Live Performance Industry in Australia

2016 Ticket Attendance and Revenue Survey

Live Performance Australia

Reliance Restricted

29 August 2017

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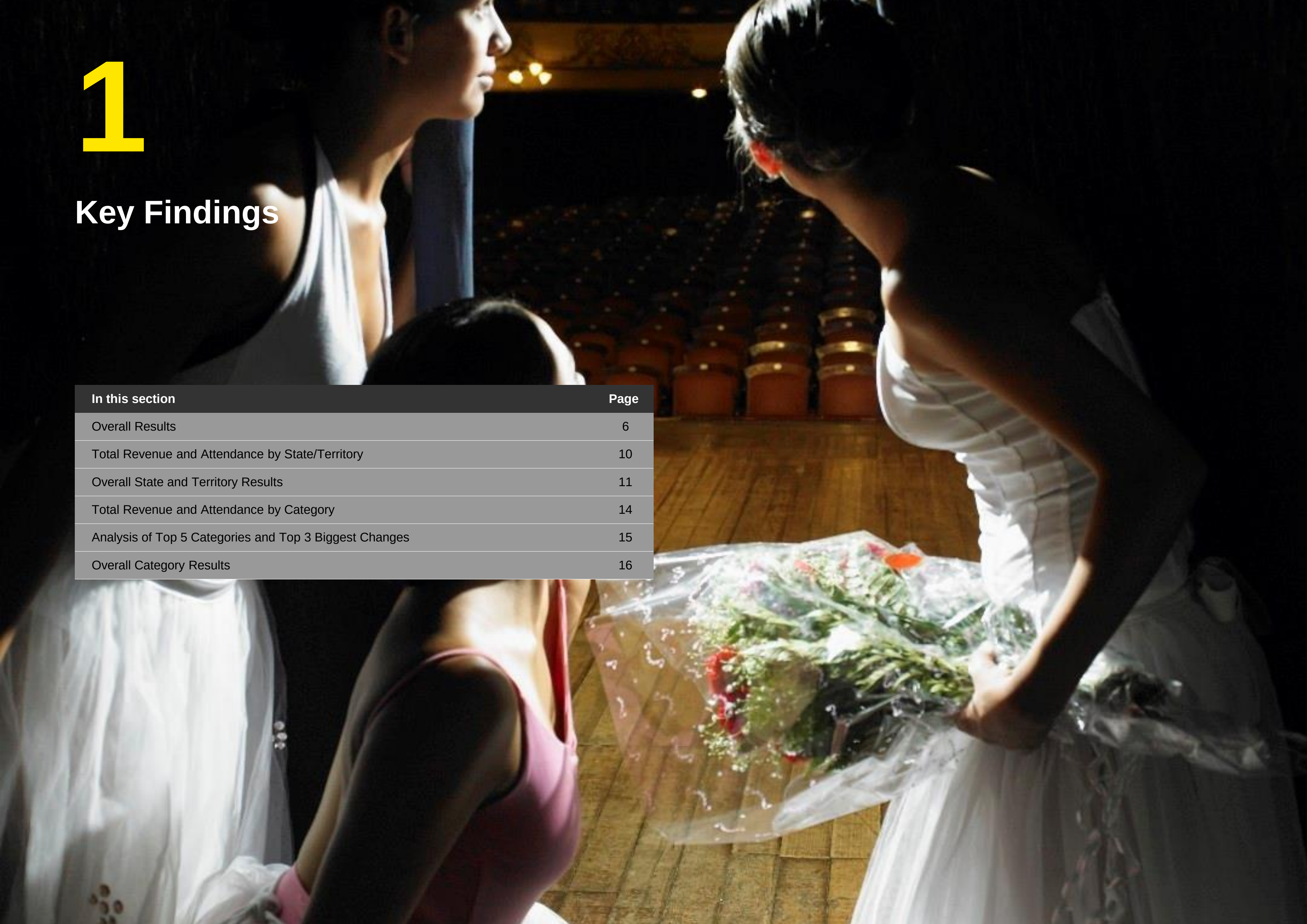

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Key Findings

1 Key Findings
Overall Results

In 2016 total industry revenue has grown to $1.43b with over 18.78m tickets issued.

Industry growth

- In 2016 (calendar year), the Australian live performance industry generated total ticket sales revenue of $1.43b, up 1.2% on 2015 when ticket sales totalled $1.41b. This increase in revenue was a result of an increase in the total number of paid tickets, offset by a slight decrease in the average ticket price by 3% from $86.34 to $83.72.
- Approximately 18.78m tickets were issued in 2016, representing an increase of 0.8% from 2015 when 18.63m tickets were issued. Of the 18.78m total tickets, the number of paid tickets issued was 17.09m, an increase from 16.37m sold in 2015. The remaining 1.7m tickets issued in 2016 were complimentary, sponsor allocated and zero-priced tickets.
- In 2016 the highest number of tickets issued for live performance events since 2008 was recorded. Although revenue increased slightly in 2016, it is still well short of the record revenues achieved in 2013 ($1.48b) and 2014 ($1.51b). This is due to the record high average ticket prices achieved in 2013 and 2014, driven by major international tours in the Contemporary Music category during the period, including Pink, Katy Perry, Rolling Stones and Bruce Springsteen.

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

Drivers of growth

- Consistent with previous years, NSW generated the highest share of national live performance revenue and attendance (35%), with Victoria being the second largest contributor (30%). Combined NSW and Victoria generated approximately 65% of Australia's live performance revenue and attendance in 2016.
- Tasmania experienced the highest state growth in revenue (38.5%) and attendance (13.7%) in 2016. NSW also experienced steady growth in revenue by 10.9% and attendance by 8.6%.
- Consistent with previous years, Contemporary Music is the largest category in the industry, generating a 30.5% market share of total revenue and attendance.
- Revenue growth in Comedy (57.3%), Children's/Family Events (41.6%), Classical Music (36.1%), Special Events (44.1%) and Theatre (40%) drove growth in the live performance industry in 2016. This growth was offset by revenue declines in Circus and Physical Theatre (26.1%), Festivals (Contemporary Music) (25.2%), Festivals (Multi-Category) (8.9%) and Contemporary Music (7.9%).

Background

This report presents the findings of ticket attendances and revenues for the live performance industry for the 2016 calendar year. This follows on from the previous annual ticketing studies published by LPA since 2004, and by LPA in partnership with Ernst & Young (EY) since 2006.

As in previous years, the *2016 Ticket Attendance and Revenue Survey* has captured ticket attendance and revenue data from ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies. Unlike the 2015 Survey, the 2016 Survey does not include ticket attendance and revenue data from the Australia Council for the Arts (Key Organisations) and a selection of Australian Performing Arts Centres Association (APACA) members. This dataset was reported on separately to the primary data in the 2015 Report and is referred to as "Supplementary" data. This supplementary dataset will be compiled in a separate report to provide a representation of the small to medium sector, as well as regional and metropolitan (non-capital city) venues.

The live performance industry encompasses performances, productions, previews and concerts that are performed in front of a live audience. Our analysis in this Report groups events into 12 distinct categories based on the type of art form (as defined in Appendix B).

1 Key Findings
Overall Results

2016 Ticket Attendance and Revenue (2004 – 2016)

	Revenue		Attendance		Ticket price	
Year	**Revenue ($)**	**Growth (%)**	**Total Attendance***	**Growth (%)**	**Average ticket price ($)****	**Growth (%)**
2004	$689,599,070	-	13,477,231	-	$55.13	-
2005	$834,337,206	21.0%	15,808,790	17.3%	$60.62	10.0%
2006	$1,158,064,526	38.8%	19,835,756	25.5%	$64.08	5.7%
2007	$1,228,658,664	6.1%	20,887,365	5.3%	$66.03	3.1%
2008	$1,061,273,304	-13.6%	15,823,705	-24.2%	$76.60	16.0%
2009	$1,083,329,949	2.1%	15,196,773	-4.0%	$80.57	5.2%
2010	$1,327,805,816	22.6%	17,241,139	13.5%	$86.43	7.3%
2011	$1,309,187,150	-1.4%	17,345,720	0.6%	$85.99	-0.5%
2012	$1,204,883,551	-8.0%	16,273,730	-6.2%	$85.46	-0.6%
2013	$1,478,976,893	22.7%	17,926,626	10.2%	$92.16	7.8%
2014	$1,507,963,952	2.0%	18,536,434	3.4%	$91.57	-0.6%
2015 ***	$1,413,208,686	-6.3%	18,626,457	0.5%	$86.34	-5.7%
2016	$1,430,399,693	1.2%	18,782,588	0.8%	$83.72	-3.0%

Trend analysis considerations

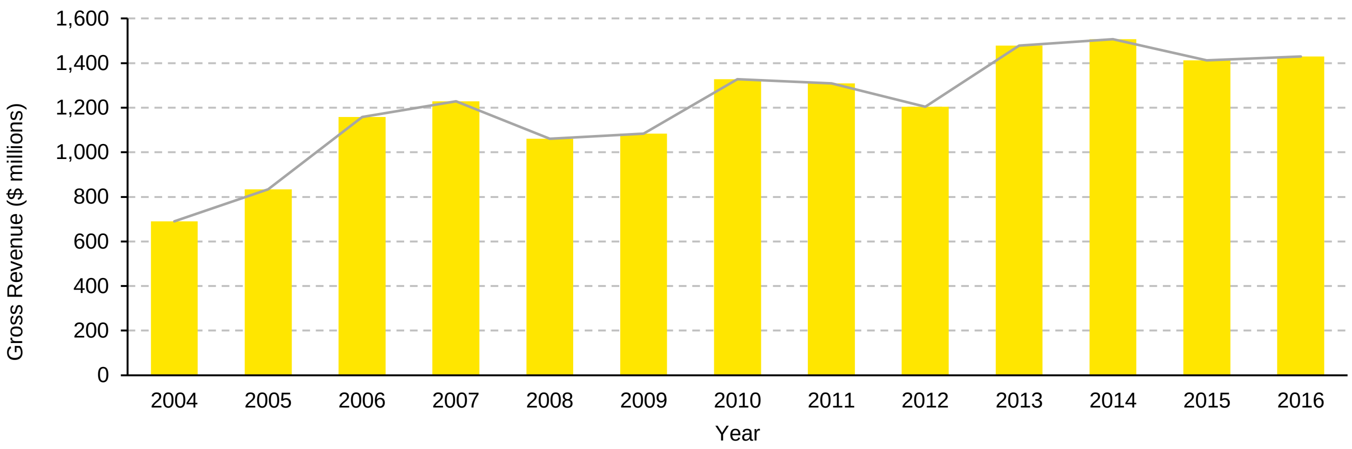
- An analysis of longer term trends that follow over the page provides an indication of how the industry has performed in recent years. However, given that data used to prepare the reports prior to 2008 was not provided in a disaggregated format and as such EY was unable to query the accuracy of the allocation of events in these years, our trend analysis has only been performed on data from 2008 to 2016. Further, these trends do not account for the inclusion of new data providers over time.

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

1 Key Findings

Overall Results

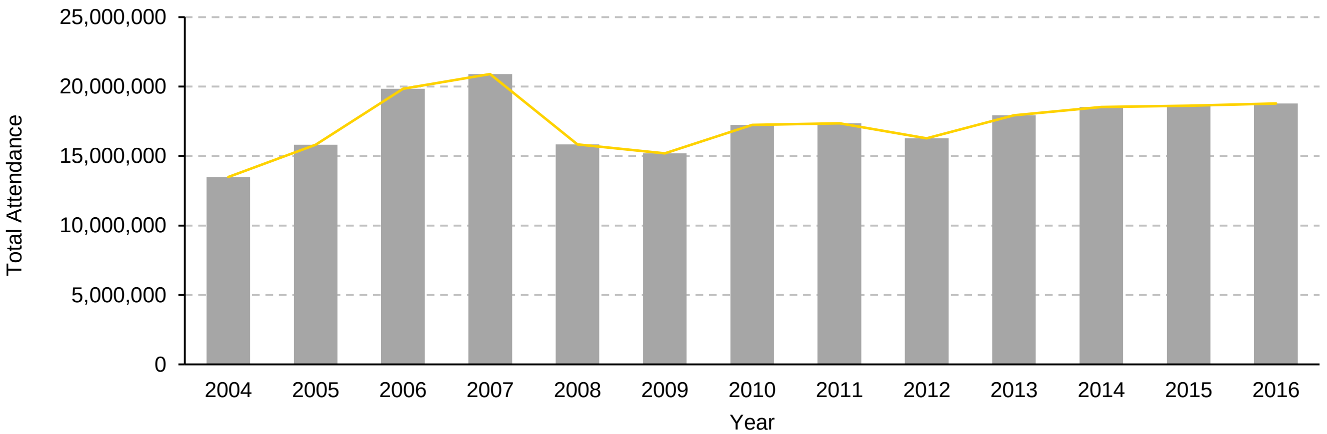
Total Revenue (2004 – 2016)



Key Revenue Insights

- Between 2008 and 2016, industry revenue has increased by 34.8%, despite falling in 2011, 2012 and 2015.
- The compound annual growth rate (CAGR) for revenue over the same period was 3.8%.
- Comedy experienced the highest category increase in revenue by 57.3% ($86.4m) in 2016.
- Tasmania had the most significant state growth in revenue by 38.5% ($14.7m) in 2016.

Total Attendance (2004 – 2016)

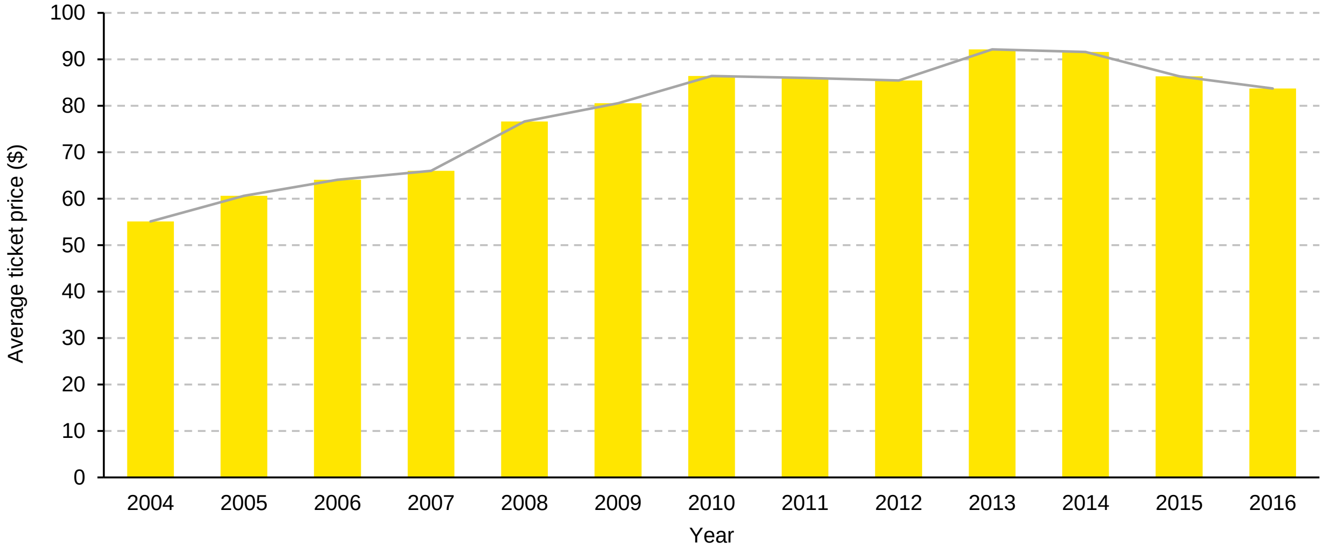


Key Attendance Insights

- Total attendance has remained relatively consistent across 2013 to 2016, increasing by 4.8% over the period.
- The CAGR for attendance between 2008 and 2016 was 2.2%.
- Consistent with the growth in revenue, Comedy experienced the highest category increase in attendance (42%) and Tasmania experienced the most significant state growth in attendance (13.7%) in 2016.

1 Key Findings
Overall Results

Average Ticket Price (2004 – 2016)



Key Average Ticket Price Insights

- Between 2008 and 2016 the average ticket price has increased by a total of 9.3%, representing a CAGR 1.1%.
- The growth rate in average ticket price over this period has been subdued by the decline in average ticket price since it peaked at $92.16 in 2013.
- 2016 experienced a further decline of 3% from an average ticket price of $86.34 in 2015 to $83.72.
- This decrease was driven by large declines in the average ticket price in Festivals (Multi-Category) by 21.4%, Circus and Physical Theatre by 11.7% and Contemporary Music by 11.4%.

1 Key Findings
Total Revenue and Attendance by State/Territory

Total Revenue and Attendance by State/Territory (2016)

	Revenue				Attendance			
State/Territory	Revenue (2016)	Share of Industry (2016)	Share of Industry (2015)	Change in Revenue from 2015	Total Attendance* (2016)	Share of Industry (2016)	Share of Industry (2015)	Change in Attendance from 2015
NSW	$530,186,274	37.1%	33.8%	10.9%	6,073,498	32.3%	30.0%	8.6%
VIC	$440,330,153	30.8%	30.9%	0.8%	5,431,066	28.9%	29.8%	-2.1%
QLD	$180,304,512	12.6%	13.8%	-7.7%	2,527,535	13.5%	15.6%	-13.3%
WA	$147,807,422	10.3%	11.9%	-12.4%	2,334,951	12.4%	11.9%	5.3%
SA	$94,316,578	6.6%	6.8%	-2.6%	1,797,087	9.6%	9.1%	5.7%
ACT	$19,564,660	1.4%	1.7%	-16.8%	313,386	1.7%	2.0%	-15.9%
TAS	$14,743,791	1.0%	0.8%	38.5%	239,778	1.3%	1.1%	13.7%
NT	$3,146,303	0.2%	0.2%	-2.3%	65,287	0.3%	0.4%	-6.8%
Total	$1,430,399,693	100.0%	100.0%	1.2%	18,782,588	100.0%	100.0%	0.8%

*Based on both paid and unpaid tickets

1 Key Findings

Overall State and Territory Results

Between 2015 and 2016 the live performance industry in each state and territory experienced varying shifts in growth and decline in both ticket sales revenue and attendance.

Both NSW and Tasmania experienced steady growth in both revenue and attendance.

- **Tasmania** experienced the highest growth in revenue and attendance amongst all the states and territories. Between 2015 and 2016 revenue increased by 38.5% (to $14.7m) and attendance increased by 13.7% (to 0.24m). This significant growth was primarily due to Cirque du Soleil's performances of *QUIDAM* in Hobart. Cirque du Soleil last performed in Tasmania in 2011.
- **NSW** experienced an increase in revenue by 10.9% (to $530.2m) and attendance by 8.6% (to 6.1m) between 2015 and 2016. This increase in revenue and attendance was largely driven by growth in the following categories:
    - **Circus and Physical Theatre** experienced an increase of 140% in revenue and 122.1% in attendance primarily attributable to Cirque du Soleil's tours of *QUIDAM* and *KOOZA* to NSW.
    - **Comedy** revenue and attendance increased by 82.4% and 115.7% respectively, driven by the tours of high-profile international comedians including Kevin Hart, Michael McIntyre and Dawn French.
    - **Classical Music** experienced an increase of 42.7% in revenue and 29.8% in attendance primarily due to the return of André Rieu for the first time since 2013.
    - **Musical Theatre** revenue increased by 15.5% and attendance by 5.4% due to performances of major musicals taking place including *My Fair Lady*, *The Sound of Music* and *Aladdin*.

The variation in growth and decline generated in each market is primarily impacted by major tours or events, particularly international tours that take place in each state or territory in any given year.

Victoria remained steady, recording slight growth in revenue despite a slight decline in attendance.

- **Victoria** experienced a slight increase in revenue by 0.8% (to $440.3m) and a slight decrease in attendance of 2.1% (to 5.4m) between 2015 and 2016. The slight increase in revenue was driven by significant increases in Opera (53.6%) and Special Events (340.2%), offset by substantial decreases in Festivals (Multi-category) (44.2%) and Circus and Physical Theatre (67.5%).
    - **Opera** revenue increased primarily due to the return of Opera Australia's production of *The Ring Cycle* performed exclusively in Melbourne. This production was previously performed in Melbourne in 2013. The increase of revenue in **Special Events** was primarily due to the Royal Edinburgh Military Tattoo performing in Melbourne for the first time.
    - **Festivals (Multi-Category)** revenue decreased due to falling ticket prices across the festivals held in Victoria. The decrease in revenue for **Circus and Physical Theatre** can be primarily attributed to the absence of Cirque du Soleil, which performed in Victoria in 2015 but did not return in 2016.

*Based on both paid and unpaid tickets

1 Key Findings

Overall State and Territory Results

Queensland, ACT and NT all experienced declines in revenue and attendance.

- **ACT** experienced the greatest decline in revenue and attendance amongst all the states and territories. Between 2015 and 2016 revenue decreased by 16.8% (to $19.6m) and attendance decreased by 15.9% (to 0.31m). This decline in growth was primarily due to the absence of Cirque du Soleil, which performed in Canberra in 2015 but did not return in 2016.
- **QLD** experienced a decline in revenue by 7.7% (to $180.3m) and attendance by 13.3% (2.5m) between 2015 and 2016. The declines in revenue and attendance were largely driven by decreases in the following categories:
  - **Musical Theatre** revenue and attendance declined by 30% due to a decrease in the number of major musicals performing in 2016 compared to 2015.
  - **Festivals (Multi-Category)** revenue declined by 25% and attendance by 17.6% primarily due to falling ticket prices across festivals held in Queensland.
- **NT** experienced a slight decline in revenue by 2.3% (to $3.1m) and in attendance by 6.8% (to 65k).

Both WA and SA experienced declines in revenue, despite generating steady growth in attendance.

WA has experienced a decrease in revenue each year since 2013, declining by 24% between 2013 and 2016. Despite this decline, WA has generated an increase in attendance by 8% over the same period.

- **WA** revenue decreased by 12.4% (to $147.8m) despite a 5% rise in attendance (to 2.3m) between 2015 and 2016. The decline in revenue was largely driven by decreases in the following categories:
  - **Circus and Physical Theatre** revenue decreased by 73.2% due primarily to the absence of Cirque du Soleil, which performed in WA in 2015 but did not return in 2016.
  - **Festivals (Contemporary Music)** decreased by 52%, with the WA festivals market being hit particularly hard by the cancellation of Future Music Festival and Stereosonic in 2016.
  - **Contemporary Music** revenue decreased by 34.5% due to a number of prominent acts that attracted large crowds in 2015 not returning in 2016, such as AC/DC, Fleetwood Mac, Foo Fighters, Ed Sheeran and One Direction. Additionally, many of the high-profile international acts that toured Australia in 2016 did not perform in WA including Coldplay, Prince, Selena Gomez, Kendrick Lamar and Madonna.
- Despite the fall in revenue, attendance at live performance events in WA increased due to significant attendance growth in a number of categories.
  - **Children's/Family Events** and **Comedy** attendance in WA increased by 169.8% and 216.9% respectively due to the impact of major tours, particularly international tours, that took place across both categories. In Children's/Family Events this included tours by *Disney on Ice: Magical Ice Festival* and The Wiggles. In Comedy this included tours by international comedians including Billy Crystal and Dawn French.
  - **Musical Theatre** attendance increased by 63.6% primarily due to performances of major musicals in Perth including *The Lion King, The Sound of Music* and *Little Shop of Horrors.*

*Based on both paid and unpaid tickets

1 Key Findings

Overall State and Territory Results

SA has experienced steady growth in attendance each year since 2013, increasing by 20% between 2013 and 2016.

However, revenue in SA has declined each year since 2014, decreasing by 6.6% between 2014 and 2016.

- **SA** experienced a slight decline in revenue of 2.6% (to $94.3m), despite attendance increasing by 5.7% (to 1.8m) between 2015 and 2016. The fall in revenue was primarily driven by significant declines in revenue in the same categories that WA experienced declines:
  - Similarly to WA, **Circus and Physical Theatre** revenue decreased by 75.4% due primarily to the absence of Cirque du Soleil, which performed in SA in 2015 but did not return in 2016.
  - **Festivals (Contemporary Music)** experienced a decrease in revenue by 74.6%, due to the SA festivals market being hit particularly hard by the cancellation of major national touring festivals Future Music Festival and Stereosonic in 2016.
  - **Contemporary Music** revenue decreased by 20% primarily due to a number of prominent acts that attracted large crowds in 2015 not returning in 2016. Additionally many of the high-profile international acts that toured Australia in 2016 did not perform in SA including Coldplay, Prince, Selena Gomez, Kendrick Lamar and Madonna.
- The increase in attendance at live performance events in SA between 2015 and 2016 was largely driven by increased attendance in a number of categories.
  - **Classical Music** attendance increased by 78% due both to an increase in attendance to performances by AMPAG companies including Adelaide Symphony Orchestra, as well as the return of international artist André Rieu for the first time since 2013.
  - **Musical Theatre** attendance increased by 74.6% due to the performance of major musicals including *CATS, Ghost the Musical, Singin' in the Rain, Little Shop of Horrors* and *The Sound of Music.*
  - Attendance at **Children's/Family Events** increased by 39.7%, due to high-profile major performances including *Disney on Ice: Magical Ice Festival, Scooby-Doo Live* and performances by The Wiggles.

NSW and Victoria generate the largest share of revenue and attendance.

Additionally, both states generate a larger share of industry revenue and attendance compared to their share of Australia's population.

- NSW consistently records the highest revenue and attendance amongst all the states and territories in Australia, accounting for 37.1% and 32.3% of the industry market share of revenue and attendance respectively in 2016. Victoria maintained the second largest share of national revenue and attendance, representing 30% of the market. Combined NSW and Victoria generated 65% of Australia's live performance revenue and attendance in 2016.
- The NSW spend per capita on live performance events in 2016 ($68) was well above the national spend ($58.67 per capita), with Victoria being the only state to generate a higher spend per capita ($70.52). Victoria has recorded the highest spend per capita each year since 2013.
- NSW and Victoria command the largest market share of revenue and attendance in most categories, with the notable exception of Festivals (Multi-Category). SA and WA generate the majority of revenue and attendance in this category, with a combined 63.3% market share of revenue and 75.3% of attendance. Major annual festivals held in SA and WA include Adelaide Fringe, Adelaide Festival, WOMADelaide, Fringe World Festival (Perth) and Perth International Arts Festival.

*Based on both paid and unpaid tickets

1 Key Findings
Total Revenue and Attendance by Category

Total Revenue and Attendance by Category in 2016

	Revenue			Attendance		
Category	Revenue	% change in revenue (from 2015)	Share of industry	Attendance	% change in attendance (from 2015)	Share of industry
Ballet and Dance	$60,079,595	-5.4%	4.2%	815,458	-5.1%	4.3%
Children's/Family	$54,316,058	41.6%	3.8%	1,376,254	27.3%	7.3%
Circus and Physical Theatre	$73,439,491	-26.2%	5.1%	838,980	-13.9%	4.5%
Classical Music	$76,764,404	36.1%	5.4%	1,219,293	22.7%	6.5%
Comedy	$86,382,773	57.3%	6.0%	1,409,299	42.0%	7.5%
Contemporary Music	$440,083,629	-7.9%	30.8%	5,658,753	1.9%	30.1%
Festivals (Multi-Category)	$56,641,751	-8.9%	4.0%	1,549,007	4.2%	8.2%
Festivals (Contemporary Music)	$79,865,326	-25.2%	5.6%	672,771	-48.2%	3.6%
Musical Theatre	$347,684,296	3.8%	24.3%	3,298,051	1.2%	17.6%
Opera	$46,247,521	11.4%	3.2%	407,965	-5.8%	2.2%
Special Events	$29,310,579	44.1%	2.0%	185,104	-66.8%	1.0%
Theatre	$79,584,271	40.0%	5.6%	1,351,653	19.1%	7.2%
Total	**$1,430,399,693**	1.2%	100.0%	18,782,588	0.8%	100.0%

1 Key Findings

Analysis of Top 5 Categories and Top 3 Biggest Changes

Top 5 Categories - Revenue and Attendance

Revenue			Attendance		
Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
Contemporary Music	$440,083,629	30.8%	Contemporary Music	5,658,753	30.1%
Musical Theatre	$347,684,296	24.3%	Musical Theatre	3,298,051	17.6%
Comedy	$86,382,773	6.0%	Festivals (Multi-Category)	1,549,007	8.2%
Festivals (Contemporary Music)	$79,865,326	5.6%	Comedy	1,409,299	7.5%
Theatre	$79,584,271	5.6%	Children's/Family	1,376,254	7.3%

Top 3 Biggest Changes in Revenue by Category

	Revenue Increase		Revenue Decrease	
	Biggest Increase Revenue		Biggest Decline Revenue	
No.	Category	Increase from 2015	Category	Decrease from 2015
1	Comedy	57.3%	Circus and Physical Theatre	-26.2%
2	Special Events	44.1%	Festivals (Contemporary Music)	-25.2%
3	Children's/Family	41.6%	Festivals (Multi-Category)	-8.9%

Top 3 Biggest Changes in Attendance by Category

	Attendance Increase		Attendance Decrease	
	Biggest Increase Attendance		Biggest Decline Attendance	
No.	Category	Increase from 2015	Category	Decrease from 2015
1	Comedy	42.0%	Special Events	-66.8%
2	Children's/Family	27.3%	Festivals (Contemporary Music)	-48.2%
3	Classical Music	22.7%	Circus and Physical Theatre	-13.9%

1 Key Findings
Overall Category Results

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

While total ticket sales revenue and attendance maintained a slight increase of 1.2% and 0.8% respectively, most of the categories experienced dramatic shifts in growth and decline. This is primarily due to the impact of major tours or events, particularly international tours, in the market in any given year.

Comedy, Children's/Family Events, Classical Music, Theatre and Special Events all experienced significant increases in revenue and attendance in 2016. The Comedy, Children's/Family Events and Classical Music categories in particular experienced record-breaking growth this year. Growth in these categories was primarily driven by major tours and events, particularly international tours that took place across Australia in 2016.

