# Live Performance Industry in Australia

2017 Ticket Attendance and Revenue Report

Live Performance Australia

**Reliance Restricted**

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# Report Disclaimer

## Notice

Ernst & Young (EY) was engaged on the instructions of Live Performance Australia (LPA) to prepare the 2017 Ticket Attendance and Revenue Report ("Report"), in accordance with the contract dated 27 March 2018.

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

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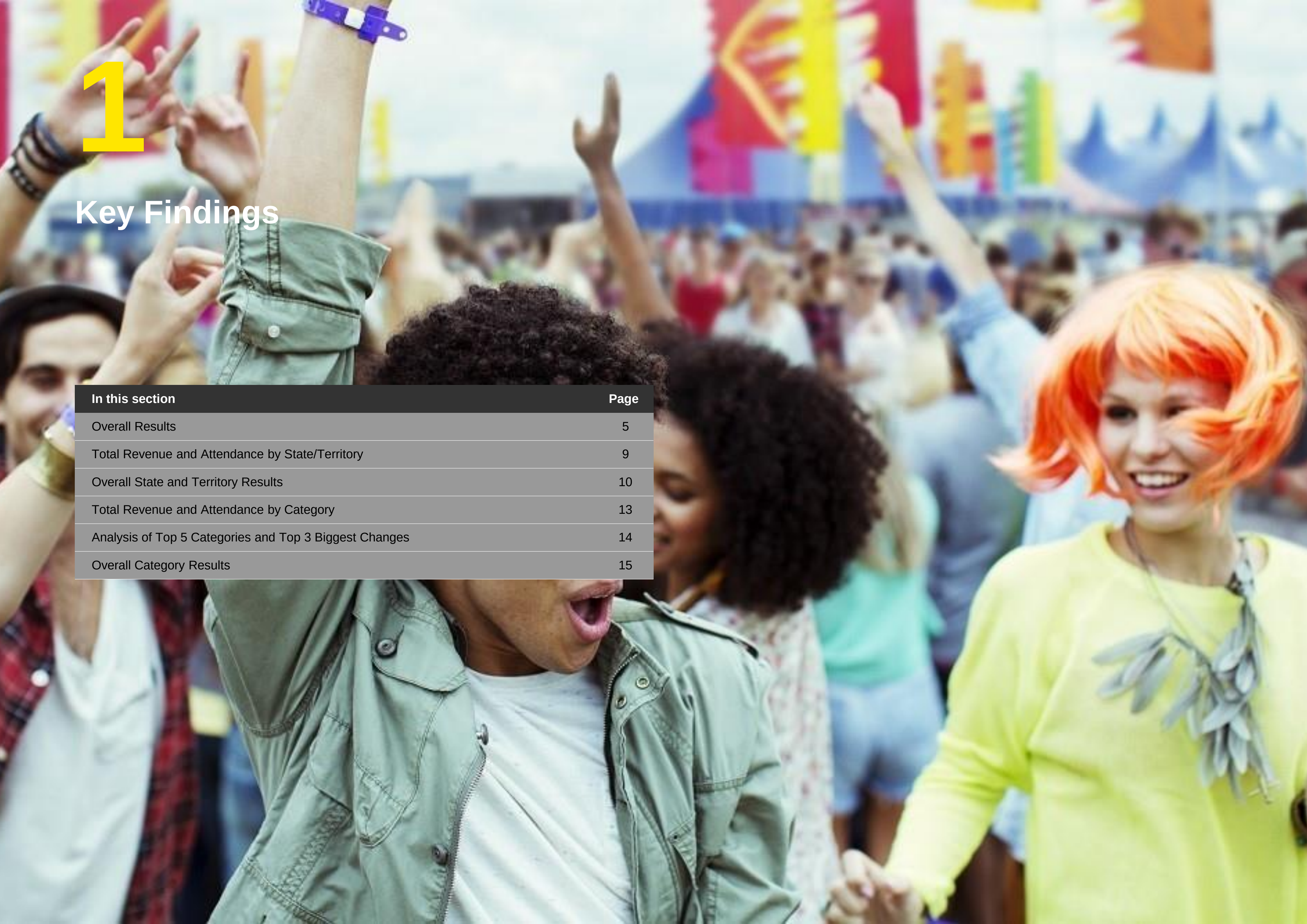


