses performances, productions, previews or concerts that are performed in front of a live audience. Our analysis in this report groups events into 12 distinct categories based on the type of art form.

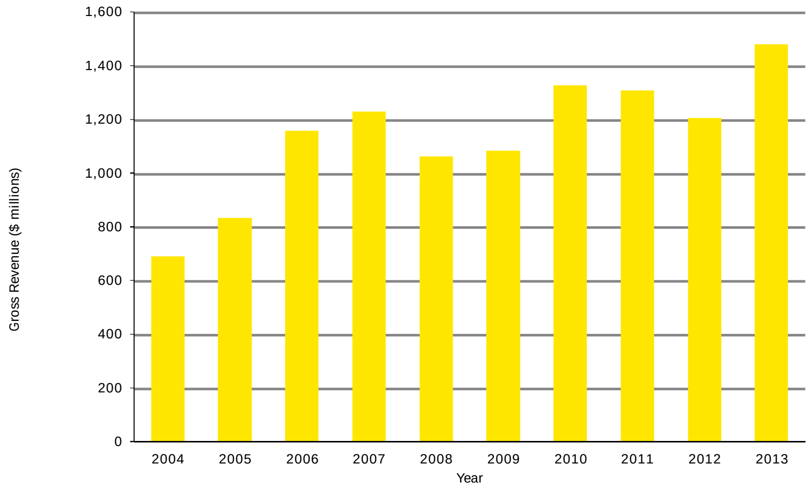
Overall results

There were significant gains made in 2013, in what was overall a strong year for the Live Performance Industry. Approximately 17.93 million tickets were issued to live entertainment events in Australia in 2013. This represents an increase of 10.2% on 2012 where 16.27 million tickets were issued to events. Ticket sales in 2013 generated total revenue of $1.479 billion, up 22.7% on 2012, when ticket sales totalled $1.205 billion. This increase in revenue is a result of an increase in both the total number of paid tickets and the average ticket price.

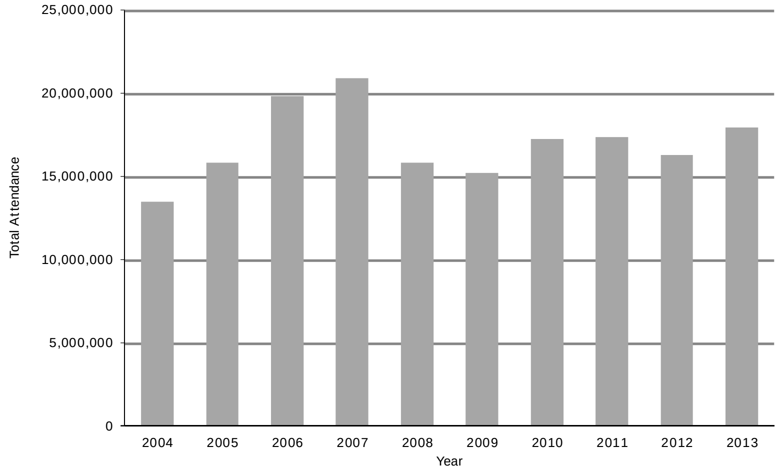
These gains were largely driven by significantly higher revenue and patronage in the Contemporary Music and Circus and Physical Theatre categories. The Theatre, Festival (Multi-Category) and Special Events categories also performed well, with gains to both revenues and attendances while, the Musical Theatre, Comedy, Opera and Children's/Family categories experienced declines in both revenue and attendance. A summary of the results by category are provided in Table ES1 over the page.

An analysis of longer term trends in the table below provides an indication of how the Industry has performed in recent times. However, given the limitations outlined in Section 1.3, our trend analysis has only been performed on data from 2008 to 2012. The compound annual growth rates (CAGRs) for revenue and average ticket price between 2008 and 2012 were 6.9% and 3.8% respectively while the CAGR for attendance for the same period was 2.5%. In particular, average ticket price changes since 2008 have slightly outpaced the consumer price index (CPI) of 2 to 3%.

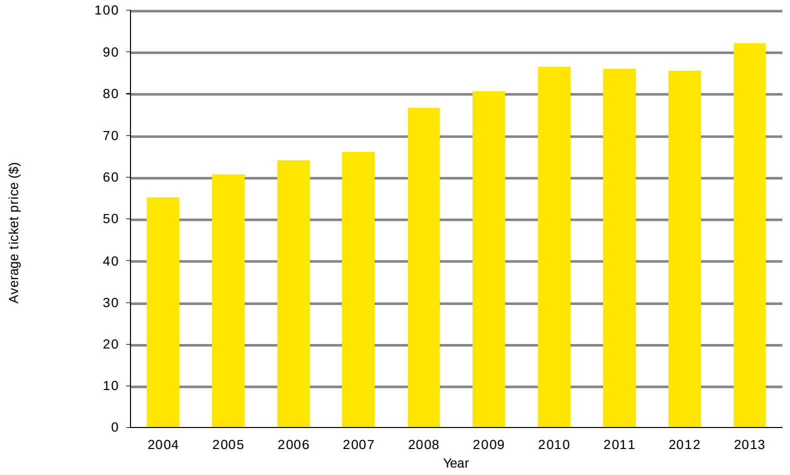
Total Revenue (2004-2013)



Total Attendances (2004-2013)



Average Ticket Price (2004-2013)



Result by State

Between 2012 and 2013, New South Wales and Victoria experienced gains in terms of revenue and attendance. The two states had combined revenue of $970.98 million, or approximately two-thirds of the entire Australian Live Performance Industry. Despite the overall gains in New South Wales, the State experienced declines in terms of industry share, as growth in other states outpaced that in New South Wales. Revenue in Victoria increased more strongly (by 37.5%) and that state increased its share of the industry. Revenue growth in Victoria was largely driven by growth in the Circus and Physical Theatre, Contemporary Music and Musical Theatre categories. On the other hand, the Australian Capital Territory experienced a fall in revenue despite higher attendances. Most other states and territories had a stronger year, with gains to revenues and attendances. In particular, Western Australia experienced significant revenue growth (44.9%) with gains in all event categories other than Theatre, and particularly strong growth in Circus and Physical Theatre. South Australia also performed well, although this was in part due to the inclusion of Adelaide Fringe for the first time in 2013 which attracted high attendance.

Table ES1: Total Revenue and Attendances by State/Territory (2012-2013)

State/Territory	Revenue	Change in Revenue from 2012	Share of Industry (2013)	Share of Industry (2012)	Tickets	Change in Attendance from 2012	Share of Industry (2013)	Share of Industry (2012)
New South Wales	$497,463,659	11.5%	33.6%	37.0%	5,865,914	1.2%	32.7%	35.6%
Victoria	$473,516,913	37.5%	32.0%	28.6%	5,607,475	14.1%	31.3%	30.2%
Queensland	$200,178,524	8.9%	13.5%	15.3%	2,318,207	0.7%	12.9%	14.1%
Western Australia	$194,312,089	44.9%	13.1%	11.1%	2,153,483	20.2%	12.0%	11.0%
South Australia	$93,864,893	27.6%	6.3%	6.1%	1,497,204	42.1%	8.4%	6.5%
ACT	$15,104,224	-12.7%	1.0%	1.4%	351,242	29.4%	2.0%	1.7%
Tasmania	$2,402,818	-43.1%	0.2%	0.4%	75,115	-23.3%	0.4%	0.6%
Northern Territory	$2,133,774	44.9%	0.1%	0.1%	57,986	32.8%	0.3%	0.3%
Total	$1,478,976,893	22.7%	100.0%	100.0%	17,926,626	10.2%	100.0%	100.0%

A comparison of each state and territory's share of the Live Performance Industry against their population provides insight into spend per capita as well as the concentration of the industry relative to where people live. Table ES2 illustrates that Victoria and Western Australia command a larger share of both Live Performance revenue and attendance compared to their share of Australia's population. Although New South Wales' share of the industry declined in 2013, it still remained slightly above its share of the population. Across the other States and Territories, all had a smaller share of industry revenue compared to their population, although South Australia and the Australian Capital Territory had a larger share of attendance.

Table ES2: Population and per capita results (2013)

State/Territory	Population (2013) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	7.47	32.0%	33.6%	32.7%	$66.64
Victoria	5.79	24.8%	32.0%	31.3%	$81.77
Queensland	4.69	20.1%	13.5%	12.9%	$42.67
Western Australia	2.55	10.9%	13.1%	12.0%	$76.17
South Australia	1.68	7.2%	6.3%	8.4%	$55.96
Australian Capital Territory	0.38	1.6%	1.0%	2.0%	$39.32
Tasmania	0.51	2.2%	0.2%	0.4%	$4.68
Northern Territory	0.24	1.0%	0.1%	0.3%	$8.80
Total	23.32	100.0%	100.0%	100.0%	$63.42

*Note: *Population is as of December 2013 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0*

Result by event category

As with previous years, the Contemporary Music and Musical Theatre categories represent the two largest categories in the industry, generating 42.5% and 13.1% of revenue, respectively. Combined, these two categories account for 55.6% of the Live Performance Industry in terms of gross revenue and 46.6% of total attendance. The top 3 revenue categories combined, which also includes Circus and Physical Theatre, accounts for 65% of all industry revenue.

The most significant gains were experienced by the Festivals (Multi-Category) and Circus and Physical Theatre categories. The significant increases for Festivals (Multi-Category) can be largely explained by the first time inclusion of data for Adelaide Fringe and Perth's *Fringe World* festivals. The increases in the Circus and Physical Theatre category were primarily due to the number and calibre of touring performances, including two Cirque Du Soleil productions (*Ovo* and *Michael Jackson: The Immortal*), *Slava's Snowshow* and *Empire*. On the other hand, the Children's/Family category experienced some of the larger declines in both revenue and attendances. Although a number of children's favourites returned in 2013, the *How to Train Your Dragon Arena Spectacular* which toured in 2012 was not staged in 2013, impacting revenue and attendance in the category. In 2013 there were fewer Opera performances by the AMPAG companies, which helps to explain the decrease in revenue and attendances for the category. Notably, Opera Australia did not return to Brisbane in 2013, after performing there for the first time in 24 years in 2012. Additionally, Opera Queensland had few performances in 2013, further contributing to the large decline in that state. Opera Australia is also increasingly staging musicals as part of its regular season, and the revenue and attendance for these performances is reflected in the Musical Theatre category.

Table ES3: Top 5 Categories - Revenue and Attendance

	Revenue			Attendance		
	Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
1	Contemporary Music	$628,130,146	42.5%	Contemporary Music	6,266,137	35.0%
2	Musical Theatre	$193,389,763	13.1%	Musical Theatre	2,085,131	11.6%
3	Circus and Physical Theatre	$142,033,217	9.6%	Theatre	1,842,177	10.3%
4	Theatre	$119,647,414	8.1%	Circus and Physical Theatre	1,285,991	7.2%
5	Festivals (Single-Category)	$107,367,780	7.3%	Classical Music	1,169,643	6.5%

Table ES4: Top 3 Biggest Changes in Revenue by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2012	Category	Decrease from 2012
1	Circus and Physical Theatre	162.8%	Children's/Family	25.0%
2	Festivals (Multi-Category)	98.4%	Comedy	14.8%
3	Theatre	44.2%	Opera	9.5%

Table ES5: Top 3 Biggest Changes in Attendance by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2012	Category	Decrease from 2012
1	Festivals (Multi-Category)	201.8%	Opera	20.0%
2	Circus and Physical Theatre	131.5%	Children's/Family	16.1%
3	Special Events	24.2%	Festivals (Single-Category)	9.9%

Table ES6: Total revenue and attendances by category (2013)

Category	Revenue	% change in revenue (from 2012)	Share of industry	Tickets	% change in attendance (from 2012)	Share of industry
Ballet and Dance	$62,832,992	8.6%	4.2%	976,336	6.1%	5.4%
Children's/Family	$38,684,410	-25.0%	2.6%	1,090,598	-16.1%	6.1%
Circus and Physical Theatre	$142,033,217	162.8%	9.6%	1,285,991	131.5%	7.2%
Classical Music	$70,481,841	15.8%	4.8%	1,169,643	-6.8%	6.5%
Comedy	$41,473,321	-14.8%	2.8%	912,609	-7.0%	5.1%
Contemporary Music	$628,130,146	30.3%	42.5%	6,266,137	14.3%	35.0%
Festivals (Multi-Category)	$25,622,029	98.4%	1.7%	786,530	201.8%	4.4%
Festivals (Single-Category)	$107,367,780	9.2%	7.3%	1,053,419	-9.9%	5.9%
Musical Theatre	$193,389,763	-4.9%	13.1%	2,085,131	-6.2%	11.6%
Opera	$43,283,705	-9.5%	2.9%	344,761	-20.0%	1.9%
Special Events	$6,030,274	41.9%	0.4%	113,294	24.2%	0.6%
Theatre	$119,647,414	44.2%	8.1%	1,842,177	15.0%	10.3%
Total	$1,478,976,893	22.7%	100.0%	17,926,626	10.2%	100.0%

1. Introduction

1.1 Scope of work

Ernst & Young (EY) has been engaged by Live Performance Australia (LPA) to undertake a survey of ticket attendances and revenues for the Live Performance Industry for the 2013 calendar year. The Live Performance Industry encompasses performances, productions, previews or concerts that are performed in front of a live audience. The scope of our work included:

- Coordinating the collection of the ticket sales and revenue data ("national survey data") for the Live Performance Industry in Australia from participating ticketing companies, venues, entertainment companies, event promoters and the Australia Council for the Arts

- Compiling the 2013 national survey data on an overall basis, by state and by event category

- Performing an analysis of the 2013 national survey data on an overall basis (and in comparison to previous years), by state and by event category.

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

1.2 Approach

For this Survey, EY compiled data from ticketing companies, self-ticketing venues, event promoters and the Australia Council for the Arts (collectively referred to in this study as the "Survey participants"). The ticketing companies, self-ticketing venues and event promoters that provided data as part of this study were as follows:

- Araluen Centre for Arts & Entertainment NT
- The Arts Centre (Melbourne)
- Arts Projects Australia (WOMADelaide) SA
- BASS SA
- Bluesfest
- Canberra Ticketing
- Cirque du Soleil
- Darwin Entertainment Centre
- FringeTIX (Adelaide Fringe)
- Fringe World Festival (Perth)
- Melbourne Recital Centre
- The Ticket Group (previously Moshtix and Foxtix)
- Queensland Performing Arts Centre (Qtix)
- Sydney Opera House
- Ticketmaster
- Ticketek.

These companies were identified by LPA and provided both gross revenue and attendance data to EY for the 2013 calendar year. Gross revenue comprised revenue sourced from paid tickets only (i.e. it excludes sponsorships); while the attendance data provided and applied in the analysis included both paid and non-paid tickets[1]. Average ticket price data was calculated based on paid tickets only.

As for the Australia Council, the data was limited to the Australian Major Performing Arts Group (AMPAG) companies. These were:

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

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

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

Ticketing data was assigned by the ticketing companies, self-ticketing venues and the Australia Council to event categories based on the guidelines established between LPA and these organisations. Table 1 presents a description of these event categories. Further, as part of these guidelines, the ticketing companies and venues are requested to exclude from their data all events produced or presented by the AMPAG Companies. This is to avoid double counting of revenue and attendance data.

Table 1: Category descriptor guide (2013)

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)

Category	Description
Contemporary Music^	All forms of the following, performed by any type of ensemble or soloist (including any ensemble/chorus/solo musicians advertising a program which is exclusively one of the following categories, e.g. 'pop' or 'jazz,' as in The Australian Jazz Orchestra): Pop, Jazz, Blues, Country, Rock, Folk, Soul, R&B, Techno, Hip hop, Rap, Heavy Metal, and Electronic Dance Music
Festivals (Multi-Category)	Festivals/events which contain a number of different types of events which fall into two or more categories
Festivals (Single-Category)	Festivals/events which contain a number of events but which fall into one category only
Musical Theatre	Staged productions which include music/drama/movement in popular form, primarily (but not limited to): Musicals 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

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

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

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

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

1.3 Limitations

As with previous studies, data on ticket revenues and attendances for the Live Performance Industry was limited to that provided by the Survey participants. While national in reach, the coverage of this Survey excludes events in some regional venues, free performances, and also schools' performances of the AMPAG companies. Small to medium companies and independent theatre are also under-represented as many of these companies either self-ticket or use ticketing service providers and venues not currently involved in the Survey. To capture these types of live performance events LPA and EY are producing a supplementary ticket attendance and revenue report for 2013 that will include data from the following organisations:

- Australia Council for the Arts – Key Organisations (small to medium companies)
- The Australian Performing Arts Centre Association (APACA) - regional and metropolitan venue members.

Moreover, attendances at festivals are under-reported in this Survey. First, some festivals maintain their own ticketing systems and many of these are not part of this Survey. The inclusion of ticketing data from Bluesfest, Adelaide Fringe and *Fringe World* for the first time this year addresses some under reporting in the festival categories. However, Tasmanian contributions to revenue and attendance are likely to be undervalued because growing festival events like MONA FOMA and Dark MOFO are self-ticketed and are not presently contributing data to the Survey. Second, for numerous festivals the Survey only reports paid tickets and does not include the substantial unpaid and/or unticketed components. The Contemporary Music category is subject to similar limitations; as pub and club venues that self-ticket, or use ticketing companies who are not part of the Survey are not included in the results. However, data from The Ticket Group helps to decrease the level of under-reporting, as this ticketing agency includes smaller performances at certain bars and hotels. Still, this Survey provides a conservative estimate of the total ticket revenues and attendances sourced from live performance events in Australia.

As part of our analysis, the 2013 data was compared against historical data sourced directly from Live Performance Australia's *Live Entertainment Industry in Australia 2006 - 2011 Reports*. EY note that we did not revisit the data collection and allocation methodology used in 2006 and 2007 as the historical data used to prepare the reports in these years was not provided in a disaggregated format. As such, EY was unable to query the accuracy of the allocation of events in these years.

Therefore caution should be applied when comparing data from 2008 to 2013 with data from previous years as inconsistencies may exist in the data collection methodology between the surveys performed in these five years, and for previous surveys (where more detailed event specific information was not requested).

1.4 Changes in the 2013 Ticketing Survey compared to prior years

We have made the following changes to the Ticketing Survey in 2013:

- The inclusion of data from FringeTIX, which provides ticketing services to the Adelaide Fringe Festival. For this Survey, FringeTIX provided data on the 2013 Adelaide Fringe, in the category of Festivals (Multi-Category).
- The inclusion of data from Fringe World 2013. This Perth based Fringe Festival provided data in the category of Festivals (Multi-Category).
- The inclusion of data from Bluesfest. Bluesfest provided ticketing information for the Bluesfest Festival in the category of Festivals (Single-Category) and Boomerang Festival in category of Festivals (Multi-Category), as well as touring shows in the category of Contemporary Music.
- All venues previously ticketed by BOCS Ticketing WA for the Perth Theatre Trust are now ticketed by Ticketek. The Perth Theatre Trust venues are His Majesty's Theatre, Perth Concert

Hall, Subiaco Arts Centre, State Theatre Centre of Western Australia and Albany Entertainment Centre.

- SeatAdvisor Box Office (SABO), which was first included in 2012, did not provide data in 2013. In 2012, data provided by SABO related to comedy performances, mainly from the Sydney Comedy Festival, Comedy Store and Factory Theatre in Sydney. Much of this data was captured through the Ticketek data in 2013.

On a like for like basis excluding the impact of the above mentioned additions, the total number of tickets issued in 2013 was 17.27 million, which generated total revenue of $1.448 billion.

When comparing 2013 data with that from previous years, the following should be noted in addition to the above changes:

- The Non-Classical Music category was renamed to ‘Contemporary Music’ in 2011. However, the scope of performances in this category remains the same as prior years.