- **Comedy** experienced the highest growth in revenue and attendance amongst all the categories, generating a 57.3% increase in revenue (to $86.4m) and 42% increase in attendance (to 1.41m) between 2015 and 2016. This is the highest recorded revenue and attendance for Comedy since this category was introduced to the Survey Report in 2009. Between 2009 and 2016 revenue in Comedy has increased by 118.3% and attendance has increased by 83.3%. Comedy has experienced year on year growth in both revenue and attendance each year since 2013. The growth in Comedy in 2016 was primarily driven by major high-profile comedians that headlined tours in 2016 including international comedians Kevin Hart, Billy Crystal, Michael McIntyre and Dawn French, as well as local comedians Carl Barron and Jim Jeffries. Additionally, an increase of the average ticket price by 9% (to $65.54) contributed to the increase in revenue.
- **Children's/Family Events** experienced the third highest growth in ticket sales revenue (after Comedy and Special Events respectively) increasing by 41.6% (to $54.3m), and the second highest increase in attendance (after Comedy) increasing by 27.3% (to 1.4m) between 2015 and 2016. This is the highest revenue and attendance for Children's/Family events recorded since 2011. The significant growth in this category was primarily driven by national tours of major events that attracted large audiences including *Disney on Ice: Magical Ice Festival*, *Scooby-Doo Live*, *Peppa Pig Live*, *Ice Age Live!* and performances by The Wiggles. Additionally, an increase of the average ticket price by 9.5% (to $42.87) contributed to the increase in revenue.
- **Classical Music** experienced an increase in revenue of 36.1% (to $76.8m) and an increase in attendance of 22.7% (to 1.2m) between 2015 and 2016. This is the highest revenue recorded for Classical Music since 2008 and highest attendance since 2012. This is also the first year of growth in the Classical Music category following year on year declines in revenue each year since 2013 and year on year declines in attendance each year since 2012. The growth in this category was primarily driven by international major events including the return of high-profile international artist André Rieu for the first time since 2013 and the BBC Proms festival held in Melbourne. This was the first time the BBC Proms had been held outside of the UK. Additionally, an increase in the average ticket price by 9.7% (to $78.43) contributed to the increase in revenue.
- **Theatre** experienced an increase in revenue by 40% (to $79.65m) and an increase in attendance by 19.1% (to 1.4m) in 2016. This is the first year of growth in the Theatre category following year on year declines in revenue and attendance each year since 2014. Growth in Theatre was primarily driven by an increase in major theatre productions including a national tour of the commercial production *Mrs Brown's Boys*, Sydney Theatre Company's production of *Speed-the-Plow* starring Rose Byrne and Melbourne Theatre Company's production of *The Odd Couple* starring Shaun Micallef.
- **Special Events** substantially increased in revenue by 44.1% (to $29.3m) and increased in average ticket price by 304.4% (to $170.90) in 2016, although attendance declined substantially by 66.8%. The increase in revenue and average ticket price were primarily driven by the Royal Edinburgh Military Tattoo performances held in Melbourne. This was the first time that the Royal Edinburgh Military Tattoo performed in Victoria, and prior to this had only performed outside of the UK on three occasions. The Special Events category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.

1 Key Findings
Overall Category Results

Circus and Physical Theatre, Festivals (Contemporary Music) and Ballet and Dance experienced decreases in revenue and attendance in 2016. This is primarily due to the absence in 2016 of major events that took place in 2015.

- **Circus and Physical Theatre** experienced a decline of 26.2% in ticket sales revenue (to $73.44m) and a decrease in attendance of 13.9% (to 0.84m) in 2016. This category can be variable depending on the presence or absence of major tours by international companies in any given year, particularly Cirque du Soleil. The decline in revenue and attendance can be primarily attributed to Cirque du Soleil holding less performances in 2016 compared to 2015. In 2015 Cirque du Soleil performed in Sydney, Brisbane, Melbourne, Adelaide, Perth, Canberra and Wollongong. Comparatively, in 2016 Cirque du Soleil only performed in Sydney, Brisbane, Hobart and Newcastle.
- **Festivals (Contemporary Music)** experienced significant declines in revenue by 25.2% (to $79.9m in 2016) and declines in attendance by 48.2% (to 0.67m) between 2015 and 2016. Contemporary Music Festival revenue peaked in 2014 at $129.2m, and between 2014 and 2016 revenue decreased by 38.2%. This category experienced the second highest decline in revenue (after Circus and Physical Theatre) and attendance (after Special Events). The substantial decrease in Festivals (Contemporary Music) revenue and attendance was primarily driven by the cancellation of Future Music Festival and Stereosonic in 2016. The music festival market in SA and WA were hit particularly hard by the cancellation of these major festivals, experiencing a decrease in revenue by 74.6% and 52% respectively.
- **Ballet and Dance** experienced a decline in revenue by 5.4% (to $60.1m) and in attendance by 5.1% (0.82m) between 2015 and 2016. The average ticket price also declined by 2.1% from $84.36 to $82.59. The decline in Ballet and Dance was primarily driven by major performances such as Michael Flatley's *Lord of the Dance* that performed in 2015 not returning in 2016.

Festivals (Multi-Category) and Contemporary Music experienced moderate declines in revenue, despite increased attendance. Significant decreases in the average ticket price for these categories in 2016 contributed to the decrease in revenue.

- **Festivals (Multi-Category)** revenue decreased by 8.9% (to $56.6m) in 2016, despite attendance increasing slightly by 4.2% (to 1.55m). The decrease in revenue is primarily due to the decrease in average ticket price by 21.4% to $39.57 in 2016.
- **Contemporary Music** revenue decreased by 7.9% (to $440.1m) despite a slight increase in attendance by 1.9% (to 5.7m) between 2015 and 2016. Contemporary Music revenue has declined each year since 2013, decreasing by 30% between 2013 and 2016. In the same period attendance has decreased by 9.7%. The decline in revenue is partially due to the average ticket price decreasing by 11.4% (to $85.35) between 2015 and 2016. The average ticket price has continued to decrease each year since 2013 when the average ticket price peaked at $110.50, declining by 22.8% between 2013 and 2016. The decrease in Contemporary Music revenue is primarily due to a number of prominent acts with arena or stadium tours that attracted large crowds and toured to all five major cities in 2015 that did not return in 2016, such as AC/DC, Fleetwood Mac, Foo Fighters, Ed Sheeran and One Direction. Additionally, many of the high-profile international acts that toured Australia in 2016 only performed in up to three major capital cities (Sydney, Melbourne and/or Brisbane) including Coldplay, Prince, Selena Gomez, Kendrick Lamar and Madonna.

1 Key Findings

Overall Category Results

Opera and Musical Theatre both maintained moderate increases in revenue, driven by increases in the average ticket price.

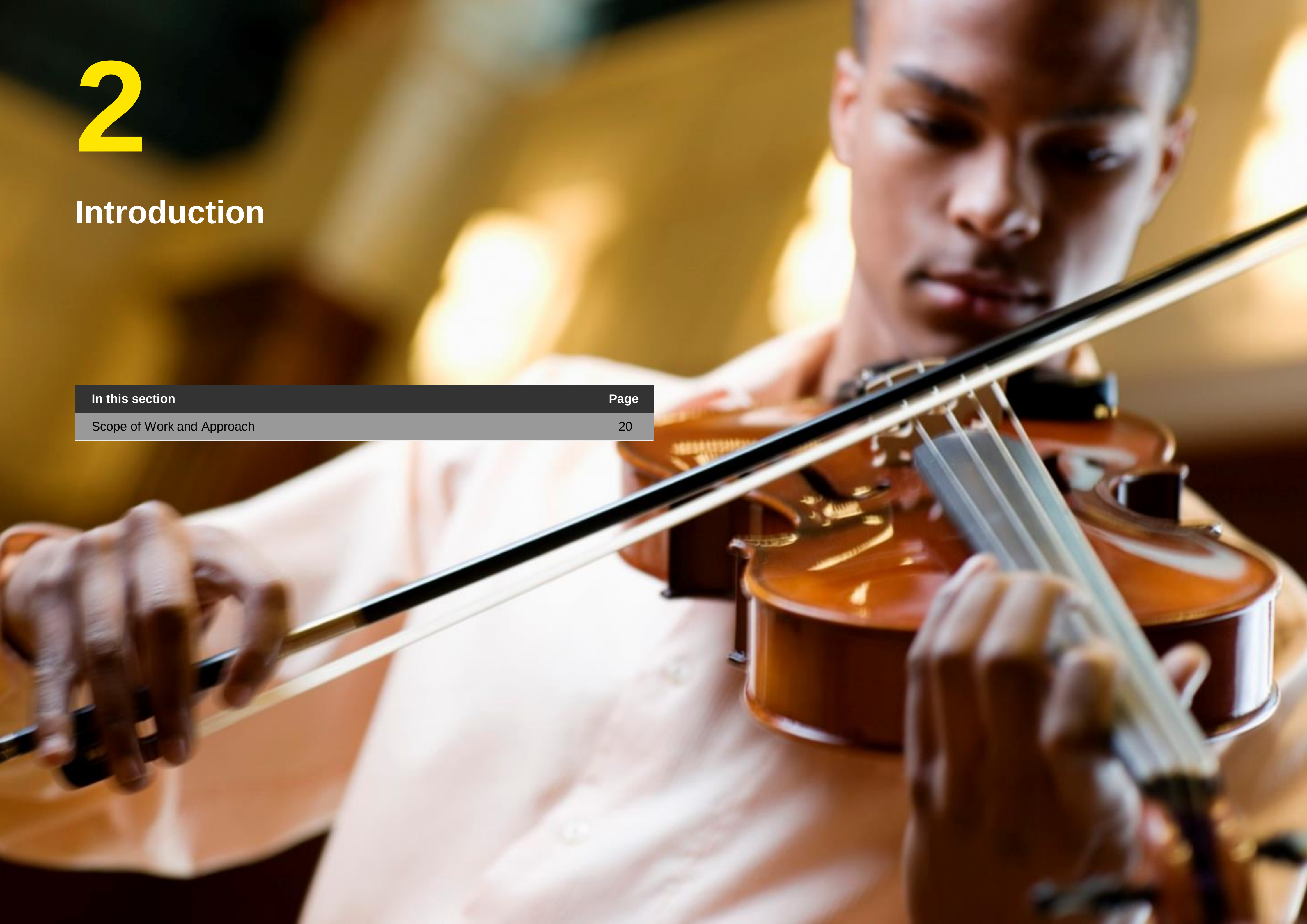
- **Opera** experienced an increase in revenue by 11.4% (to $46.2m), despite a decline in attendance by 5.8% (to 0.41m) between 2015 and 2016. The increase in average ticket price by 20.1% (to $145.80) contributed to the increase in revenue. Opera recorded the second highest average ticket price (after Special Events) in 2016. Opera Australia's production of *The Ring Cycle*, performed exclusively in Melbourne for the first time since 2013, contributed significantly to the increase in revenue and high average ticket price.
- **Musical Theatre** experienced a slight increase in revenue by 3.8% (to $347.7m) and in attendance by 1.2% with 39,317 more tickets sold in 2016 than in 2015. Musical Theatre has experienced growth in revenue and attendance each year since 2014. The increase in revenue this year can be attributed both to a slight increase in the average ticket price by 2.9% (to $111.21), as well as an increase in the number of major musical productions including *Aladdin*, *Matilda the Musical*, *The Sound of Music*, *Kinky Boots*, *Little Shop of Horrors*, *My Fair Lady* and many others. The average ticket price in this category has experienced year on year growth each year since 2011, increasing by 20% between 2011 and 2016.

As with previous years, Contemporary Music and Musical Theatre command the largest share of the live performance market respectively. However, the majority share held by Contemporary Music has been declining over time.

- The top 5 categories accounted for approximately 71.5% of industry revenue and attendance in 2016.
- **Contemporary Music** and **Musical Theatre** represent the two largest categories in the industry generating 30.8% and 24.3% of revenue respectively, and 30.1% and 17.6% of attendance respectively. Combined, these two categories account for 55.1% of the live performance industry in terms of revenue and 47.7% of attendance.
- Although Contemporary Music still generates the largest live performance market share, its slice of the pie has been declining. At its peak in 2010, Contemporary Music commanded a 49.6% market share of revenue and 40.8% market share of attendance. In 2016 **Contemporary Music** and **Festivals (Contemporary Music)** combined generated approximately 35% of industry revenue and attendance, compared to 2013 in which the combined categories represented 45% of the market.

2

Introduction



2 Introduction
Scope of Work and Approach

Introduction

Scope of Work

Ernst & Young (EY) has been engaged by Live Performance Australia (LPA) to undertake the annual survey of ticket attendances and revenues for the live performance industry for the 2016 calendar year. The live performance industry encompasses performances, productions, previews and concerts that are performed in front of a live audience. The scope of our work included:

- Coordinating the collection of the ticket sales and revenue data (national survey data) for the live performance industry in Australia from participating ticketing companies, venues, entertainment companies, event organisers and the Australia Council for the Arts on behalf of the Australian Major Performing Arts Companies (AMPAG).
- Compiling the 2016 national survey data on an overall basis, by state and by event category.
- Conducting an analysis of the 2016 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.

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 are provided in Appendix A of this Report.

Ticketing data was assigned by the Survey Participants to event categories based on the guidelines established between LPA and these organisations. Appendix B of this Report presents a description of these event categories. Further, as part of these guidelines, the ticketing companies and venues 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.

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:

- Sporting events, talks, fashion festivals, food festivals (that do not include music line ups), workshops, cinema screenings, award nights, graduation ceremonies and art exhibitions were identified in some data sets. These were excluded as they are not considered part of the live performance industry.
- Amateur events such as school performances, dance academy concerts and other community group performances were excluded as the scope of this Survey does not include amateur performances.
- Music festivals included in Contemporary Music were reallocated to Festivals (Contemporary Music).
- Comedy events included in Theatre were reallocated to the Comedy category.

2 Introduction
Scope of Work and Approach

Limitations

As with previous studies, data on ticket revenues and attendances for the live performance industry were limited to those provided by the Survey participants. While national in reach, the coverage of this Survey excludes events in some regional venues as well as contract-fee performances by AMPAG companies. Small to medium companies and independent theatre are also under-represented as many of these companies either self-ticket or use ticketing service providers and venues not currently involved in the Survey. To capture these types of live performance events LPA and EY are producing a supplementary ticket attendance and revenue report for 2016 that will include data from the following organisations:

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

It is important to note, festivals are under-reported in this Survey due to the fact that;

- Some festivals maintain their own ticketing systems and many of these are not part of this Survey. The inclusion of ticketing data from Oztix, Bluesfest, MONA FOMA and Dark MOFO in recent years addresses some under reporting in the festival categories. However, revenue and attendance are likely to be undervalued in the category because a number of boutique festival events are self-ticketed and are not presently contributing data to the Survey. 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 Oztix and Moshtix (The Ticket Group) helps to decrease the level of under-reporting, as these ticketing agencies include smaller performances at certain bars and hotels. Still, this Survey provides a conservative estimate of the total ticket revenues and attendances sourced from live performance events in Australia.

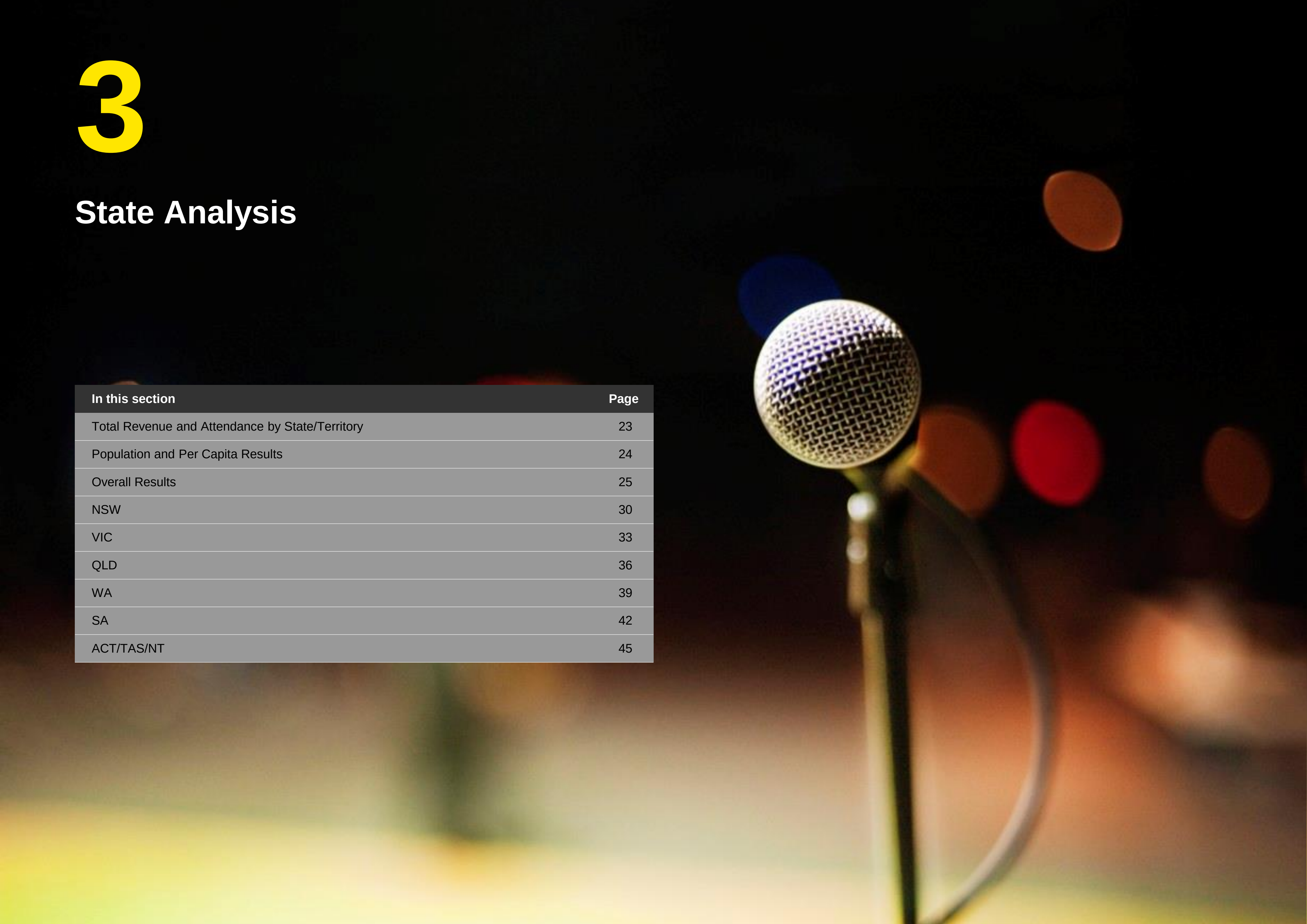
As part of our analysis, the 2016 data was compared against historical data sourced directly from Live Performance Australia’s *Live Performance Industry in Australia 2006 - 2015 Reports*. EY acknowledges that we did not revisit the data collection and allocation methodology used in 2006 and 2007 as the historical data used to prepare the reports in these years was not provided in a disaggregated format. As such, EY was unable to query the accuracy of the allocation of events in these years.

Therefore caution should be applied when comparing data from 2008 to 2016 periods with that of data from previous years as inconsistencies may exist in the data collection methodology between the surveys performed in these nine years, and for previous surveys (where more detailed event specific information was not requested).

Changes in 2016 Survey compared to prior years

We have made the following changes to the Survey in 2016 when compared to prior years:

- The inclusion of data from the **Melbourne Fringe Festival**, impacting the category Festivals (Multi-Category).
- Inclusion of data from **WA Venues and Events**. This company predominately tickets events for Perth Concert Hall, which was formerly ticketed by Ticketek until November 2015. Perth Concert Hall presents events across all categories.
- Inclusion of data from **The Blue Room Theatre**, an independent theatre which predominantly presents small scale theatre productions.
- The category Festivals (Single-Category) was renamed **Festivals (Contemporary Music)** to provide greater clarity to the definition. It is now defined as festivals/events which contain a number of events that predominately fall into the category of Contemporary Music (e.g. Bluesfest).



3

State Analysis

3 State Analysis

Total Revenue and Attendance by State/Territory

Total Revenue and Attendance by State/Territory (2016)

	Revenue				Attendance			
State/Territory	Revenue (2016)	Share of Industry (2016)	Share of Industry (2015)	Change in Revenue from 2015	Total Attendance* (2016)	Share of Industry (2016)	Share of Industry (2015)	Change in Attendance from 2015
NSW	$530,186,274	37.1%	33.8%	10.9%	6,073,498	32.3%	30.0%	8.6%
VIC	$440,330,153	30.8%	30.9%	0.8%	5,431,066	28.9%	29.8%	-2.1%
QLD	$180,304,512	12.6%	13.8%	-7.7%	2,527,535	13.5%	15.6%	-13.3%
WA	$147,807,422	10.3%	11.9%	-12.4%	2,334,951	12.4%	11.9%	5.3%
SA	$94,316,578	6.6%	6.8%	-2.6%	1,797,087	9.6%	9.1%	5.7%
ACT	$19,564,660	1.4%	1.7%	-16.8%	313,386	1.7%	2.0%	-15.9%
TAS	$14,743,791	1.0%	0.8%	38.5%	239,778	1.3%	1.1%	13.7%
NT	$3,146,303	0.2%	0.2%	-2.3%	65,287	0.3%	0.4%	-6.8%
Total	$1,430,399,693	100.0%	100.0%	1.2%	18,782,588	100.0%	100.0%	0.8%

*Based on both paid and unpaid tickets

3 State Analysis
Population and Per Capita Results

Population and Per Capita Results (2016)

	Population		Revenue	Attendance	Spending
State/Territory	Population (2016) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend Per Capita
NSW	7.80	32.0%	37.1%	32.3%	$67.99
VIC	6.24	25.6%	30.8%	28.9%	$70.52
QLD	4.88	20.0%	12.6%	13.5%	$36.92
WA	2.57	10.5%	10.3%	12.4%	$57.56
SA	1.72	7.0%	6.6%	9.6%	$54.93
ACT	0.41	1.7%	1.4%	1.7%	$37.69
TAS	0.52	2.1%	1.0%	1.3%	$60.18
NT	0.25	1.0%	0.2%	0.3%	$7.74
Total	**24.38**	**100.0%**	**100.0%**	**100.0%**	**$58.67**

Per capital results

- A comparison of each state and territory's share of the live performance industry against population provides insight into spend per capita, as well as the concentration of the industry relative to where people live. The above table illustrates NSW and Victoria command a larger share of revenue and attendance compared to their share of Australia's population. Victoria has recorded the highest spend per capita each year since 2013.

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

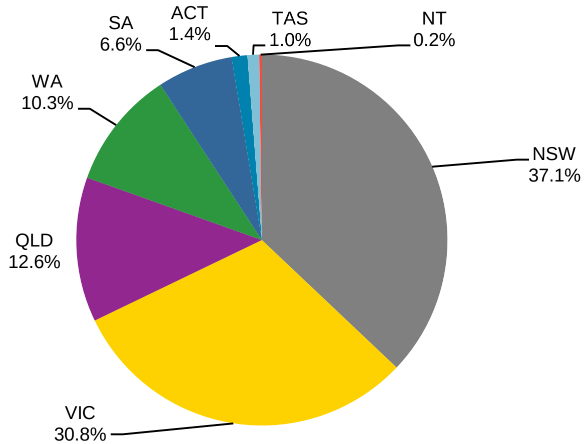
QLD reflects a lower proportion of industry revenue and attendance when compared with its share of population. This trend has also emerged in previous years. Reasons for these disproportional results include:

- Majority of regional performances are not included in this per capita analysis and as such, performances in larger states with significant regional markets, such as Queensland, are under-reported.
- Cities such as Brisbane are constrained in their ability to host performances due to a smaller number of venues and hence capacity.
- Some of Australia's largest performing arts companies are based in NSW and Victoria and as such stage the bulk of their performances in Sydney and Melbourne, for example Opera Australia (Sydney), Melbourne Symphony Orchestra, Sydney Symphony Orchestra and the Australian Ballet (Melbourne).
- Destination NSW and Visit Victoria are particularly active in the live performance major events markets and as such have been successful in attracting major live performance events to these states.

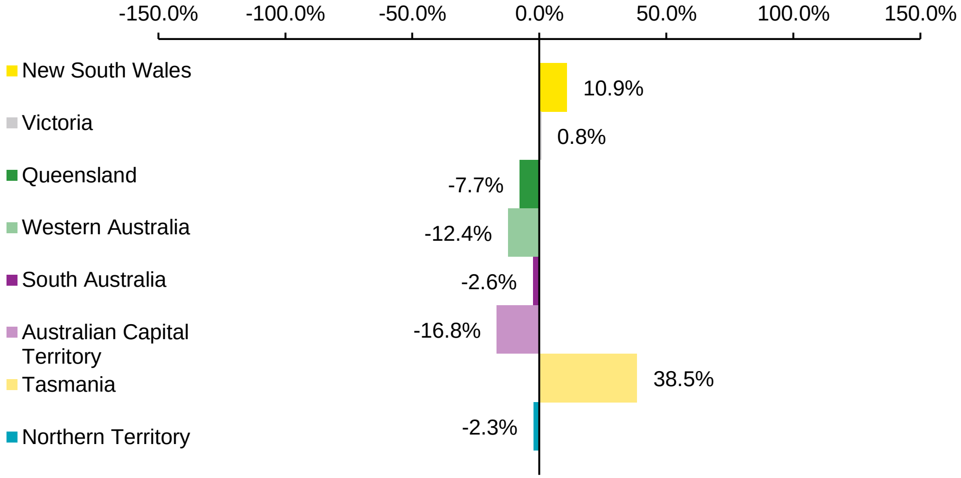
*Note: Population is as of December 2016 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0

3 State Analysis
Overall Results

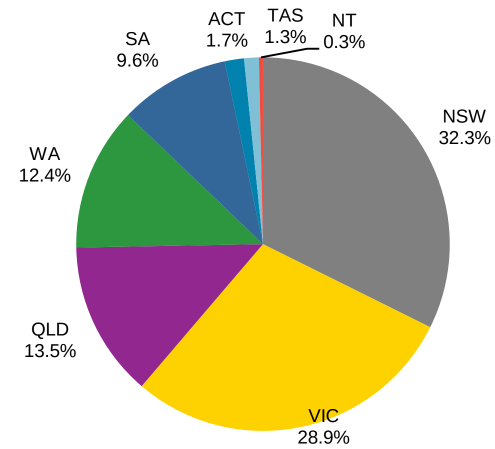
Market Share (Revenue) by State/Territory 2016



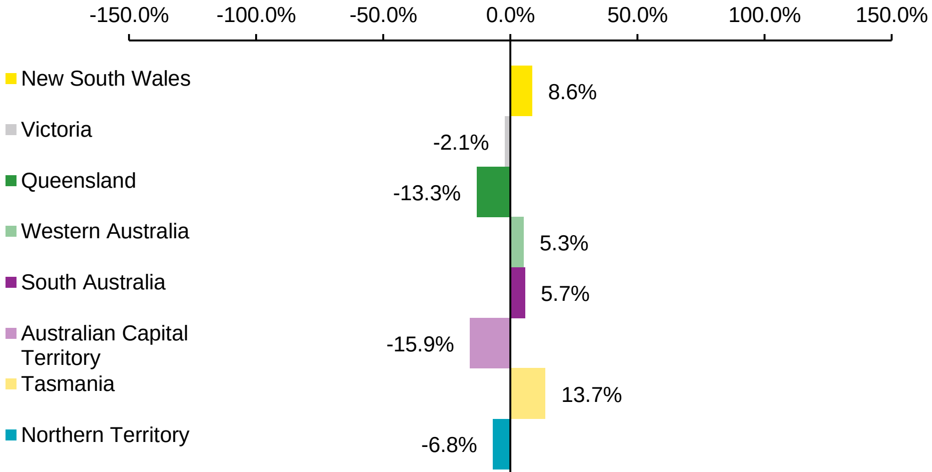
Percentage Movement in Revenue by State/Territory (2015/16)



Market Share (Attendance) by State/Territory 2016

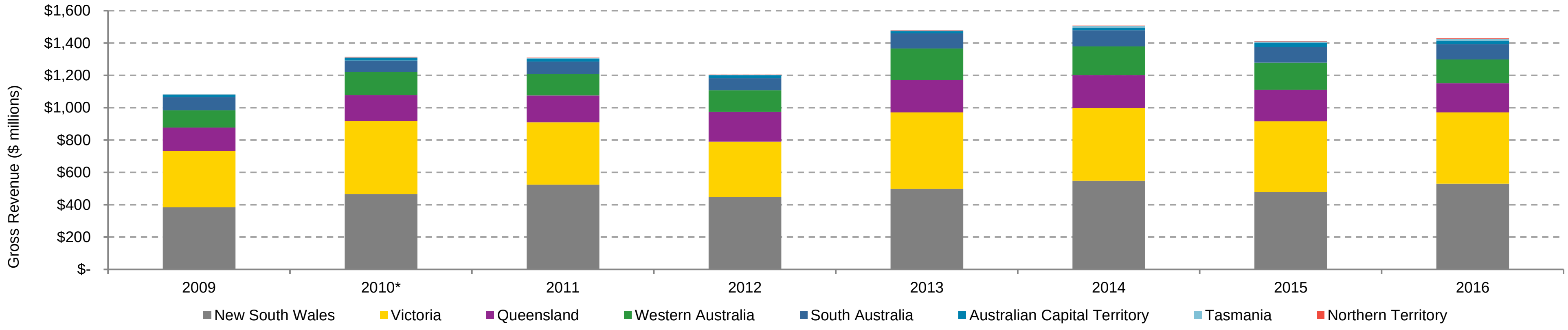


Percentage Movement in Attendance by State/Territory (2015/16)

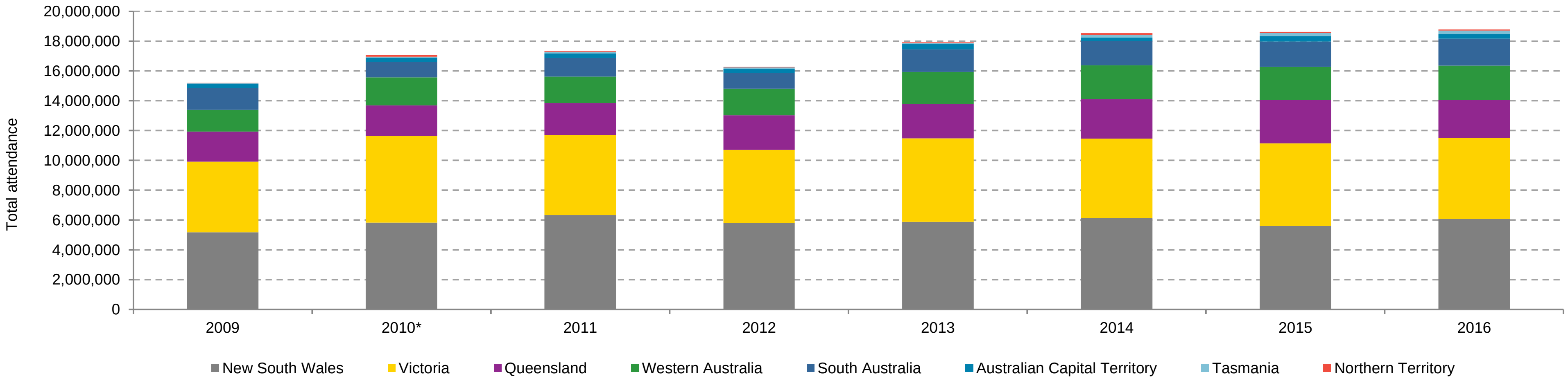


3 State Analysis
Overall Results

Total Revenue by State/Territory (2009 - 2016)



Total Attendance by State/Territory (2009-2016)



3 State Analysis
Overall Results

Total Revenue by State/Territory (2009 – 2016)

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

Total Attendance by State/Territory (2009 – 2016)

Attendance									
Year	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
2009	5,176,385	4,744,449	2,006,608	1,468,882	1,449,260	264,174	72,336	14,679	**15,196,773**
2010	5,818,163	5,820,603	2,043,327	1,879,408	1,035,243	304,168	59,753	96,872	**17,057,537**
2011	6,331,001	5,359,749	2,150,329	1,788,262	1,237,386	325,233	99,653	54,107	**17,345,720**
2012	5,795,757	4,916,559	2,302,462	1,791,795	1,053,997	271,525	97,972	43,663	**16,273,730**
2013	5,865,914	5,607,475	2,318,207	2,153,483	1,497,204	351,242	75,115	57,986	**17,926,626**
2014	6,132,827	5,318,537	2,661,632	2,266,435	1,614,267	246,542	185,011	111,183	**18,536,434**
2015	5,592,686	5,548,412	2,914,530	2,217,942	1,699,529	372,546	210,798	70,014	**18,626,457**
2016	6,073,498	5,431,066	2,527,535	2,334,951	1,797,087	313,386	239,778	65,287	**18,782,588**