# 1

# Key Findings

# 1 Key Findings
## Overall Results



**In 2017 total industry revenue has grown to $1.88b with over 23.02m tickets issued.**

### Industry growth

- In 2017 (calendar year), the Australian live performance industry generated total ticket sales revenue of $1.88b – an increase of 31.7% from 2016, when ticket sales totalled $1.43b. This increase in revenue was the result of a 21.7% increase in the total number of paid tickets in 2017, coupled with an increase in the average ticket price by 8.2% from $83.72 to $90.59.
- Approximately 23.02m tickets were issued in 2017, representing an increase of 22.6% from 2016 when 18.78m tickets were issued. Of the 23.02m total tickets, the number of paid tickets issued was 20.8m (an increase from 17.09m tickets sold in 2016). The remaining 2.2m tickets issued in 2017 were complimentary, sponsor allocated and zero-priced tickets.
- In 2017 the number of tickets issued and revenue generated for live performance events was the highest recorded. However, the average ticket price in 2017 ($90.59) is still slightly short of the record average ticket prices achieved in 2013 ($92.16) and 2014 ($91.57) which were 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

- Victoria generated the highest share of national live performance revenue (34.0%) and attendance (32.0%) in 2017, with NSW being the second largest contributor in revenue (32.7%) and attendance (29.9%). Combined, Victoria and NSW generated approximately 66.7% of Australia's live performance revenue and 61.9% of attendance in 2017.
- Queensland experienced the greatest growth in revenue (46.4%) primarily driven by growth in Contemporary Music and Musical Theatre, closely followed by Victoria (45.3%).The highest growth in attendance was witnessed in Tasmania (84.3%), followed by Victoria (35.6%) and Queensland (26.5%).
- Contemporary Music remains the largest category in the industry in 2017, representing a market share of 43.8% in revenue and 36.8% in attendance.
- Revenue growth in Contemporary Music (87.7%), Circus and Physical Theatre (58.7%), Festival (Contemporary Music) (26%) and Musical Theatre (19.9%) categories drove growth in the live performance industry in 2017. This growth was offset by revenue declines in the Special Events (82.8%), Opera (21.4%), Theatre (19.3%), Comedy (16.3%) and Children's/Family (5.5%) categories.

### Background

This report presents the findings of ticket attendances and revenues for the live performance industry for the 2017 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 2017 Ticket Attendance and Revenue Report has captured ticket attendance and revenue data from ticketing companies, self-ticketing venues, event promoters and Australian Major Performing Arts Group (AMPAG) companies.

Unlike the 2016 Report, the 2017 Report includes ticket attendance and revenue data from a selection of PAC Australia members ("supplementary data providers").

Prior to 2017, this dataset was reported separately to the primary data and was referred to as "Supplementary" data. However, the supplementary data is now incorporated along with the main data and also presented under a separate section in the 2017 report to provide a greater representation of venues that self-ticket, particularly regional venues.

# 1 Key Findings

## Overall Results



### 2017 Ticket Attendance and Revenue (2004 – 2017)

| | Revenue | | Attendance | | Ticket price | |
|---|---|---|---|---|---|---|
| **Year** | **Revenue ($)** | **Growth (%)** | **Total Attendance*** | **Growth (%)** | **Average ticket price ($)**** | **Growth (%)** |
| 2004 | $689,599,070 | - | 13,477,231 | - | $55.13 | - |
| 2005 | $834,337,206 | 21.0% | 15,808,790 | 17.3% | $60.62 | 10.0% |
| 2006 | $1,158,064,526 | 38.8% | 19,835,756 | 25.5% | $64.08 | 5.7% |
| 2007 | $1,228,658,664 | 6.1% | 20,887,365 | 5.3% | $66.03 | 3.1% |
| 2008 | $1,061,273,304 | -13.6% | 15,823,705 | -24.2% | $76.60 | 16.0% |
| 2009 | $1,083,329,949 | 2.1% | 15,196,773 | -4.0% | $80.57 | 5.2% |
| 2010 | $1,327,805,816 | 22.6% | 17,241,139 | 13.5% | $86.43 | 7.3% |
| 2011 | $1,309,187,150 | -1.4% | 17,345,720 | 0.6% | $85.99 | -0.5% |
| 2012 | $1,204,883,551 | -8.0% | 16,273,730 | -6.2% | $85.46 | -0.6% |
| 2013 | $1,478,976,893 | 22.7% | 17,926,626 | 10.2% | $92.16 | 7.8% |
| 2014 | $1,507,963,952 | 2.0% | 18,536,434 | 3.4% | $91.57 | -0.6% |
| 2015 | $1,413,208,686 | -6.3% | 18,626,457 | 0.5% | $86.34 | -5.7% |
| 2016 | $1,430,399,693 | 1.2% | 18,782,588 | 0.8% | $83.72 | -3.0% |
| 2017 | $1,884,141,882 | 31.7% | 23,027,550 | 22.6% | $90.59 | 8.2% |