- The Melbourne Recital Centre and Foxtix (together with Moshtix) were new data providers in 2011. Melbourne Recital Centre provides ticketing services primarily in the categories of Classical Music and Opera while Foxtix operate primarily in the categories of Festivals (Single-Category) and Contemporary Music.

- In 2009, the ‘Comedy’ and ‘Circus and Physical Theatre’ categories were introduced. As defined in Section 1.2 under our Approach, the Comedy category includes all comedy events such as stand up but does not include comedy plays, while the Circus and Physical Theatre includes Circus, Physical Theatre and Burlesque events. The introduction of these categories does not represent an extension of the scope of the Ticketing Survey, rather events which fall within these new categories would have been included in other categories in prior years.

- The inclusion of data from Arts Projects Australia. Arts Projects Australia from 2009 onwards provided ticketing data for WOMADelaide, a multi-category festival in Adelaide previously not covered by this Survey. Also in 2009, data from The Arts Centre (Melbourne) was included for the first time, having previously been outsourced to Ticketmaster (and therefore included in Ticketmaster’s data).

2. Ticket attendance and revenue results

2.1 Overview

There were significant gains made in 2013, in what was overall a strong year for the Live Performance Industry. The gain was largely driven by significantly higher revenue and patronage in the Contemporary Music and Circus and Physical Theatre categories, which together comprise over 50% of the industry in terms of revenue. The increases in these categories were primarily due to the number and calibre of touring performances. For Contemporary Music, the major tours in 2013 included Beyoncé, Bon Jovi, Bruce Springsteen, One Direction and Pink. In particular, Pink's tour was extended to 46 Australian shows. For Circus and Physical Theatre, major performances included two Cirque Du Soleil productions (*Ovo* and *Michael Jackson: The Immortal*), *Slava's Snowshow* and *Empire*.

The Theatre, Festival (Multi-Category) and Special Events categories also performed well, with gains to both revenues and attendances. Reasons for these gains varied across the categories. In the Theatre category, increases were due to commercial theatre tours and an overall strong year for the AMPAG companies. In contrast, the increase for Festivals (Multi-Category) was largely due to the first time inclusion of the Adelaide Fringe and *Fringe World* festivals in the 2013 Survey. The increase in the Special Events category can be explained by the variability in this category, as it is highly dependent on whether performances that cannot be classified into other categories take place.

On the other hand, the Children's/Family and Opera categories experienced some of the larger declines in both revenue and attendances. The decline in Opera revenues and attendances was in part due to fewer performances by the AMPAG companies. Notably, Opera Australia did not return to Brisbane in 2013, after performing there for the first time in 24 years in 2012. Additionally, Opera Queensland had few performances in 2013, further contributing to the large decline in that state. Opera Australia is also increasingly staging musicals as part of its regular season, and the revenue and attendance for these performances is reflected in the Musical Theatre category.

In the Children's/Family category, the *How to Train Your Dragon Arena Spectacular* which toured in 2012 was not staged in 2013, impacting revenue and attendance in the category. The Musical Theatre and Comedy categories also experienced declines in both revenue and attendance.

The overall gains in the Live Performance Industry in 2013 are consistent with a year of improved consumer confidence across Australia. Consumer confidence measures the level of economic optimism that consumers have and as such, is an indicator of their willingness to spend. Consumer confidence fluctuated throughout 2013, but was generally higher than in 2012[2].

2.2 Analysis of overall trends

In 2013, approximately 17.93 million tickets were issued to live entertainment events in Australia. This represents an increase of 10.2% on 2012 where 16.27 million tickets were issued to events. Of the 17.93 million total tickets, the number of paid tickets was 16.05 million, a rise from 14.10 million in 2012. The remaining 1.88 million issued in 2013 were complimentary, sponsor and zero-priced tickets[3], a decrease from 2.17 million in 2012.

Ticket sales in 2013 generated total revenue of $1.479 billion, up 22.7% on 2012, when ticket sales totalled $1.205 billion. This increase in revenue is a result of an increase in both the total number of paid tickets and the average ticket price.

[2] See for example Westpac Melbourne Institute Consumer Sentiment Index (http://www.westpac.com.au/docs/pdf/aw/economics-research/er20140611BullConsumerSentiment.pdf)
[3] It is industry practice to issue sponsor tickets at zero priced, but these are effectively paid tickets via the sponsorship agreements. In this analysis, the ticketing revenue excludes any sponsorship revenue.

An analysis of longer term trends provides an indication of how the Industry has performed in recent times. However, given the limitations outlined in Section 1.3, our trend analysis has only been performed on data from 2008 to 2012. The compound annual growth rates (CAGRs) for revenue and average ticket price between 2008 and 2012 were 6.9% and 3.8% respectively while the CAGR for attendance for the same period was 2.5%. In particular, average ticket price changes since 2008 have slightly outpaced the consumer price index (CPI) of 2-3%.

Table 2 below summarises the changes in revenue, tickets and ticket price between 2004 and 2013.

Table 2: Total Revenue, Attendance and Average Ticket Price (2004-2013)

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

**Based on both paid and unpaid tickets*

*** Average ticket prices are calculated based only on paid tickets.*

Figure 1: Total Revenue (2004-2013)

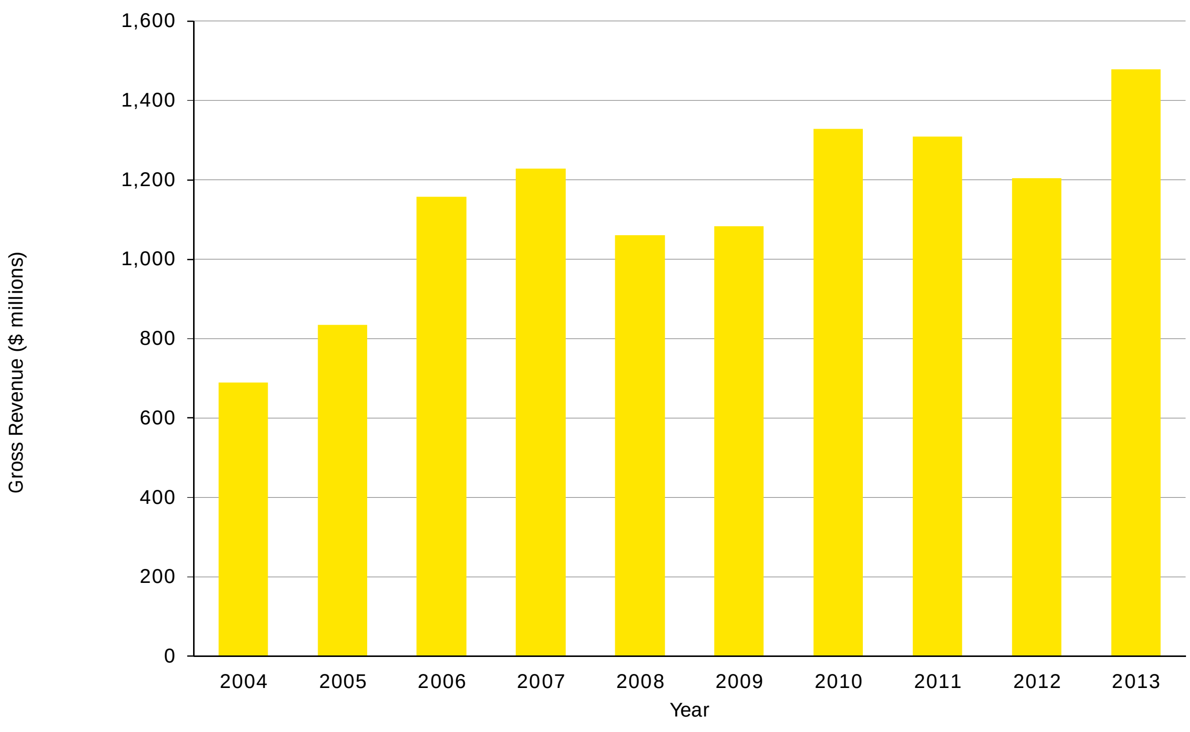


Figure 2: Total Attendances (2004-2013)

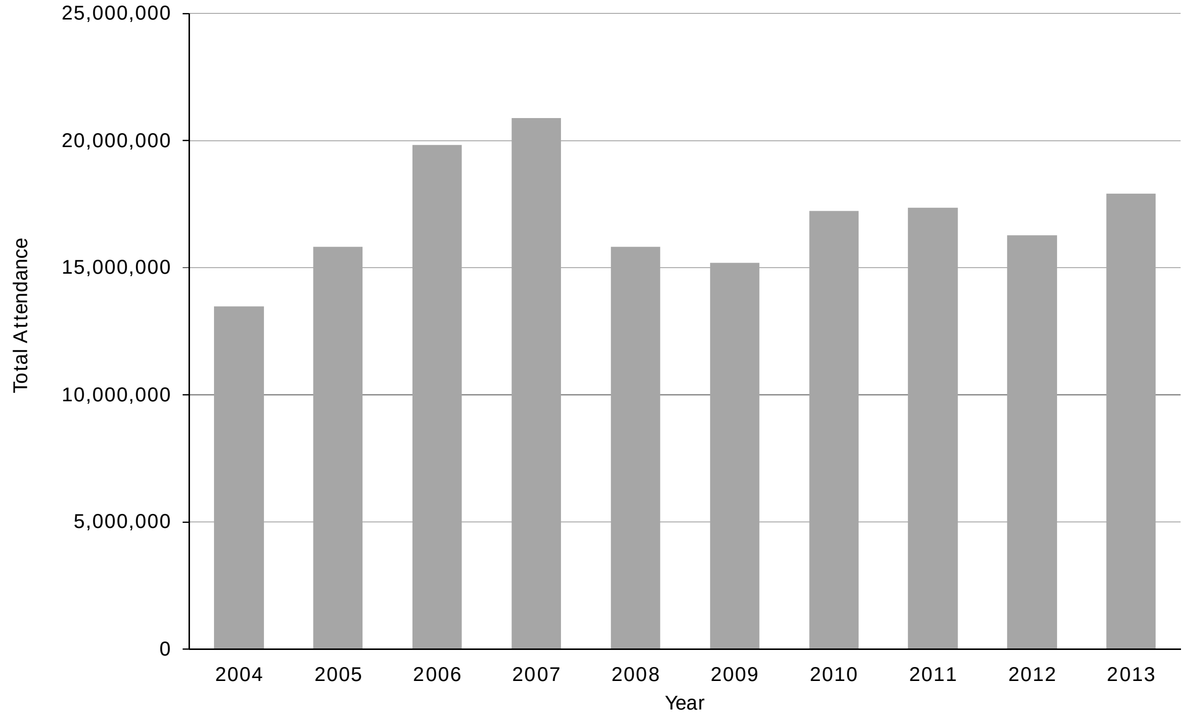
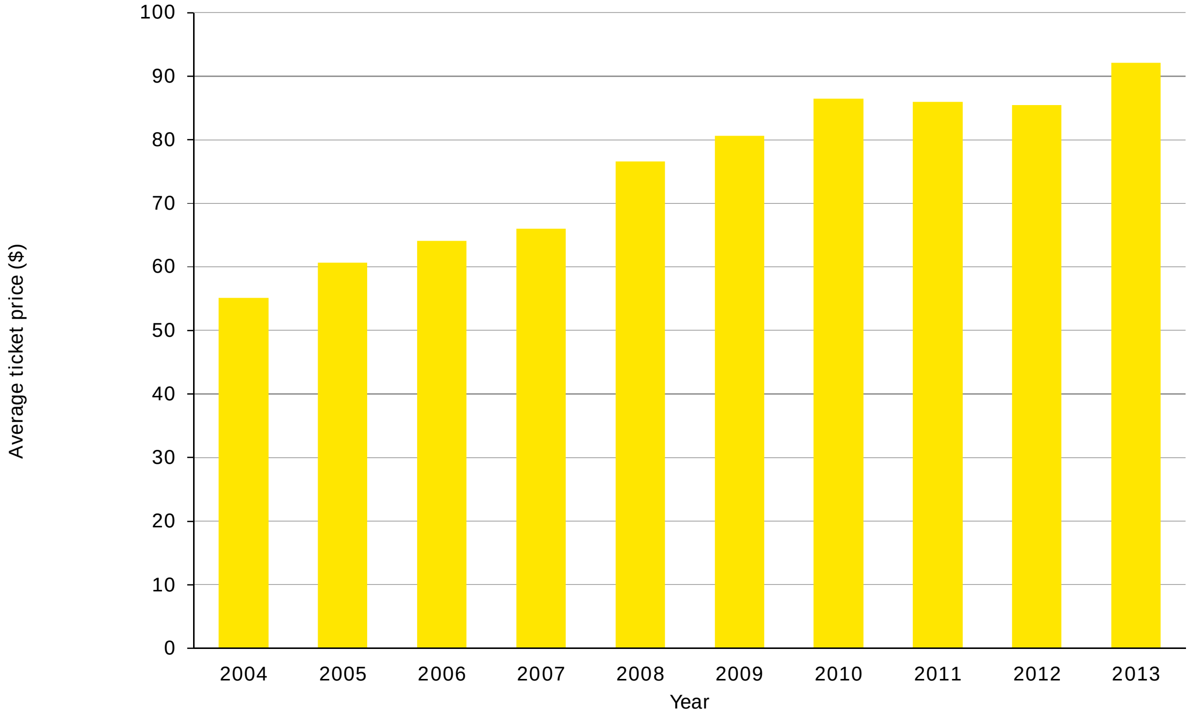


Figure 3: Average Ticket Price (2004-2013)



3. Revenue and attendance by state

3.1 Overall results

This section presents the revenues and attendances for all eight states and territories within Australia for 2013 as detailed in Table 3 below.

Between 2012 and 2013, New South Wales and Victoria experienced gains in terms of revenue and attendance. The two states had combined revenue of $970.98 million, or approximately two-thirds of the entire Australian Live Performance Industry. Despite the overall gains in New South Wales, the State experienced declines in terms of industry share, as growth in other states outpaced that in New South Wales. Revenue in Victoria increased more strongly (by 37.5%) and that State increased its share of industry. Revenue growth in Victoria was largely driven by growth in the Circus and Physical Theatre, Contemporary Music and Musical Theatre categories. On the other hand, the Australian Capital Territory experienced a fall in revenue despite higher attendances. Most other states and territories had a stronger year, with gains to revenues and attendances. In particular, Western Australia experienced significant revenue growth (44.9%) with gains in all event categories other than Theatre, and particularly strong growth in Circus and Physical Theatre. South Australia also performed well, although this was in part due to the inclusion of Adelaide Fringe for the first time in 2013.

Figure 6 and Figure 7 illustrate the year on year changes in revenue and attendance while Table 4 and Table 5 provide a breakdown of total revenue and attendance by Category and State/Territory.

Table 3: Total Revenue and Attendances by State/Territory (2012-2013)

State/Territory	Revenue	Share of Industry (2013)	Share of Industry (2012)	Change in Revenue from 2012	Tickets	Share of Industry (2013)	Share of Industry (2012)	Change in Attendance from 2012
New South Wales	$497,463,659	33.6%	37.0%	11.5%	5,865,914	32.7%	35.6%	1.2%
Victoria	$473,516,913	32.0%	28.6%	37.5%	5,607,475	31.3%	30.2%	14.1%
Queensland	$200,178,524	13.5%	15.3%	8.9%	2,318,207	12.9%	14.1%	0.7%
Western Australia	$194,312,089	13.1%	11.1%	44.9%	2,153,483	12.0%	11.0%	20.2%
South Australia	$93,864,893	6.3%	6.1%	27.6%	1,497,204	8.4%	6.5%	42.1%
Australian Capital Territory	$15,104,224	1.0%	1.4%	-12.7%	351,242	2.0%	1.7%	29.4%
Tasmania	$2,402,818	0.2%	0.4%	-43.1%	75,115	0.4%	0.6%	-23.3%
Northern Territory	$2,133,774	0.1%	0.1%	44.9%	57,986	0.3%	0.3%	32.8%
Total	$1,478,976,893	100.0%	100.0%	22.7%	17,926,626	100.0%	100.0%	10.2%

Figure 4: Market Share (Revenue) by State/Territory (2013)

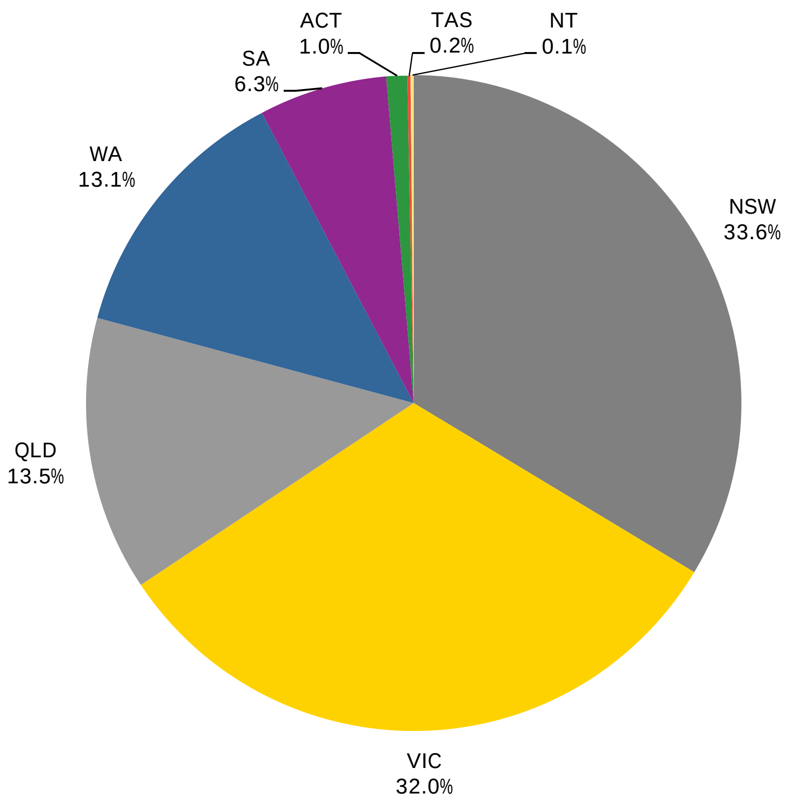


Figure 5: Market Share (Attendance) by State/Territory (2013)

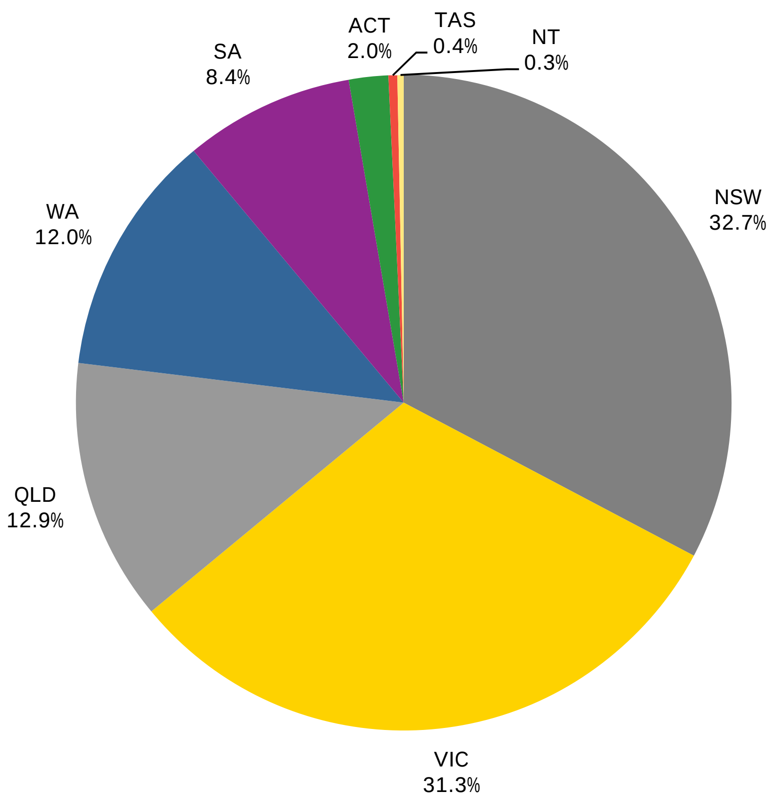


Figure 6: Percentage Movement in Revenue by State/Territory (2012-13)