3 State Analysis
Overall Results

Revenue by Category and State/Territory in 2016

Revenue									
Category/State	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$23,243,516	$18,316,661	$9,177,865	$4,928,233	$3,269,188	$1,080,267	-	$63,864	$60,079,595
Children's/Family	$19,180,350	$13,428,692	$6,879,316	$9,309,814	$3,918,236	$956,800	$319,664	$323,186	$54,316,058
Circus & Physical Theatre	$36,259,497	$9,138,614	$15,357,947	$5,417,525	$2,699,405	$978,979	$3,418,945	$168,579	$73,439,491
Classical Music	$32,579,475	$20,043,267	$8,661,621	$7,515,080	$5,153,598	$1,314,067	$1,493,512	$3,784	$76,764,404
Comedy	$21,444,180	$35,367,097	$11,028,063	$12,189,587	$3,125,300	$2,266,127	$159,956	$802,464	$86,382,773
Contemporary Music	$157,626,354	$129,677,372	$69,265,321	$46,200,547	$26,999,437	$7,097,245	$2,200,935	$1,016,419	$440,083,629
Festival (Multi Category)	$2,065,377	$9,366,715	$2,649,557	$11,077,097	$24,771,946	$431,166	$6,208,563	$71,330	$56,641,751
Festival (Contemporary Music)	$43,563,204	$14,030,671	$9,355,622	$7,893,042	$2,306,003	$1,978,885	$183,345	$554,555	$79,865,326
Musical Theatre	$125,214,539	$129,198,499	$38,994,129	$35,775,176	$16,570,468	$1,929,447	-	$2,038	$347,684,296
Opera	$30,404,441	$11,439,197	$1,508,084	$1,195,725	$1,355,075	$280,511	-	$64,489	$46,247,521
Special Events	$296,476	$27,831,031	$766,737	$156,527	$164,171	$95,636	-	-	$29,310,579
Theatre	$38,308,867	$22,492,337	$6,660,250	$6,149,070	$3,983,751	$1,155,529	$758,871	$75,595	$79,584,271
Total	**$530,186,274**	**$440,330,153**	**$180,304,512**	**$147,807,422**	**$94,316,578**	**$19,564,660**	**$14,743,791**	**$3,146,303**	**$1,430,399,693**

3 State Analysis
Overall Results

Attendance by Category and State/Territory in 2016

	Attendance								
Category/State	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	273,970	214,373	157,843	101,262	42,404	23,352	-	2,254	815,458
Children's/Family	457,618	362,689	176,701	226,333	98,971	30,970	11,263	11,709	1,376,254
Circus & Physical Theatre	346,002	162,278	157,907	60,557	48,602	20,652	38,644	4,338	838,980
Classical Music	410,151	391,440	134,560	146,001	72,765	23,797	40,467	112	1,219,293
Comedy	302,015	664,317	175,394	172,454	40,383	36,312	2,936	15,488	1,409,299
Contemporary Music	1,909,137	1,546,191	955,483	684,709	411,954	90,544	44,393	16,342	5,658,753
Festival (Multi Category)	41,495	145,318	95,055	387,491	778,869	9,866	88,658	2,255	1,549,007
Festival (Contemporary Music)	330,722	89,380	103,208	74,195	40,451	19,052	7,111	8,652	672,771
Musical Theatre	1,126,562	1,230,303	402,616	339,523	169,361	29,612	-	74	3,298,051
Opera	233,000	86,713	31,436	35,336	16,454	3,113	-	1,913	407,965
Special Events	3,973	162,759	13,208	1,917	2,092	1,155	-	-	185,104
Theatre	638,853	375,305	124,124	105,173	74,781	24,961	6,306	2,150	1,351,653
Total	**6,073,498**	**5,431,066**	**2,527,535**	**2,334,951**	**1,797,087**	**313,386**	**239,778**	**65,287**	**18,782,588**

3 State Analysis
NSW

NSW Revenue and Attendance

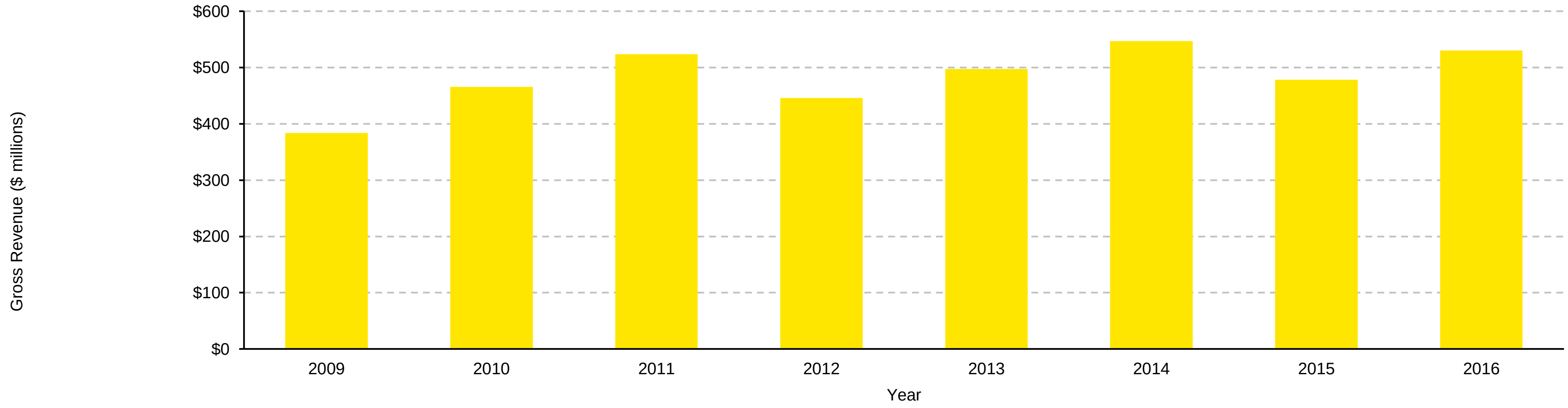
- In 2016 NSW generated $530.2m in ticket sales revenue and 6.1m in attendance. NSW consistently records the highest revenue and attendance amongst all the states and territories in Australia, accounting for 37.1% and 32.3% of the industry market share of revenue and attendance respectively in 2016. The NSW spend per capita on live performance events in 2016 ($68) was well above the national spend ($58.67 per capita), with Victoria being the only state to generate a higher spend per capita ($70.52). Revenue and attendance both steadily increased in 2016, by 10.9% and 8.6% respectively. This increase in revenue and attendance was largely driven by growth in the following categories:
  - Circus and Physical Theatre experienced an increase of 140% in revenue and 122.1% in attendance primarily attributable to Cirque du Soleil's tours of *QUIDAM* and *KOOZA* to NSW.
  - Comedy revenue and attendance increased by 82.4% and 115.7% respectively, driven by the tours of high-profile international comedians including Kevin Hart, Billy Crystal and Michael McIntyre.
  - Classical Music experienced an increase of 42.7% in revenue and 29.8% in attendance primarily due to the return of André Rieu for the first time since 2013.
  - Musical Theatre revenue increased by 15.5% and attendance by 5.4% due to performances of major musicals taking place including *My Fair Lady*, *The Sound of Music* and *Aladdin*.

NSW – Revenue and Attendance (2009 – 2016)

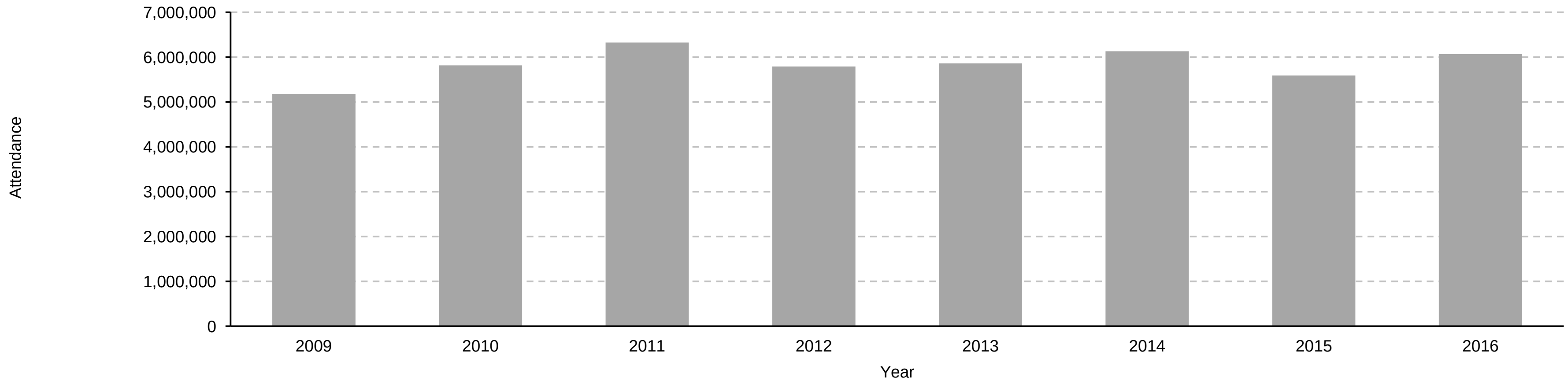
	Revenue		Attendance	
Year	Revenue	% Growth in Revenue	Attendance	% Growth in Attendance
2009	$383,713,353	-	5,176,385	-
2010	$465,761,849	21.4%	5,818,163	12.4%
2011	$523,903,477	12.5%	6,331,001	8.8%
2012	$446,063,403	-14.9%	5,795,757	-8.5%
2013	$497,463,659	11.5%	5,865,914	1.2%
2014	$547,173,799	10.0%	6,132,827	4.6%
2015	$478,077,501	-12.6%	5,592,686	-8.8%
2016	$530,186,274	10.9%	6,073,498	8.6%

3 State Analysis
NSW

Gross Revenue – NSW (2009-2016)



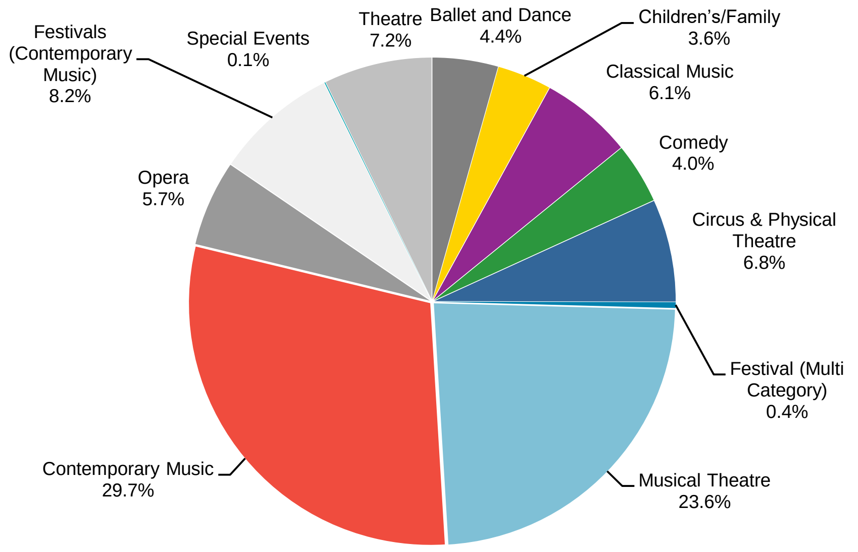
Total Attendance – NSW (2009-2016)



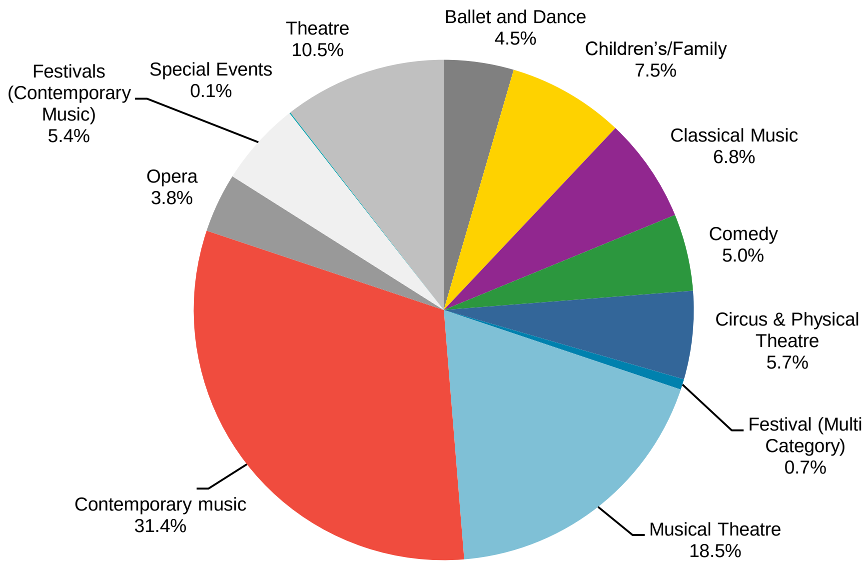
3 State Analysis

NSW

NSW Revenue by Category (2016)



NSW Attendance by Category (2016)



3 State Analysis
VIC

VIC Revenue and Attendance

- Victoria experienced a slight increase in revenue of 0.8% (from $436.9m in 2015 to $440.3m in 2016) and a slight decrease in attendance of 2.1% (from 5.5m in 2015 to 5.4m in 2016). Victoria maintained the second largest share of national revenue (30.8%) and attendance (28.9%), as well as achieving the highest spend per capita ($70.52). Victoria has recorded the highest spend per capita each year since 2013.
- The slight increase in revenue was driven by significant increases in Opera (53.6%) and Special Events (340.2%), offset by substantial decreases in Festivals (Multi-Category) (44.2%) and Circus and Physical Theatre (67.5%).
- Opera revenue increased primarily due to the return of Opera Australia's production of *The Ring Cycle* performed exclusively in Melbourne. This production was previously performed in Melbourne in 2013. The increase of revenue in Special Events was primarily due to the Royal Edinburgh Military Tattoo performing in Victoria for the first time.
- Festivals (Multi-Category) revenue decreased due to falling ticket prices across festivals held in Victoria. The decrease in revenue for Circus and Physical Theatre can be primarily attributed to the absence of Cirque du Soleil, which performed in Victoria in 2015 but did not return in 2016.
- Consistent with 2015, Contemporary Music was the most popular category, with Victoria contributing 29.5% and 27.3% respectively to the national revenue and attendance for Contemporary Music. Major international artists that performed included Coldplay, Madonna, Prince, Selena Gomez, Black Sabbath and Kendrick Lamar. Local artists included Flume, Keith Urban and Troye Sivan.

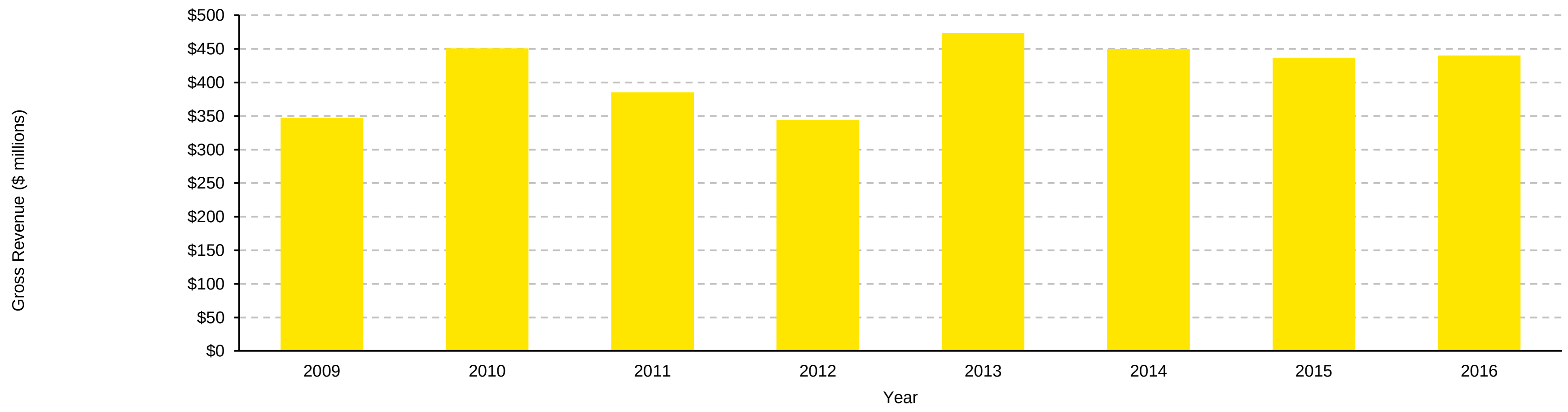
VIC – Revenue and Attendance (2009 – 2016)

	Revenue		Attendance	
Year	**Revenue**	**% Growth in Revenue**	**Attendance**	**% Growth in Attendance**
2009	$347,305,100	-	4,744,449	-
2010	$451,053,035	29.9%	5,820,603	22.7%
2011	$385,643,996	-14.5%	5,359,749	-7.9%
2012	$344,389,414	-10.7%	4,916,559	-8.3%
2013	$473,516,913	37.5%	5,607,475	14.1%
2014	$450,034,039	-5.0%	5,318,537	-5.2%
2015	$436,933,907	-2.9%	5,548,412	4.3%
2016	$440,330,153	0.8%	5,431,066	-2.1%

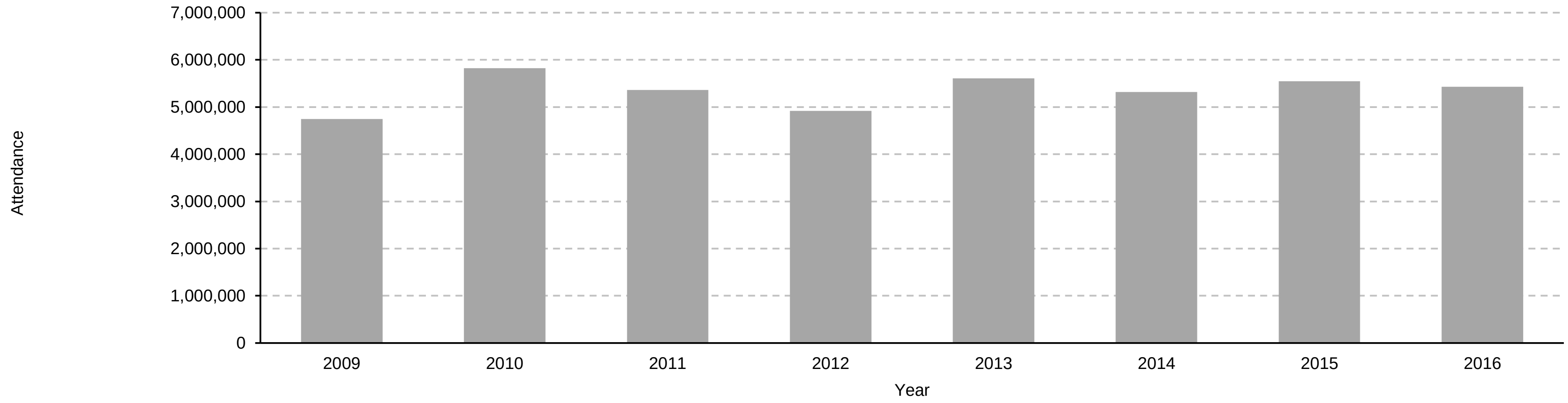
3 State Analysis

VIC

Gross Revenue – VIC (2009-2016)



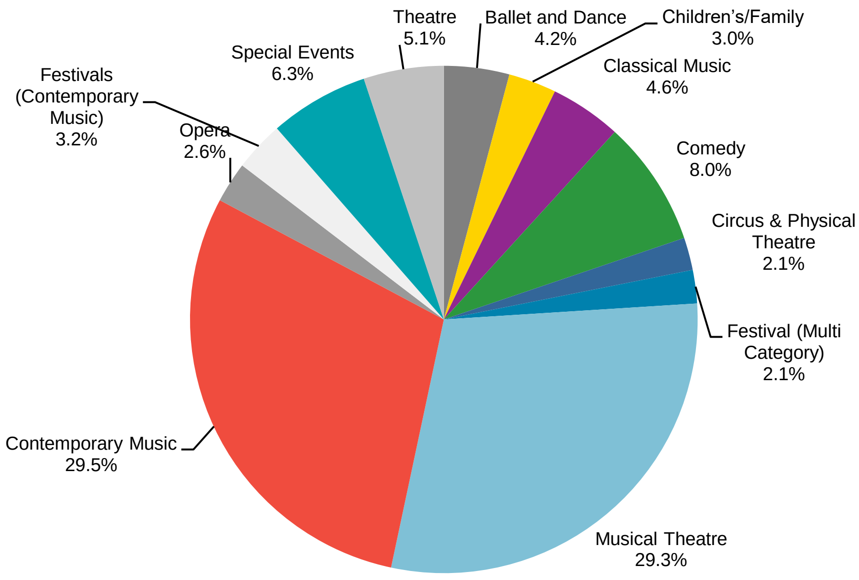
Total Attendance – VIC (2009-2016)



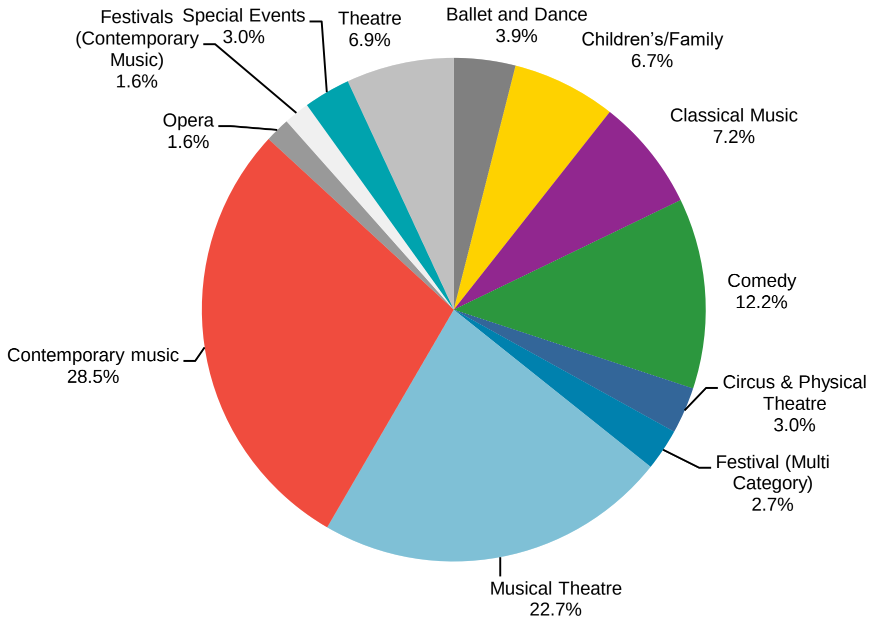
3 State Analysis

VIC

VIC Revenue by Category (2016)



VIC Attendance by Category (2016)



3 State Analysis
QLD

QLD Revenue and Attendance

- In 2016 Queensland generated $180.3m in ticket sales revenue and 2.5m in attendance. Following declines in ticket sales revenue and attendance in 2015, Queensland again experienced a decline in revenue (7.7%) and attendance (13.3%) in 2016. Declines in revenue and attendance were largely driven by decreases in the following categories:
  - Revenue for Special Events declined by (85.3%) and attendance by (95.4%).
  - Musical Theatre revenue declined by 30.2% and attendance by 30.1% due to a decrease in the number of major musicals that performed in 2016 compared to 2015.
  - Festivals (Multi-Category) revenue declined by 25% and attendance by 17.6% primarily due to falling ticket prices across festivals held in Queensland.
- Queensland experienced substantial increases of 46.1% in revenue and 31.4% in attendance in Ballet and Dance primarily driven by high-profile major performances including Ballet Preljocaj's *Snow White*, The Australian Ballet's *Cinderella* and Queensland Ballet's *Strictly Gershwin*. Queensland generated 15.3% and 19.4% of national revenue and attendance respectively in Ballet and Dance in 2016, compared to 9.9% and 14% respectively in 2015.

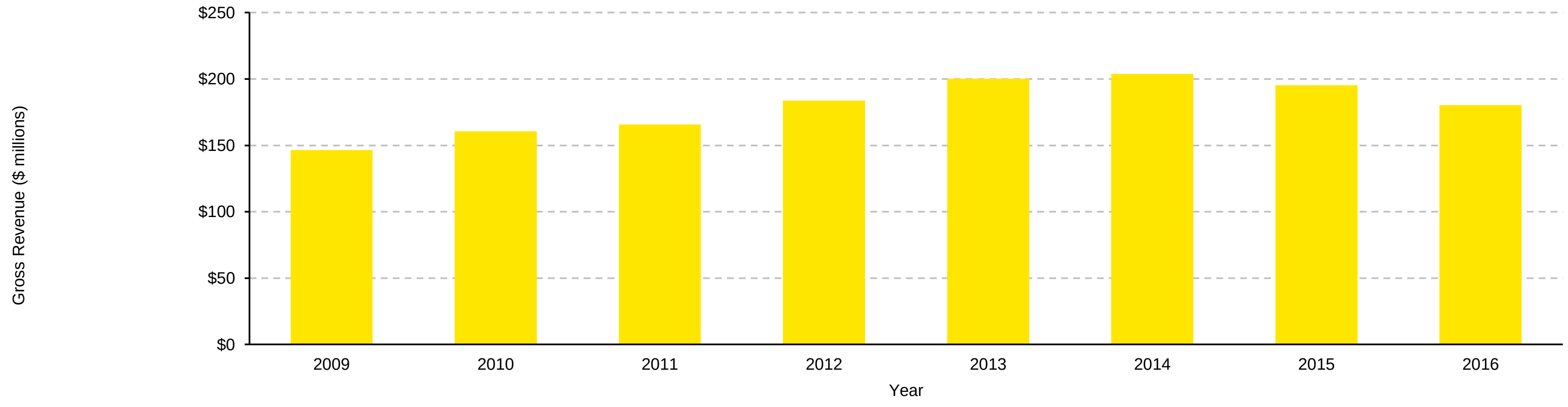
QLD – Revenue and Attendance (2009 – 2016)

	Revenue		Attendance	
Year	Revenue	% Growth in Revenue	Attendance	% Growth in Attendance
2009	$146,567,867	-	2,006,608	-
2010	$160,520,942	9.5%	2,043,327	1.8%
2011	$165,840,931	3.3%	2,150,329	5.2%
2012	$183,775,420	10.8%	2,302,462	7.1%
2013	$200,178,524	8.9%	2,318,207	0.7%
2014	$203,918,468	1.9%	2,661,632	14.8%
2015	$195,336,838	-4.2%	2,914,530	9.5%
2016	$180,304,512	-7.7%	2,527,535	-13.3%

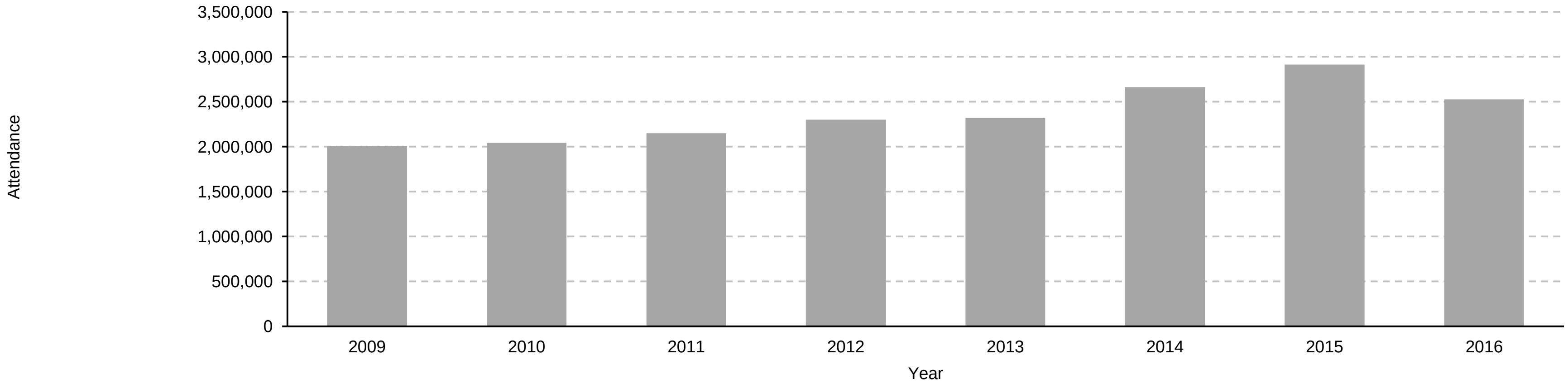
Note: This report includes the tickets and sales revenue generated by the Dinosaur Discovery Special Event held in QLD in 2015. Investigations have noted that this event should have been an excluded event.

3 State Analysis
QLD

Gross Revenue – QLD (2009-2016)

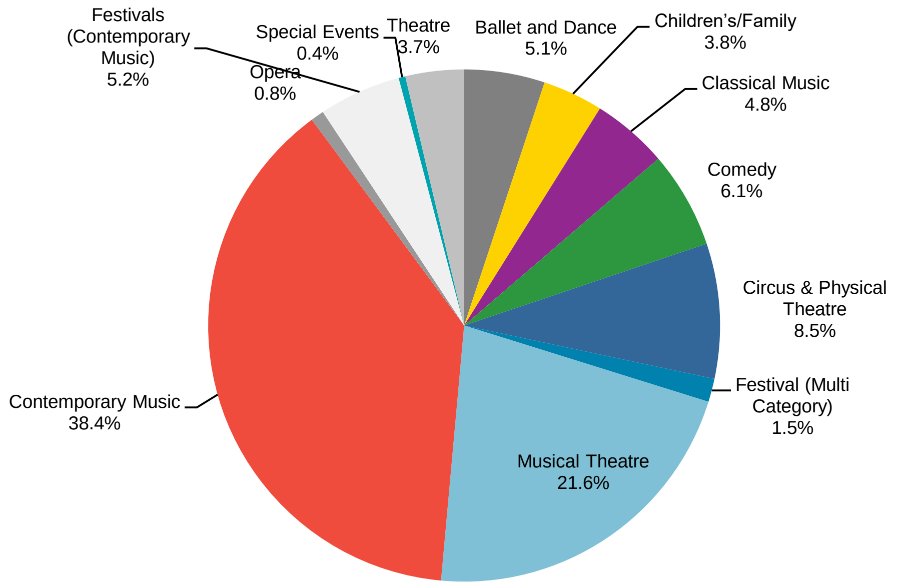


Total Attendance – QLD (2009-2016)

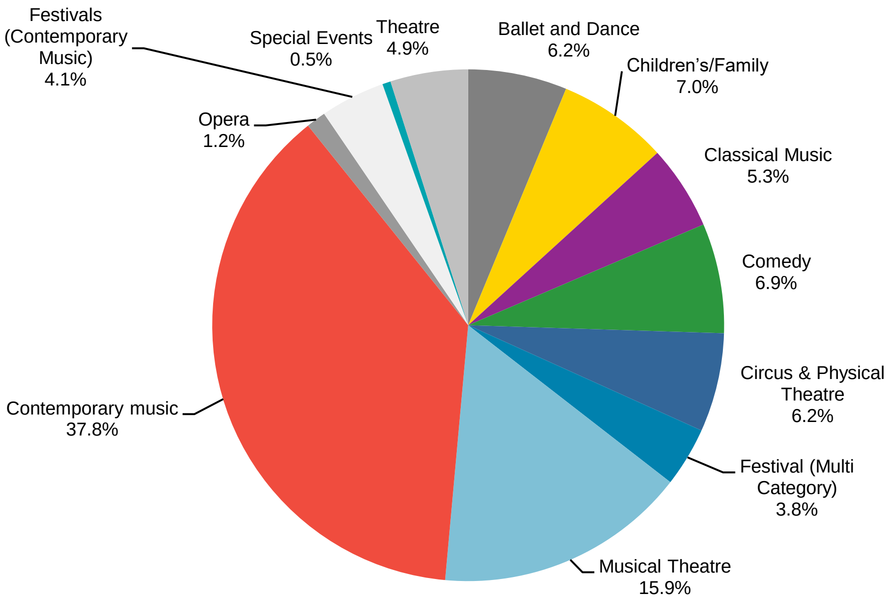


3 State Analysis
QLD

QLD Revenue by Category (2016)



QLD Attendance by Category (2016)



3 State Analysis
WA

WA Revenue and Attendance

- In 2016 WA generated $147.8m in ticket sales revenue and 2.3m in attendance. WA has experienced a 24% decrease in revenue between 2013 and 2016, despite an increase of 8.4% in attendance over the same period. Between 2015 and 2016, revenue decreased by 12.4% despite a rise in attendance of 5%. The decline in revenue was largely driven by decreases in the following categories:
  - Circus and Physical Theatre revenue decreased by 73.2% due primarily to the absence of Cirque du Soleil, which performed in WA in 2015 but did not return in 2016.
  - Festivals (Contemporary Music) decreased by 52%, with the WA festivals market being hit particularly hard by the cancellation of Future Music Festival and Stereosonic in 2016. Contemporary Music revenue decreased by 34.5% due to a number of prominent acts that attracted large crowds in 2015 not returning in 2016, such as AC/DC, Fleetwood Mac, Foo Fighters, Ed Sheeran and One Direction. Additionally, many of the high-profile international acts that toured Australia in 2016 did not perform in WA including Coldplay, Selena Gomez, Kendrick Lamar and Madonna.
- Despite the fall in revenue, attendance at live performance events in WA increased due to significant attendance growth in the following categories:
  - Children's/Family Events attendance increased by 169.8%, due to more major performances held in WA in 2016 compared to 2015, including performances by The Wiggles.
  - Comedy attendance increased by 216.9% primarily due to popular international acts such as Kevin Hart, Michael McIntyre and Dawn French.
  - Musical Theatre attendance increased by 63.6% primarily due to performances of major musicals held in Perth including *The Lion King*, *The Sound of Music* and *Little Shop of Horrors*.