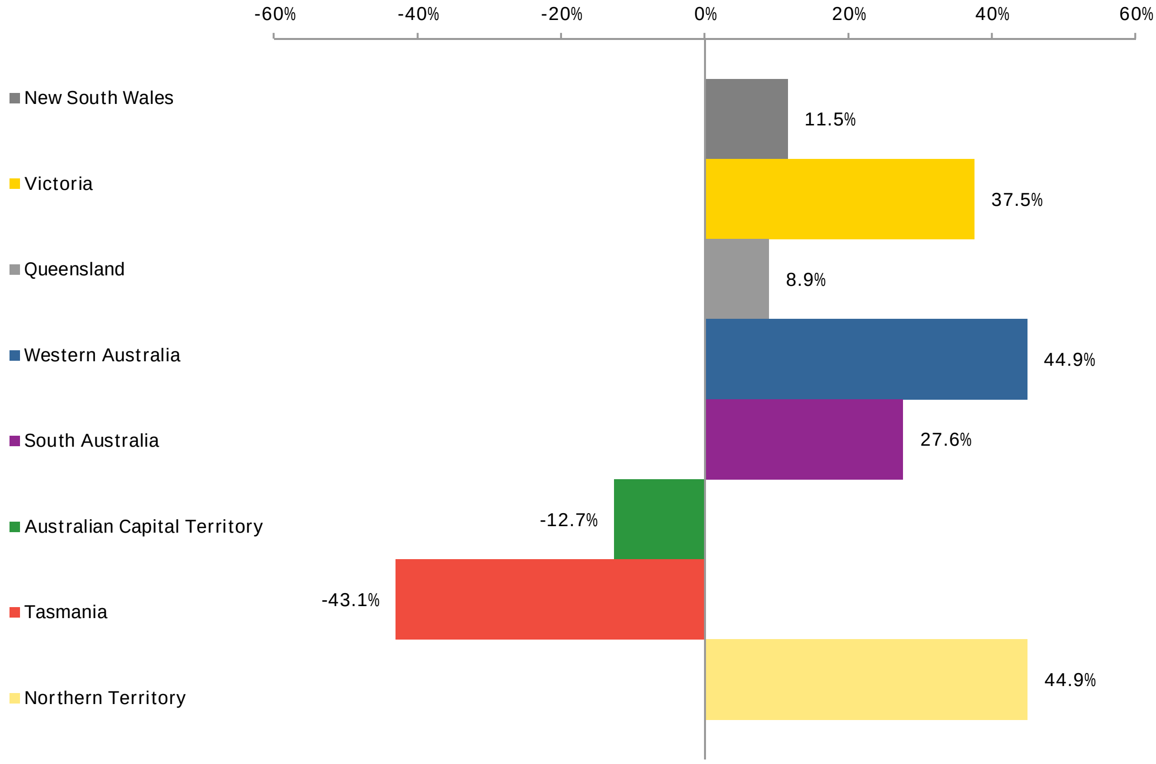


Figure 7: Percentage Movement in Attendance by State/Territory (2012-13)

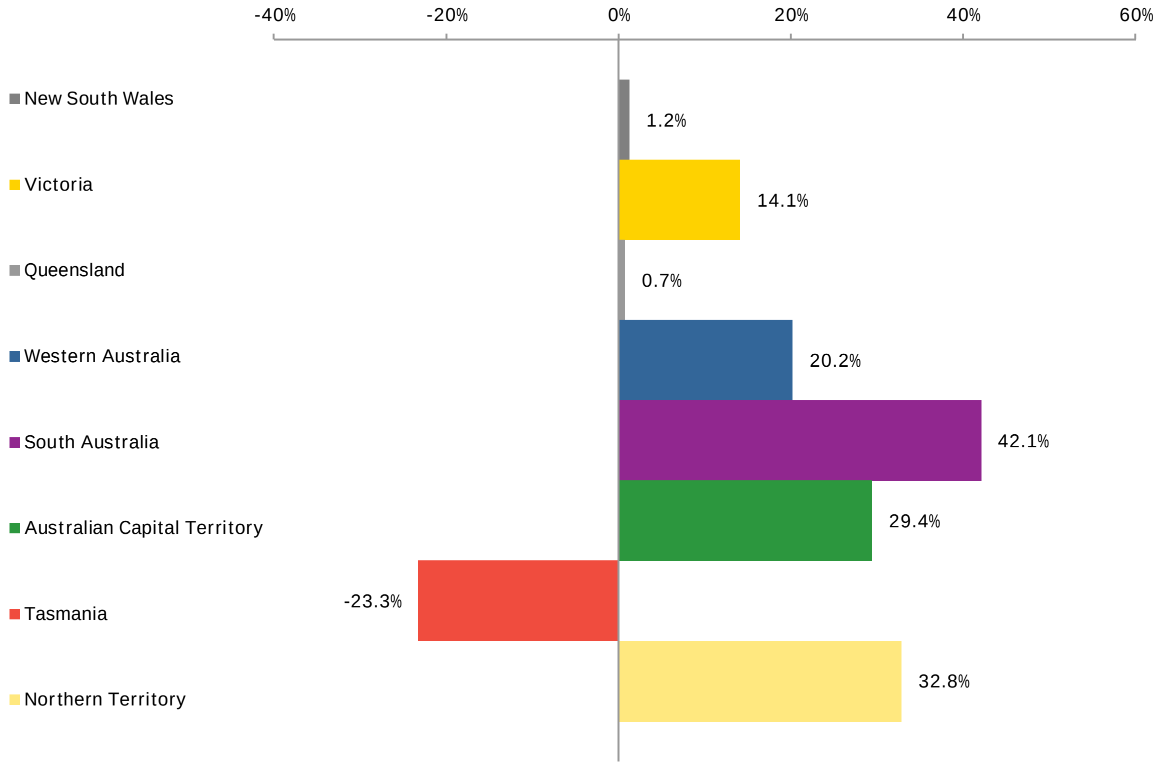


Table 4: Revenue by Category and State/Territory in 2013

	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$23,766,984	$15,512,671	$12,849,167	$6,591,712	$2,431,129	$1,285,815	$43,998	$351,515	$62,832,992
Children's/Family	$14,926,172	$11,274,847	$3,402,352	$5,351,217	$2,810,657	$689,365	$152,300	$77,501	$38,684,410
Circus and Physical Theatre	$22,042,158	$48,215,552	$16,769,270	$40,485,923	$12,619,243	$1,834,262	$0	$66,810	$142,033,217
Classical Music	$28,141,032	$19,690,169	$6,901,925	$8,612,569	$4,034,298	$1,798,826	$1,253,508	$49,515	$70,481,841
Comedy	$11,044,446	$18,777,732	$3,377,522	$5,764,505	$931,673	$1,092,092	*	$485,352	$41,473,321
Contemporary Music	$215,971,625	$210,818,386	$97,584,546	$63,155,966	$35,199,943	$4,019,373	$705,054	$675,254	$628,130,146
Festival (Multi-Category)	$1,633,267	$1,447,136	$1,495,630	$2,682,777	$17,467,335	$567,815	$0	$328,070	$25,622,029
Festival (Single-Category)	$55,241,777	$15,882,492	$8,538,325	$20,492,751	$5,165,428	$1,945,470	$101,538	$0	$107,367,780
Musical Theatre	$51,096,420	$71,506,742	$33,916,204	$29,850,394	$6,994,692	$0	$0	$25,310	$193,389,763
Opera	$26,510,867	$11,848,442	$1,368,433	$1,915,455	$1,601,321	**	$0	$39,187	$43,283,705
Special Events	$2,189,759	$1,108,776	$745,567	$1,249,478	$184,993	$551,701	***	***	$6,030,274
Theatre	$44,899,152	$47,433,968	$13,229,582	$8,159,342	$4,424,182	$1,438,420	$0	$62,769	$119,647,414
Total	$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

**Comedy in TAS has been combined with NT*

***Opera in ACT has been combined with NT*

****Special Events in TAS and NT have been combined with ACT*

Note: State totals in ACT, TAS and NT reflect revenue in that state/territory and do not sum across categories due to combining of data across states.

Table 5: Attendance by Category and State/Territory in 2013

	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	292,546	231,403	201,056	114,568	30,966	90,762	3,064	11,971	976,336
Children's/Family	417,584	306,139	96,646	137,296	91,666	26,383	10,726	4,158	1,090,598
Circus and Physical Theatre	206,103	427,222	180,558	323,094	124,238	23,083	-	1,693	1,285,991
Classical Music	411,465	381,342	119,603	120,372	61,778	32,789	41,479	815	1,169,643
Comedy	199,257	517,491	54,814	92,142	16,536	22,280	*	10,089	912,609
Contemporary Music	2,325,350	1,994,389	890,438	600,409	366,289	63,694	14,411	11,157	6,266,137
Festival (Multi-Category)	36,603	39,203	50,085	107,246	504,902	33,612	-	14,879	786,530
Festival (Single-Category)	433,553	193,097	95,253	182,980	126,114	21,198	1,224	-	1,053,419
Musical Theatre	562,112	765,115	396,950	284,607	75,698	-	-	649	2,085,131
Opera	193,272	82,572	19,402	27,705	20,545	**	-	1,265	344,761
Special Events	52,405	18,083	11,585	14,790	5,548	10,883	***	***	113,294
Theatre	735,664	651,419	201,817	148,274	72,924	29,944	-	2,135	1,842,177
Total	5,865,914	5,607,475	2,318,207	2,153,483	1,497,204	351,242	75,115	57,986	17,926,626

**Comedy in TAS has been combined with NT*

***Opera in ACT has been combined with NT*

****Special Events in TAS and NT have been combined with ACT*

Note: State totals in ACT, TAS and NT reflect attendance in that state/territory and do not sum across categories due to combining of data across states.

3.2 Per capita results

A comparison of each state and territory's share of the Live Performance Industry against their population provides insight into spend per capita as well as the concentration of the Industry relative to where people live. Table 6 illustrates that Victoria and Western Australia command a larger share of both Live Performance revenue and attendance compared to their share of Australia's population. Although New South Wales' share of the industry declined in 2013, it still remained slightly above its share of the population. Across the other States and Territories, all had a smaller share of industry revenue compared to their population, although South Australia and the Australian Capital Territory had a larger share of attendance.

There exist several possible explanations for these disproportional results:

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

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

Table 6: Population and per capita results (2013)

State/Territory	Population (2013) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	7.47	32.0%	33.6%	32.7%	$66.64
Victoria	5.79	24.8%	32.0%	31.3%	$81.77
Queensland	4.69	20.1%	13.5%	12.9%	$42.67
Western Australia	2.55	10.9%	13.1%	12.0%	$76.17
South Australia	1.68	7.2%	6.3%	8.4%	$55.96
Australian Capital Territory	0.38	1.6%	1.0%	2.0%	$39.32
Tasmania	0.51	2.2%	0.2%	0.4%	$4.68
Northern Territory	0.24	1.0%	0.1%	0.3%	$8.80
Total	23.32	100.0%	100.0%	100.0%	$63.42

*Note: *Population is as of December 2013 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0*

4. Category analysis

4.1 Overall highlights

This section presents the largest categories by revenue and attendance (Table 7) as well as the categories which experienced the greatest movements in revenue and attendance (Table 8 and Table 9). As with previous years, the Contemporary Music and Musical Theatre categories represent the two largest categories in the industry, generating 42.5% and 13.1% of revenue, respectively. Combined, these two categories account for 55.6% of the Live Performance Industry in terms of gross revenue and 46.6% of total attendance. The top 3 revenue categories combined, which also includes Circus and Physical Theatre, accounts for 65% of all industry revenue.

The most significant gains were experienced by the Festivals (Multi-Category) and Circus and Physical Theatre categories. The significant increases for Festivals (Multi-Category) can be largely explained by the first time inclusion of data for Adelaide Fringe and Perth's *Fringe World* festivals. The increases in the Circus and Physical Theatre category were primarily due to the number and calibre of touring performances, including two Cirque Du Soleil productions (*Ovo* and *Michael Jackson: The Immortal*), *Slava's Snowshow* and *Empire*. On the other hand, the Children's/Family category experienced some of the larger declines in both revenue and attendances. Although a number of children's favourites returned in 2013, the *How to Train Your Dragon Arena Spectacular* which toured in 2012 was not staged in 2013, impacting revenue and attendance in this category. The Opera category also experienced significant declines in revenue and attendance, in part due to fewer performances by the AMPAG companies. Opera Australia did not return to Brisbane in 2013, after performing there for the first time in 24 years in 2012. Additionally, Opera Queensland had fewer performances in 2013, further contributing to the large decline in that state. Opera Australia is also increasingly staging musicals as part of its regular season, and the revenue and attendance for these performances is reflected in the Musical Theatre category.

Table 7: Top 5 Categories - Revenue and Attendance

	Revenue			Attendance		
	Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
1	Contemporary Music	$628,130,146	42.5%	Contemporary Music	6,266,137	35.0%
2	Musical Theatre	$193,389,763	13.1%	Musical Theatre	2,085,131	11.6%
3	Circus and Physical Theatre	$142,033,217	9.6%	Theatre	1,842,177	10.3%
4	Theatre	$119,647,414	8.1%	Circus and Physical Theatre	1,285,991	7.2%
5	Festivals (Single-Category)	$107,367,780	7.3%	Classical Music	1,169,643	6.5%

Table 8: Top 3 Biggest Changes in Revenue by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2012	Category	Decrease from 2012
1	Circus and Physical Theatre	162.8%	Children's/Family	25.0%
2	Festivals (Multi-Category)	98.4%	Comedy	14.8%
3	Theatre	44.2%	Opera	9.5%

Table 9: Top 3 Biggest Changes in Attendance by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2012	Category	Decrease from 2012
1	Festivals (Multi-Category)	201.8%	Opera	20.0%
2	Circus and Physical Theatre	131.5%	Children's/Family	16.1%
3	Special Events	24.2%	Festivals (Single-Category)	9.9%

4.2 Category trends

This section presents an analysis for each of the 12 event categories, as defined in Table 1. Table 10 shows the total revenue and attendances by category for 2013. Figure 8 and Figure 9 illustrate the breakdown of the Live Performance Industry in Australia based on share of gross revenue by category in 2013 and 2012. Figure 10 and Figure 11 illustrate the industry breakdown based on share of total attendance by category in 2013 and 2012.

Figure 12 and Figure 13 illustrate the year on year revenue and attendance movements by category, while Figure 14 and Figure 15 present time series data of the market shares of each event category over the past ten years of the Survey in terms of ticket revenues and attendances.

Additionally, Table 11 below shows the average ticket price by category for the past 5 years.

Table 10: Total revenue and attendances by category (2013)

Category	Revenue	% change in revenue (from 2012)	Share of industry	Tickets	% change in attendance (from 2012)	Share of industry
Ballet and Dance	$62,832,992	8.6%	4.2%	976,336	6.1%	5.4%
Children's/Family	$38,684,410	-25.0%	2.6%	1,090,598	-16.1%	6.1%
Circus and Physical Theatre	$142,033,217	162.8%	9.6%	1,285,991	131.5%	7.2%
Classical Music	$70,481,841	15.8%	4.8%	1,169,643	-6.8%	6.5%
Comedy	$41,473,321	-14.8%	2.8%	912,609	-7.0%	5.1%
Contemporary Music	$628,130,146	30.3%	42.5%	6,266,137	14.3%	35.0%
Festivals (Multi-Category)	$25,622,029	98.4%	1.7%	786,530	201.8%	4.4%
Festivals (Single-Category)	$107,367,780	9.2%	7.3%	1,053,419	-9.9%	5.9%
Musical Theatre	$193,389,763	-4.9%	13.1%	2,085,131	-6.2%	11.6%
Opera	$43,283,705	-9.5%	2.9%	344,761	-20.0%	1.9%
Special Events	$6,030,274	41.9%	0.4%	113,294	24.2%	0.6%
Theatre	$119,647,414	44.2%	8.1%	1,842,177	15.0%	10.3%
Total	$1,478,976,893	22.7%	100.0%	17,926,626	10.2%	100.0%

Table 11: Average ticket prices by category (2008-2013)

Year	2008	2009	2010	2011	2012	2013	Compound Annual Growth Rate
Ballet and Dance	$60.67	$63.33	$64.86	$71.93	$77.93	$74.69	4.2%
Children's/Family	$34.24	$32.38	$34.23	$43.87	$43.17	$38.17	2.2%
Circus and Physical Theatre	N/A	$47.98	$43.03	$86.81	$103.67	$118.91	25.5%
Classical Music	$84.81	$74.01	$60.43	$68.82	$60.34	$73.18	-2.9%
Comedy	N/A	$54.06	$51.53	$55.07	$53.55	$48.82	-2.5%
Contemporary Music	$101.35	$108.61	$102.78	$103.45	$100.27	$110.50	1.7%
Festival (Multi-Category)	$52.11	$33.60	$43.12	$57.02	$59.58	$34.59	-7.9%
Festival (Single Category)	$60.91	$81.19	$119.39	$138.97	$128.71	$130.46	16.5%
Musical Theatre	$89.23	$93.54	$98.84	$92.79	$97.08	$100.94	2.5%
Opera	$114.46	$111.62	$112.86	$124.66	$126.84	$145.28	4.9%
Special Events	$43.60	$67.79	$88.67	$57.28	$57.58	$73.18	10.9%
Theatre	$46.92	$46.58	$51.47	$56.14	$59.86	$72.88	9.2%
All Categories	$76.60	$80.57	$86.43	$85.99	$85.46	$92.16	3.8%

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

Figure 8: Gross Revenue by Category (2013)

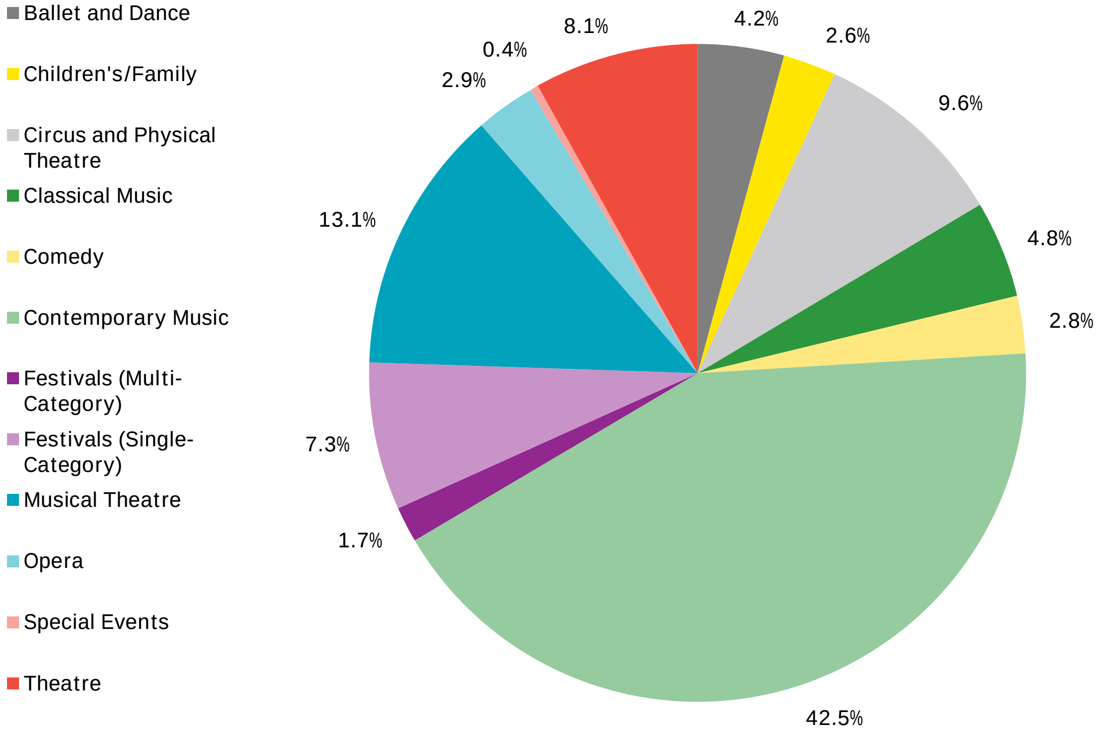


Figure 9: Gross Revenue by Category (2012)