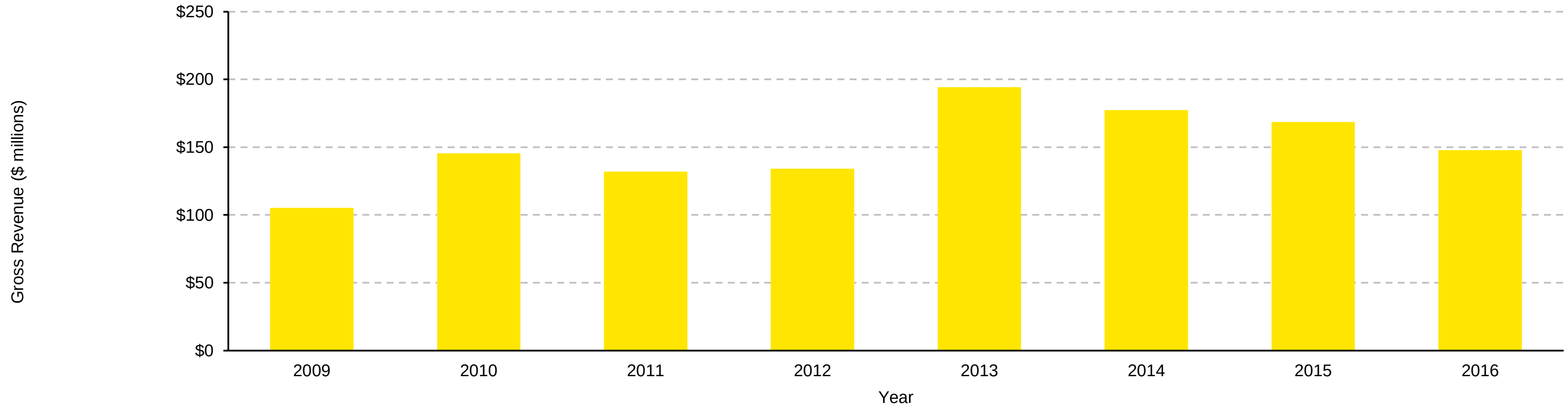
WA – Revenue and Attendance (2009 – 2016)

	Revenue		Attendance	
Year	Revenue	% Growth in Revenue	Attendance	% Growth in Attendance
2009	$105,312,778	-	1,468,882	
2010	$145,479,374	38.1%	1,879,408	27.9%
2011	$131,936,782	-9.3%	1,788,262	-4.8%
2012	$134,131,622	1.7%	1,791,795	0.2%
2013	$194,312,089	44.9%	2,153,483	20.2%
2014	$177,326,653	-8.7%	2,266,435	5.2%
2015	$168,688,271	-4.9%	2,217,942	-2.1%
2016	$147,807,422	-12.4%	2,334,951	5.3%

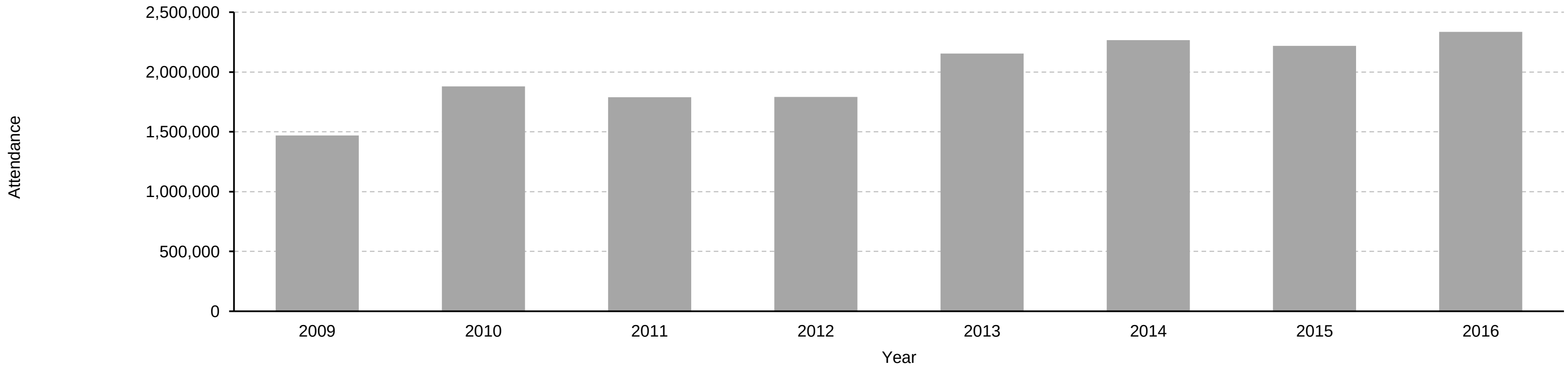
Note: The 2015 attendance and revenue figures in this report have been adjusted to include the 248,274 tickets and $6,194,244 in sales revenue generated by the Fringe World Festival (Perth) in 2015, to ensure the report is comparing figures on a like for like basis.

3 State Analysis
WA

Gross Revenue – WA (2009-2016)

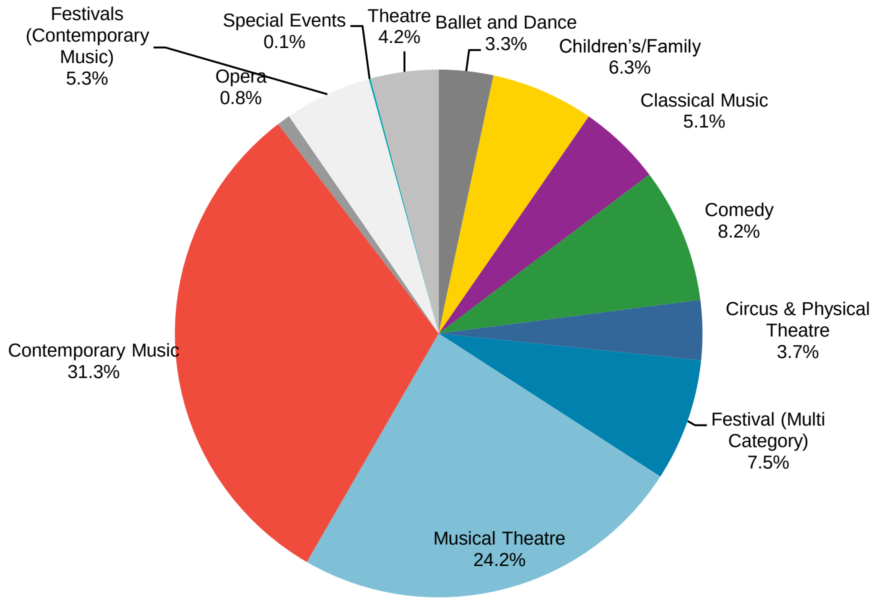


Total Attendance – WA (2009-2016)

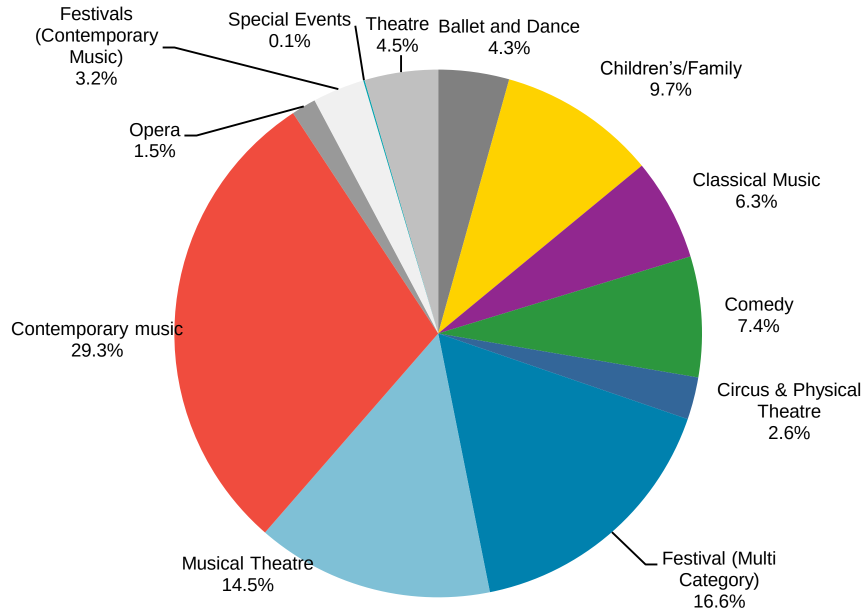


3 State Analysis
WA

WA Revenue by Category (2016)



WA Attendance by Category (2016)



3 State Analysis
SA

SA Revenue and Attendance

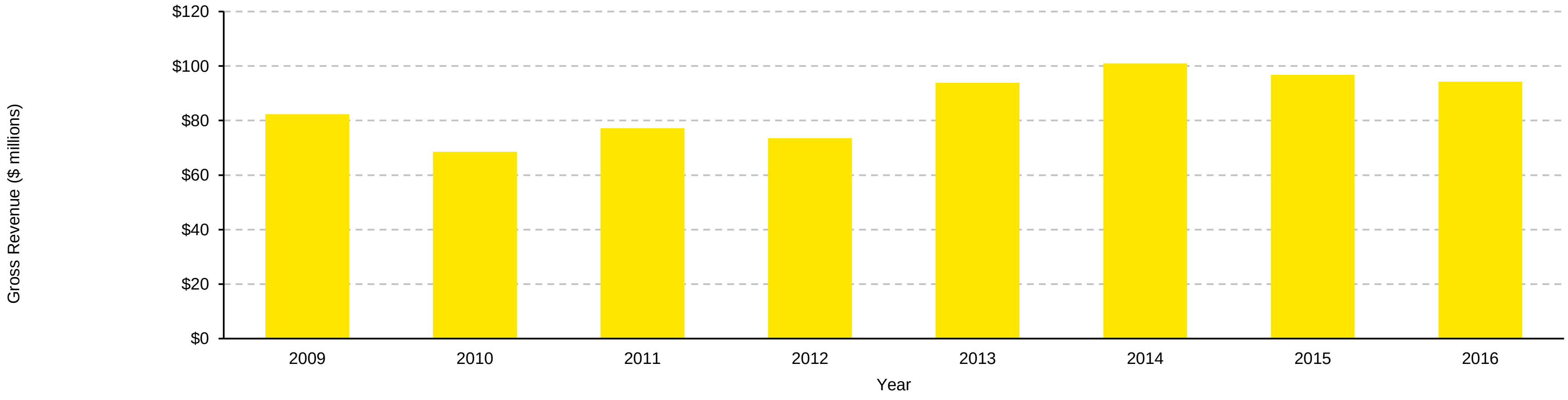
- In 2016 SA experienced a slight 2.6% decline in ticket sales revenue (from $96.8m in 2015 to $94.3m in 2016), despite attendance increasing by 5.7% (from 1.7m in 2015 to 1.8m in 2016). SA has experienced steady growth in attendance each year since 2013, increasing by 20% from 2013 to 2016. However, revenue in SA has declined each year since 2014, decreasing by 6.6% from 2014 to 2016. The fall in revenue between 2015 and 2016 was primarily driven by significant declines in revenue in the following categories.
  - Circus and Physical Theatre revenue decreased by 75.4% due primarily to the absence of Cirque du Soleil, which performed in SA in 2015 but did not return in 2016.
  - Festivals (Contemporary Music) experienced a decrease in revenue by 74.6% due to the SA festivals market being hit particularly hard by the cancellation of Future Music Festival and Stereosonic in 2016. Contemporary Music revenue decreased by 20% primarily due to a number of prominent acts that attracted large crowds in 2015 not returning in 2016, such as AC/DC, Fleetwood Mac, Foo Fighters, Ed Sheeran and One Direction. Additionally, many of the high-profile international acts that toured Australia in 2016 did not perform in SA including Coldplay, Prince, Selena Gomez, Kendrick Lamar and Madonna.
- The growth in attendance at live performance events in SA between 2015 and 2016 was largely driven by increased attendance in the following categories:
  - Classical Music attendance increased by 78% due both to an increase in attendance to performances by AMPAG companies including Adelaide Symphony Orchestra, as well as the return of international artist André Rieu for the first time since 2013.
  - Musical Theatre attendance increased by 74.6% due to the performance of major musicals including *CATS*, *Ghost the Musical*, *Singin' in the Rain*, *Little Shop of Horrors* and *The Sound of Music*.
  - Attendance at Children's/Family Events increased by 39.7% due to high-profile major performances including *Disney on Ice: Magical Ice Festival, Scooby-Doo Live* and performances by The Wiggles.

SA – Revenue and Attendance (2009 – 2016)

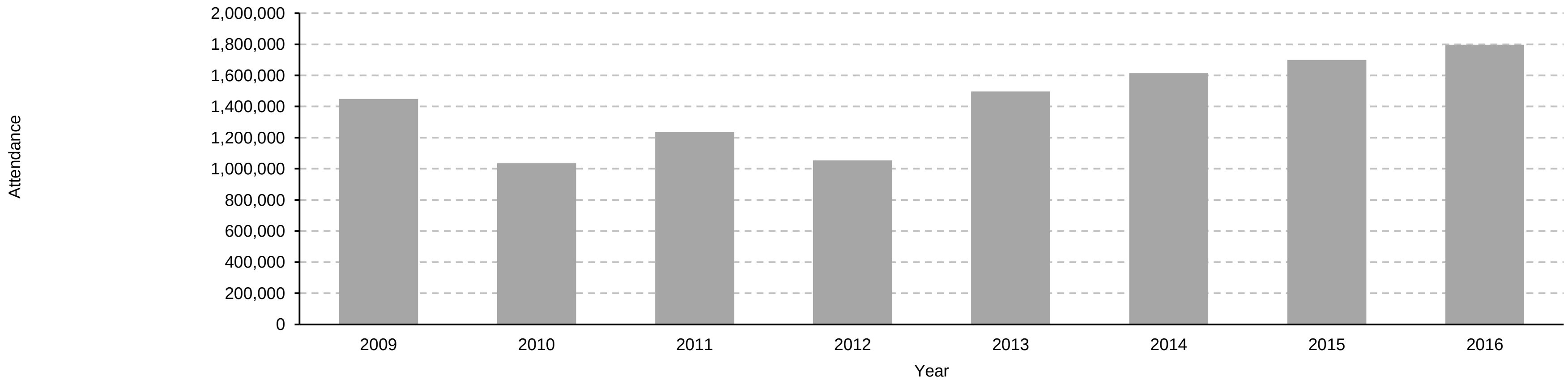
	Revenue		Attendance	
Year	Revenue	% Growth in Revenue	Attendance	% Growth in Attendance
2009	$82,326,982	-	1,449,260	-
2010	$68,538,320	-16.7%	1,035,243	-28.6%
2011	$77,215,957	12.7%	1,237,386	19.5%
2012	$73,536,693	-4.8%	1,053,997	-14.8%
2013	$93,864,893	27.6%	1,497,204	42.1%
2014	$100,944,048	7.5%	1,614,267	7.8%
2015	$96,804,782	-4.1%	1,699,529	5.3%
2016	$94,316,578	-2.6%	1,797,087	5.7%

3 State Analysis
SA

Gross Revenue – SA (2009-2016)



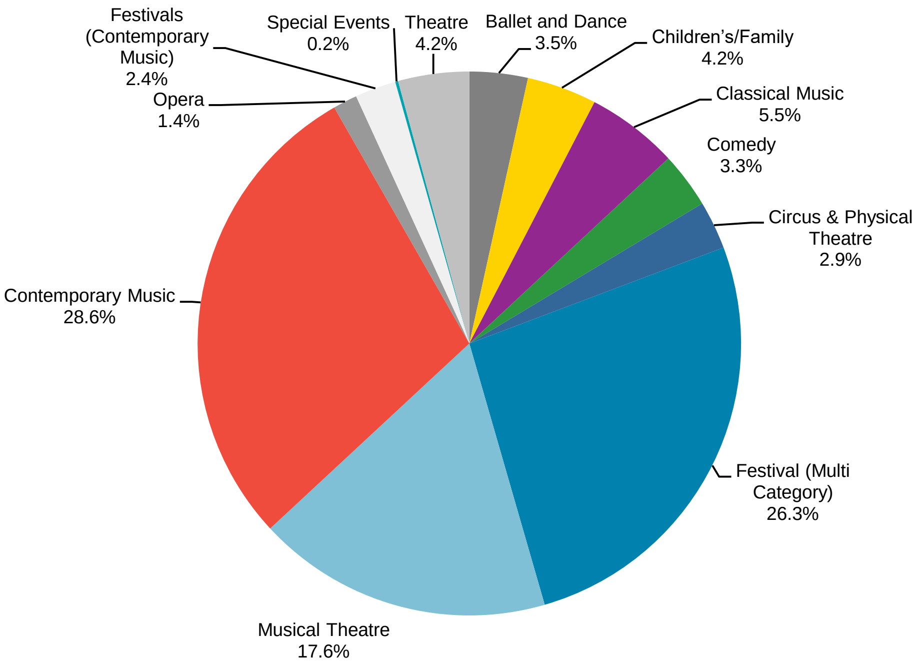
Total Attendance – SA (2009-2016)



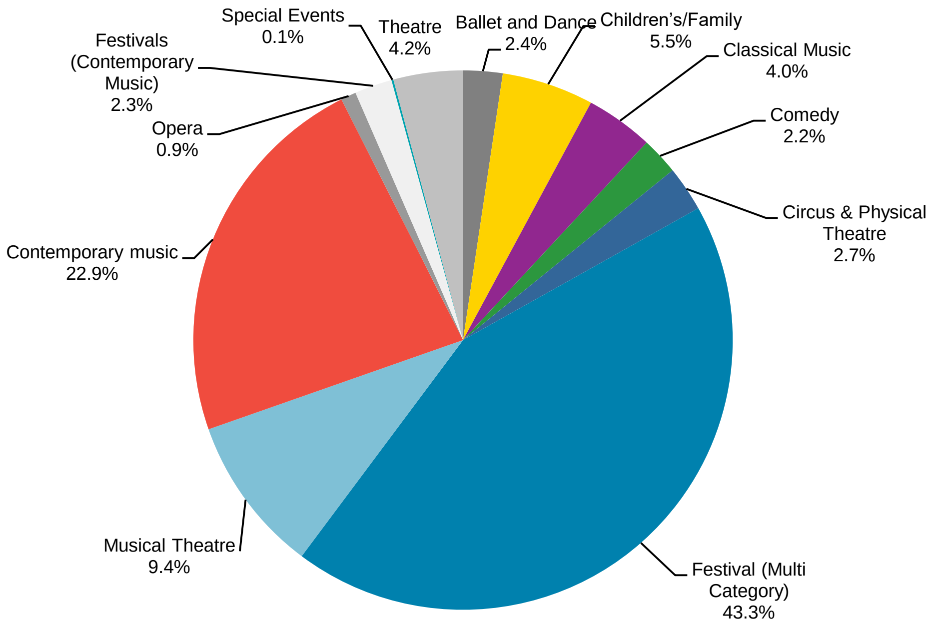
3 State Analysis

SA

SA Revenue by Category (2016)



SA Attendance by Category (2016)



3 State Analysis
ACT/TAS/NT

ACT, TAS and NT Revenue and Attendance

- Tasmania experienced the highest growth in revenue and attendance amongst all the states and territories. Between 2015 and 2016 revenue increased by 38.5% (to $14.7m) and attendance increased by 13.7% (to 0.24m). This significant growth was primarily due to Cirque du Soleil's performances of *QUIDAM* in Hobart. Cirque du Soleil last performed in Tasmania in 2011.
- ACT experienced the greatest decline in revenue and attendance amongst all the states and territories. Between 2015 and 2016 revenue decreased by 16.8% (to $19.6m) and attendance decreased by 15.9% (to 0.31m). This decline in growth was primarily due to the absence of Cirque du Soleil, which performed in Canberra in 2015 but did not return in 2016.
- NT remained consistent, experiencing a slight decline in revenue by 2.3% (to $3.1m) and in attendance by 6.8% (to 65k).

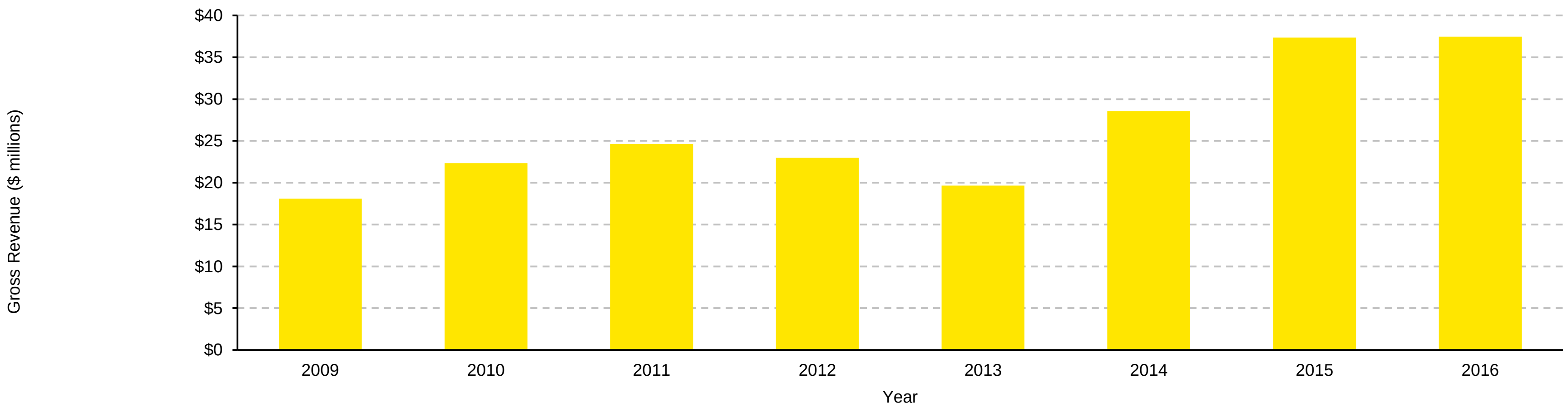
Note: ACT/TAS/NT revenue and attendance numbers and commentary have been combined for confidentiality purposes.

ACT/TAS/NT – Revenue and Attendance (2009 – 2016)

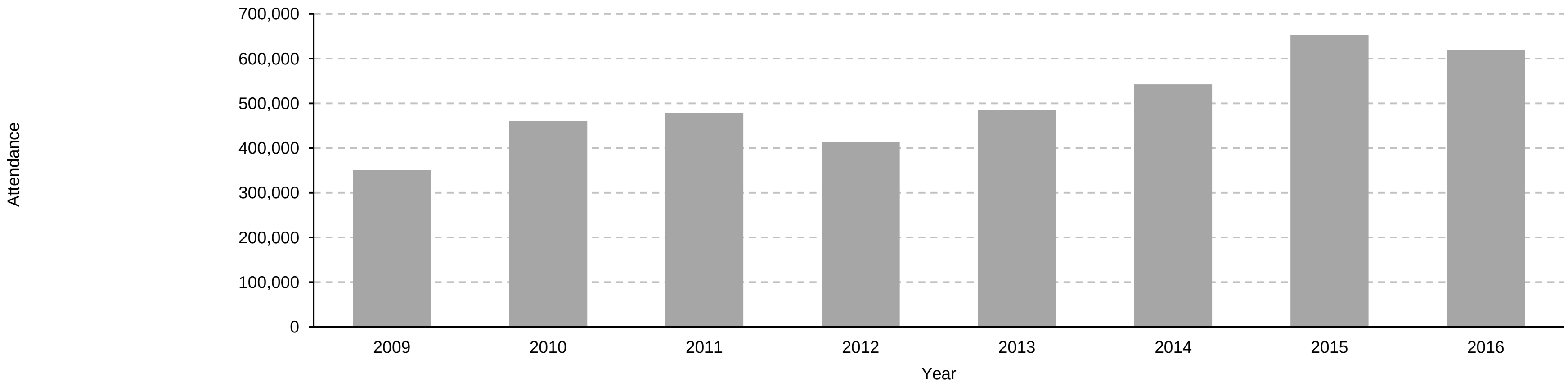
	Revenue		Attendance	
Year	Revenue	% Growth in Revenue	Attendance	% Growth in Attendance
2009	$18,103,869	-	351,189	-
2010	$22,345,107	23.4%	460,793	31.2%
2011	$24,646,007	10.3%	478,993	3.9%
2012	$22,986,999	-6.7%	413,160	-13.7%
2013	$19,640,815	-14.6%	484,343	17.2%
2014	$28,566,945	45.4%	542,736	12.1%
2015	$37,367,387	30.8%	653,358	20.4%
2016	$37,454,754	0.2%	618,451	-5.3%

3 State Analysis
ACT/TAS/NT

Gross Revenue – ACT/TAS/NT (2009-2016)



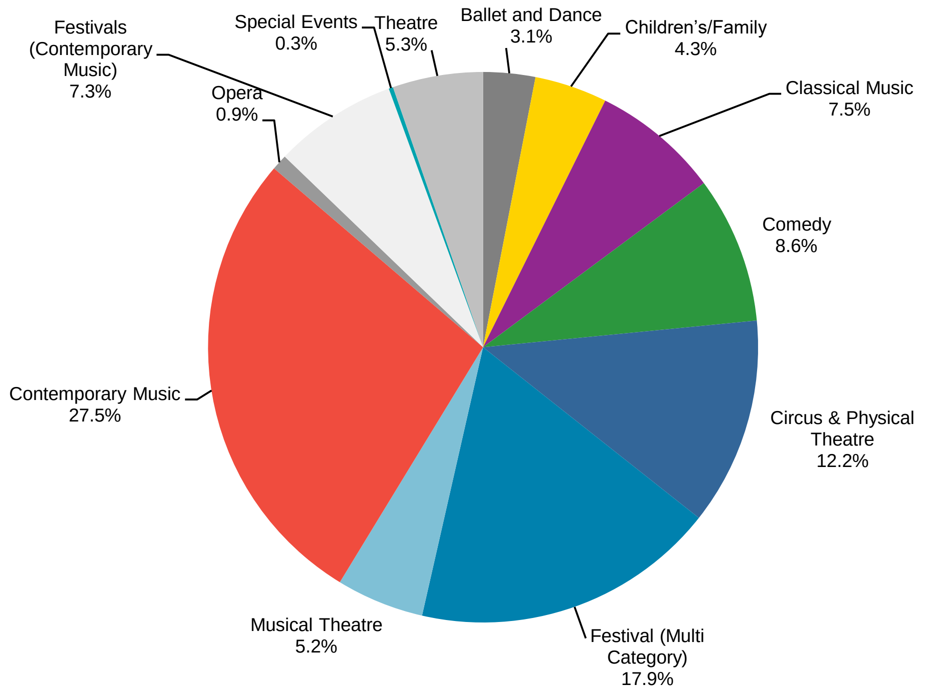
Total Attendance – ACT/TAS/NT (2009-2016)



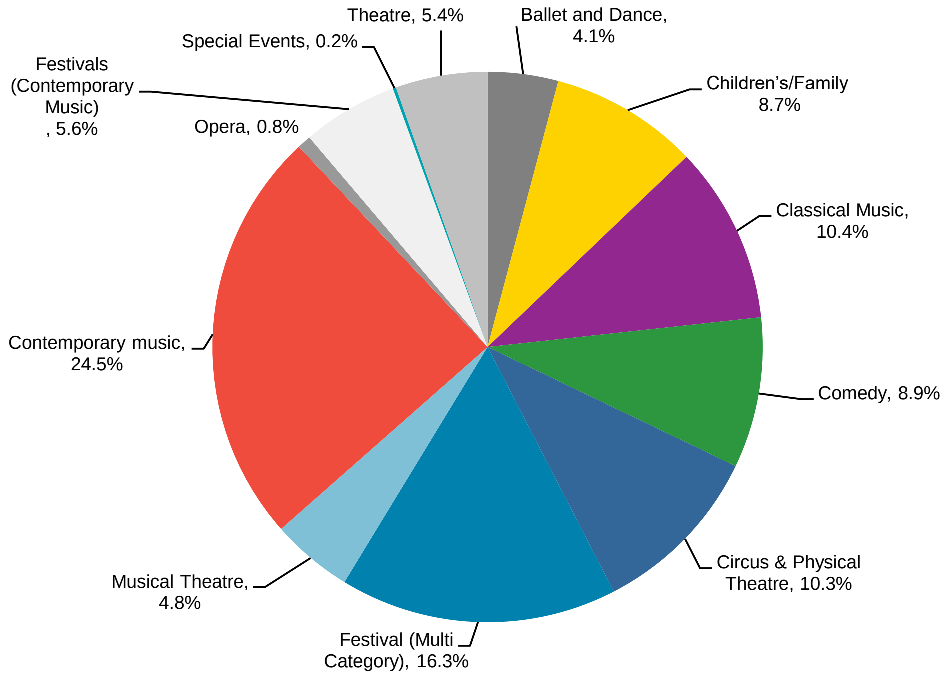
Note: ACT/TAS/NT revenue and attendance numbers have been combined for confidentiality purposes.

3 State Analysis
ACT/TAS/NT

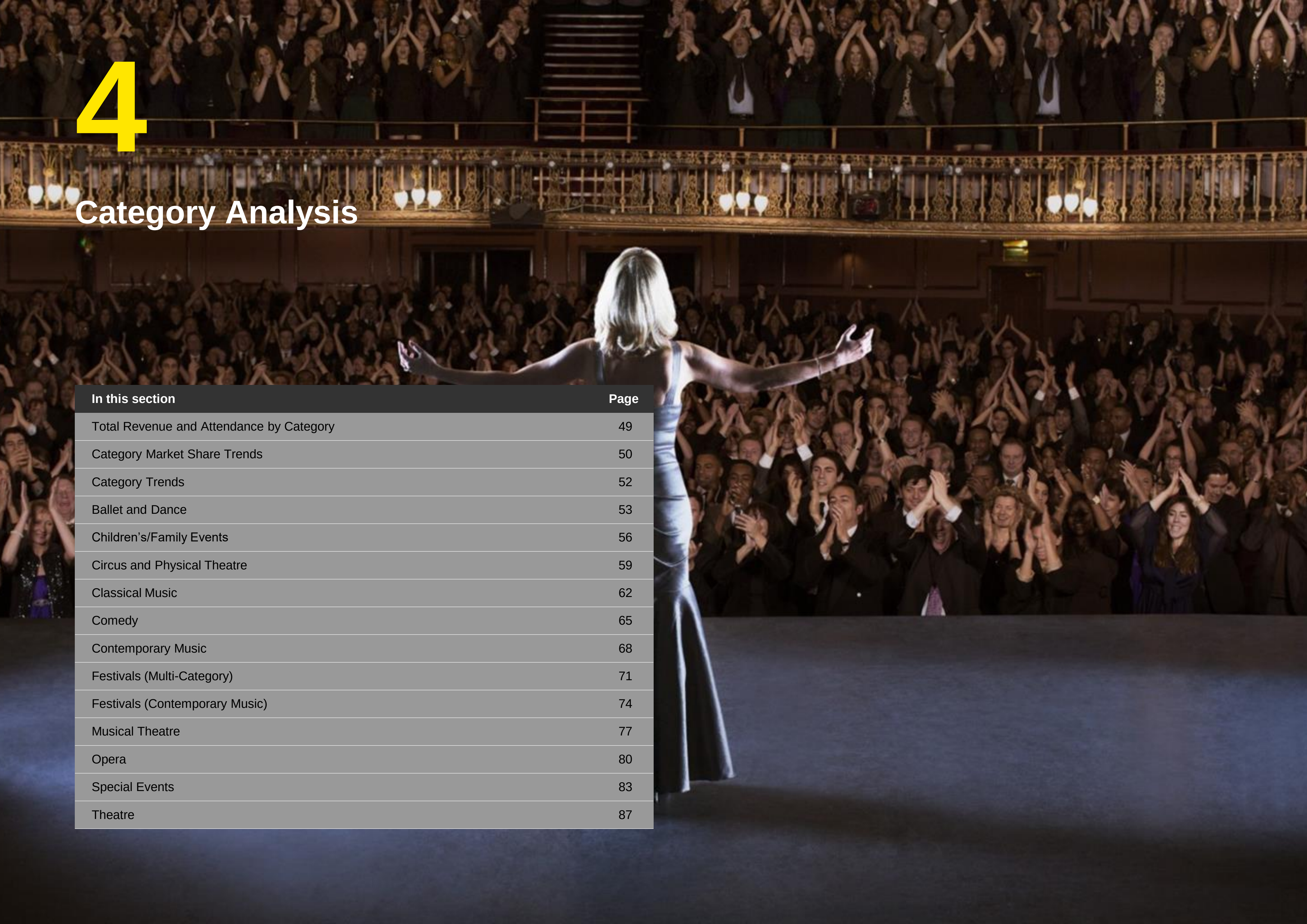
ACT/TAS/NT Revenue by Category (2016)



ACT/TAS/NT Attendance by Category (2016)



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



4

Category Analysis

4 Category Analysis

Total Revenue and Attendance by Category

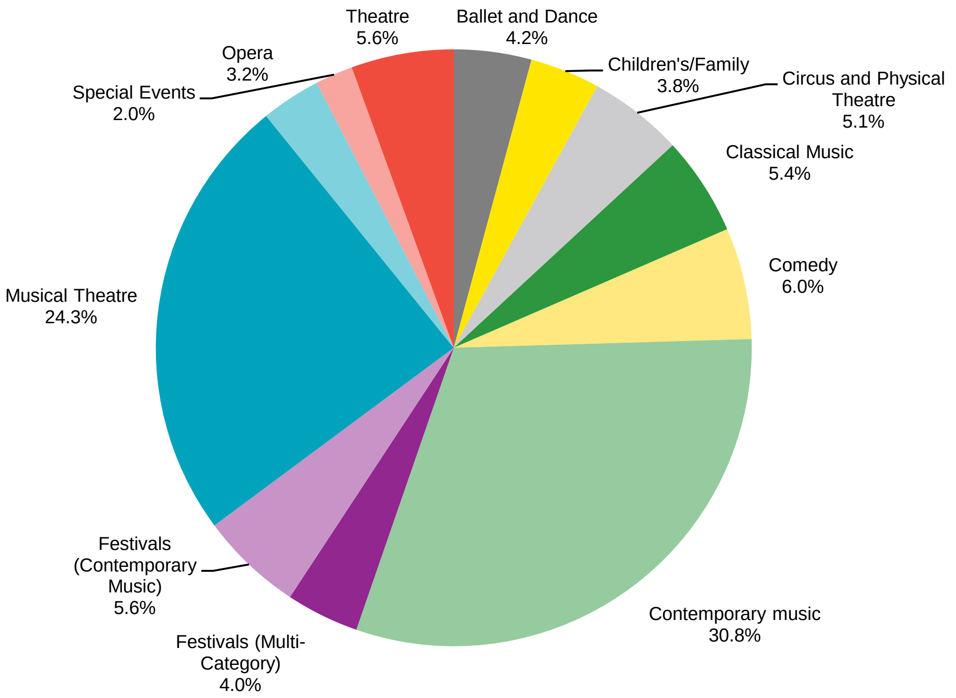
Total Revenue and Attendance by Category in 2016

	Revenue			Attendance		
Category	Revenue	% change in revenue (from 2015)	Share of industry 2016	Attendance	% change in Attendance (from 2015)	Share of industry
Ballet and Dance	$60,079,595	-5.4%	4.2%	815,458	-5.1%	4.3%
Children's/Family	$54,316,058	41.6%	3.8%	1,376,254	27.3%	7.3%
Circus and Physical Theatre	$73,439,491	-26.2%	5.1%	838,980	-13.9%	4.5%
Classical Music	$76,764,404	36.1%	5.4%	1,219,293	22.7%	6.5%
Comedy	$86,382,773	57.3%	6.0%	1,409,299	42.0%	7.5%
Contemporary Music	$440,083,629	-7.9%	30.8%	5,658,753	1.9%	30.1%
Festivals (Multi-Category)	$56,641,751	-8.9%	4.0%	1,549,007	4.2%	8.2%
Festivals (Contemporary Music)	$79,865,326	-25.2%	5.6%	672,771	-48.2%	3.6%
Musical Theatre	$347,684,296	3.8%	24.3%	3,298,051	1.2%	17.6%
Opera	$46,247,521	11.4%	3.2%	407,965	-5.8%	2.2%
Special Events	$29,310,579	44.1%	2.0%	185,104	-66.8%	1.0%
Theatre	$79,584,271	40.0%	5.6%	1,351,653	19.1%	7.2%
Total	**$1,430,399,693**	**1.2%**	**100.0%**	**18,782,588**	**0.8%**	**100.0%**

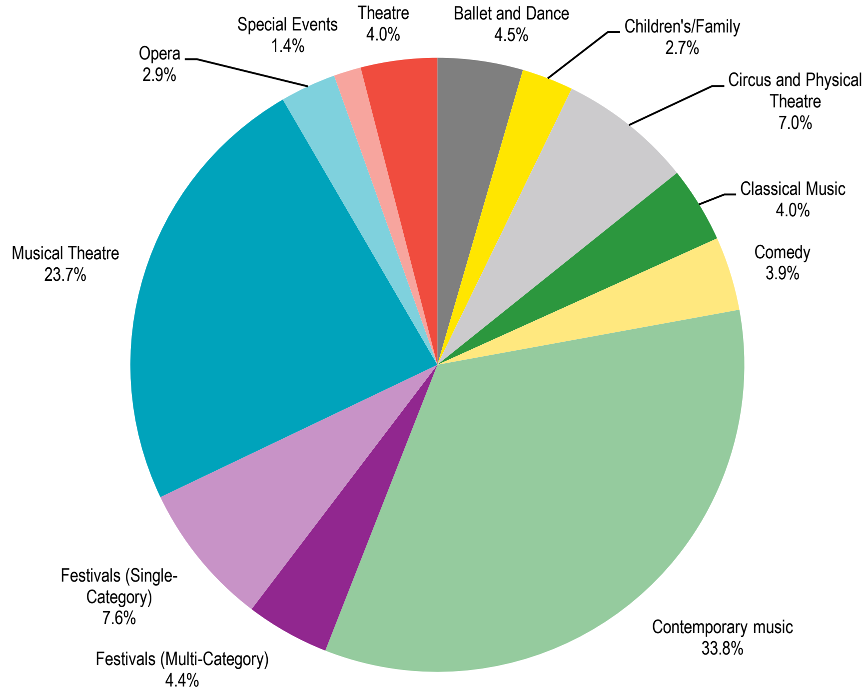
4 Category Analysis

Category Market Share Trends

Gross Revenue by Category (2016)



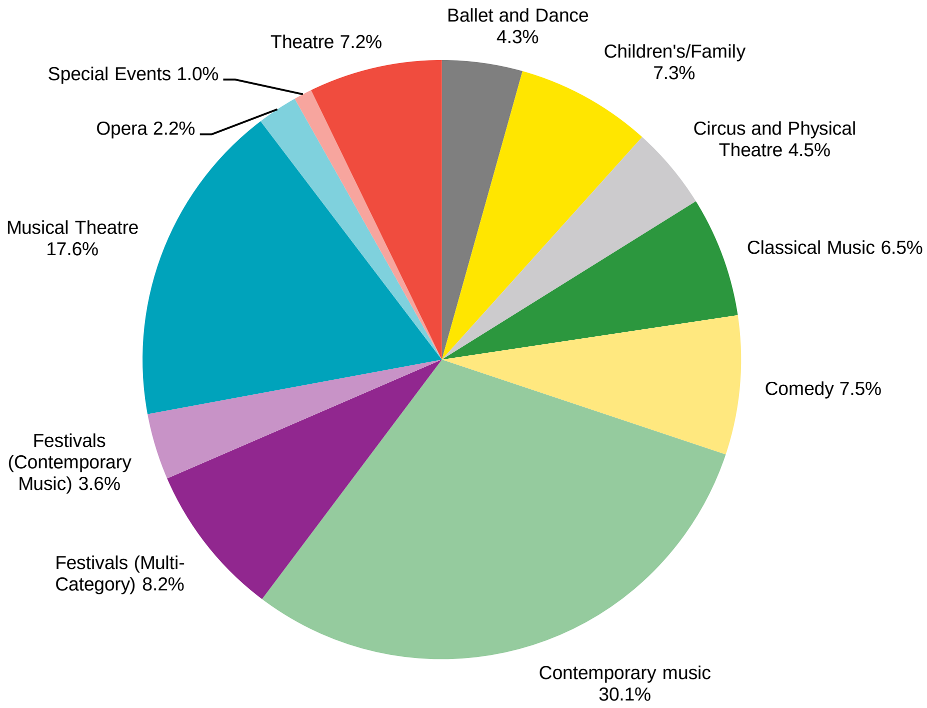
Gross Revenue by Category (2015)



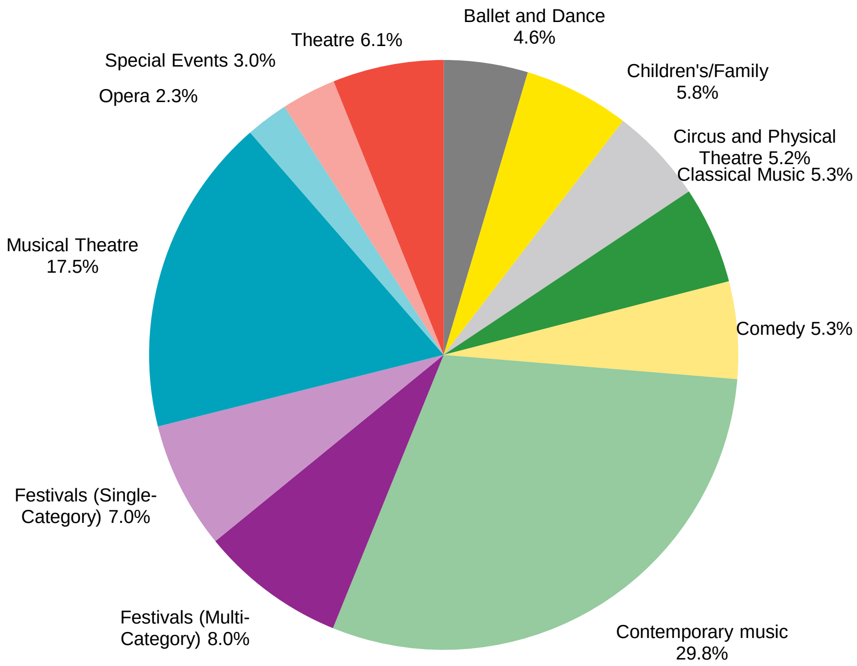
4 Category Analysis

Category Market Share Trends

Total Attendance by Category (2016)

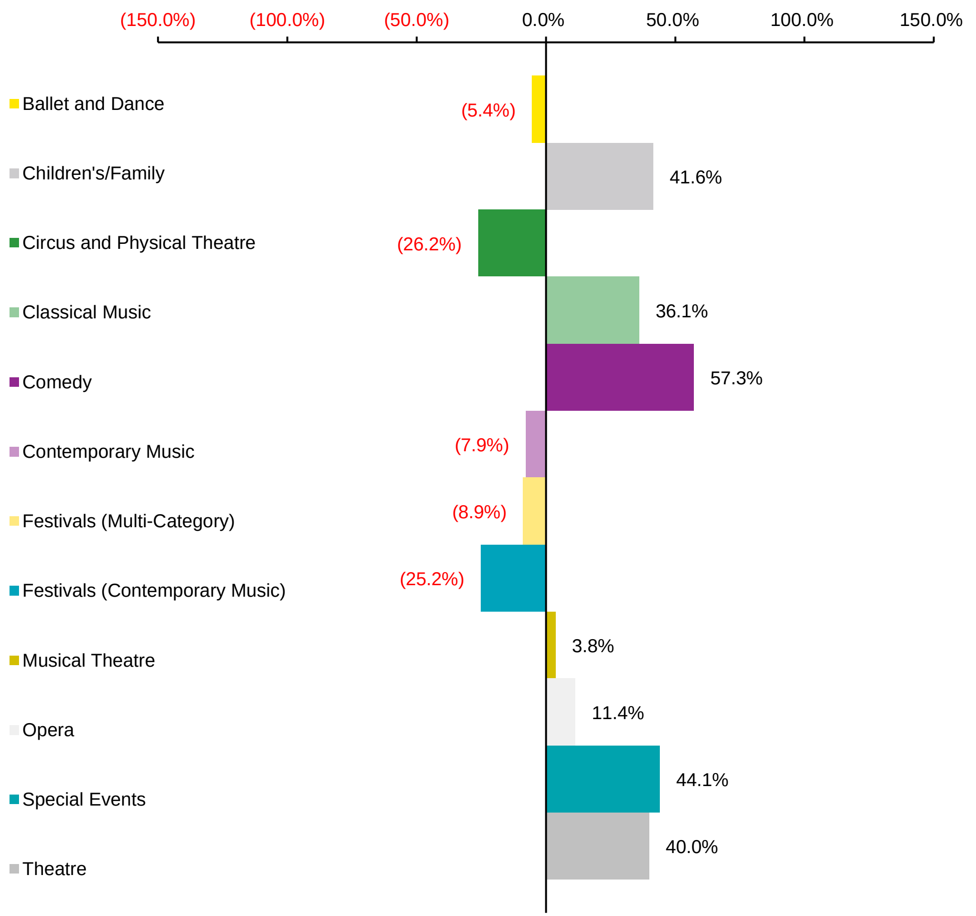


Total Attendance by Category (2015)

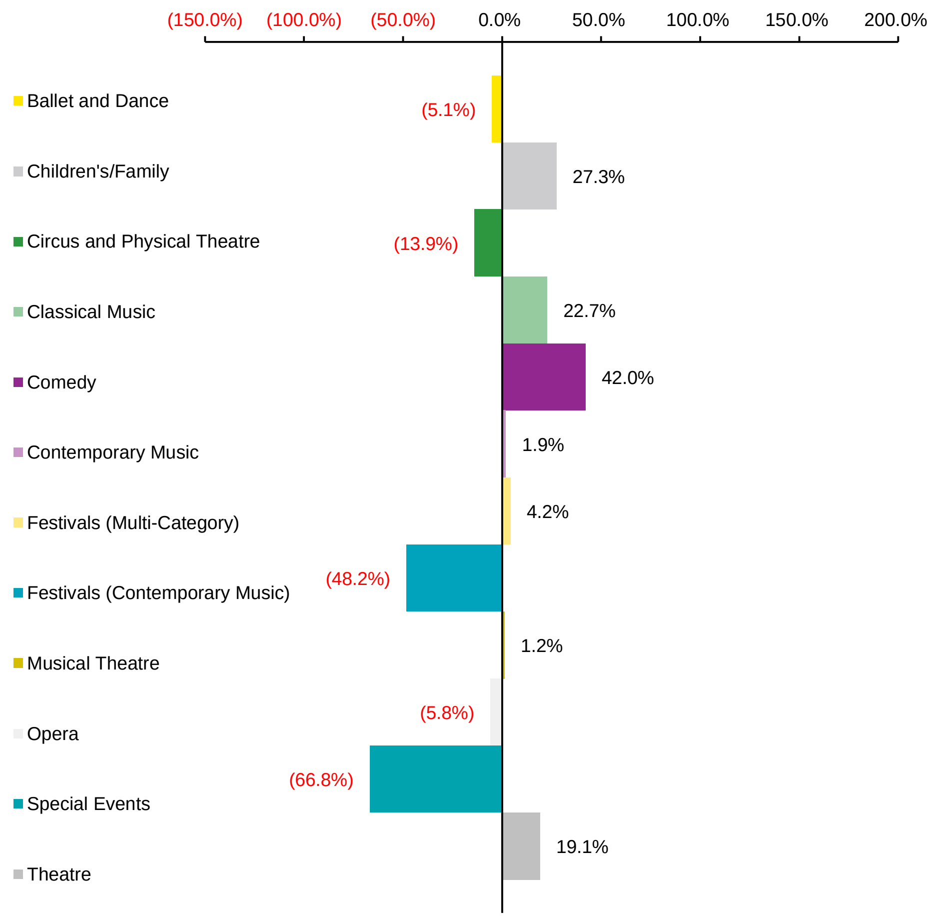


4 Category Analysis
Category Trends

Percentage Movement in Revenue by Category (2015-16)



Percentage Movement in Attendance by Category (2015-2016)



4 Category Analysis
Ballet and Dance

National Overview

- The Ballet and Dance category experienced a decline in ticket sales revenue by 5.4% (from $63.5m in 2015 to $60.1m in 2016) and a decline in attendance by 5.1% (from 0.86m in 2015 to 0.82m in 2016). The average ticket price also declined by 2.1% from $84.36 to $82.59 in 2016. The declines in Ballet and Dance were primarily driven by major performances such as Michael Flatley's *Lord of the Dance* that performed in 2015 not returning in 2016.
- 69.5% of revenue and 64.3% of attendance in Ballet and Dance was generated through performances by AMPAG companies including The Australian Ballet, Sydney Dance Company, Bangarra Dance Theatre, Queensland Ballet and West Australian Ballet. AMPAG companies overall experienced an increase in revenue by 8.4% and an increase in attendance by 9.1%.
- NSW, Victoria and Queensland generated the most revenue and attendance in this category, with a national market share of approximately 36.2%, 28.4% and 17.4% respectively. These three states generated 82% of national Ballet and Dance revenue and attendance in 2016. Queensland experienced the most significant state growth in revenue (46.1%) and attendance (31.4%) in Ballet and Dance, primarily driven by high-profile major performances including Ballet Preljocaj's *Snow White*, The Australian Ballet's *Cinderella* and Queensland Ballet's *Strictly Gershwin.*

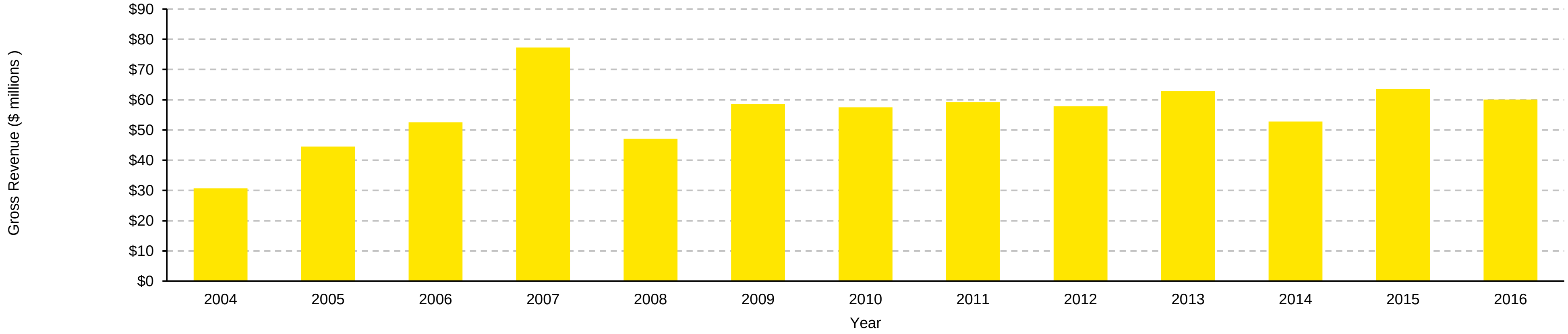
Ballet and Dance – Revenue and Attendance (2004 – 2016)

	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$30,664,060	-	682,755	-	$50.07	-
2005	$44,563,085	45.3%	930,639	36.3%	$52.76	5.4%
2006	$52,523,644	17.9%	1,113,849	19.7%	$50.52	-4.2%
2007	$77,287,071	47.1%	1,457,306	30.8%	$57.39	13.6%
2008	$47,051,946	-39.1%	934,533	-35.9%	$60.67	5.7%
2009	$58,570,704	24.5%	1,050,763	12.4%	$63.33	4.4%
2010	$57,509,401	-1.8%	1,023,077	-2.6%	$64.86	2.4%
2011	$59,164,135	2.9%	947,846	-7.4%	$71.93	10.9%
2012	$57,865,897	-2.2%	920,193	-2.9%	$77.93	8.3%
2013	$62,832,992	8.6%	976,336	6.1%	$74.69	-4.2%
2014	$52,771,905	-16.0%	767,890	-21.3%	$80.82	8.2%
2015	$63,522,318	20.4%	859,095	11.9%	$84.36	4.4%
2016	$60,079,595	-5.4%	815,458	-5.1%	$82.59	-2.1%

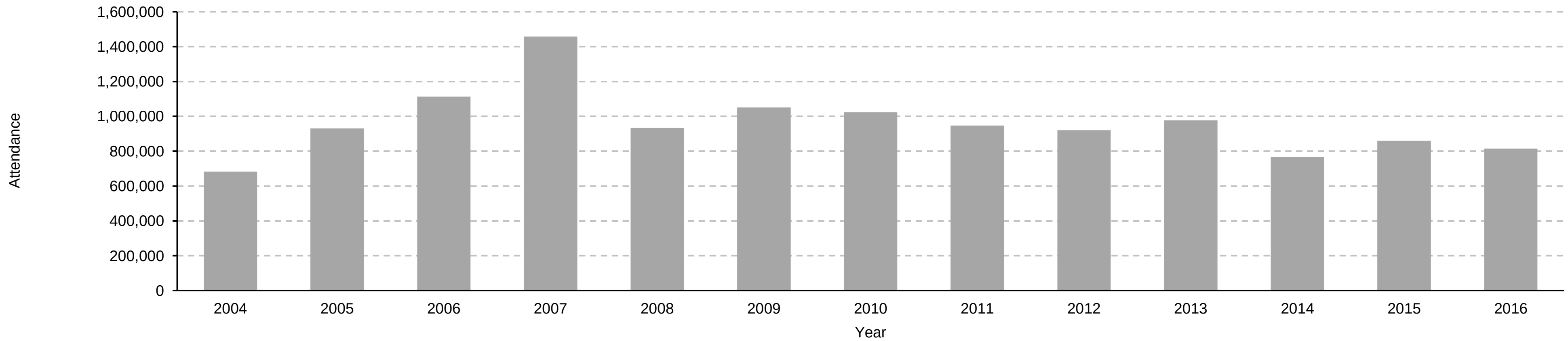
4 Category Analysis

Ballet and Dance

Ballet and Dance – Gross Revenue (2004-2016)

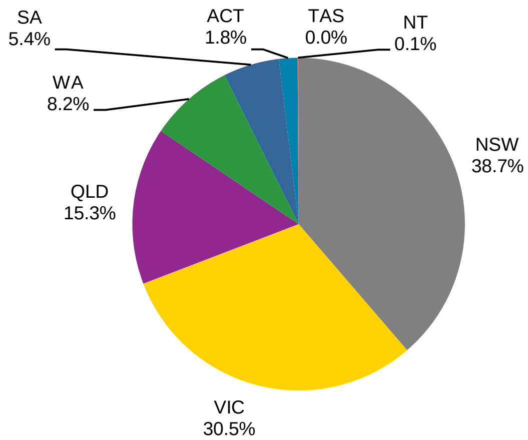


Ballet and Dance – Total Attendance (2004-2016)



4 Category Analysis
Ballet and Dance

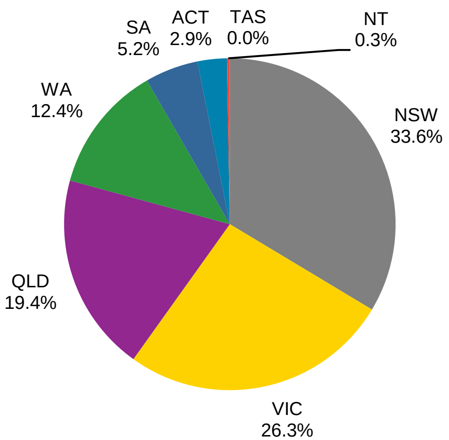
Ballet and Dance – Revenue by State/Territory



Ballet and Dance – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$23,243,516	38.7%	-4.9%
VIC	$18,316,661	30.5%	-14.2%
QLD	$9,177,865	15.3%	46.1%
WA	$4,928,233	8.2%	-23.2%
SA	$3,269,188	5.4%	21.1%
ACT	$1,080,267	1.8%	-45.9%
TAS	-	-	-
NT	$63,864	0.1%	-25.8%
Total	**$60,079,595**	**100.0%**	**-5.4%**

Ballet and Dance – Attendance by State/Territory



Ballet and Dance – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	273,970	33.6%	-5.1%
VIC	214,373	26.3%	-23.3%
QLD	157,843	19.4%	31.4%
WA	101,262	12.4%	2.9%
SA	42,404	5.2%	12.1%
ACT	23,352	2.9%	-22.3%
TAS	-	-	-
NT	2,254	0.3%	21.4%
Total	**815,458**	**100.0%**	**-5.1%**

4 Category Analysis
Children’s/Family Events

National Overview

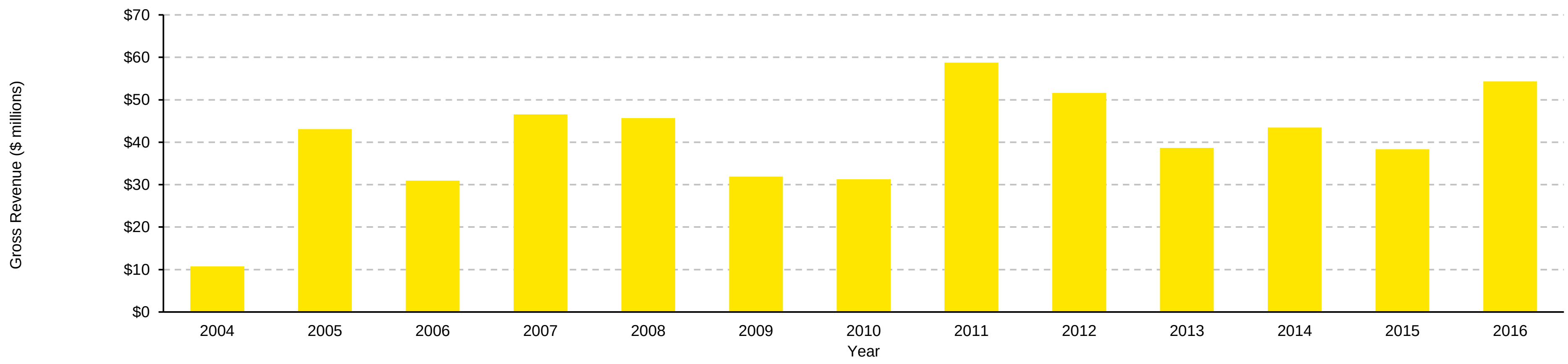
- Children’s/Family events experienced the third highest growth in ticket sales revenue (after Comedy and Special Events respectively) and the second highest increase in attendance (after Comedy). In 2016 revenue in this category increased by 41.6% from $38.4m in 2015 to $54.3m in 2016, and attendance increased by 27.3% from 1.1m in 2015 to 1.4m. This is the highest revenue and attendance for Children’s/Family events recorded since 2011. Additionally, the average ticket price increased by 9.5% from $39.15 in 2015 to $42.87 in 2016.
- The significant growth in this category was primarily driven by national tours of major events that attracted large audiences including *Disney on Ice: Magical Ice Festival*, *Scooby-Doo Live*, *Peppa Pig Live*, *Ice Age Live!* and performances by The Wiggles.
- Tasmania was the only state that did not experience growth in both revenue and attendance in this category, with a slight decline of 0.5% in attendance. WA experienced the most significant growth in revenue (202.2%) and attendance (169.8%) due to more major performances held in WA in 2016 compared to 2015.