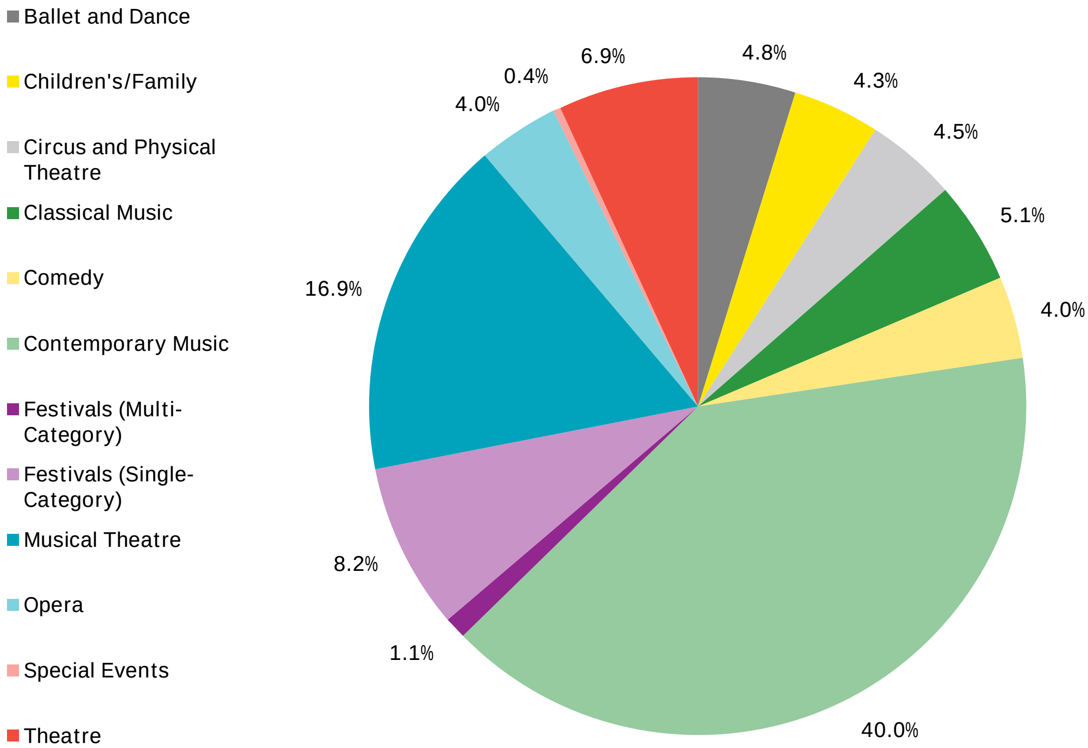


Figure 10: Total Attendance by Category (2013)

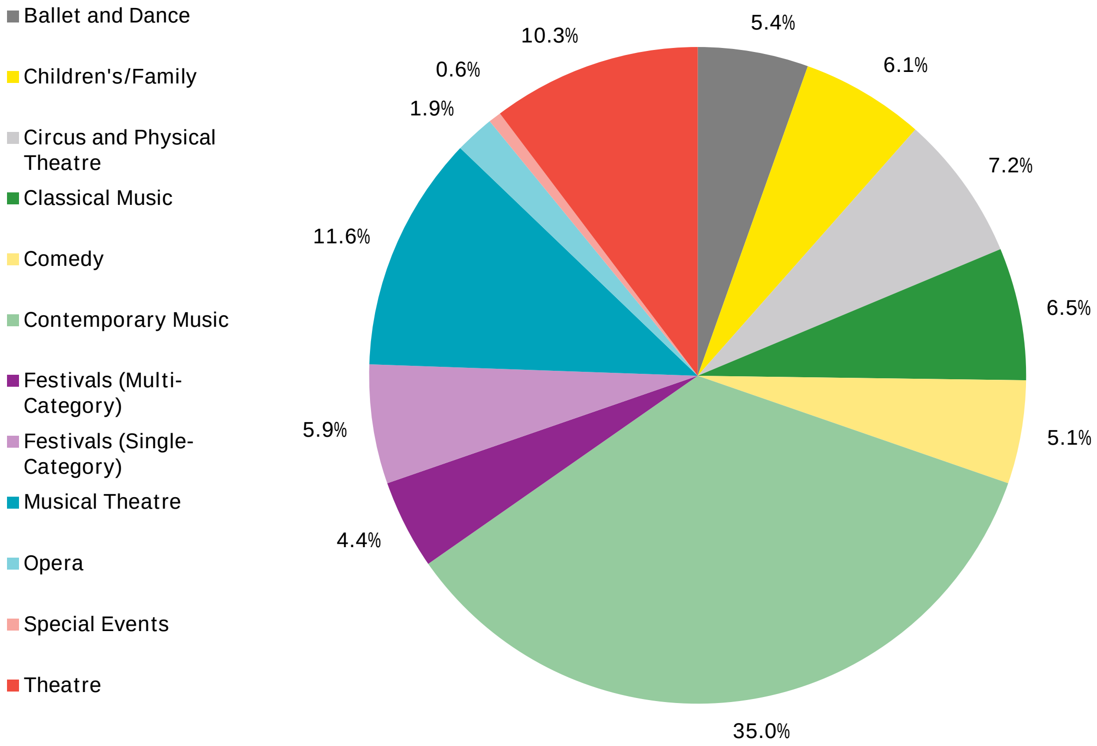


Figure 11: Total Attendance by Category (2012)

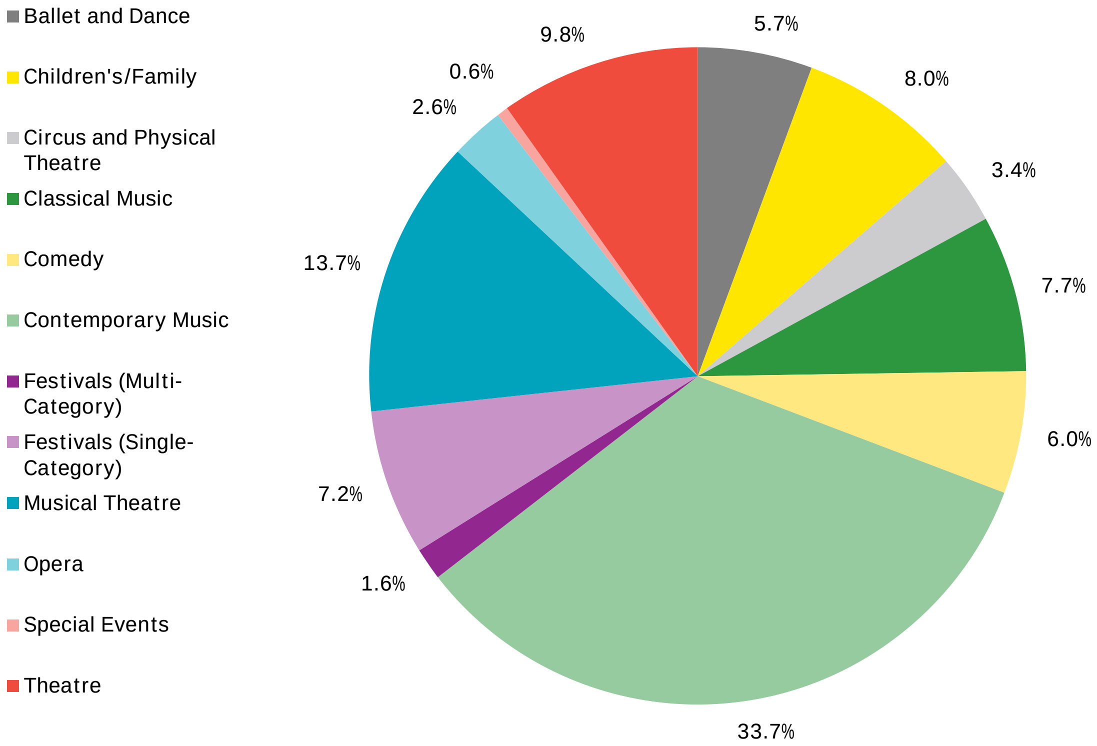


Figure 12: Percentage Movement in Revenue by Category (2012-2013)

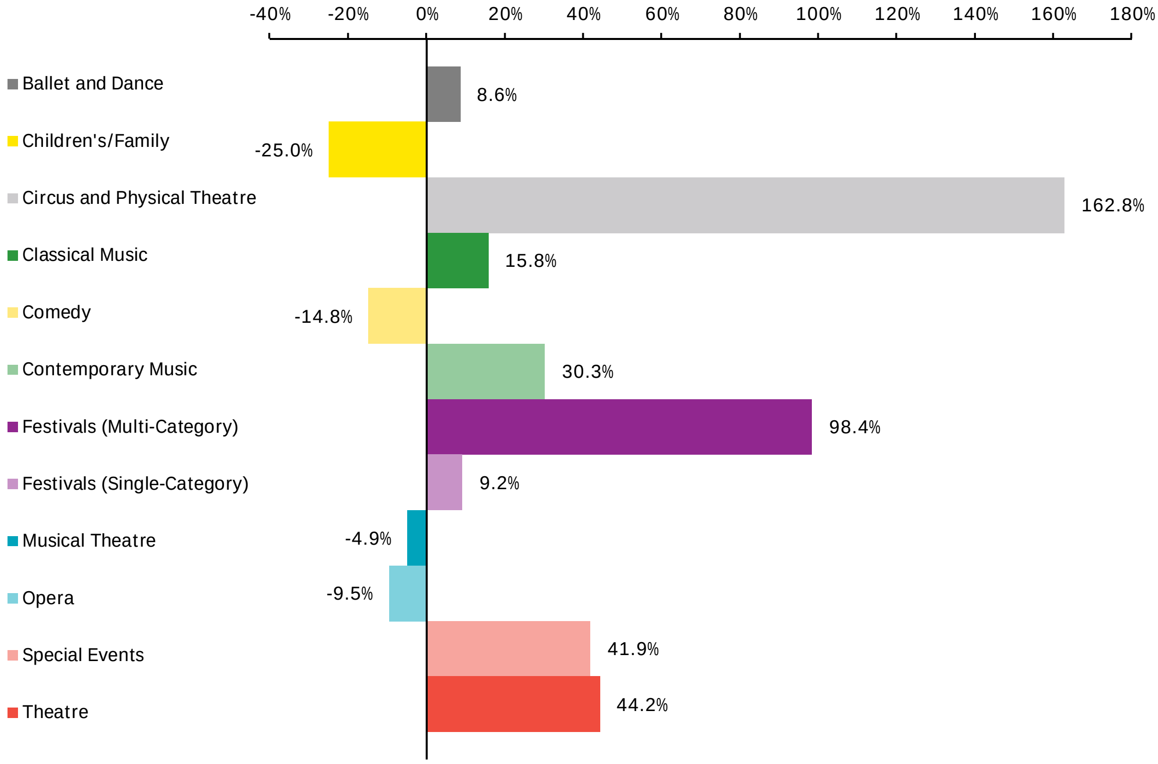


Figure 13: Percentage Movement in Attendance by Category (2012-2013)

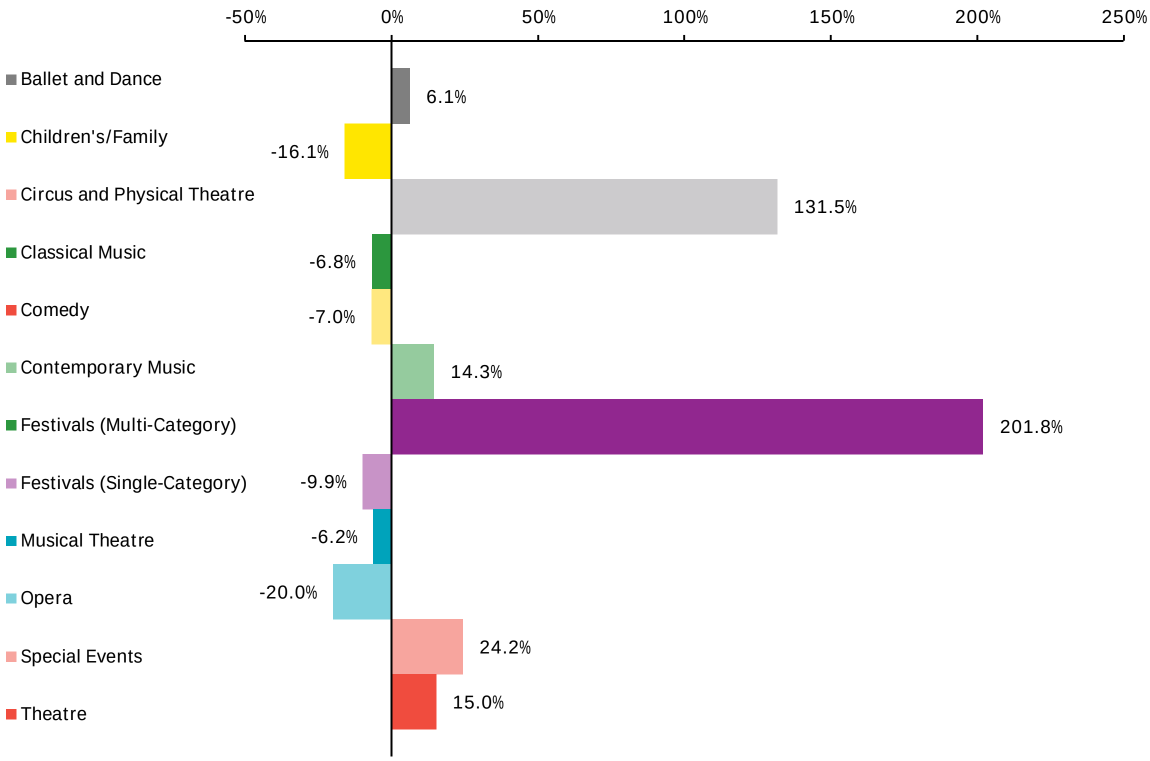


Figure 14: Market Shares (Gross Revenue) by Category (2004-2013)

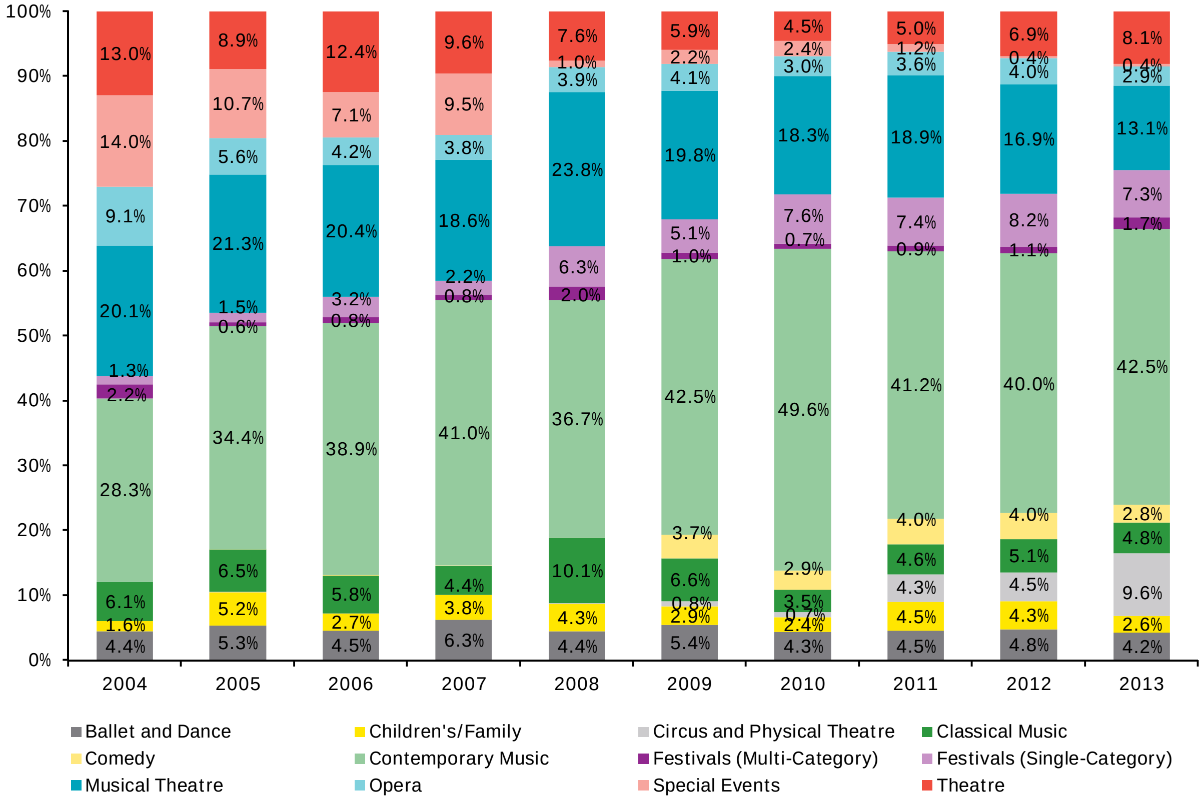
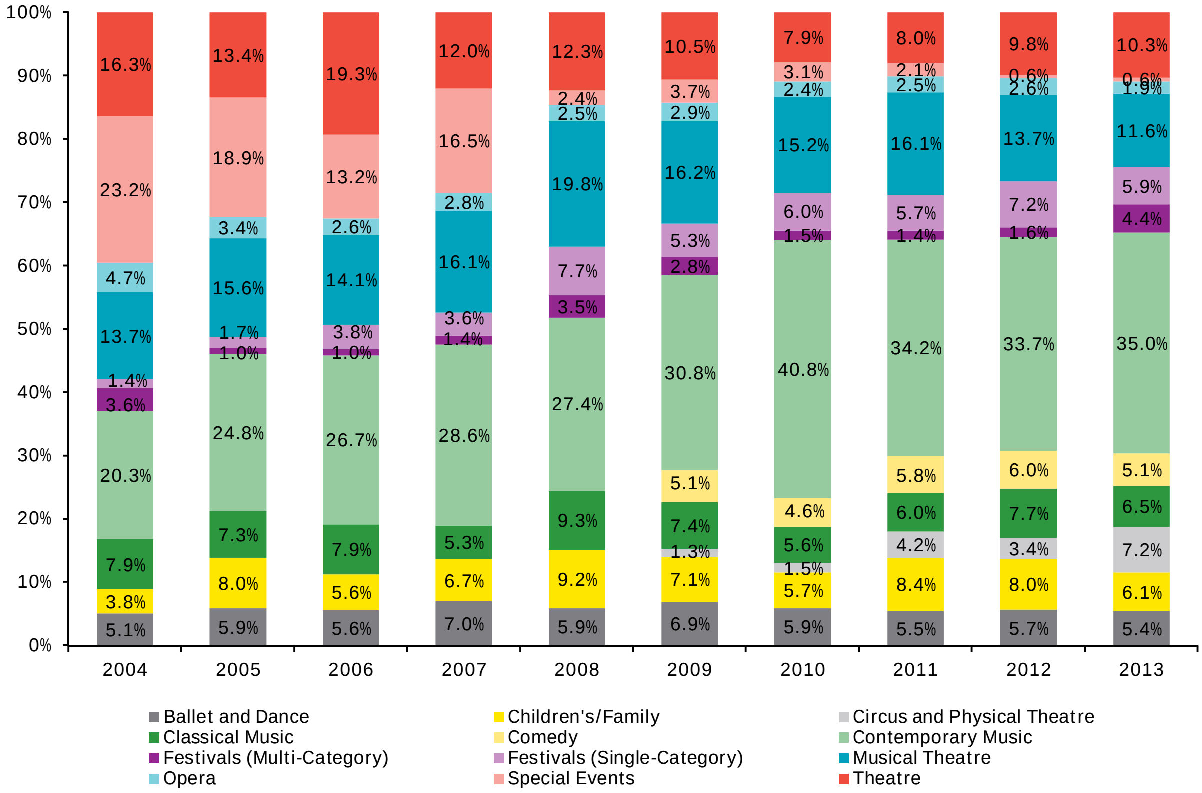


Figure 15: Market Shares (Attendances) by Category (2004-2013)



4.3 Ballet and Dance

4.3.1 National Overview

The Ballet and Dance category experienced growth in both gross revenue and attendance in 2013. Gross revenue increased by 8.6% from $57.87 million in 2012 to $62.83 million in 2013 while total attendances increased by 6.1% over the same time frame. In contrast, the average ticket price decreased by 4.2% from $77.93 to $74.69. However, revenue still increased due to the increase in patronage.