Children's/Family Events – Revenue and Attendance (2004 – 2016)

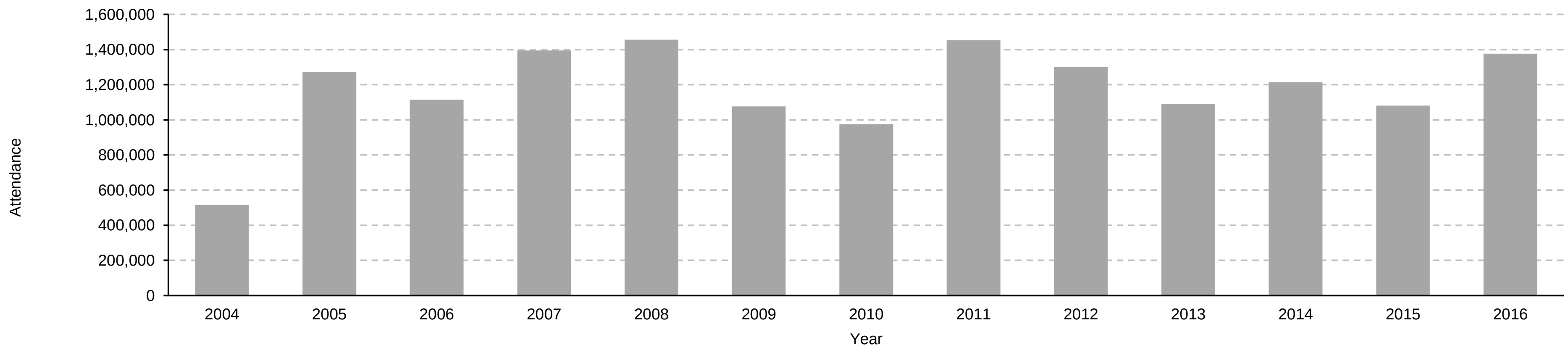
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$10,737,662	-	515,276	-	$21.25	-
2005	$43,108,863	301.5%	1,271,239	146.7%	$35.52	67.1%
2006	$30,944,086	-28.2%	1,114,427	-12.3%	$28.96	-18.5%
2007	$46,535,403	50.4%	1,393,942	25.1%	$36.49	26.0%
2008	$45,647,441	-1.9%	1,455,400	4.4%	$34.24	-6.2%
2009	$31,904,974	-30.1%	1,076,332	-26.0%	$32.38	-5.4%
2010	$31,247,780	-2.1%	974,624	-9.4%	$34.23	5.7%
2011	$58,777,398	88.1%	1,453,012	49.1%	$43.87	28.1%
2012	$51,587,317	-12.2%	1,300,334	-10.5%	$43.17	-1.6%
2013	$38,684,410	-25.0%	1,090,598	-16.1%	$38.17	-11.6%
2014	$43,431,918	12.3%	1,214,273	11.3%	$38.27	0.3%
2015	$38,368,367	-11.7%	1,081,003	-11.0%	$39.15	2.3%
2016	$54,316,058	41.6%	1,376,254	27.3%	$42.87	9.5%

4 Category Analysis
Children's/Family Events

Children's/Family Events – Gross Revenue (2004-2016)

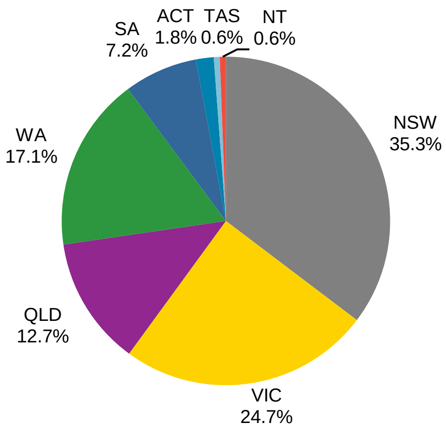


Children's/Family Events – Total Attendance (2004-2016)



4 Category Analysis
Children's/Family Events

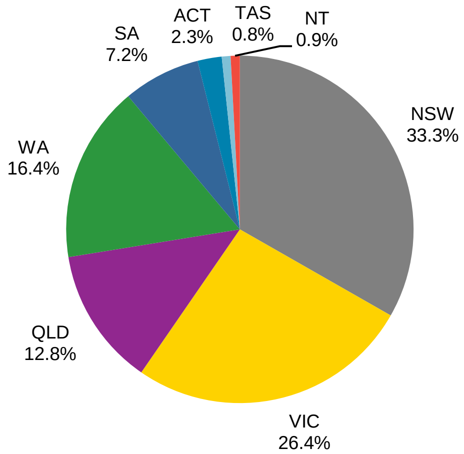
Children's/Family Events – Revenue by State/Territory



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

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$19,180,350	35.3%	33.0%
VIC	$13,428,692	24.7%	9.6%
QLD	$6,879,316	12.7%	52.1%
WA	$9,309,814	17.1%	202.2%
SA	$3,918,236	7.2%	41.9%
ACT	$956,800	1.8%	3.4%
TAS	$319,664	0.6%	75.5%
NT	$323,186	0.6%	45.9%
Total	**$54,316,058**	**100.0%**	**41.6%**

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



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

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	457,618	33.3%	16.8%
VIC	362,689	26.4%	3.2%
QLD	176,701	12.8%	34.0%
WA	226,333	16.4%	169.8%
SA	98,971	7.2%	39.7%
ACT	30,970	2.3%	2.4%
TAS	11,263	0.8%	-0.5%
NT	11,709	0.9%	21.9%
Total	**1,376,254**	**100.0%**	**27.3%**

4 Category Analysis
Circus and Physical Theatre

National Overview

- The Circus and Physical Theatre category experienced a decline of 26.2% in ticket sales revenue from $99.6m in 2015 to $73.4m in 2016 and a decrease in attendance of 13.9% from 0.97m in 2015 to 0.84m in 2016. This category can be variable depending on the presence or absence of major tours by international companies in any given year, particularly Cirque du Soleil.
- The decline in revenue and attendance can be primarily attributed to Cirque du Soleil holding less performances in 2016 compared to 2015. In 2016 Cirque du Soleil performed *QUIDAM* in Hobart and Newcastle, and *KOOZA* in Sydney and Brisbane. Other major events in this category included Dynamo and Circus 1903.
- Positive and negative growth experienced in each state and territory was primarily driven by the presence or absence of performances by Cirque du Soleil. The states that Cirque du Soleil toured to (NSW, Queensland and Tasmania) all experienced significant growth in revenue and attendance, whereas states and territories that Cirque du Soleil did not tour to (Victoria, SA, WA, ACT and NT) all experienced significant declines.

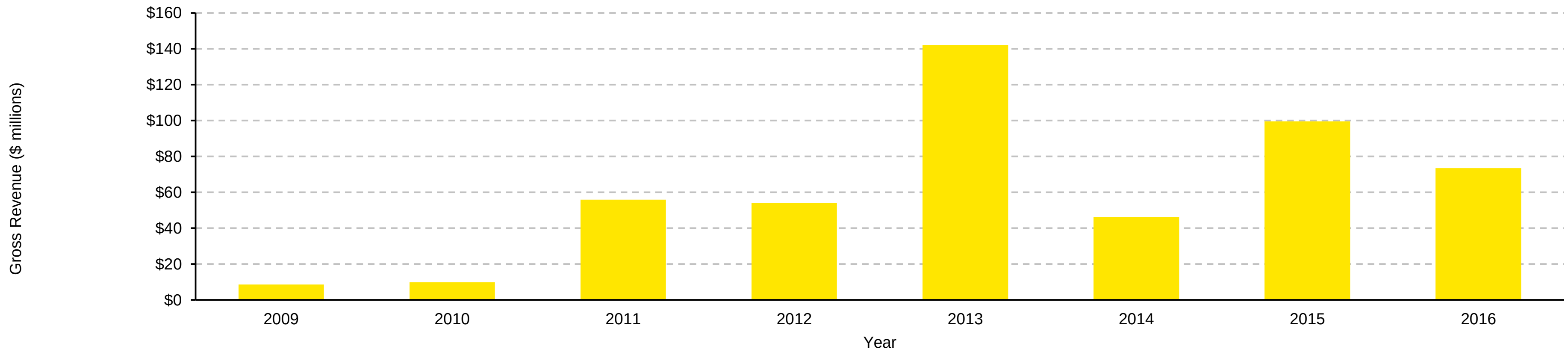
Circus and Physical Theatre – Revenue and Attendance (2009 – 2016)

	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$8,601,990	N/A	198,274	N/A	$47.98	N/A
2010	$9,900,116	15.1%	265,837	34.1%	$43.03	-10.3%
2011	$55,865,945	464.3%	728,799	174.2%	$86.81	101.8%
2012	$54,042,789	-3.3%	555,506	-23.8%	$103.67	19.4%
2013	$142,033,217	162.8%	1,285,991	131.5%	$118.91	14.7%
2014	$46,094,984	-67.5%	564,676	-56.1%	$88.60	-25.5%
2015	$99,558,819	116.0%	974,645	72.6%	$109.41	23.5%
2016	$73,439,491	-26.2%	838,980	-13.9%	$96.56	-11.7%

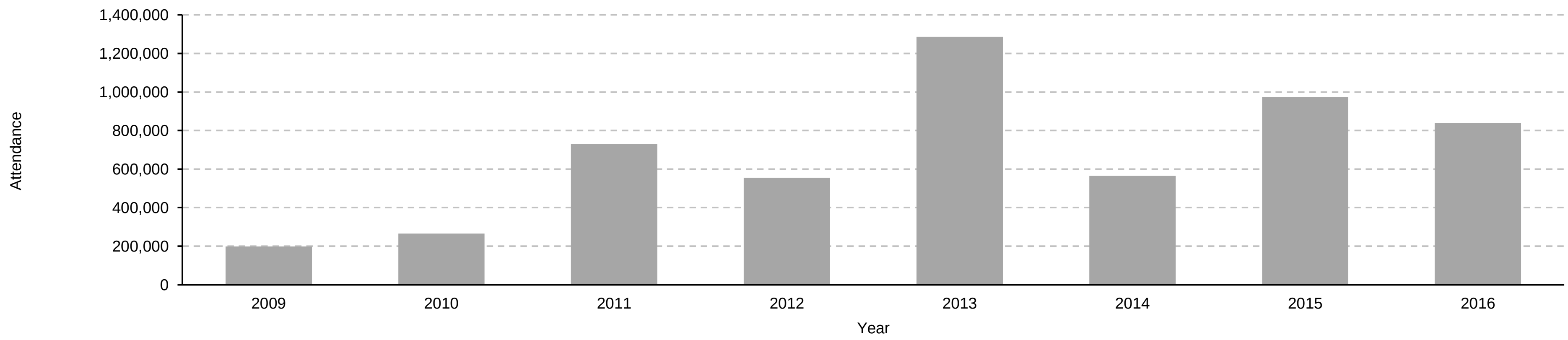
Note: Data is provided from 2009 as the category was only introduced in the 2009 Survey. Prior to 2009, such events were included in the Theatre or Children's/Family categories.

4 Category Analysis
Circus and Physical Theatre

Circus and Physical Theatre – Gross Revenue (2009-2016)

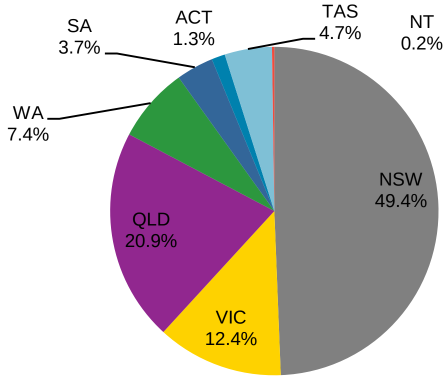


Circus and Physical Theatre – Total Attendance (2009-2016)



4 Category Analysis
Circus and Physical Theatre

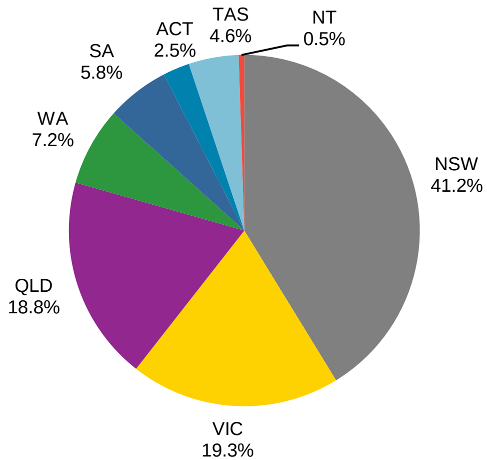
Circus and Physical Theatre – Revenue by State/Territory



Circus and Physical Theatre – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$36,259,497	49.4%	140.0%
VIC	$9,138,614	12.4%	-67.5%
QLD	$15,357,947	20.9%	-10.3%
WA	$5,417,525	7.4%	-73.2%
SA	$2,699,405	3.7%	-75.4%
ACT	$978,979	1.3%	-87.2%
TAS	$3,418,945	4.7%	N/A
NT	$168,579	0.2%	-60.7%
Total	**$73,439,491**	**100.0%**	**-26.2%**

Circus and Physical Theatre – Attendance by State/Territory



Circus and Physical Theatre – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	346,002	41.2%	122.1%
VIC	162,278	19.3%	-43.1%
QLD	157,907	18.8%	0.2%
WA	60,557	7.2%	-66.5%
SA	48,602	5.8%	-55.1%
ACT	20,652	2.5%	-74.0%
TAS	38,644	4.6%	N/A
NT	4,338	0.5%	-44.3%
Total	**838,980**	**100.0%**	**-13.9%**

4 Category Analysis
Classical Music

National Overview

- Classical Music experienced an increase in revenue of 36.1% from $56.4m in 2015 to $76.8m in 2016, and an increase in attendance of 22.7% from 0.99m in 2015 to 1.2m in 2016. This is the highest revenue for Classical Music recorded since 2008 and highest attendance since 2012. This is also the first year of growth in the Classical Music category following year on year declines in revenue each year since 2013 and year and year declines in attendance each year since 2012. The average ticket price increased between 2015 and 2016 by 9.7% from $71.50 to $78.43, contributing to the increase in revenue in 2016.
- As with previous years, the majority of revenue (66.8%) and attendance (65.2%) in this category was generated through performances by AMPAG companies. This includes the Australian Brandenburg Orchestra, Australian Chamber Orchestra, Melbourne Symphony Orchestra, Sydney Symphony Orchestra, Queensland Symphony Orchestra, West Australian Symphony Orchestra, Adelaide Symphony Orchestra, Tasmanian Symphony Orchestra, Musica Viva Australia and Orchestra Victoria. AMPAG companies overall experienced an increase in revenue by 13.1% and an increase in attendance by 6.3%.
- The growth in this category was primarily driven by major events including the return of high-profile international artist André Rieu for the first time since 2013 and the BBC Proms festival held in Melbourne. This was the first time the BBC Proms had been held outside of the UK.

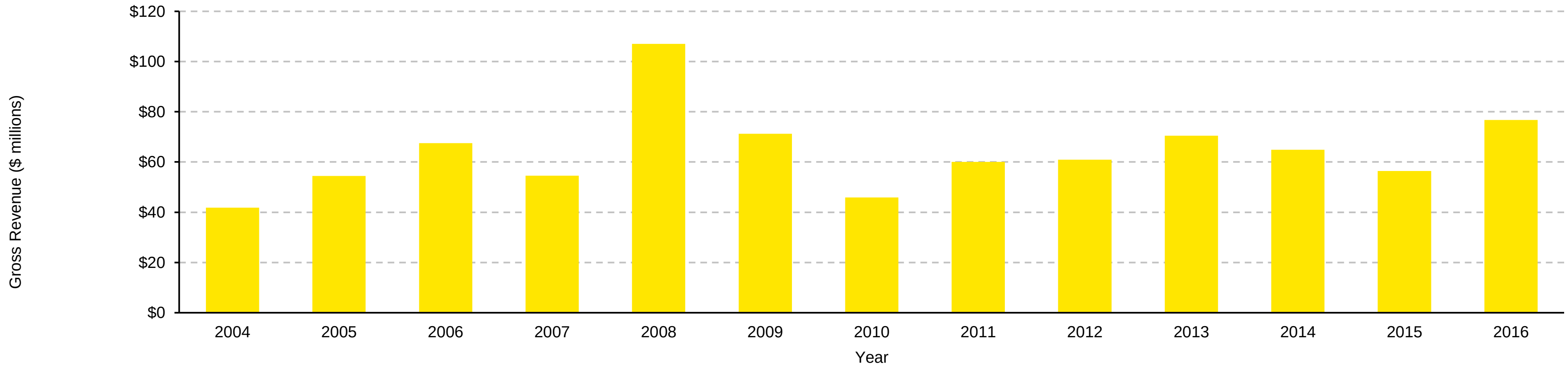
Classical Music – Revenue and Attendance (2004 – 2016)

	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$41,875,659		1,062,071		$43.21	
2005	$54,395,768	29.9%	1,154,340	8.7%	$52.95	22.5%
2006	$67,568,915	24.2%	1,571,748	36.2%	$46.93	-11.4%
2007	$54,615,181	-19.2%	1,104,146	-29.8%	$55.85	19.0%
2008	$107,050,440	96.0%	1,478,281	33.9%	$84.81	51.9%
2009	$71,273,338	-33.4%	1,120,002	-24.2%	$74.01	-12.7%
2010	$45,882,050	-35.6%	962,132	-14.1%	$60.43	-18.3%
2011	$60,096,039	31.0%	1,048,115	8.9%	$68.82	13.9%
2012	$60,884,219	1.3%	1,254,963	19.7%	$60.34	-12.3%
2013	$70,481,841	15.8%	1,169,643	-6.8%	$73.18	21.3%
2014	$64,870,493	-8.0%	1,015,122	-13.2%	$75.05	2.6%
2015	$56,395,824	-13.1%	993,906	-2.1%	$71.50	-4.7%
2016	$76,764,404	36.1%	1,219,293	22.7%	$78.43	9.7%

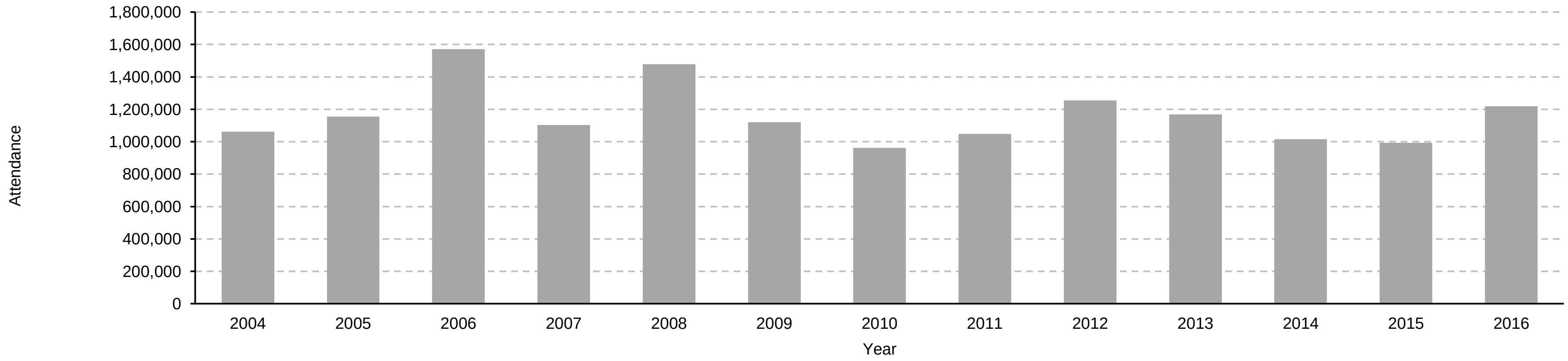
4 Category Analysis

Classical Music

Classical Music – Gross Revenue (2004-2016)

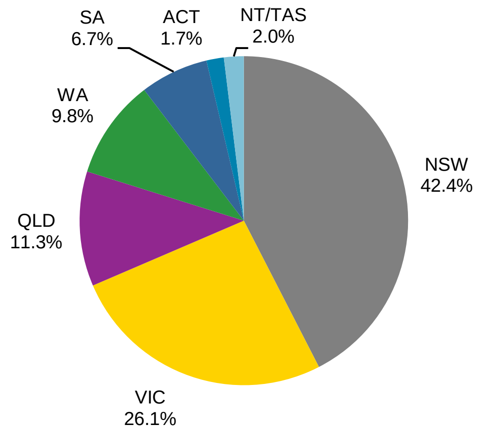


Classical Music – Total Attendance (2004-2016)



4 Category Analysis
Classical Music

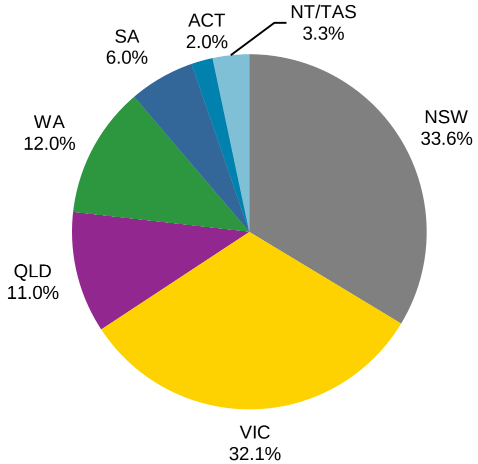
Classical Music – Revenue by State/Territory



Classical Music – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$32,579,475	42.4%	42.7%
VIC	$20,043,267	26.1%	19.0%
QLD	$8,661,621	11.3%	50.1%
WA	$7,515,080	9.8%	25.1%
SA	$5,153,598	6.7%	87.3%
ACT	$1,314,067	1.7%	13.2%
TAS	$1,493,512	1.9%	46.8%
NT	$3,784	0.0%	-83.8%
Total	**$76,764,404**	**100.0%**	**36.1%**

Classical Music – Attendance by State/Territory



Classical Music – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	410,151	33.6%	29.8%
VIC	391,440	32.1%	13.5%
QLD	134,560	11.0%	19.8%
WA	146,001	12.0%	14.2%
SA	72,765	6.0%	78.0%
ACT	23,797	2.0%	23.5%
TAS	40,467	3.3%	25.6%
NT	112	0.0%	-81.6%
Total	**1,219,293**	**100.0%**	**22.7%**

4 Category Analysis
Comedy

National Overview

- In 2016 the Comedy category recorded the highest ticket sales revenue and attendance since this category was introduced to the Survey Report in 2009. Between 2009 and 2016 revenue has increased by 118.3% and attendance has increased by 83.3%. Comedy has experienced growth in both revenue and attendance each year since 2013. Between 2015 and 2016 Comedy generated significant gains in revenue by 57.3% from $55m to $86.4m, and in attendance by 42% from 0.99m to 1.4m. In 2016 Comedy experienced the highest growth in revenue and attendance amongst all other categories. The increase in the average ticket price by 9% from $60.11 in 2015 to $65.54 in 2016 contributed to the growth in revenue.
- The significant growth in Comedy was primarily driven by major high-profile comedians that headlined tours in 2016 including international comedians Kevin Hart, Billy Crystal, Michael McIntyre and Dawn French, as well as local comedians Carl Barron and Jim Jeffries. As in previous years, revenue and attendance in the Comedy category was largely generated by the Melbourne International Comedy Festival and Sydney Comedy Festival.
- Tasmania was the only state to experience a decline in revenue, with a decrease of 57.7%. In 2016 Victoria generated the majority of national revenue (40.9%, declined from 46.5% in 2015) and attendance (47.1%, declined from 56% in 2015).

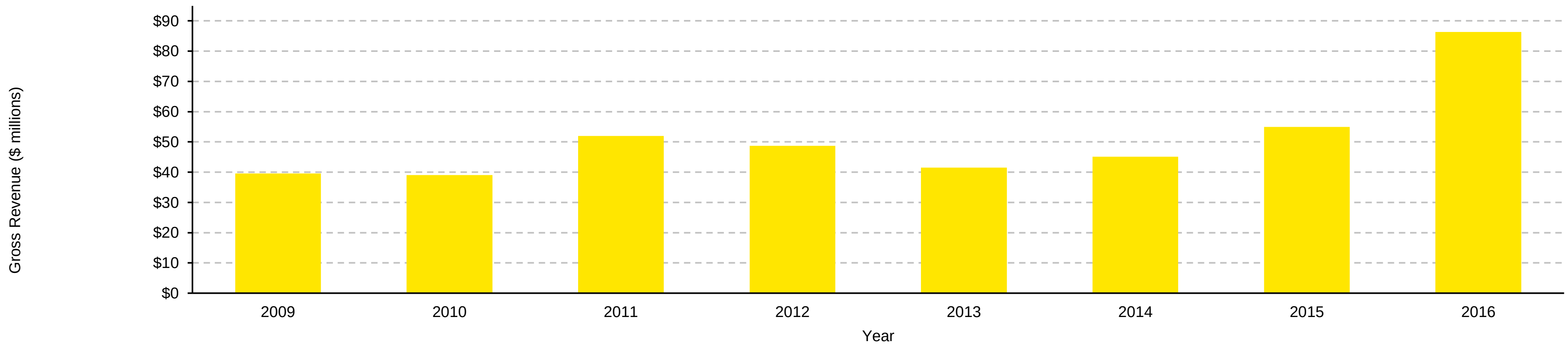
Comedy– Revenue and Attendance (2009 – 2016)

	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$39,570,117	-	769,058	-	$54.06	-
2010	$39,048,164	-1.3%	792,713	3.1%	$51.53	-4.7%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	-6.4%	981,035	-3.0%	$53.55	-2.8%
2013	$41,473,321	-14.8%	912,609	-7.0%	$48.82	-8.8%
2014	$45,154,726	8.9%	963,108	5.5%	$50.55	3.5%
2015	$54,924,280	21.6%	992,399	3.0%	$60.11	18.9%
2016	$86,382,773	57.3%	1,409,299	42.0%	$65.54	9.0%

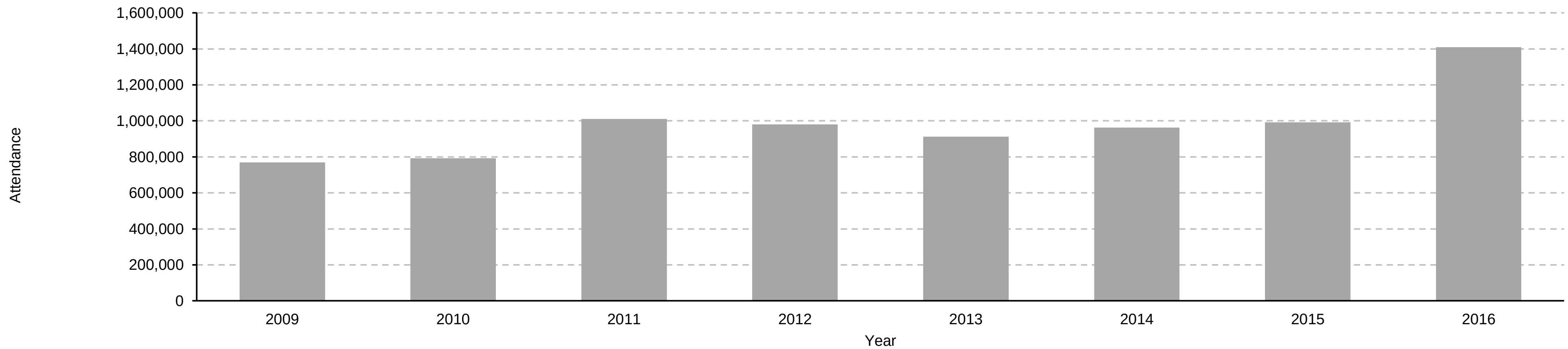
Note: Data is provided from 2009 as the category was only introduced in the 2009 Survey. Prior to 2009, such events were included in the Theatre or former Festivals (Single-Category) genre.

4 Category Analysis
Comedy

Comedy – Gross Revenue (2009-2016)



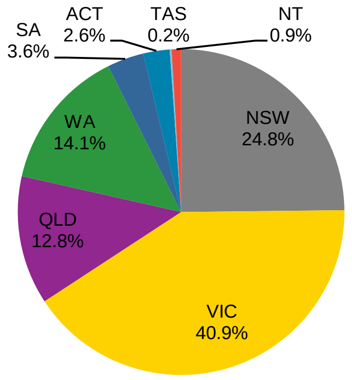
Comedy – Total Attendance (2009-2016)



4 Category Analysis

Comedy

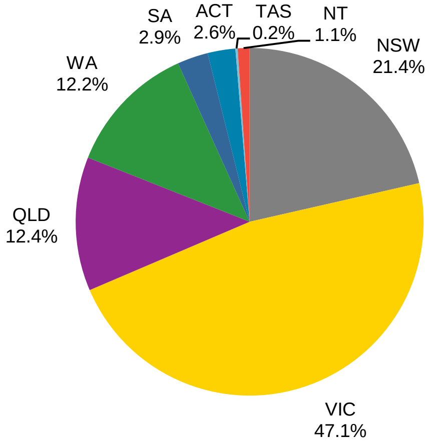
Comedy – Revenue by State/Territory



Comedy– Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$21,444,180	24.8%	82.4%
VIC	$35,367,097	40.9%	38.6%
QLD	$11,028,063	12.8%	50.3%
WA	$12,189,587	14.1%	173.3%
SA	$3,125,300	3.6%	20.0%
ACT	$2,266,127	2.6%	6.1%
TAS	$159,956	0.2%	-57.7%
NT	$802,464	0.9%	9.4%
Total	**$86,382,773**	**100.0%**	**57.3%**

Comedy – Attendance by State/Territory



Comedy – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	302,015	21.4%	115.7%
VIC	664,317	47.1%	19.5%
QLD	175,394	12.4%	16.6%
WA	172,454	12.2%	216.9%
SA	40,383	2.9%	17.5%
ACT	36,312	2.6%	-3.0%
TAS	2,936	0.2%	-10.9%
NT	15,488	1.1%	-5.9%
Total	**1,409,299**	**100.0%**	**42.0%**

4 Category Analysis
Contemporary Music

National Overview

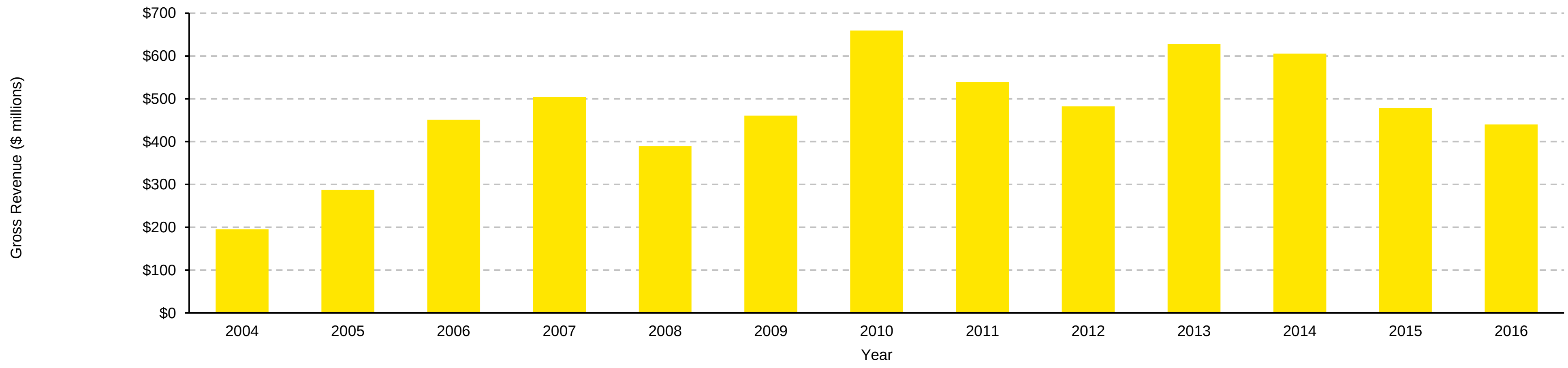
- In 2016 ticket sales revenue in the Contemporary Music category decreased by 7.9%, from $478m in 2015 to $440m in 2016. Despite the decline in revenue, attendance slightly increased by 1.9% from 5.6m in 2015 to 5.7m in 2016. Contemporary Music revenue has declined each year since 2013, decreasing by 30% between 2013 and 2016. In the same period attendance has decreased by 9.7%. In 2016 the average ticket price decreased by 11.4% from $96.38 in 2015 to $85.35. The average ticket price has continued to decrease each year since 2013 when the average ticket price peaked at $110.50, declining by 22.8% between 2013 and 2016.
- Contemporary Music still generates the largest live performance market share of revenue (30.8%) and attendance (30.1%). However, comparatively at its peak in 2010 Contemporary Music commanded a 49.6% market share of revenue and 40.8% market share of attendance.
- The annual variability of this category strongly reflects the number of high-profile international artists that tour in any given year, particularly the number of stadium tours that attract large audiences. Major international artists that toured Australia in 2016 included Coldplay, Prince, Selena Gomez, Black Sabbath, Kendrick Lamar and Madonna. Local acts that performed included Flume, Crowded House, Keith Urban, Delta Goodrem and Troye Sivan. The decrease in Contemporary Music revenue is primarily due to a number of prominent acts with arena or stadium tours that attracted large crowds and toured to all five major cities in 2015 that did not return in 2016, such as AC/DC, Fleetwood Mac, Foo Fighters, Ed Sheeran and One Direction. Additionally, many of the high-profile international acts that toured Australia in 2016 only performed in up to three major capital cities (Sydney, Melbourne and/or Brisbane) including Coldplay, Prince, Selena Gomez, Kendrick Lamar and Madonna.
- NSW and ACT were the only states that experienced an increase in Contemporary Music revenue by 2.8% and 102.3% respectively. High-profile artists including Delta Goodrem, Rob Thomas and Morrissey contributed to the growth in revenue in ACT. NSW had the highest share of revenue at $157.6m (35.8% market share).
- Note: these figures do not include music festivals, which are categorised under Festivals (Contemporary Music).