Major performances in the Ballet and Dance category in 2013 included *Ballet Revolucion*, *Stomp* and *Blaze*, along with tours by the Paris Opera Ballet and the Bolshoi Ballet. Other major performances in this category include the Imperial Russian Ballet's *Festival of Russian Ballet*, the St Petersburg Ballet's performance of *Swan Lake*, and *Red Bull Flying Bach*.

In particular, the Paris Opera Ballet's exclusive season of *Giselle* at the Capitol Theatre in Sydney helped contribute to healthy gains between 2012 and 2013 for New South Wales. Further, the Bolshoi Ballet's exclusive season at the Queensland Performing Arts Centre partially explains the increase in revenue in that state.

As with previous years, local productions from the AMPAG companies comprise a significant proportion of performances and thus gross revenue in this event category. Major companies within this group included The Australian Ballet, The Queensland Ballet, Sydney Dance Company, Bangarra Dance Theatre and West Australian Ballet.

Figure 16: Ballet and Dance – Gross Revenue (2004-2013)

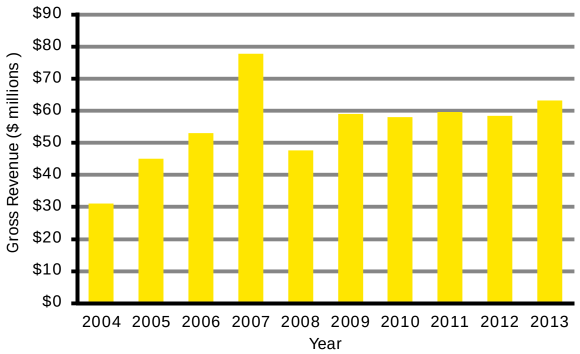


Figure 17: Ballet and Dance – Total Attendance (2004-2013)

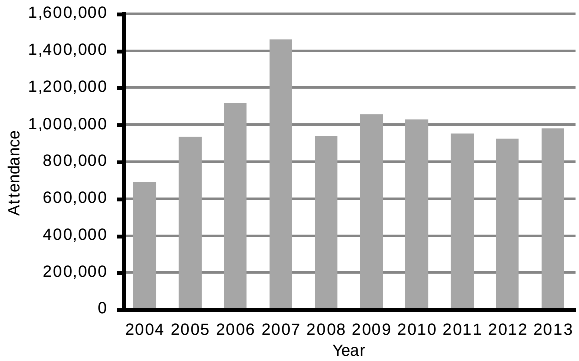


Table 12: Ballet and Dance – Revenue and Attendance (2004-2013)

	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%

4.3.2 State/Territory Breakdown

Figure 18: Ballet and Dance – Revenue by State/Territory (2013)

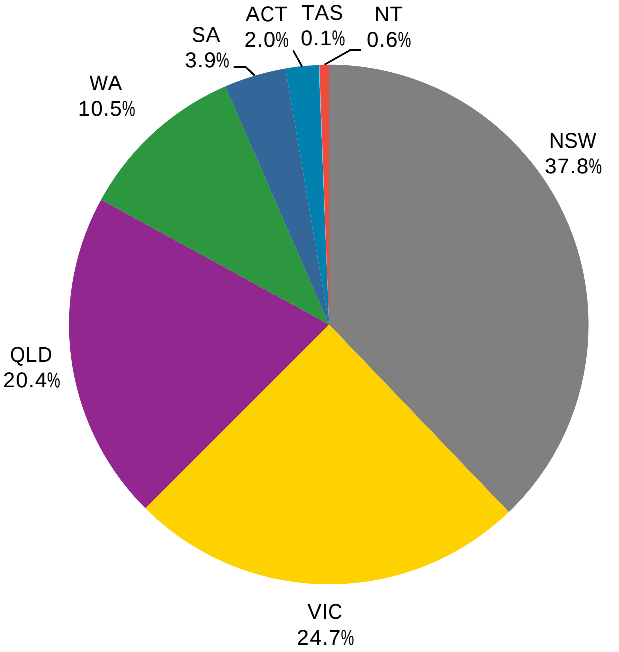


Table 13: Ballet and Dance - Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$23,766,984	37.8%	4.2%
VIC	$15,512,671	24.7%	-3.7%
QLD	$12,849,167	20.4%	2.3%
WA	$6,591,712	10.5%	0.3%
SA	$2,431,129	3.9%	-1.2%
ACT	$1,285,815	2.0%	-0.7%
TAS	$43,998	0.1%	-1.4%
NT	$351,515	0.6%	0.3%
Total	$62,832,992	100.0%	

Figure 19: Ballet and Dance – Attendance by State/Territory (2013)

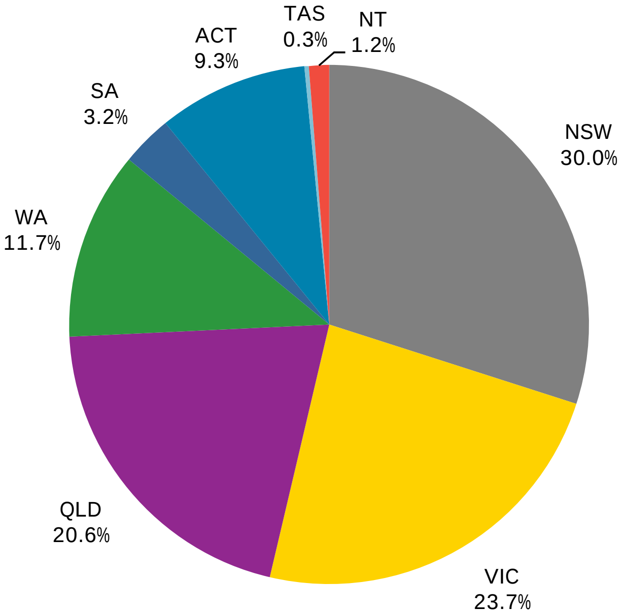


Table 14: Ballet and Dance - Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	292,546	30.0%	1.8%
VIC	231,403	23.7%	1.0%
QLD	201,056	20.6%	-6.4%
WA	114,568	11.7%	0.1%
SA	30,966	3.2%	-1.6%
ACT	90,762	9.3%	5.3%
TAS	3,064	0.3%	-0.9%
NT	11,971	1.2%	0.7%
Total	976,336	100.0%	

4.4 Children's/Family Events

4.4.1 National Overview

2013 saw declines in gross revenue, attendance and average ticket prices for the Children's/Family Events category, continuing the declines experienced in 2012. Gross revenue declined by 25.0% from $51.59 million in 2012 to $38.68 million in 2013. Total attendance fell by 16.1% while the average ticket price declined by 11.6%, from $43.17 to $38.17.

Major events in 2013 in this category were *Disney on Ice*, *Disney Live*, *Peppa Pig Live*, *Giggle and Hoot and Friends* and a tour by The Wiggles. Other children's favourites that returned in 2013 included *Dora the Explorer*, Hi-5 and *Hairy Maclary*.

The major impact on revenue and attendance is caused by the *How to Train Your Dragon Arena Spectacular* which toured in 2012 but was not staged in 2013.

Figure 20: Children's/Family Events - Gross Revenue (2004-2013)

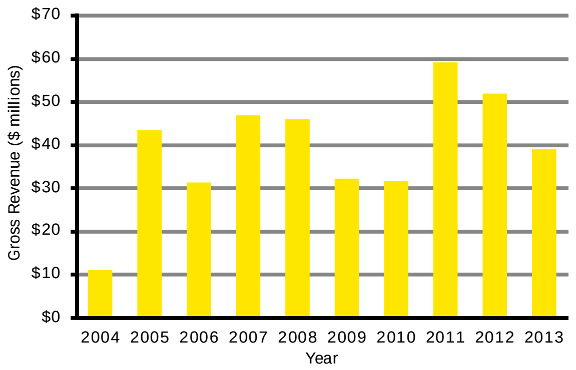


Figure 21: Children's/Family Events – Total Attendance (2004-2013)

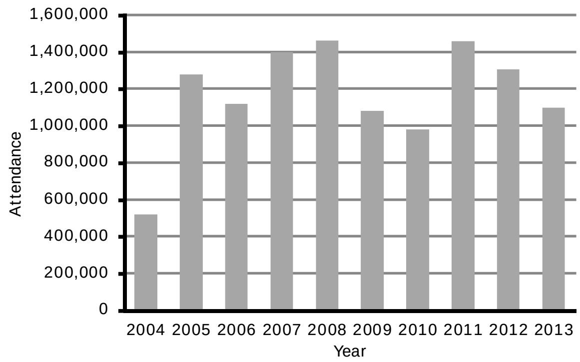


Table 15: Children's/Family Events - Revenue and Attendance (2004-2013)

	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%

4.4.2 State/Territory Breakdown

Figure 22: Children's/Family Events - Revenue by State/Territory (2013)

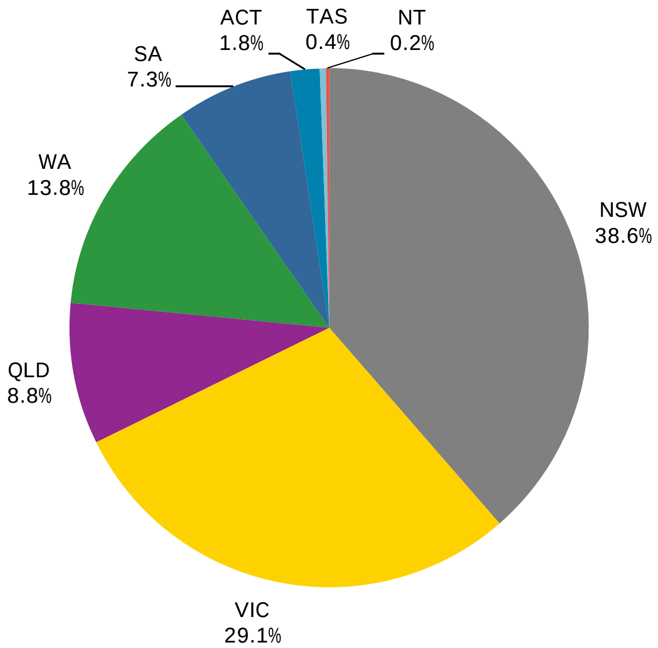


Table 16: Children's/Family Events - Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$14,926,172	38.6%	-3.2%
VIC	$11,274,847	29.1%	0.8%
QLD	$3,402,352	8.8%	-4.1%
WA	$5,351,217	13.8%	7.0%
SA	$2,810,657	7.3%	0.3%
ACT	$689,365	1.8%	0.0%
TAS	$152,300	0.4%	-0.4%
NT	$77,501	0.2%	-0.4%
Total	$38,684,410	100.0%	

Figure 23: Children's/Family Events - Attendance by State/Territory (2013)

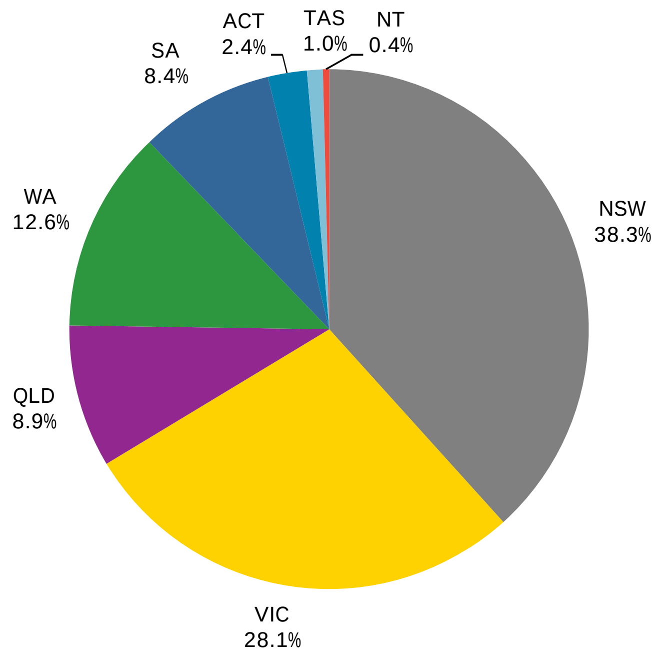


Table 17: Children's/Family Events – Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2011
NSW	417,584	38.3%	-1.7%
VIC	306,139	28.1%	0.4%
QLD	96,646	8.9%	-2.2%
WA	137,296	12.6%	4.1%
SA	91,666	8.4%	-0.3%
ACT	26,383	2.4%	0.1%
TAS	10,726	1.0%	0.1%
NT	4,158	0.4%	-0.5%
Total	1,090,598	100.0%	

4.5 Circus and Physical Theatre

4.5.1 National Overview

In 2013, the Circus and Physical Theatre category experienced a sharp rise in both revenue and attendance compared to 2012. Gross revenue increased by 162.8% from $54.04 million to $142.03 million while total attendance increased by 131.5%. The average ticket price also rose by 14.7% from $103.67 to $118.91, which explains why growth in revenue outpaced growth in attendances.

Following the success of its 2012 *Ovo* production, Cirque du Soleil once again dominated this category in 2013 with the continuation of the *Ovo* season and the national tour of *Michael Jackson: The Immortal*. The timing of *Ovo* over two calendar years helps to explain the skewed distribution of revenue and attendance by state. Only Melbourne, Perth and some Adelaide performances have been included in the 2013 Survey. Performances of *Ovo* in Sydney, Brisbane and earlier Adelaide shows in 2012 do not correspond to this survey period.

It should be noted that the Canadian entertainment company does not conduct tours of Australia every year (it did not stage any performances in 2010 and only had limited shows in 2009). The touring of two productions in 2013 by Cirque du Soleil helps to explain the significant increase in revenue and attendances for this category.

Other major events in the Circus and Physical Theatre category that were staged in 2013 included *Empire* presented by Spiegelworld and *Slava's Snowshow*. These events were not staged in 2012. Other favourites such as the magician Cosentino, *La Soiree*, Circus Oz and *El Caballo Blanco* also returned in 2013.

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

Figure 24: Circus and Physical Theatre – Gross Revenue (2009-2013)

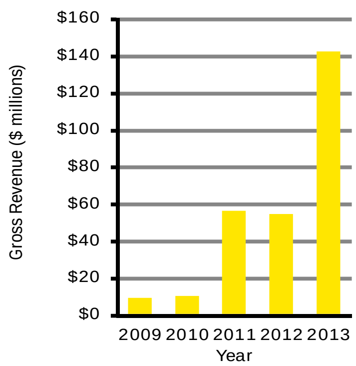


Figure 25: Circus and Physical Theatre – Total Attendance (2009-2013)

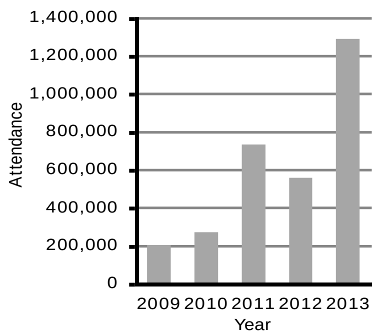


Table 18: Circus and Physical Theatre - Revenue and Attendance (2009-2013)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2009	$8,601,990	N/A	198,274	N/A	$47.98	N/A
2010	$9,900,116	15.1%	265,837	34.1%	$43.03	-10.3%
2011	$55,865,945	464.3%	728,799	174.2%	$86.81	101.8%
2012	$54,042,789	-3.3%	555,506	-23.8%	$103.67	19.4%
2013	$142,033,217	162.8%	1,285,991	131.5%	$118.91	14.7%

4.5.2 State/Territory Breakdown

Figure 26: Circus and Physical Theatre – Revenue by State/Territory (2013)

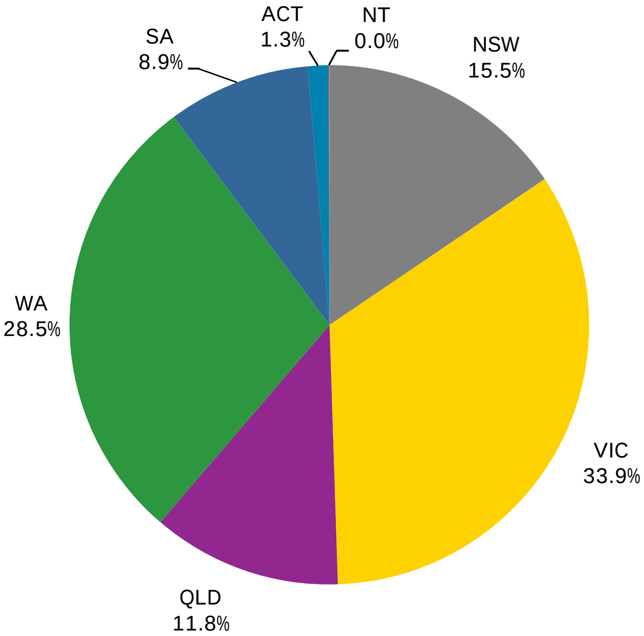


Table 19: Circus and Physical Theatre – Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$22,042,158	15.5%	-35.8%
VIC	$48,215,552	33.9%	28.1%
QLD	$16,769,270	11.8%	-15.7%
WA	$40,485,923	28.5%	27.4%
SA	$12,619,243	8.9%	-4.9%
ACT	$1,834,262	1.3%	1.3%
TAS	$0	0.0%	-0.4%
NT	$66,810	0.0%	0.0%
Total	$142,033,217	100.0%	

Figure 27: Circus and Physical Theatre – Attendance by State/Territory (2013)

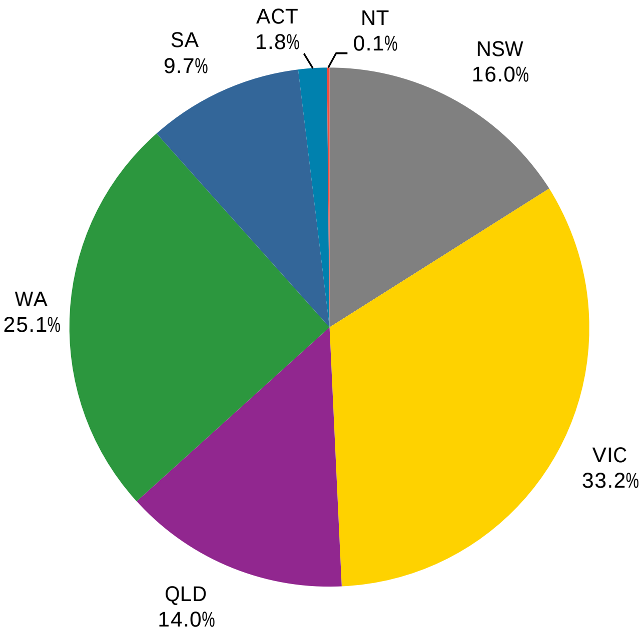


Table 20: Circus and Physical Theatre – Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	206,103	16.0%	-31.7%
VIC	427,222	33.2%	20.0%
QLD	180,558	14.0%	-9.3%
WA	323,094	25.1%	22.9%
SA	124,238	9.7%	-2.8%
ACT	23,083	1.8%	1.8%
TAS	-	0.0%	-1.0%
NT	1,693	0.1%	0.0%
Total	1,285,991	100.0%	

4.6 Classical Music

4.6.1 National Overview

Between 2012 and 2013, the Classical Music category experienced an increase in revenue but a decrease in attendance. Gross revenue grew by 15.8% from $60.88 million to $70.48 million while total attendance fell by 6.8%. The increase in average ticket price by 21.3% from $60.34 to $73.18 helps to explain the increase in revenue despite the decline in attendance.

As with previous years, the majority of revenue and ticket sales in the Classical Music category came from the AMPAG companies in 2013. Major companies include The Australian Chamber Orchestra, the Melbourne Symphony Orchestra, the Sydney Symphony Orchestra, the Queensland Symphony Orchestra, the West Australian Symphony Orchestra, the Australian Brandenburg Orchestra, Adelaide Symphony Orchestra, Tasmanian Symphony Orchestra and Musica Viva Australia.

Outside of AMPAG, other performances included tours by André Rieu, Celtic Thunder, the Royal Concertgebouw Orchestra and the Mahler Chamber Orchestra.

Figure 28: Classical Music – Gross Revenue (2004-2013)

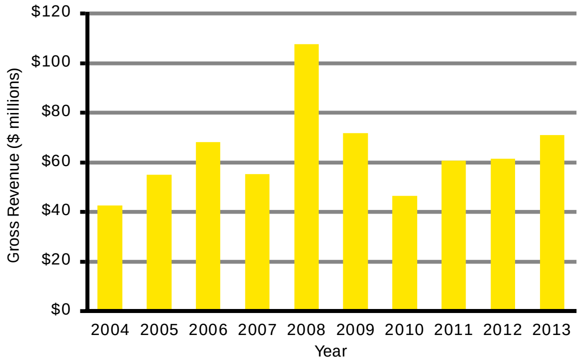


Figure 29: Classical Music – Total Attendance (2004-2013)

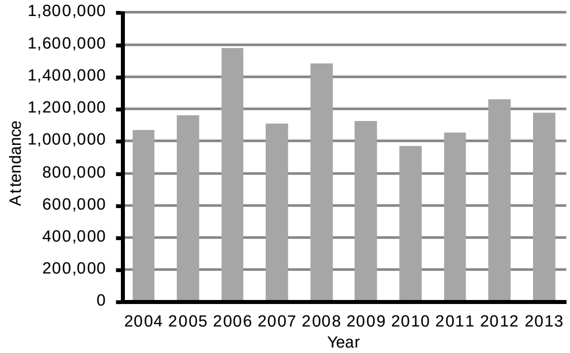


Table 21: Classical Music – Revenue and Attendance (2004-2013)

	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%

4.6.2 State/Territory Breakdown

Figure 30: Classical Music – Revenue by State/Territory (2013)

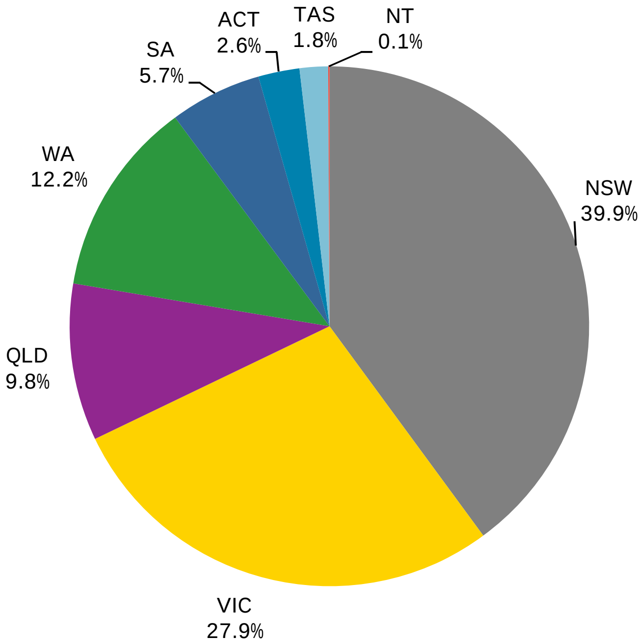


Table 22: Classical Music - Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$28,141,032	39.9%	-0.7%
VIC	$19,690,169	27.9%	-3.5%
QLD	$6,901,925	9.8%	1.2%
WA	$8,612,569	12.2%	2.5%
SA	$4,034,298	5.7%	0.3%
ACT	$1,798,826	2.6%	0.3%
TAS	$1,253,508	1.8%	0.0%
NT	$49,515	0.1%	0.0%
Total	$70,481,841	100.0%	

Figure 31: Classical Music - Attendance by State/Territory (2013)

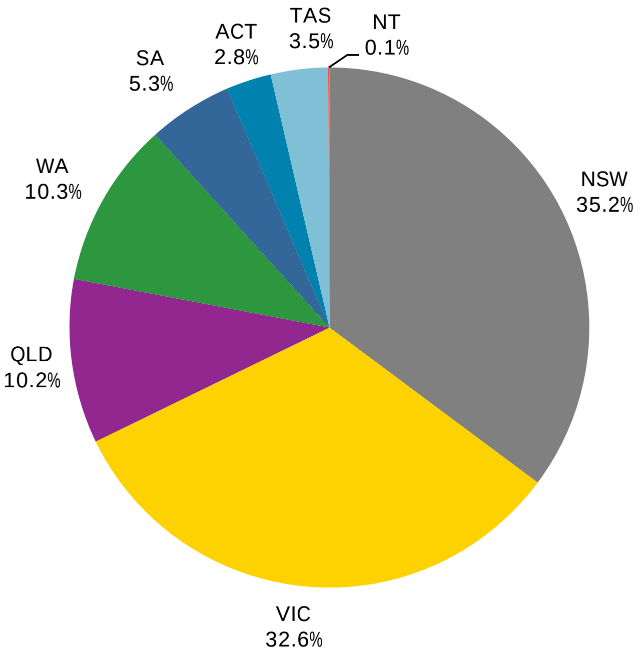


Table 23: Classical Music - Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2011
NSW	411,465	35.2%	4.7%
VIC	381,342	32.6%	-7.4%
QLD	119,603	10.2%	1.0%
WA	120,372	10.3%	0.1%
SA	61,778	5.3%	0.5%
ACT	32,789	2.8%	1.1%
TAS	41,479	3.5%	0.1%
NT	815	0.1%	-0.1%
Total	1,169,643	100.0%	

4.7 Comedy

4.7.1 National Overview

The Comedy category experienced across-the-board declines between 2012 and 2013, although revenue and attendances remained higher than 2009 and 2010 figures. Gross revenue fell by 14.8% from $48.69 million to $41.47 million. Total attendance fell by 7.0% while the average ticket price decreased by 8.8% from $53.55 to $48.82.

As in previous years, revenue and attendances in the Comedy category largely came from the Melbourne International Comedy Festival and Sydney Comedy Festival. Major touring acts at these festivals included Arj Barker, Ross Noble and Danny Bhoy.

Other notable comedians that toured in 2013 include Jason Alexander, Michael McIntyre, Russell Peters and Anh Doh. However a number of popular acts who toured in 2012 did not return to Australia in 2013, such as Russell Brand and John Cleese, at least partly explaining the decline in revenue and attendances.

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

Figure 32: Comedy - Gross Revenue (2009-2013)

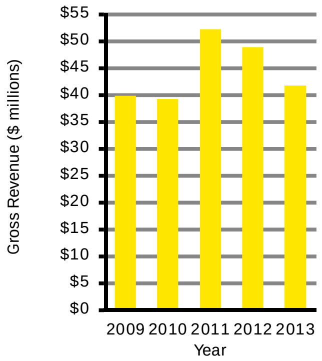


Figure 33: Comedy - Total Attendance (2009-2013)

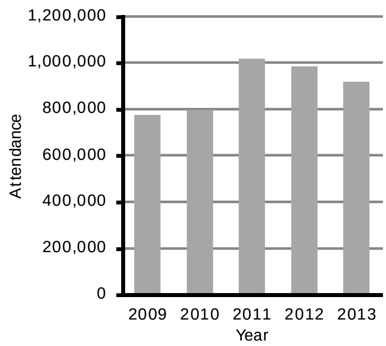


Table 24: Comedy - Revenue and Attendance (2009-2013)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2009	$39,570,117	N/A	661,445	N/A	$44.07	N/A
2010	$39,048,164	-1.3%	792,713	19.8%	$51.53	16.9%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	-6.4%	981,035	-3.0%	$53.55	-2.8%
2013	$41,473,321	-14.8%	912,131	-7.0%	$48.82	-8.8%

4.7.2 State/Territory Breakdown

Figure 34: Comedy – Revenue by State/Territory (2013)

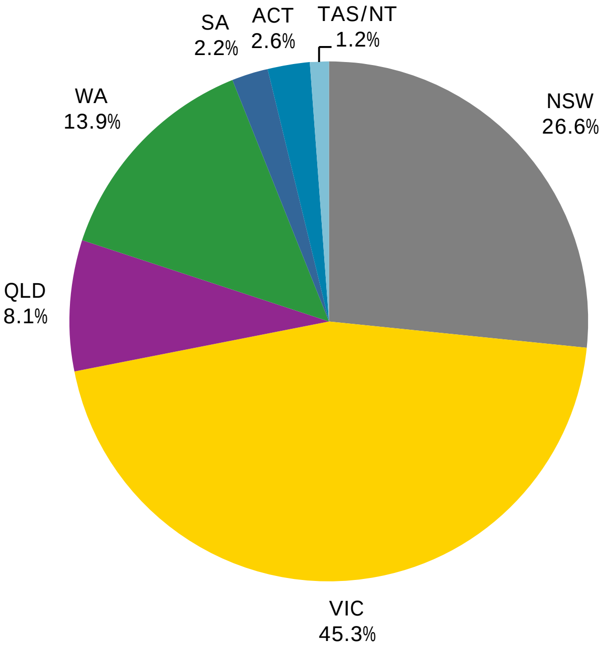


Table 25: Comedy – Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$11,044,446	26.6%	-5.8%
VIC	$18,777,732	45.3%	8.0%
QLD	$3,377,522	8.1%	-0.9%
WA	$5,764,505	13.9%	2.8%
SA	$931,673	2.2%	-2.2%
ACT	$1,092,092	2.6%	-1.8%
TAS/NT*	$485,352	1.2%	-0.1%
Total	$41,473,321	100.0%	

Figure 35: Comedy – Attendance by State/Territory (2013)

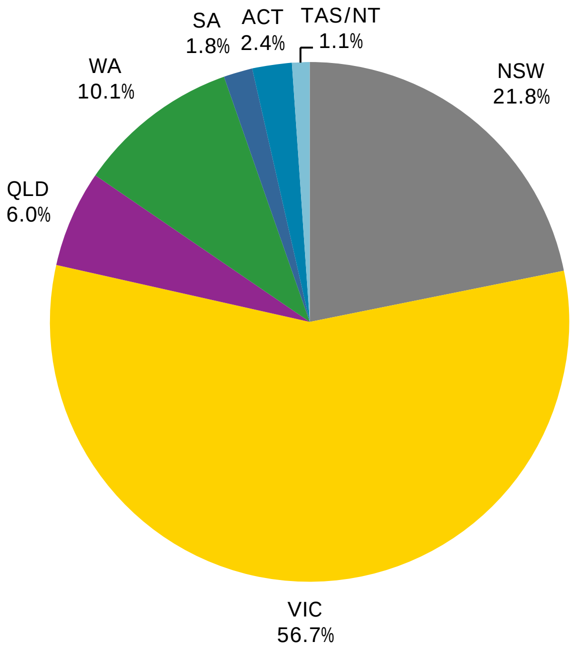


Table 26: Comedy – Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	199,257	21.8%	-5.3%
VIC	517,491	56.7%	7.4%
QLD	54,814	6.0%	0.2%
WA	92,142	10.1%	-0.6%
SA	16,536	1.8%	-0.6%
ACT	22,280	2.4%	-0.7%
TAS/NT*	10,089	1.1%	-0.4%
Total	912,609	100.0%	

* TAS and NT have been combined due to a single event occurring in Tasmania

4.8 Contemporary Music

4.8.1 National Overview

In 2013, the Contemporary Music category experienced growth in both revenue and total attendance from 2012. Although total attendance increased by 14.3%, gross revenue increased by 30.3% from $482.18 million to $628.13 million. The larger gain in gross revenue can be explained by the 10.2% increase in the average ticket price from $100.27 to $110.50.

The Contemporary Music category continues to be the biggest in the Live Performance Industry, commanding more than one third of the Live Performance Industry's share. However, the annual variability of this category strongly reflects the number of big-name artists which tour in any given year, particularly the number of stadium tours.

Major tours in 2013 included Beyoncé, Bon Jovi, Bruce Springsteen, One Direction and Pink. In particular, Pink's tour was extended to 46 Australian shows, including 18 shows in Melbourne, contributing to strong growth in Victoria. Other big-name international artists which toured Australia included Rhianna, Taylor Swift, Ricky Martin and Justin Bieber. Local artists that toured in 2013 included The Seekers, Keith Urban, Neil Finn and Paul Kelly, Guy Sebastian, Nick Cave and the Bad Seeds and Bernard Fanning.

Figure 36: Contemporary Music – Gross Revenue (2004-2013)

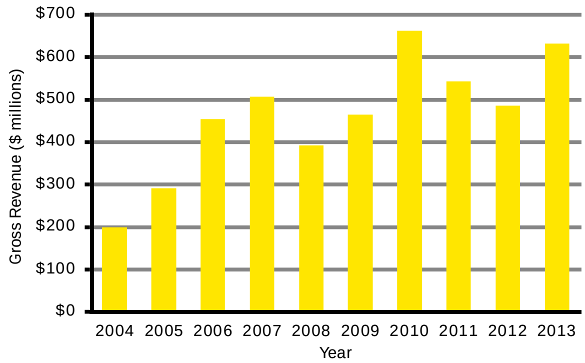


Figure 37: Contemporary Music – Total Attendance (2004-2013)

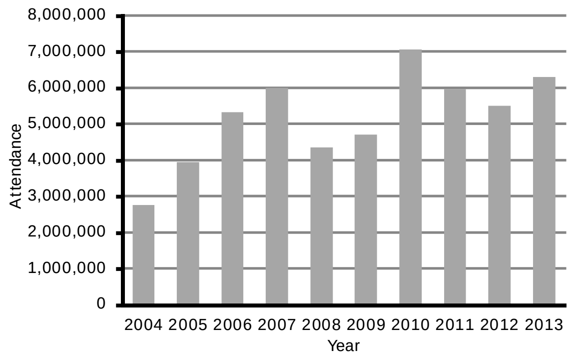


Table 27: Contemporary Music - Revenue and Attendance (2004-2013)

	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%

4.8.2 State/Territory Breakdown

Figure 38: Contemporary Music – Revenue by State/Territory (2013)

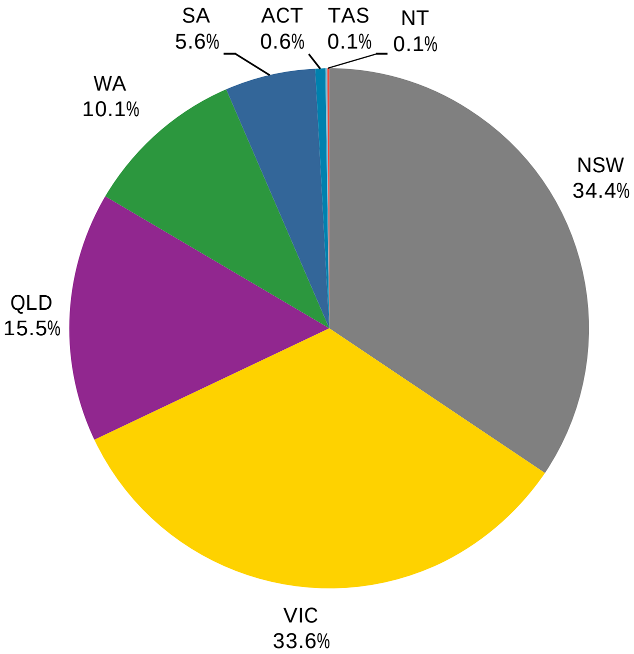


Table 28: Contemporary Music – Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$215,971,625	34.4%	-0.2%
VIC	$210,818,386	33.6%	0.9%
QLD	$97,584,546	15.5%	0.8%
WA	$63,155,966	10.1%	-1.4%
SA	$35,199,943	5.6%	0.8%
ACT	$4,019,373	0.6%	-0.7%
TAS	$705,054	0.1%	-0.2%
NT	$675,254	0.1%	0.1%
Total	$628,130,146	100.0%	

Figure 39: Contemporary Music – Attendance by State/Territory (2013)

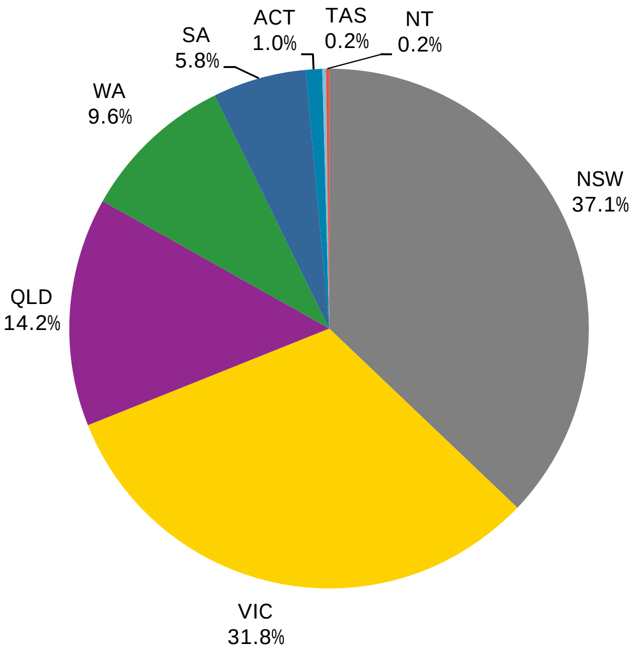


Table 29: Contemporary Music – Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	2,325,350	37.1%	1.3%
VIC	1,994,389	31.8%	-1.1%
QLD	890,438	14.2%	1.8%
WA	600,409	9.6%	-1.5%
SA	366,289	5.8%	0.0%
ACT	63,694	1.0%	-0.4%
TAS	14,411	0.2%	-0.2%
NT	11,157	0.2%	0.1%
Total	6,266,137	100.0%	

4.9 Festivals (Multi-Category)

4.9.1 National Overview

In the period 2012 to 2013, Festivals (Multi-Category) increased sharply in terms of revenue and attendance. Gross revenue increased by 98.4% from $12.92 million to $25.62 million. The increase in total attendance was even more pronounced at 201.8% and thus, the softer result in revenue is mostly explained by a fall in ticket prices. The average ticket price declined from $59.58 in 2012 to $34.59 in 2013, a decrease of 41.9%.