Contemporary Music – Revenue and Attendance (2004 – 2016)

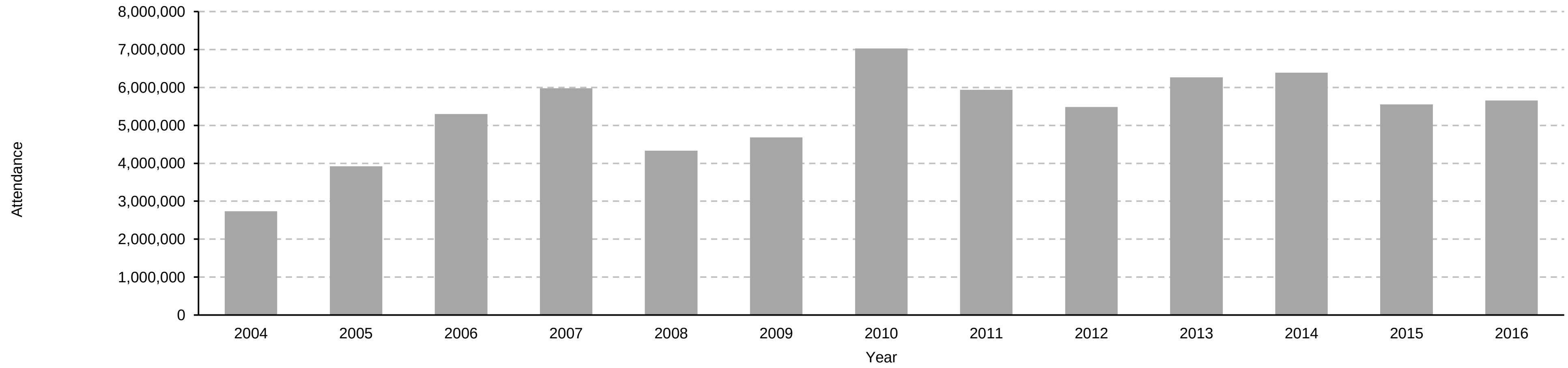
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$195,058,791		2,737,873		$77.09	
2005	$287,201,319	47.2%	3,924,276	43.3%	$83.37	8.1%
2006	$450,855,531	57.0%	5,295,988	35.0%	$92.78	11.3%
2007	$503,240,419	11.6%	5,975,561	12.8%	$90.49	-2.5%
2008	$389,160,746	-22.7%	4,330,620	-27.5%	$101.35	12.0%
2009	$460,443,027	18.3%	4,682,805	8.1%	$108.61	7.2%
2010	$659,102,048	43.1%	7,028,235	50.1%	$102.78	-5.4%
2011	$539,274,481	-18.2%	5,939,618	-15.5%	$103.45	0.6%
2012	$482,180,550	-10.6%	5,484,257	-7.7%	$100.27	-3.1%
2013	$628,130,146	30.3%	6,266,137	14.3%	$110.50	10.2%
2014	$604,963,041	-3.7%	6,386,058	1.9%	$107.60	-2.6%
2015	$477,904,944	-21.0%	5,554,811	-13.0%	$96.38	-10.4%
2016	$440,083,629	-7.9%	5,658,753	1.9%	$85.35	-11.4%

4 Category Analysis
Contemporary Music

Contemporary Music – Gross Revenue (2004-2016)

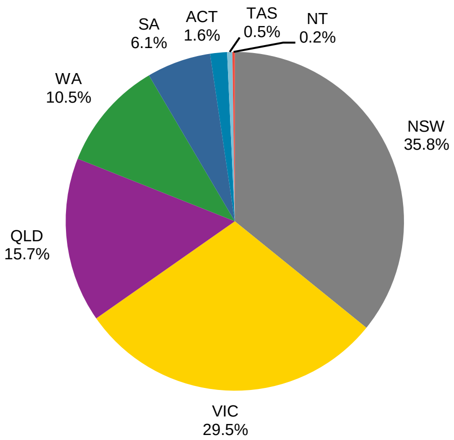


Contemporary Music – Total Attendance (2004-2016)



4 Category Analysis
Contemporary Music

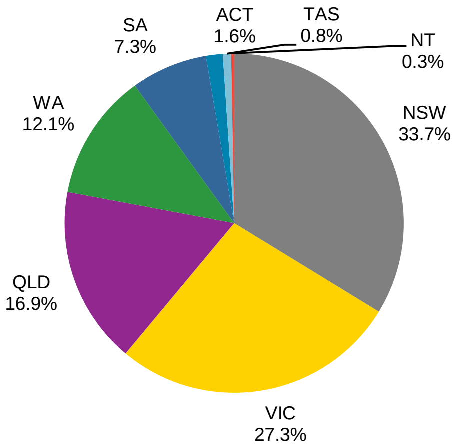
Contemporary Music – Revenue by State/Territory



Contemporary Music – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$157,626,354	35.8%	2.8%
VIC	$129,677,372	29.5%	-6.4%
QLD	$69,265,321	15.7%	-6.9%
WA	$46,200,547	10.5%	-34.5%
SA	$26,999,437	6.1%	-20.0%
ACT	$7,097,245	1.6%	102.3%
TAS	$2,200,935	0.5%	-8.9%
NT	$1,016,419	0.2%	-21.8%
Total	**$440,083,629**	**100.0%**	**-7.9%**

Contemporary Music – Attendance by State/Territory



Contemporary Music – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	1,909,137	33.7%	9.3%
VIC	1,546,191	27.3%	1.4%
QLD	955,483	16.9%	0.4%
WA	684,709	12.1%	-15.8%
SA	411,954	7.3%	3.4%
ACT	90,544	1.6%	54.5%
TAS	44,393	0.8%	13.4%
NT	16,342	0.3%	-25.3%
Total	**5,658,753**	**100.0%**	**1.9%**

4 Category Analysis
Festivals (Multi-Category)

National Overview

- In 2016 Festivals (Multi-Category) ticket sales revenue decreased by 8.9%, from $62.2m in 2015 to $56.6m in 2016. Despite this decline in revenue, attendance increased slightly by 4.2% from 1.49m in 2015 to 1.55m in 2016. The average ticket price decreased by 21.4% from $50.32 in 2015 to $39.57 in 2016.
- SA and WA generate the majority of revenue and attendance in this category, with a combined 63.3% market share of revenue and 75.3% market share of attendance in this category.
- Festivals (Multi-Category) in SA experienced an increase in revenue of 38.7% and an increase in attendance of 12.1%. SA contributes the largest share of revenue (43.7%) and attendance (50.3%) in this category. Major festivals in SA include Adelaide Fringe, Adelaide Festival and WOMADelaide.
- WA experienced an increase in revenue of 14% and an increase in attendance of 29.6% in Festivals (Multi-Category). WA contributes the second largest share of revenue (19.6%) and attendance (25%) in this category. Major festivals in WA include Fringe World Festival and Perth International Arts Festival.
- In 2016 NSW, Victoria and Queensland experienced significant decreases in revenue (76%, 44.2% and 25% respectively) and attendance (39.1%, 23.3% and 17.6% respectively), primarily due to a decrease in average ticket price for festivals held across all three states. Major festivals in these states include The Falls Music and Arts Festival, Melbourne Festival, Melbourne Fringe Festival, Sydney Festival and Brisbane Festival. MONA FOMA and Dark Mofo (Hobart) are also major festivals in this category.
- The 2015 Survey did not include the revenue and attendance generated by the Fringe World Festival in 2015. To ensure the Report is comparing figures on a like for like basis EY has adjusted the 2015 revenue and attendance figures in the 2016 Report.

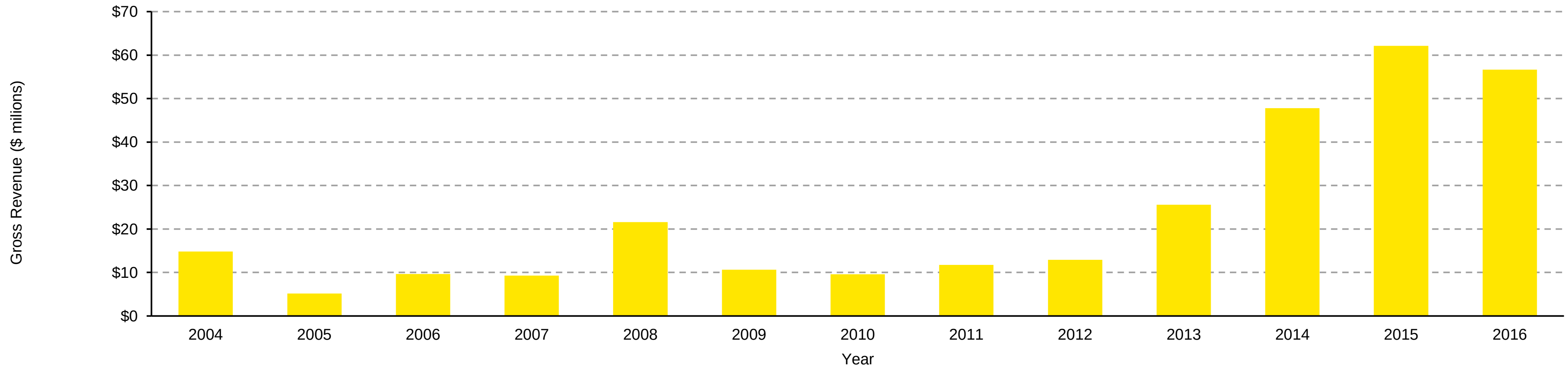
Festivals (Multi-Category) – Revenue and Attendance (2004 – 2016)

	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$14,842,476		483,858		$32.26	
2005	$5,170,934	-65.2%	157,228	-67.5%	$39.13	21.3%
2006	$9,633,454	86.3%	201,711	28.3%	$56.72	44.9%
2007	$9,318,441	-3.3%	294,296	45.9%	$44.09	-22.3%
2008	$21,615,824	132.0%	551,810	87.5%	$52.11	18.2%
2009	$10,642,917	-50.8%	431,061	-21.9%	$33.60	-35.5%
2010	$9,570,915	-10.1%	263,464	-38.9%	$43.12	28.3%
2011	$11,777,244	23.1%	242,222	-8.1%	$57.02	32.2%
2012	$12,916,787	9.7%	260,623	7.6%	$59.58	4.5%
2013	$25,622,029	98.4%	786,530	201.8%	$34.59	-41.9%
2014	$47,805,136	86.6%	1,059,806	34.7%	$48.41	39.9%
2015	$62,162,178	30.0%	1,486,599	40.3%	$50.32	3.9%
2016	$56,641,751	-8.9%	1,549,007	4.2%	$39.57	-21.4%

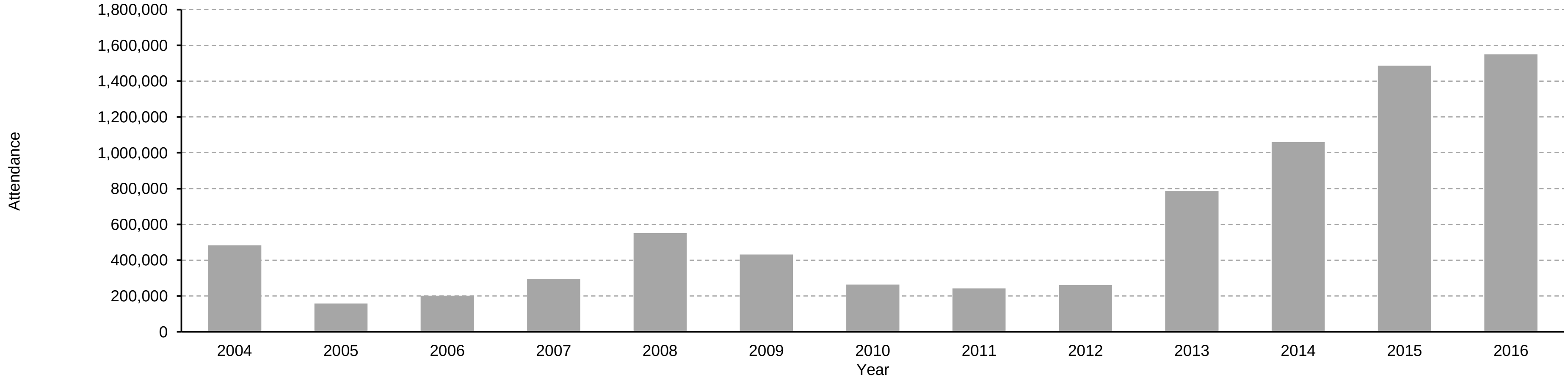
4 Category Analysis

Festivals (Multi-Category)

Festivals (Multi-Category) – Gross Revenue (2004-2016)



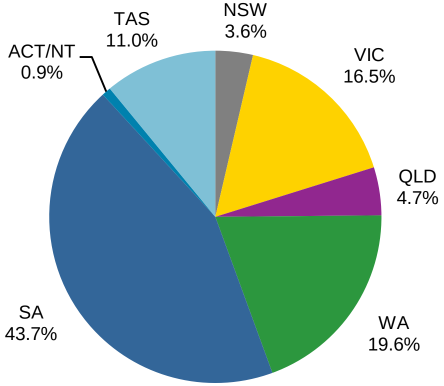
Festivals (Multi-Category) – Total Attendance (2004-2016)



4 Category Analysis

Festivals (Multi-Category)

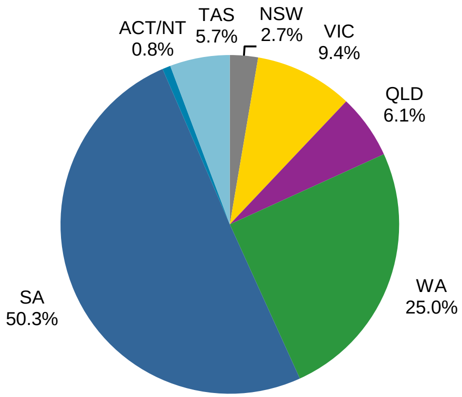
Festivals (Multi-Category) – Revenue by State/Territory



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

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$2,065,377	3.6%	-76.0%
VIC	$9,366,715	16.5%	-44.2%
QLD	$2,649,557	4.7%	-25.0%
WA	$11,077,097	19.6%	14.0%
SA	$24,771,946	43.7%	38.7%
ACT	$431,166	0.8%	4037.9%
TAS	$6,208,563	11.0%	16.8%
NT	$71,330	0.1%	-78.8%
Total	**$56,641,751**	**100.0%**	**-8.9%**

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



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

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	41,495	2.7%	-39.1%
VIC	145,318	9.4%	-23.3%
QLD	95,055	6.1%	-17.6%
WA	387,491	25.0%	29.6%
SA	778,869	50.3%	12.1%
ACT	9,866	0.6%	1994.7%
TAS	88,658	5.7%	-20.1%
NT	2,255	0.1%	-72.7%
Total	**1,549,007**	**100.0%**	**4.2%**

4 Category Analysis
Festivals (Contemporary Music)

National Overview

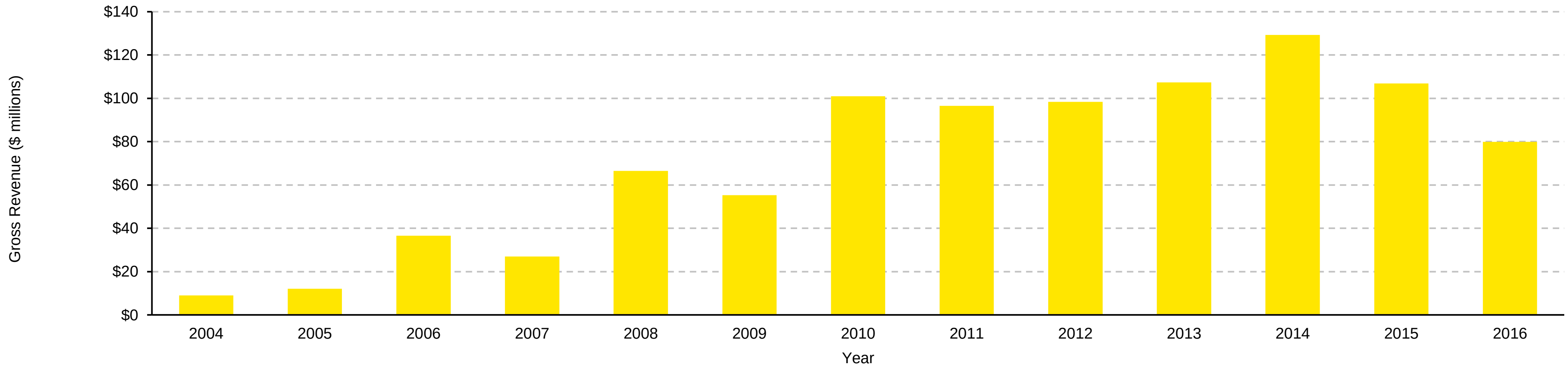
- The Festivals (Contemporary Music) category experienced significant declines in ticket sales revenue by 25.2% from $107m in 2015 to $79.9m in 2016 and by 48.2% in attendance from 1.3m in 2015 to 0.67m in 2016. Contemporary Music Festival revenue peaked in 2014 at $129.2m. Between 2014 and 2016 revenue decreased by 38.2%. This category experienced the second highest decline in revenue (after Circus and Physical Theatre) and attendance (after Special Events). Contrary to the declines in revenue and attendance, average ticket prices for this category increased by 6.7% from $117.72 to $125.60 in 2016.
- The substantial decrease in Festivals (Contemporary Music) revenue and attendance was primarily driven by the cancellation of major national touring festivals Future Music Festival and Stereosonic in 2016. Major Contemporary Music festivals that took place in 2016 include Splendour in the Grass, Bluesfest, Groovin' the Moo, St. Jerome's Laneway Festival, VIVID Live and Meredith Music Festival. The music festival market in SA and WA were hit particularly hard by the cancellation of two major festivals, experiencing a decrease in revenue by 74.6% and 52% respectively.
- It is worth noting that data for this category is likely to underestimate the size of Australia's music festival market, particularly boutique music festivals, as not all events provide data to the Survey.

Festivals (Contemporary Music)– Revenue and Attendance (2004 – 2016)

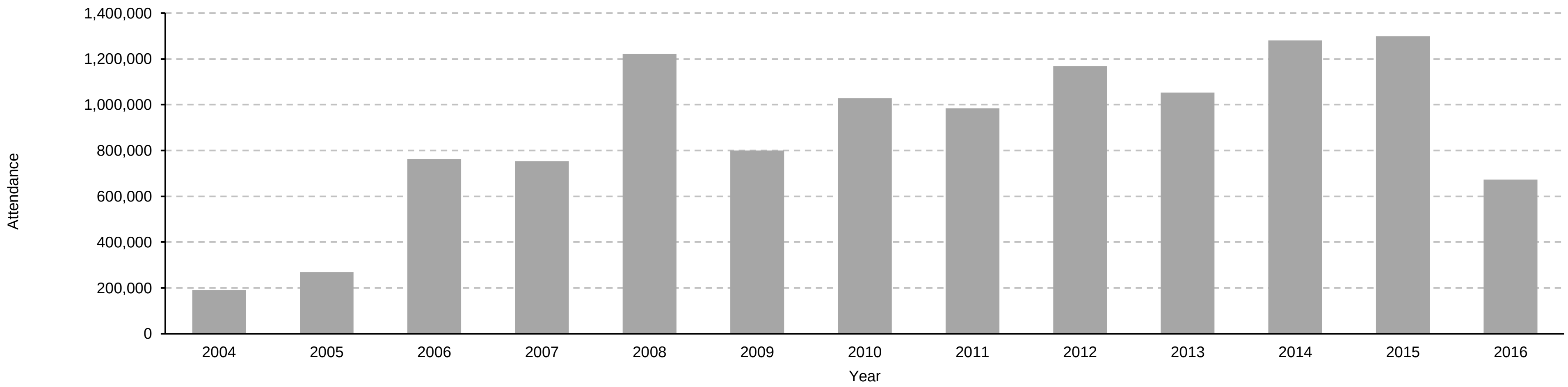
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$9,015,128		190,260		$54.69	
2005	$12,128,384	34.5%	269,208	41.5%	$63.05	15.3%
2006	$36,576,877	201.6%	761,920	183.0%	$50.93	-19.2%
2007	$26,972,082	-26.3%	753,247	-1.1%	$39.00	-23.4%
2008	$66,429,106	146.3%	1,221,972	62.2%	$60.91	56.2%
2009	$55,275,589	-16.8%	800,145	-34.5%	$81.19	33.3%
2010	$100,918,020	82.6%	1,028,170	28.5%	$119.39	47.1%
2011	$96,453,486	-4.4%	984,946	-4.2%	$138.97	16.4%
2012	$98,365,490	2.0%	1,169,233	18.7%	$128.71	-7.4%
2013	$107,367,780	9.2%	1,053,419	-9.9%	$130.46	1.4%
2014	$129,210,058	20.3%	1,281,339	21.6%	$136.91	4.9%
2015	$106,825,241	-17.3%	1,300,025	1.5%	$117.72	-14.0%
2016	$79,865,326	-25.2%	672,771	-48.2%	$125.60	6.7%

4 Category Analysis
Festivals (Contemporary Music)

Festivals (Contemporary Music) – Gross Revenue (2004-2016)

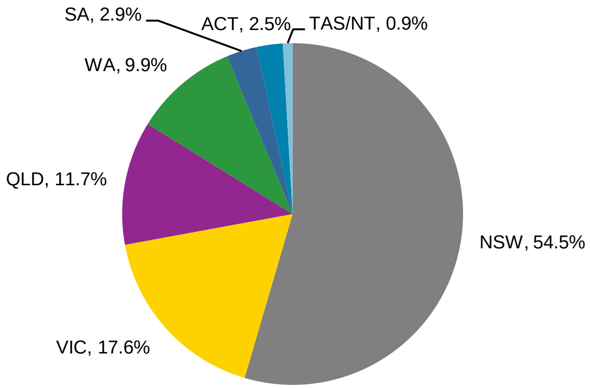


Festivals (Contemporary Music) – Total Attendance (2004-2016)



4 Category Analysis
Festivals (Contemporary Music)

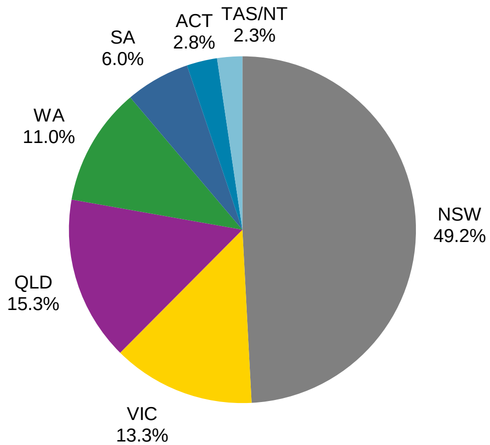
Festivals (Contemporary Music) – Revenue by State/Territory



Festivals (Contemporary Music) – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$43,563,204	54.5%	-21.8%
VIC	$14,030,671	17.6%	6.2%
QLD	$9,355,622	11.7%	-9.5%
WA	$7,893,042	9.9%	-52.0%
SA	$2,306,003	2.9%	-74.6%
ACT	$1,978,885	2.5%	4.4%
TAS	$183,345	0.2%	108.9%
NT	$554,555	0.7%	1418.5%
Total	**$79,865,326**	**100.0%**	**-25.2%**

Festivals (Contemporary Music) – Attendance by State/Territory



Festivals (Contemporary Music) – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	330,722	49.2%	-43.6%
VIC	89,380	13.3%	-54.8%
QLD	103,208	15.3%	-39.7%
WA	74,195	11.0%	-60.3%
SA	40,451	6.0%	-69.5%
ACT	19,052	2.8%	-17.6%
TAS	7,111	1.1%	425.6%
NT	8,652	1.3%	594.4%
Total	**672,771**	**100.0%**	**-48.2%**

4 Category Analysis
Musical Theatre

National Overview

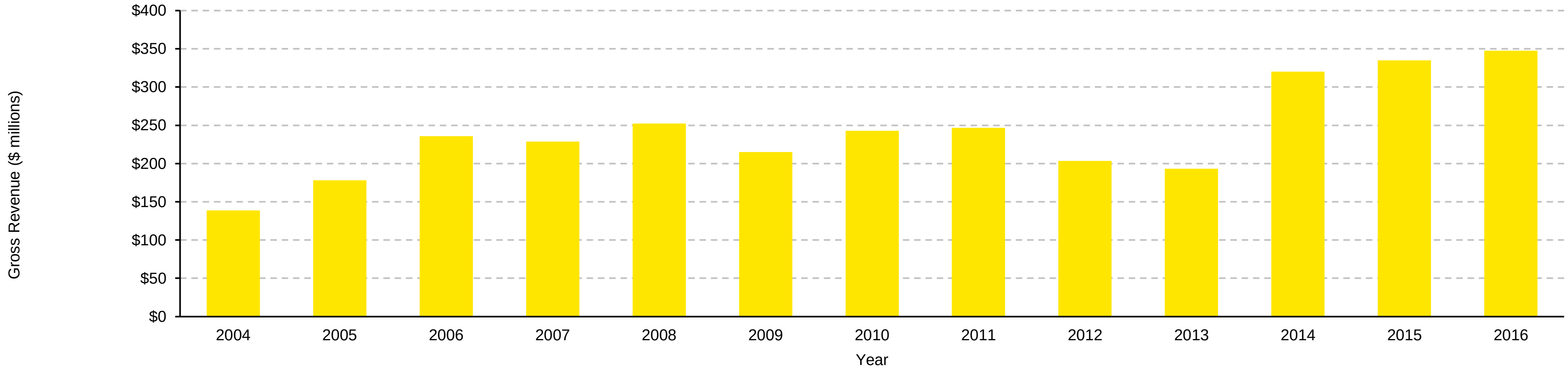
- The Musical Theatre category experienced a slight increase in revenue by 3.8% from $334.9m in 2015 to $347.7m in 2016 and attendance by 1.2% with 39,317 more tickets sold in 2016 than in 2015. Musical Theatre experienced significant growth in 2014 due to the significant increase in the number of major musical performances. Musical Theatre has experienced growth in revenue and attendance each year since 2014.
- Growth in the Musical Theatre category can be attributed to an increase in the number of performances by major musical productions including *Aladdin*, *Matilda the Musical*, *The Sound of Music*, *Kinky Boots*, *Little Shop of Horrors*, *My Fair Lady* and many others.
- Although Victoria experienced a slight decline in revenue (3.7%) and attendance (3.2%) it still generated the highest market share of revenue (37.2%) and attendance (37.3%) in Musical Theatre. Major musicals that performed in Victoria included *Kinky Boots, Matilda the Musical* and *The Sound of Music*. NSW experienced an increase in revenue by 15.5% and in attendance by 5.4% primarily driven by performances of major musicals taking place including *My Fair Lady*, *The Sound of Music* and *Aladdin*. WA and SA experienced significant increases in revenue (52.6% and 67.1% respectively) and attendance (63.6% and 74.6% respectively). Major musicals that performed in WA included *The Lion King*, *The Sound of Music* and *Little Shop of Horrors*. Major musicals that took place in SA included *CATS*, *Ghost the Musical*, *Singin' in the Rain*, *Little Shop of Horrors* and *The Sound of Music*.