The above changes can be largely explained by the inclusion of a number of new events in the 2013 Survey. The Adelaide Fringe and Perth's *Fringe World* festivals attracted high patronage, and the generally lower prices for these events lowered the overall average ticket price. South Australia is particularly strong is this category due to the *WOMADelaide Music*, *Arts and Dance Festival* and Adelaide Fringe, which is the second largest Fringe Festival in the world after Edinburgh.

Other major events in this category in 2013 included the annual Sydney Festival, Brisbane Festival, Perth International Arts Festival and Melbourne Festival.

Figure 40: Festivals (Multi-Category) - Gross Revenue (2004-2013)

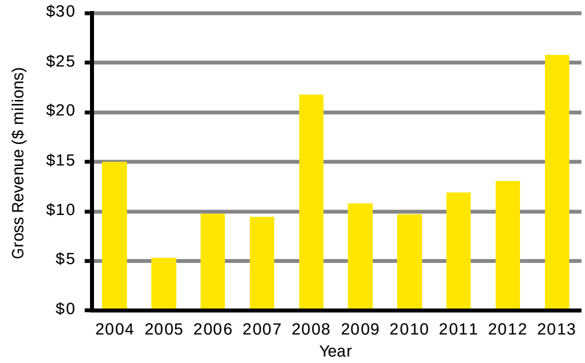


Figure 41: Festivals (Multi-Category) – Total Attendance (2004-2013)

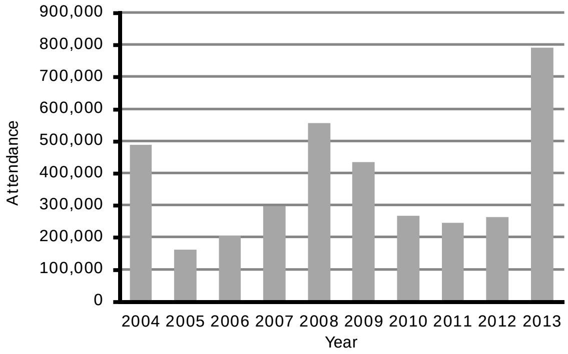


Table 30: Festivals (Multi-Category) - Revenue and Attendance (2004-2013)

	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%

.

4.9.2 State/Territory Breakdown

Figure 42: Festivals (Multi-Category) - Revenue by State/Territory (2013)

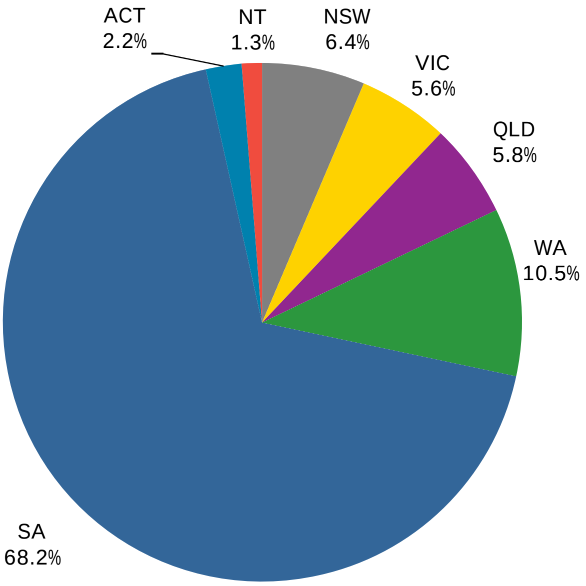


Table 31: Festivals (Multi-Category) - Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$1,633,267	6.4%	-14.3%
VIC	$1,447,136	5.6%	-11.8%
QLD	$1,495,630	5.8%	-2.6%
WA	$2,682,777	10.5%	-3.4%
SA	$17,467,335	68.2%	28.6%
ACT	$567,815	2.2%	2.2%
TAS	$0	0.0%	0.0%
NT	$328,070	1.3%	1.3%
Total	$25,622,029	100.0%	

Figure 43: Festivals (Multi-Category) - Attendance by State/Territory (2013)

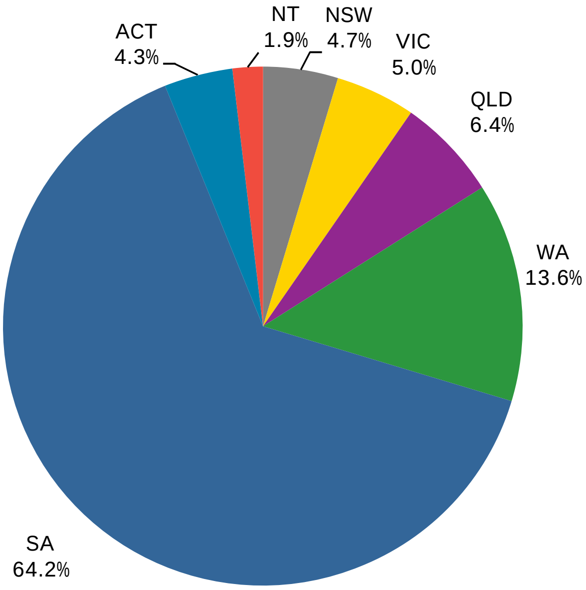


Table 32: Festivals (Multi-Category) - Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	36,603	4.7%	-18.2%
VIC	39,203	5.0%	-13.1%
QLD	50,085	6.4%	-7.2%
WA	107,246	13.6%	-2.7%
SA	504,902	64.2%	35.1%
ACT	33,612	4.3%	4.3%
TAS	-	0.0%	0.0%
NT	14,879	1.9%	1.9%
Total	786,530	100.0%	

** The dominance of SA in this category is due to the large Multi-Category Festivals WOMADelaide and Adelaide Fringe*

4.10 Festivals (Single-Category)

4.10.1 National Overview

There was an increase in revenue and a decrease in attendance for Festivals (Single-Category) in 2013. Gross revenue increased by 9.2% from $98.37 million to $107.37 million, while total attendances experienced a decline of 9.9%. The decline in total attendance was driven by a decline in unpaid attendance, with the number of paid tickets to Single-Category Festivals increasing in 2013. This, together with the 1.4% increase in average ticket prices, explains the increase in revenue despite the weaker overall attendance result.

The increase in revenue and average ticket price was largely driven by the first time inclusion of *Bluesfest* in the 2013 Survey. *Bluesfest* is a 5 day event with ticket prices ranging between $149 and $645. Other major festivals in 2013 included *Splendour in the Grass*, *Future Music Festival*, *Stereosonic*, *Summadayze*, *Big Day Out* and *Groovin' the Moo*.

Both *Splendour in the Grass* and *Bluesfest* were held in Byron Bay, NSW. The other major festivals noted above were held in multiple locations across Australia.

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

Figure 44: Festivals (Single-Category) – Gross Revenue (2004-2013)

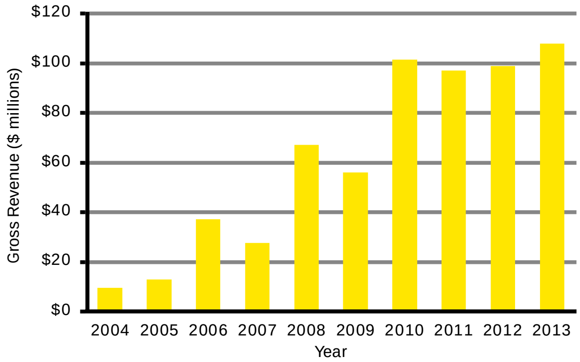


Figure 45: Festivals (Single-Category) – Total Attendance (2004-2013)

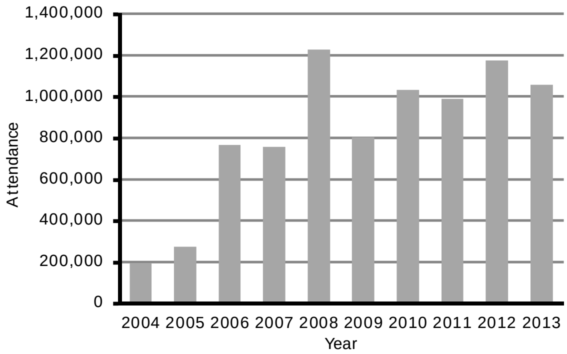


Table 33: Festivals (Single-Category) - Revenue and Attendance (2004-2013)

	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%

4.10.2 State/Territory Breakdown

Figure 46: Festivals (Single-Category) – Revenue by State/Territory (2013)

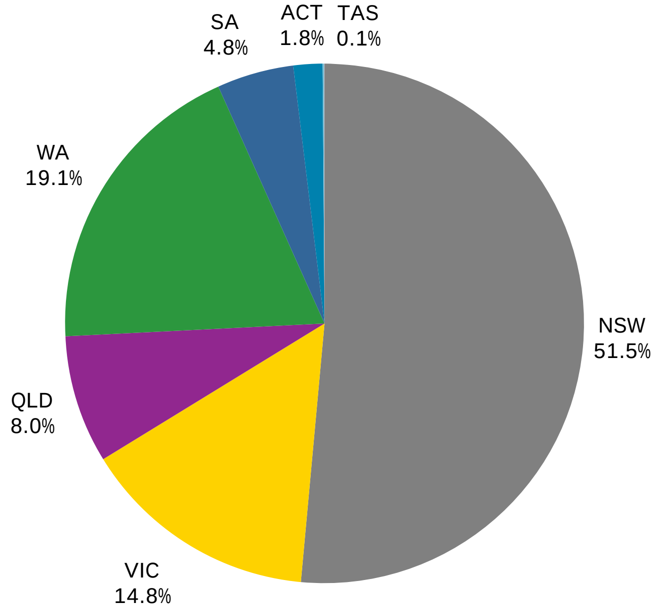


Table 34: Festivals (Single-Category) – Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$55,241,777	51.5%	3.8%
VIC	$15,882,492	14.8%	0.4%
QLD	$8,538,325	8.0%	-3.1%
WA	$20,492,751	19.1%	1.6%
SA	$5,165,428	4.8%	-3.3%
ACT	$1,945,470	1.8%	0.5%
TAS	$101,538	0.1%	0.1%
NT	$0	0.0%	0.0%
Total	$107,367,780	100.0%	

Figure 47: Festivals (Single-Category) – Attendance by State/Territory (2013)

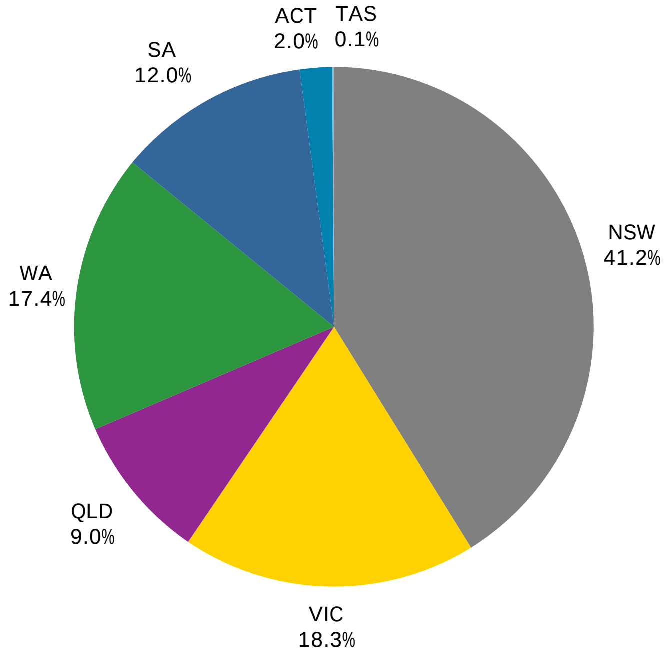


Table 35: Festivals (Single-Category) – Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	433,553	41.2%	-1.7%
VIC	193,097	18.3%	3.1%
QLD	95,253	9.0%	-4.9%
WA	182,980	17.4%	2.3%
SA	126,114	12.0%	0.7%
ACT	21,198	2.0%	0.5%
TAS	1,224	0.1%	0.1%
NT	-	0.0%	0.0%
Total	1,053,419	100.0%	

4.11 Musical Theatre

4.11.1 National Overview

The Musical Theatre category experienced declines between 2012 and 2013, with both gross revenue and total attendances falling. Gross revenue declined by 4.9% from $203.28 million in 2012 to $193.39 million in 2013. Total attendance fell by 6.2% offset somewhat by an increase in average ticket prices of 4.0%, from $97.08 in 2012 to $100.94 in 2013.

These results reflect the general volatility in the number of musical theatre performances presented nationally in any given year.

Major events in the Musical Theatre category in 2013 included *King Kong*, *Grease, Chitty Chitty Bang Bang*, *Jersey Boys, Legally Blonde the Musical* and the arena touring production of *Jesus Christ Superstar*. Disney's *The Lion King* also returned to Australia in late 2013, however only a relatively small number of shows occurred in 2013, with the season continuing into 2014.

Victoria and Western Australia were the only states to experience noteworthy growth in the Musical Theatre category. This can be partly explained by performances of *Jersey Boys*, which was only staged in Melbourne (return season) and Perth in 2013 (after completing its run in the other capital cities). In addition, the world premiere season of *King Kong*, staged exclusively at the Regent Theatre in Melbourne, contributed to strong growth between 2012 and 2013 in Victoria.

Victoria maintains an advantage over other states in the Musical Theatre category due to having the largest number of lyric theatres out of any capital city.

Figure 48: Musical Theatre – Gross Revenue (2004-2013)

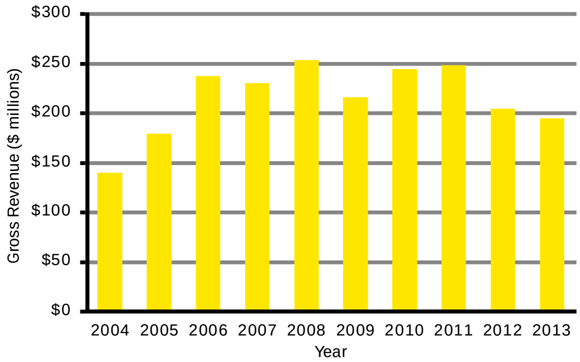


Figure 49: Musical Theatre – Total Attendance (2004-2013)

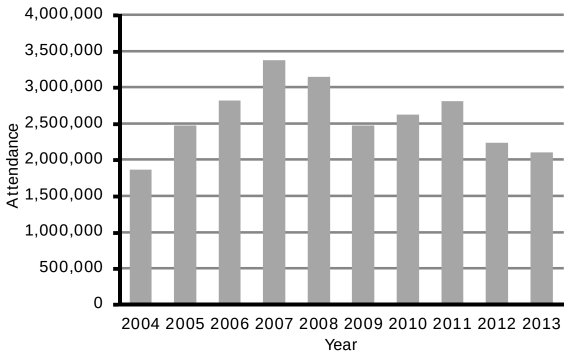


Table 36: Musical Theatre - Revenue and Attendance (2004-2013)

	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%

4.11.2 State/Territory Breakdown

Figure 50: Musical Theatre – Revenue by State/Territory (2013)

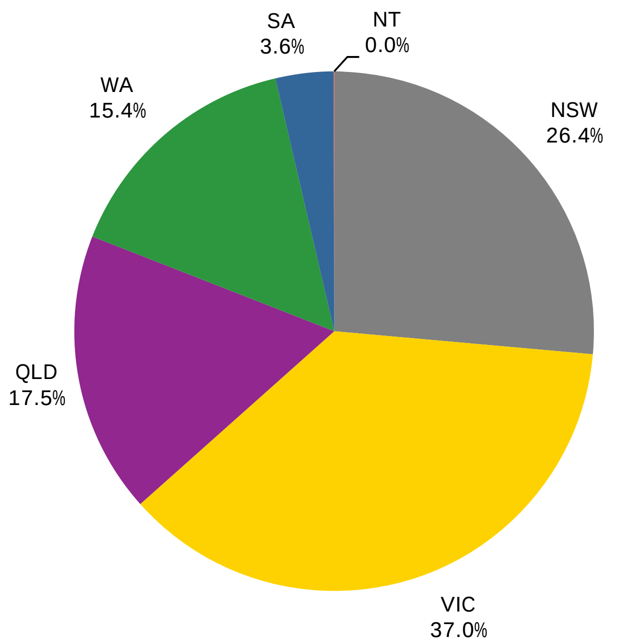


Table 37: Musical Theatre – Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$51,096,420	26.4%	-3.3%
VIC	$71,506,742	37.0%	8.9%
QLD	$33,916,204	17.5%	-5.6%
WA	$29,850,394	15.4%	2.7%
SA	$6,994,692	3.6%	-2.6%
ACT	$0	0.0%	-0.1%
TAS	$0	0.0%	0.0%
NT	$25,310	0.0%	0.0%
Total	$193,389,763	100.0%	

Figure 51: Musical Theatre – Attendance by State/Territory (2013)

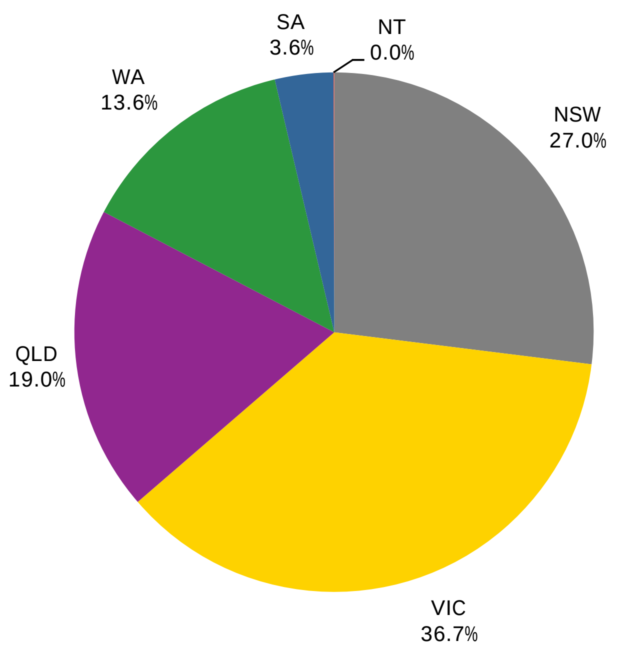


Table 38: Musical Theatre – Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	562,112	27.0%	-4.0%
VIC	765,115	36.7%	9.0%
QLD	396,950	19.0%	-3.3%
WA	284,607	13.6%	0.8%
SA	75,698	3.6%	-2.3%
ACT	-	0.0%	-0.1%
TAS	-	0.0%	0.0%
NT	649	0.0%	0.0%
Total	2,085,131	100.0%	

4.12 Opera

4.12.1 National Overview

In 2013, the Opera category experienced a decrease in both revenue and total attendances. Gross revenue declined by 9.5% from $47.84 million to $43.28 million while total attendance fell more significantly by 20.0%. The increase in average ticket prices by 14.5% from $126.84 to $145.28 explains why the decrease in revenue was not as sharp as the decline in attendance.

The majority of ticket sales and thus revenue came from productions which were staged by AMPAG companies. Within AMPAG, Opera Australia was the largest company in 2013, followed by The State Opera of South Australia, Opera Queensland and West Australian Opera Company.

In 2013 there were fewer Opera performances by the AMPAG companies, which helps to explain the decrease in revenue and attendances for the category. Notably, Opera Australia did not return to Brisbane in 2013, after performing there for the first time in 24 years in 2012. Additionally, Opera Queensland had fewer performances in 2013, further contributing to the large decline in that state. Opera Australia is also increasingly staging musicals as part of its regular season, and the revenue and attendance for these performances is reflected in the Musical Theatre category.

Major performances by Opera Australia included *The Ring Cycle*, *Carmen, La Boheme* and *Tosca*. In particular, *The Ring Cycle*, which was performed exclusively in Melbourne, contributed to an increase in Victoria's share of Opera revenue. However, the attendance potential in Melbourne was reduced given *The Ring Cycle* replaced the regular Opera Australia spring season which typically has more performances. In New South Wales, performances of *Carmen* for the highly successful Handa Opera on Sydney Harbour further strengthened that state in this category.

Outside of AMPAG, other notable Opera performances in 2013 included *Maria de Buenos Aires*, *OperaMania* and *Nixon in China*.

Figure 52: Opera – Gross Revenue (2004-2013)

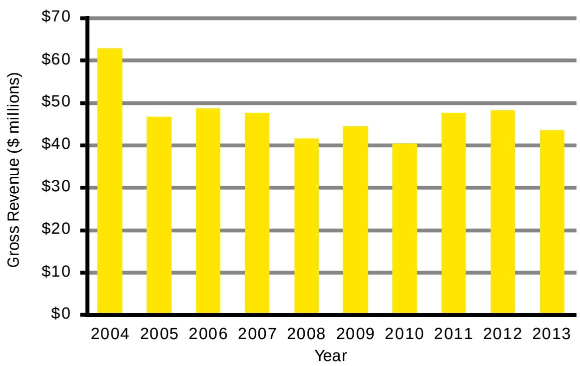


Figure 53: Opera – Total Attendance (2004-2013)

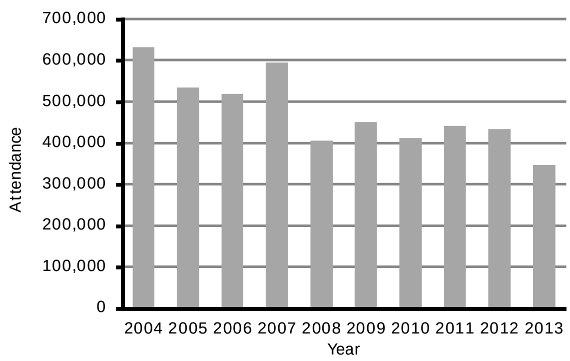


Table 39: Opera - Revenue and Attendance (2004-2013)

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

4.12.2 State/Territory Breakdown

Figure 54: Opera - Revenue by State/Territory (2013)

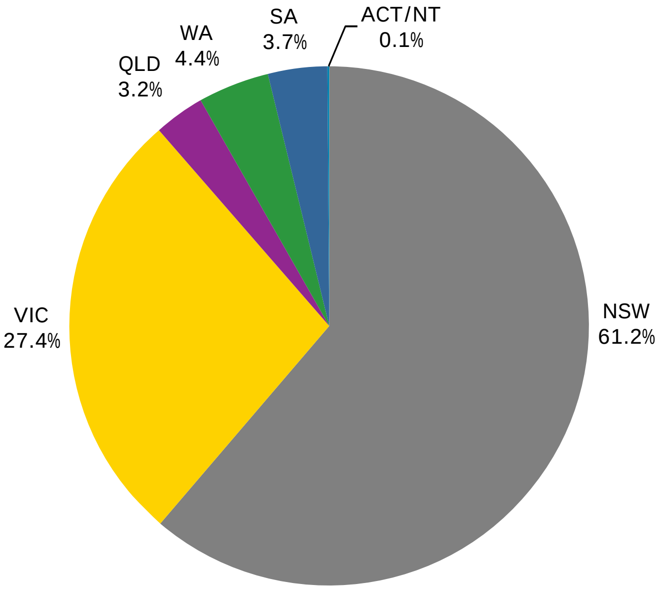


Table 40: Opera - Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$26,510,867	61.2%	-2.6%
VIC	$11,848,442	27.4%	7.9%
QLD	$1,368,433	3.2%	-5.8%
WA	$1,915,455	4.4%	0.7%
SA	$1,601,321	3.7%	0.5%
ACT/NT*	$39,187	0.1%	-0.6%
TAS	$0	0.0%	0.0%
Total	$43,283,705	100.0%	

Figure 55: Opera - Attendance by State/Territory (2013)

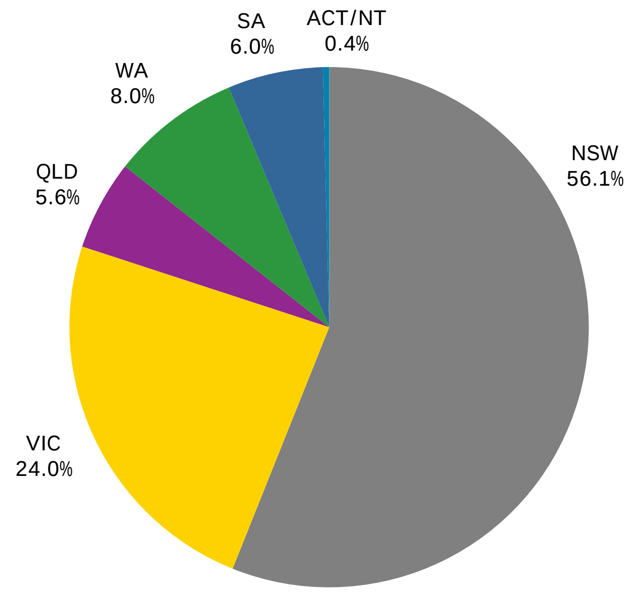


Table 41: Opera – Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	193,272	56.1%	5.1%
VIC	82,572	24.0%	-0.8%
QLD	19,402	5.6%	-7.1%
WA	27,705	8.0%	1.9%
SA	20,545	6.0%	1.9%
ACT/NT*	1,265	0.4%	-1.0%
TAS	-	0.0%	0.0%
Total	344,761	100.0%	

*ACT and NT have been combined due to a single event occurring in the Australian Capital Territory

4.13 Special Events

4.13.1 National Overview

As with previous years, the Special Events category is particularly variable as it is highly dependent on whether performances that cannot be classified into other categories take place. In the period 2012 to 2013, revenue in the Special Events category increased by 41.9% from $4.25 million to $6.03 million. Total attendances experienced somewhat softer levels of growth, increasing by 24.2%. The average ticket price also increased by 27.1% from $57.58 in 2012 to $73.18 in 2012.

The increase in this category can be explained by the aforementioned fluctuation in events. Major events in this category in 2013 included *Rockwiz Live*, *Enlighten Canberra*, a tour by Brian Cox, live Footy Show events in Brisbane and Perth and *Flix in the Stix*.

New South Wales experienced a decline in industry share, which can largely be explained by the major performances of *Planet Earth in Concert* and *The Blue Planet in Concert* that occurred at the Sydney Opera House in 2012, but which did not return in 2013.

Figure 56: Special Events – Gross Revenue (2004-2013)

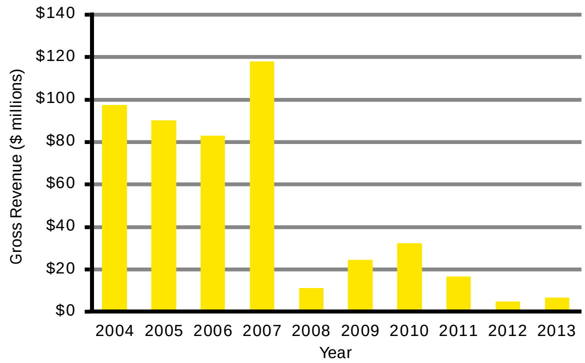


Figure 57: Special Events - Total Attendance (2004-2013)

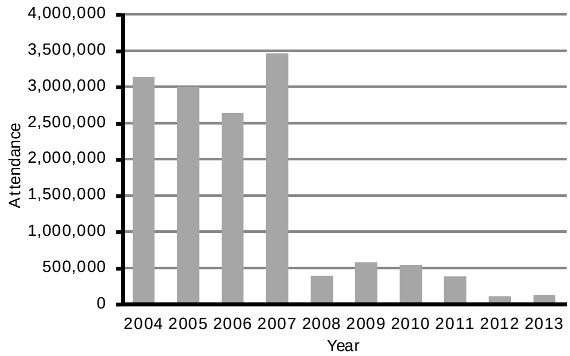


Table 42: Special Events -Revenue and Attendance (2004-2013)

	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%

4.13.2 State/Territory Breakdown

Figure 58: Special Events - Revenue by State/Territory (2013)

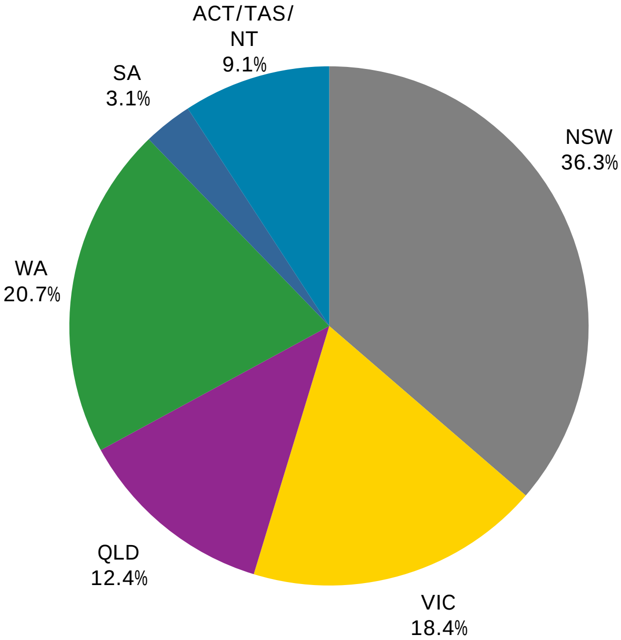


Table 43: Special Events - Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$2,189,759	36.3%	-14.0%
VIC	$1,108,776	18.4%	14.0%
QLD	$745,567	12.4%	1.2%
WA	$1,249,478	20.7%	-1.9%
SA	$184,993	3.1%	-0.2%
ACT/TAS/ NT*	$551,701	9.1%	0.9%
Total	$6,030,274	100.0%	

Figure 59: Special Events - Attendance by State/Territory (2013)

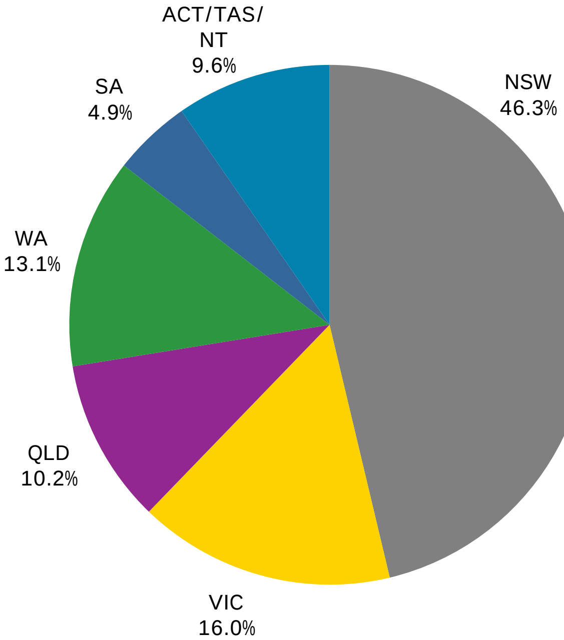


Table 44: Special Events - Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	52,405	46.3%	-3.8%
VIC	18,083	16.0%	3.0%
QLD	11,585	10.2%	-1.6%
WA	14,790	13.1%	2.6%
SA	5,548	4.9%	2.8%
ACT/TAS /NT*	10,883	9.6%	-3.0%
Total	113,294	100.0%	

*ACT, TAS and NT have been combined to maintain data confidentiality of single events

4.14 Theatre

4.14.1 National Overview

The Theatre category experienced overall gains between 2012 and 2013. Gross revenue grew strongly from $82.97 million to $119.65 million, or by 44.2%. Total attendances increased by 15.0%, while the average ticket price increased by 21.8% from $59.86 to $72.88.

As with previous years, performances through the AMPAG companies generated a large share of ticket sales and revenue. Major companies within AMPAG include Sydney Theatre Company and Melbourne Theatre Company, both of which contributed to increases for this category in 2013. In particular, the Sydney Theatre Company's productions of *The Maids*, *Waiting for Godot*, *Rosencrantz and Guildenstern are Dead* and *The Secret River* contributed to strong growth in New South Wales. *One Man, Two Guvnors*, which was presented by both Sydney Theatre Company and Melbourne Theatre Company, was also a major event presented by the AMPAG companies. Additionally, new plays like *Rupert* and *The Beast* performed well for the Melbourne Theatre Company.

Commercial theatre tours also contributed to growth in the Theatre category. Major commercial performances included national tours of *War Horse*, *Driving Miss Daisy* and *A Murder is Announced*. In addition, Barry Humphries' Farewell Tour *Eat, Pray, Laugh*, which was performed over two calendar years, continued to draw large audiences in 2013.

Figure 60: Theatre – Gross Revenue (2004-2013)

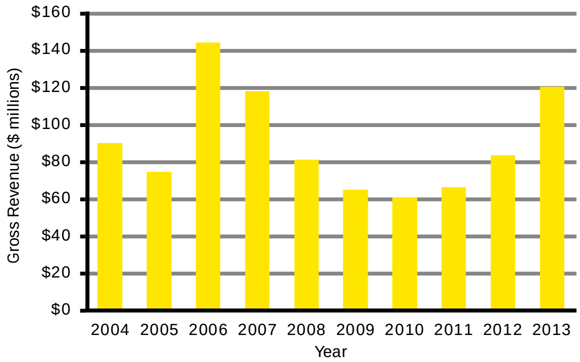


Figure 61: Theatre – Total Attendance (2004-2013)

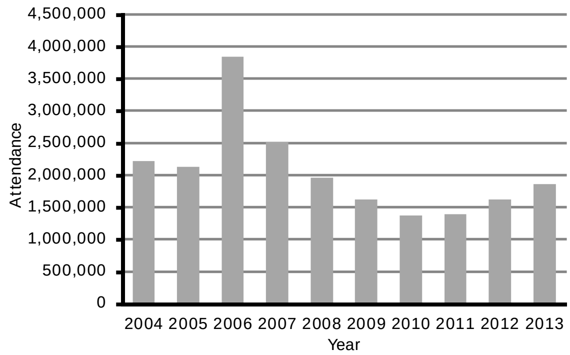


Table 45: Theatre - Revenue and Attendance (2004-2013)

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

Note: 2008 revenue and ticketing data for the Theatre category is not directly comparable to the 2009-2012 ticketing data due to the introduction of new categories being Comedy, and Circus and Physical Theatre. A large number of events which were previously in the Theatre category are now reallocated into these new categories. As a result, this has contributed to the decrease in reported revenue and attendances in this category.

4.14.2 State/Territory Breakdown

Figure 62: Theatre - Revenue by State/Territory (2013)

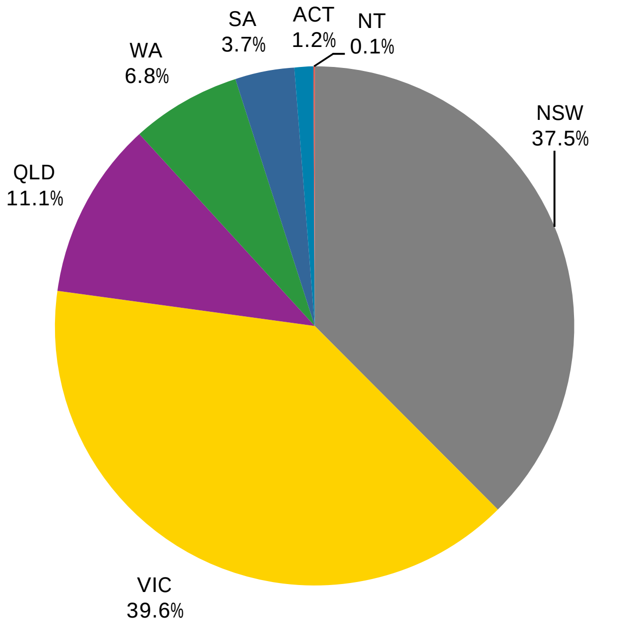


Table 46: Theatre - Revenue by State/Territory (2013)

State/ Territory	Revenue	Proportion	Industry Share Change from 2012
NSW	$44,899,152	37.5%	4.4%
VIC	$47,433,968	39.6%	0.5%
QLD	$13,229,582	11.1%	2.4%
WA	$8,159,342	6.8%	-5.1%
SA	$4,424,182	3.7%	-0.3%
ACT	$1,438,420	1.2%	-2.0%
TAS	$0	0.0%	0.0%
NT	$62,769	0.1%	0.0%
Total	$119,647,414	100.0%	

Figure 63: Theatre – Attendance by State/Territory (2013)

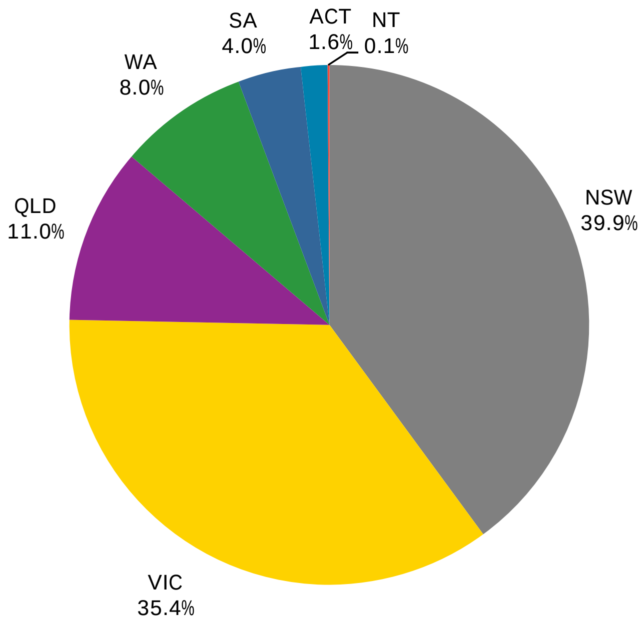


Table 47: Theatre – Attendance by State/Territory (2013)

State/ Territory	Attendance	Proportion	Industry Share Change from 2012
NSW	735,664	39.9%	1.1%
VIC	651,419	35.4%	2.7%
QLD	201,817	11.0%	0.7%
WA	148,274	8.0%	-3.4%
SA	72,924	4.0%	-0.2%
ACT	29,944	1.6%	-0.9%
TAS	-	0.0%	0.0%
NT	2,135	0.1%	0.0%
Total	1,842,177	100.0%	

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Appendix A Survey Participants

- Araluen Centre for Arts & Entertainment NT
- The Arts Centre (Melbourne)
- Arts Projects Australia (WOMADelaide) SA
- BASS SA
- Bluesfest
- Canberra Ticketing
- Cirque du Soleil
- Darwin Entertainment Centre
- FringeTIX (Adelaide Fringe)
- Fringe World Festival (Perth)
- Melbourne Recital Centre
- The Ticket Group (previously Moshtix and Foxtix)
- Queensland Performing Arts Centre (Qtix)
- Sydney Opera House
- Ticketmaster
- Ticketek

AMPAG Companies:

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

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