Musical Theatre – Revenue and Attendance (2004 – 2016)

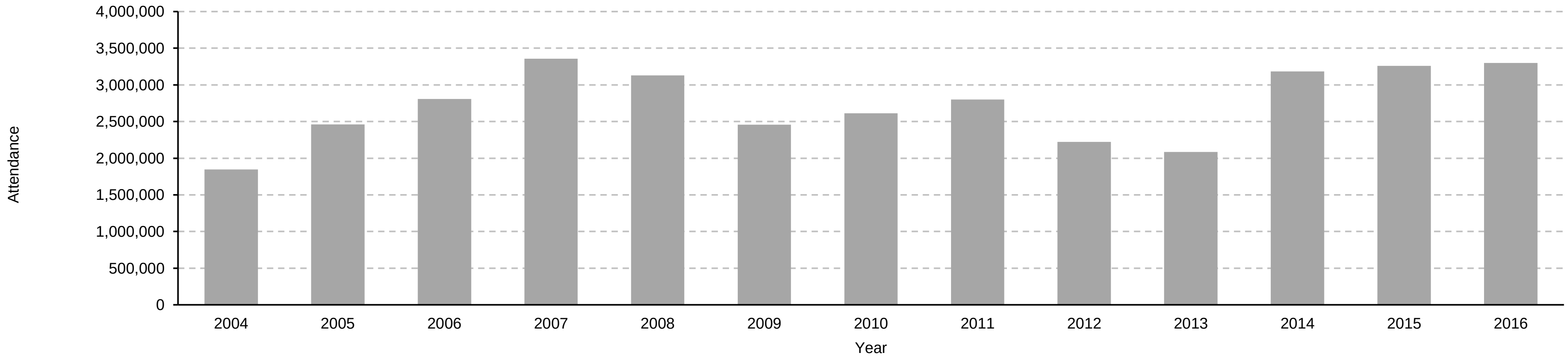
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$138,718,880		1,847,505		$76.34	
2005	$178,032,172	28.3%	2,460,314	33.2%	$76.01	-0.4%
2006	$235,922,584	32.5%	2,806,153	14.1%	$86.18	13.4%
2007	$228,854,618	-3.0%	3,358,727	19.7%	$70.50	-18.2%
2008	$252,199,267	10.2%	3,129,729	-6.8%	$89.23	26.6%
2009	$214,959,848	-14.8%	2,458,212	-21.5%	$93.54	4.8%
2010	$242,897,364	13.0%	2,612,507	6.3%	$98.84	5.7%
2011	$246,792,376	1.6%	2,799,918	7.2%	$92.79	-6.1%
2012	$203,278,606	-17.6%	2,224,068	-20.6%	$97.08	4.6%
2013	$193,389,763	-4.9%	2,085,131	-6.2%	$100.94	4.0%
2014	$320,342,329	65.6%	3,182,478	52.6%	$105.70	4.7%
2015	$334,869,038	4.5%	3,258,734	2.4%	$108.13	2.3%
2016	$347,684,296	3.8%	3,298,051	1.2%	$111.21	2.9%

4 Category Analysis
Musical Theatre

Musical Theatre – Gross Revenue (2004-2016)

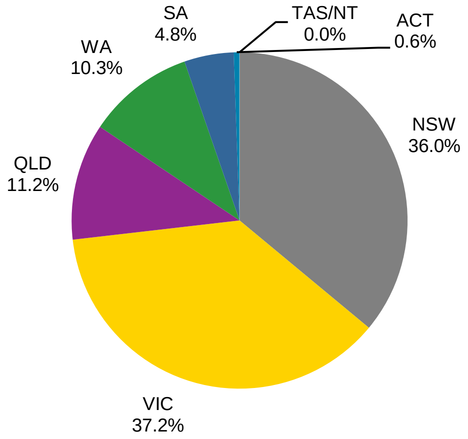


Musical Theatre – Total Attendance (2004-2016)



4 Category Analysis
Musical Theatre

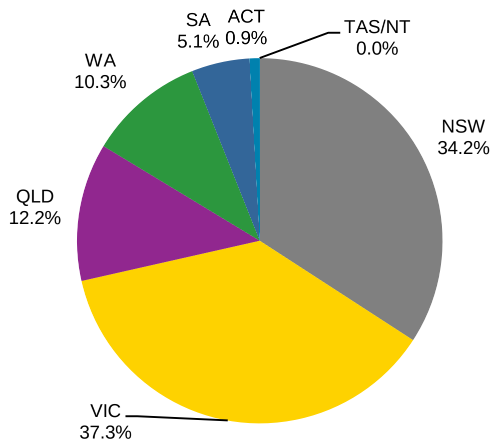
Musical Theatre – Revenue by State/Territory



Musical Theatre – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$125,214,539	36.0%	15.5%
VIC	$129,198,499	37.2%	-3.7%
QLD	$38,994,129	11.2%	-30.2%
WA	$35,775,176	10.3%	52.6%
SA	$16,570,468	4.8%	67.1%
ACT	$1,929,447	0.6%	-2.9%
TAS	-	-	-
NT	$2,038	0.0%	-83.9%
Total	**$347,684,296**	**100.0%**	**3.8%**

Musical Theatre – Attendance by State/Territory



Musical Theatre – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	1,126,562	34.2%	5.4%
VIC	1,230,303	37.3%	-3.2%
QLD	402,616	12.2%	-30.1%
WA	339,523	10.3%	63.6%
SA	169,361	5.1%	74.6%
ACT	29,612	0.9%	6.5%
TAS	-	-	-
NT	74	0.0%	-83.8%
Total	**3,298,051**	**100.0%**	**1.2%**

4 Category Analysis
Opera

National Overview

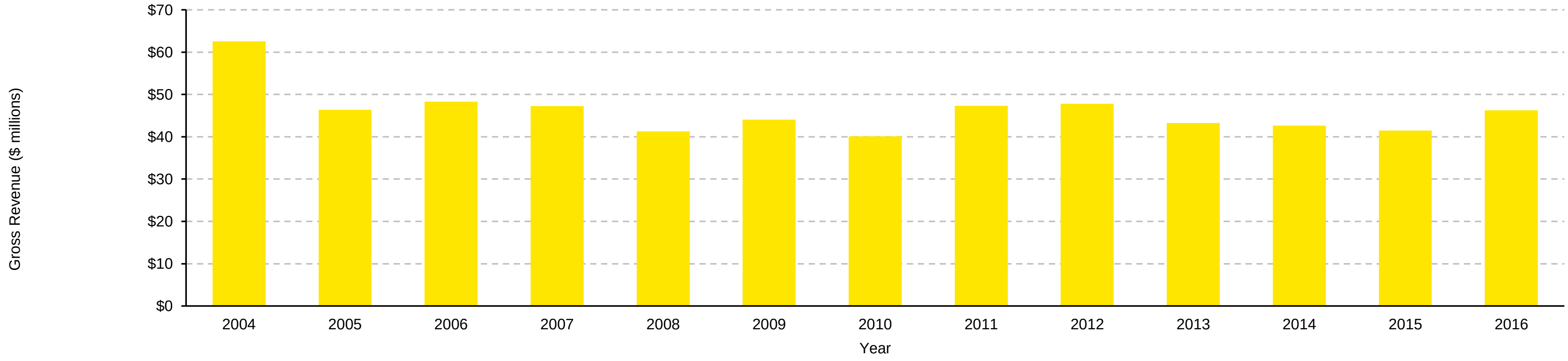
- Opera experienced an increase in ticket sales revenue by 11.4% from $41.5m in 2015 to $46.2m in 2016. Despite this increase in revenue, attendance declined by 5.8% from 0.43m in 2015 to 0.41m in 2016. The increase in average ticket price by 20.1% from $121.43 to $145.80 contributed significantly to the increase in revenue.
- 90.9% of revenue and 96.3% of attendance in the Opera category was generated through performances by AMPAG companies including Opera Australia, Opera Queensland, West Australian Opera Company, and the State Opera of South Australia. AMPAG companies overall experienced an increase in revenue by 10.4% and an increase in attendance by 8.3%.
- Opera Australia's production of *The Ring Cycle*, performed exclusively in Melbourne for the first time since 2013, contributed significantly to the increase in revenue and high average ticket price. Other major opera performances in 2016 included *Turandot (*Opera on Sydney Harbour), *Carmen*, *La Bohème*, *The Magic Flute*, *The Pearlfishers* and *The Barber of Seville*.
- NSW and Victoria generated the majority of Opera revenue and attendance, with a combined 90.4% of revenue market share (65.7% and 24.7% respectively) and 78.4% of attendance market share (57.1% and 21.3% respectively). SA was the only state to experience a decline in Opera revenue (6.6%). Attendance varied across the states with WA experiencing the largest decline of 9.9%.

Opera – Revenue and Attendance (2004 – 2016)

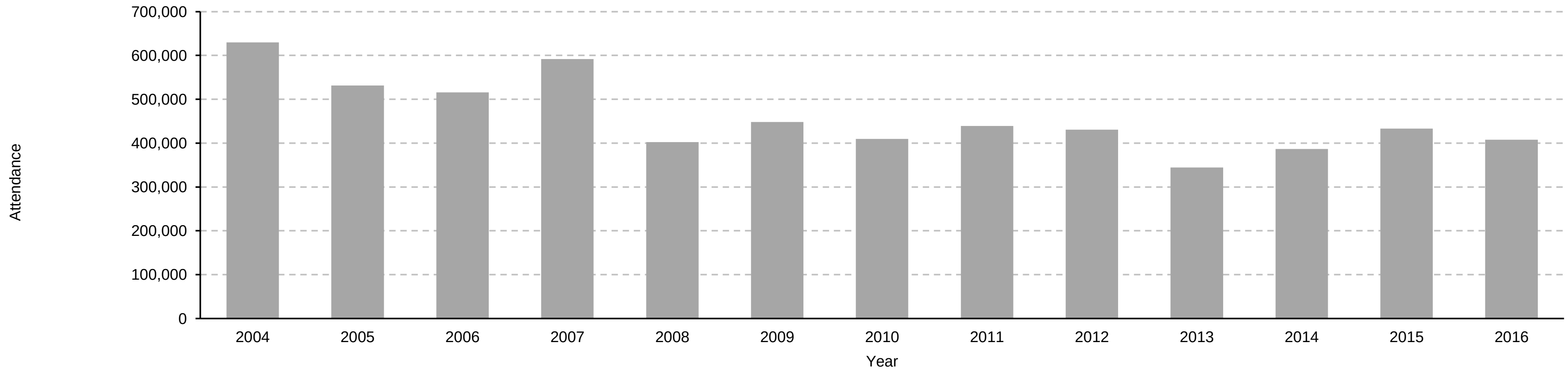
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$62,562,433		629,808		$108.88	
2005	$46,390,544	-25.8%	531,595	-15.6%	$94.38	-13.3%
2006	$48,331,324	4.2%	515,927	-2.9%	$102.40	8.5%
2007	$47,249,031	-2.2%	591,605	14.7%	$85.28	-16.7%
2008	$41,316,885	-12.6%	402,549	-32.0%	$114.46	34.2%
2009	$44,044,808	6.6%	448,096	11.3%	$111.62	-2.5%
2010	$40,128,943	-8.9%	409,541	-8.6%	$112.86	1.1%
2011	$47,305,786	17.9%	439,041	7.2%	$124.66	10.5%
2012	$47,843,971	1.1%	430,904	-1.9%	$126.84	1.8%
2013	$43,283,705	-9.5%	344,761	-20.0%	$145.28	14.5%
2014	$42,620,749	-1.5%	386,927	12.2%	$124.92	-14.0%
2015	$41,505,346	-2.6%	433,198	12.0%	$121.43	-2.8%
2016	$46,247,521	11.4%	407,965	-5.8%	$145.80	20.1%

4 Category Analysis
Opera

Opera – Gross Revenue (2004-2016)

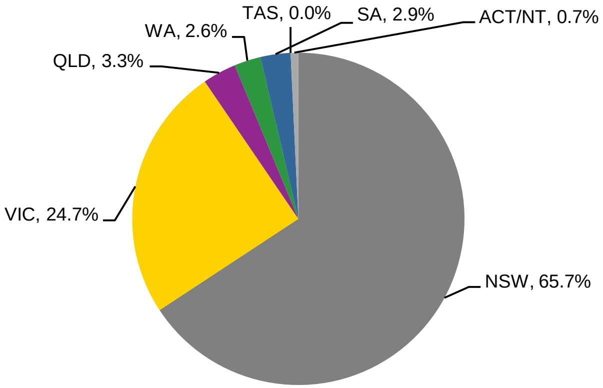


Opera – Total Attendance (2004-2016)



4 Category Analysis
Opera

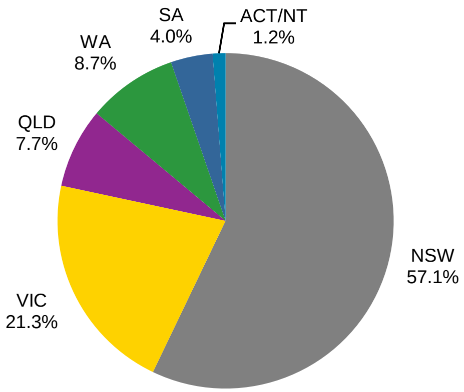
Opera – Revenue by State/Territory



Opera – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$30,404,441	65.7%	0.1%
VIC	$11,439,197	24.7%	53.6%
QLD	$1,508,084	3.3%	65.1%
WA	$1,195,725	2.6%	4.8%
SA	$1,355,075	2.9%	-6.6%
ACT	$280,511	0.6%	52.9%
TAS	-	-	-
NT	$64,489	0.1%	1031.4%
Total	**$46,247,521**	**100.0%**	**11.4%**

Opera – Attendance by State/Territory



Opera – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	233,000	57.1%	-6.8%
VIC	86,713	21.3%	-8.4%
QLD	31,436	7.7%	9.1%
WA	35,336	8.7%	-9.9%
SA	16,454	4.0%	-4.6%
ACT	3,113	0.8%	8.1%
TAS	-	-	-
NT	1,913	0.5%	477.9%
Total	**407,965**	**100.0%**	**-5.8%**

4 Category Analysis
Special Events

National Overview

- As with previous years, the Special Events category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.
- The Special Events category experienced a substantial increase in revenue by 44.1% from $20.3m in 2015 to $29.3m in 2016. Attendance in the Special Events category declined substantially by 66.8%. The average ticket price increased by 304.4% from $42.26 to $170.90. The increase in revenue and average ticket price were primarily driven by the Royal Edinburgh Military Tattoo performances held in Melbourne. This was the first time that the Royal Edinburgh Military Tattoo performed in Victoria, and prior to this had only performed outside of the UK on three occasions.
- Victoria was the only state to experience an increase in revenue of 340.2% and an increase in attendance of 34.7%.

Special Events – Revenue and Attendance (2004 – 2016)

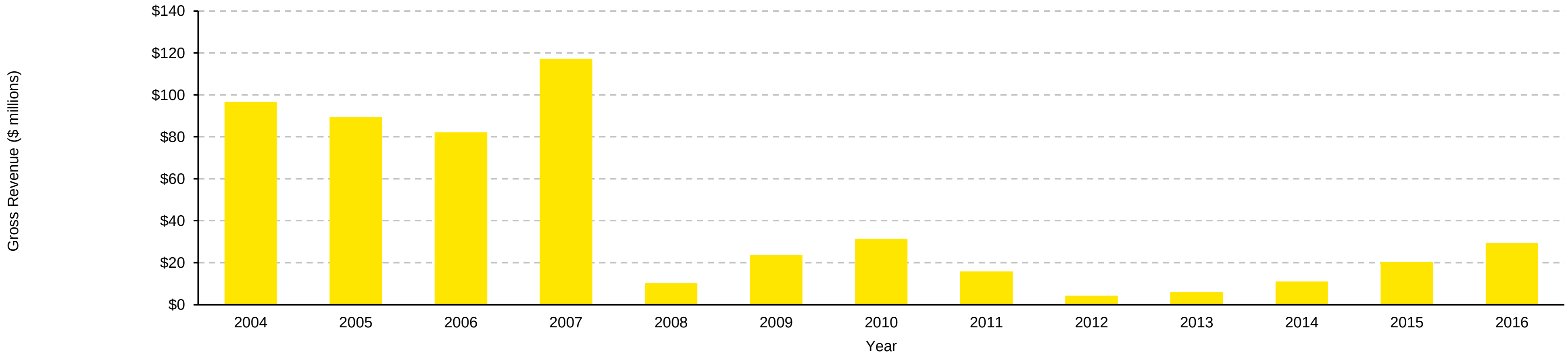
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$96,706,366		3,125,013		$45.43	
2005	$89,357,246	-7.6%	2,992,097	-4.3%	$31.50	-30.7%
2006	$82,143,879	-8.1%	2,625,779	-12.2%	$42.64	35.4%
2007	$117,203,892	42.7%	3,453,077	31.5%	$48.56	13.9%
2008	$10,324,979	-91.2%	374,623	-89.2%	$43.60	-10.2%
2009	$23,602,096	128.6%	559,434	49.3%	$67.79	55.5%
2010	$31,449,876	33.3%	526,503	-5.9%	$88.67	30.8%
2011	$15,799,946	-49.8%	370,239	-29.7%	$57.28	-35.4%
2012	$4,250,001	-73.1%	91,189	-75.4%	$57.58	0.5%
2013	$6,030,274	41.9%	113,294	24.2%	$73.18	27.1%
2014	$10,984,057	82.1%	210,390	85.7%	$86.90	18.8%
2015	$20,340,607	85.2%	556,914	164.7%	$42.26	-51.4%
2016	$29,310,579	44.1%	185,104	-66.8%	$170.90	304.4%

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

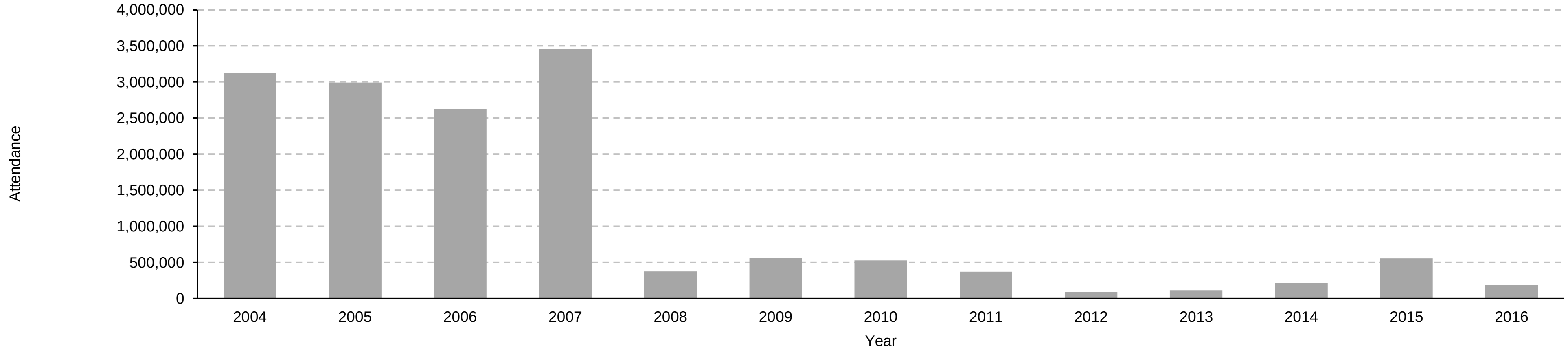
4 Category Analysis

Special Events

Special Events – Gross Revenue (2004-2016)

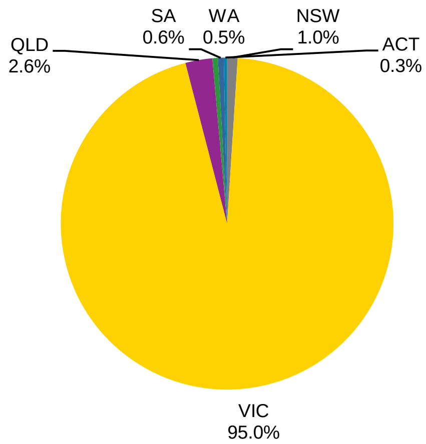


Special Events – Total Attendance (2004-2016)



4 Category Analysis
Special Events

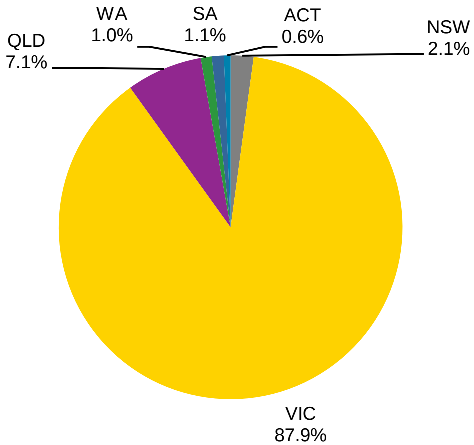
Special Events – Revenue by State/Territory



Special Events – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$296,476	1.0%	-87.1%
VIC	$27,831,031	95.0%	340.2%
QLD	$766,737	2.6%	-85.3%
WA	$156,527	0.5%	-96.6%
SA	$164,171	0.6%	-84.5%
ACT	$95,636	0.3%	-88.7%
TAS	-	-	-
NT	-	-	-
Total	**$29,310,579**	**100.0%**	**44.1%**

Special Events – Attendance by State/Territory



Special Events – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	3,973	2.1%	-87.1%
VIC	162,759	87.9%	34.7%
QLD	13,208	7.1%	-95.4%
WA	1,917	1.0%	-96.8%
SA	2,092	1.1%	-86.4%
ACT	1,155	0.6%	-97.1%
TAS	-	-	-
NT	-	-	-
Total	**185,104**	**100.0%**	**-66.8%**

4 Category Analysis
Theatre

National Overview

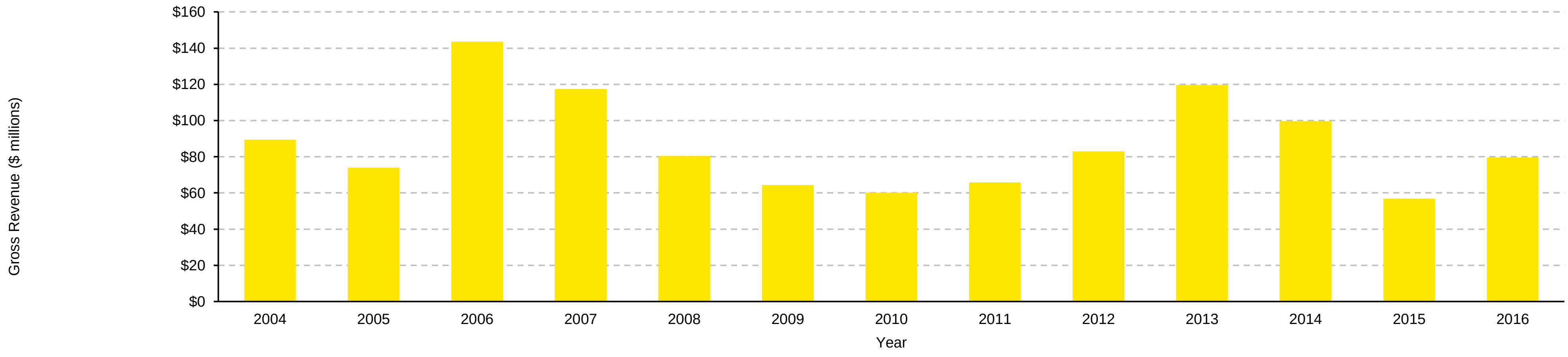
- The Theatre category experienced an increase in ticket sales revenue by 40% from $56.8m in 2015 to $79.6m in 2016 and in attendance by 19.1% from $1.14m in 2015 to $1.35m in 2016. This is the first year of growth in the Theatre category following declines in revenue and attendance each year since 2014.
- 62.3% of revenue and 66.3% of attendance in the Theatre category was generated through performances by AMPAG companies including Bell Shakespeare, Belvoir, Black Swan State Theatre Company, Malthouse Theatre, Melbourne Theatre Company, Queensland Theatre, State Theatre Company of South Australia and Sydney Theatre Company. AMPAG companies overall experienced an increase in revenue by 12.9% and an increase in attendance by 1.5%.
- Growth in Theatre was primarily driven by an increase in high-profile theatre productions including a national tour of the major commercial production *Mrs Brown's Boys*, Sydney Theatre Company's production of *Speed-the-Plow* starring Rose Byrne and Melbourne Theatre Company's production of *The Odd Couple* starring Shaun Micallef.
- The 2016 Survey includes data provided by The Blue Room Theatre (WA) for the first time which also contributed to increased revenue and attendance recorded in this category.
- ACT was the only state or territory to experience a slight decrease in revenue of 2.5%. NSW and Victoria generated the majority of Theatre revenue and attendance, with a combined 76.4% of revenue market share (48.1% and 28.3% respectively) and 75.1% of attendance market share (47.3% and 27.8% respectively).

Theatre – Revenue and Attendance (2004 – 2016)

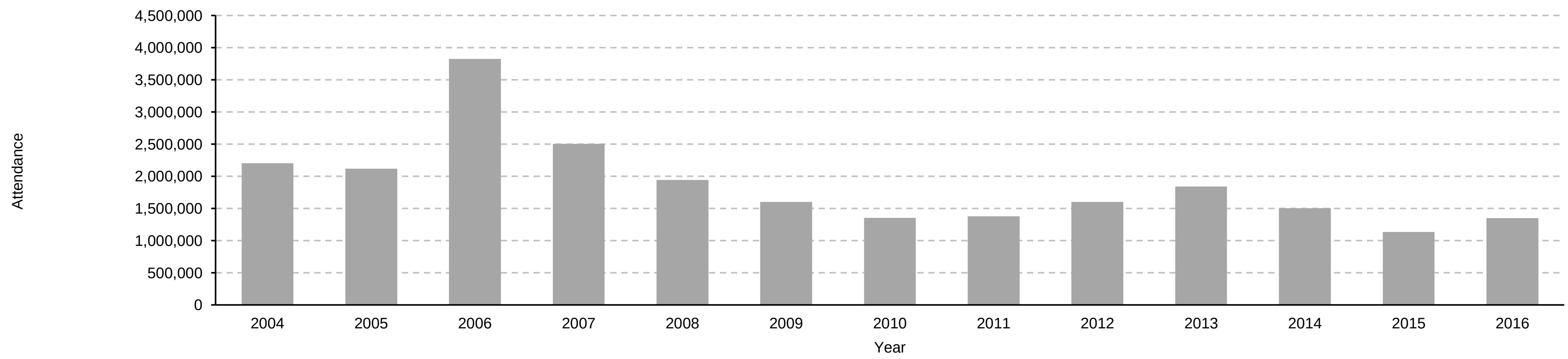
	Revenue		Attendance		Average Ticket Price	
Year	Revenue	Growth (%)	Total attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$89,417,616		2,202,812		$43.87	
2005	$73,988,892	-17.3%	2,117,854	-3.9%	$38.04	-13.3%
2006	$143,564,232	94.0%	3,828,254	80.8%	$39.42	3.6%
2007	$117,382,525	-18.2%	2,505,458	-34.6%	$50.42	27.9%
2008	$80,476,671	-31.4%	1,944,188	-22.4%	$46.92	-6.9%
2009	$64,440,541	-19.9%	1,602,591	-17.6%	$46.58	-0.7%
2010	$60,151,139	-6.7%	1,354,336	-15.5%	$51.47	10.5%
2011	$65,880,712	9.5%	1,380,622	1.9%	$56.14	9.1%
2012	$82,973,259	25.9%	1,601,425	16.0%	$59.86	6.6%
2013	$119,647,414	44.2%	1,842,177	15.0%	$72.88	21.8%
2014	$99,714,555	-16.7%	1,504,367	-18.3%	$73.83	1.3%
2015	$56,831,724	-43.0%	1,135,128	-24.5%	$56.81	-23.0%
2016	$79,584,271	40.0%	1,351,653	19.1%	$66.51	17.1%

4 Category Analysis
Theatre

Theatre – Gross Revenue (2004-2016)



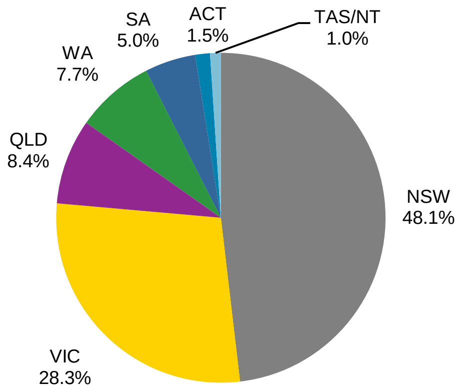
Theatre – Total Attendance (2004-2016)



4 Category Analysis

Theatre

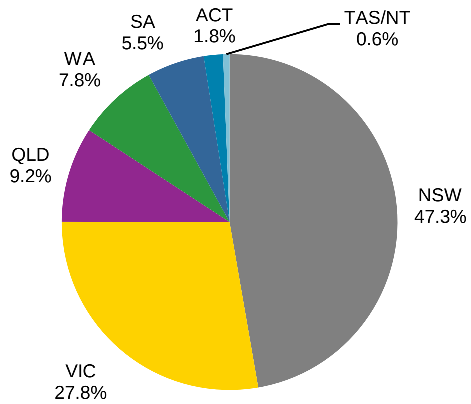
Theatre – Revenue by State/Territory



Theatre – Revenue by State/Territory

State/ Territory	Revenue	Market share proportion	Change from 2015 (%)
NSW	$38,308,867	48.1%	24.8%
VIC	$22,492,337	28.3%	37.5%
QLD	$6,660,250	8.4%	64.2%
WA	$6,149,070	7.7%	134.4%
SA	$3,983,751	5.0%	111.9%
ACT	$1,155,529	1.5%	-2.5%
TAS	$758,871	1.0%	N/A
NT	$75,595	0.1%	120.2%
Total	**$79,584,271**	**100.0%**	**40.0%**

Theatre – Attendance by State/Territory



Theatre – Attendance by State/Territory

State/ Territory	Attendance	Market share proportion	Change from 2015 (%)
NSW	638,853	47.3%	16.1%
VIC	375,305	27.8%	13.1%
QLD	124,124	9.2%	13.4%
WA	105,173	7.8%	58.9%
SA	74,781	5.5%	44.2%
ACT	24,961	1.8%	4.5%
TAS	6,306	0.5%	N/A
NT	2,150	0.2%	40.8%
Total	**1,351,653**	**100.0%**	**19.1%**

5

Appendices

5 Appendices

Appendix A - Survey Participant

The following companies were identified by LPA and provided both gross revenue and attendance data to EY for the 2016 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 . Average ticket price data was calculated based on paid tickets only.

The Adelaide Festival Centre Trust
Araluen Arts Centre (NT)
Arts Centre Melbourne
Arts Projects Australia (WOMADelaide)
Bluesfest
Blue Room Theatre
Brisbane Powerhouse
Canberra Ticketing
Cirque du Soleil
Darwin Entertainment Centre (Ntix)
FringeTIX (Adelaide Fringe)
Fringe World Festival (Perth)
Hayes Theatre Co
Melbourne Fringe Festival
Melbourne Recital Centre
MONA (MONA FOMA and Dark Mofo)
Oztix
Perth Concert Hall (WA Venues and Events)
The Ticket Group (previously Moshtix and Foxtix)
Queensland Performing Arts Centre (Qtix)
Sydney Opera House
Ticketmaster
Ticketek

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

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

5 Appendices

Appendix B - Event Category Description

Category	Description
Ballet and Dance	Traditional forms, Ethnic dance, Folk dance, Ballet, Ballroom, Latin dance, Liturgical dance, Modern dance, Ballet, Tap, and Breakdancing
Children's/Family	Live entertainment for children, Interactive performances for children and Workshops for children
Circus and Physical Theatre*	Physical Theatre, Circus and Burlesque
Classical Music	Any of the following in classical/contemporary art (i.e. current, but not 'pop') style: Orchestral music, Chamber music, Choirs and choral music, Recitals, and Singing/playing. All styles of the following: Sacred music and Traditional music/ethnic music/world music
Comedy*	Stand up, comedy performances (but not Comedy plays)
Contemporary Music^	All forms of the following, performed by any type of ensemble or soloist (including any ensemble/chorus/solo musicians advertising a program which is exclusively one of the following categories, e.g. 'pop' or 'jazz,' as in The Australian Jazz Orchestra): Pop, Jazz, Blues, Country, Rock, Folk, Soul, R&B, Techno, Hip hop, Rap, Heavy Metal, and Electronic Dance Music
Festivals (Multi-Category)	Festivals/events which contain a number of different types of events which fall into two or more categories (e.g. Adelaide Fringe or Perth International Arts Festival). Food and music festivals are only included if a music line up is involved. Festivals/events which contain a number of events that predominately fall into the category of Contemporary Music (e.g. Bluesfest). Festivals which contain a number of events that are not Contemporary Music but fall into one category will be allocated to their respective category (e.g. comedy, theatre, dance etc.)
Festivals (Contemporary Music)	Festivals/events which contain a number of events that predominately fall into the category of Contemporary Music (e.g. Bluesfest). Festivals that are not Contemporary Music but belong in one category will be allocated to their respective category (e.g. comedy, theatre, dance etc.)
Musical Theatre	Staged productions which include music/drama/movement in popular form, primarily (but not limited to): Musicals and Cabarets in cabaret mode/style
Opera	Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style: Opera and Operetta (includes Gilbert and Sullivan)
Special Events	Unique presentations which do not fall into any other category
Theatre	Script based theatre, Drama, Comedy theatre, Mime and Plays

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

5 Appendices
Appendix C: Abbreviations & Definitions

Abbreviation	Definition
$	Australian Dollar
%	Percentage
AMPAG	Australian Major Performing Arts Group
APACA	Australian Performing Arts Centres Association
b	Billion
c.	Circa
e.g.	For example
EY	Ernst & Young
i.e.	That is
k	Thousand
LPA	Live Performance Australia
m	million
NSW	New South Wales
VIC	Victoria
QLD	Queensland
WA	Western Australia
SA	South Australia
ACT	Australian Capital territory
NT	Northern Territory
TAS	Tasmania
yoy	Year on year
Total Attendance	Based on both paid and unpaid tickets
Average Ticket Price	Average Ticket Prices are calculated based only on paid tickets