**Trend analysis considerations**

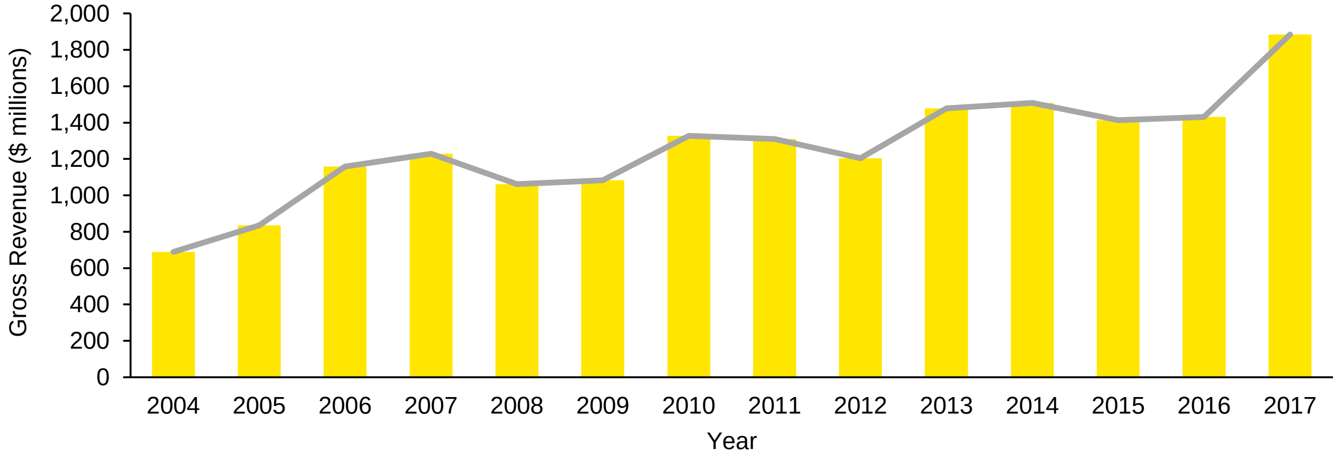
- An analysis of longer term trends that follow over the page provides an indication of how the industry has performed in recent years. However, given that data used to prepare the reports prior to 2008 was not provided in a disaggregated format and as such EY was unable to validate the accuracy of the allocation of events in these years, our trend analysis has only been performed on data from 2008 to 2017. 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

# 1 Key Findings
## Overall Results



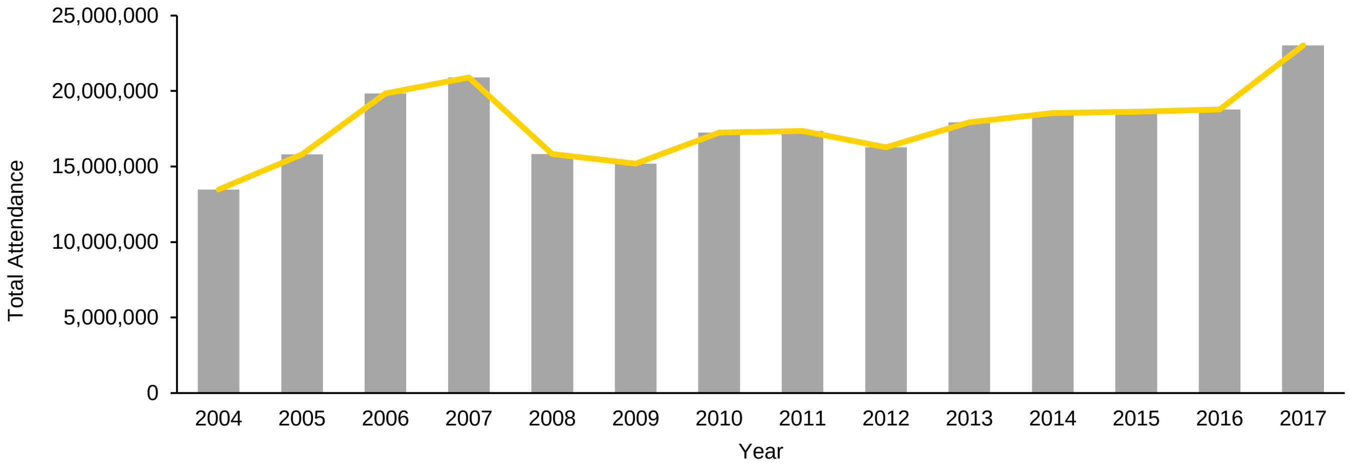
### Total Revenue (2004 – 2017)




### Key Revenue Insights

- Between 2008 and 2017, industry revenue has increased by 77.5%, despite falling in 2011, 2012 and 2015.
- The compound annual growth rate (CAGR) for revenue over the same period was 6.6%.
- Contemporary music experienced the highest category increase in revenue by 87.7% (to $826.1m) in 2017.
- Queensland had the greatest growth in revenue by 46.4% ($263.9m) in 2017.

### Total Attendance (2004 – 2017)



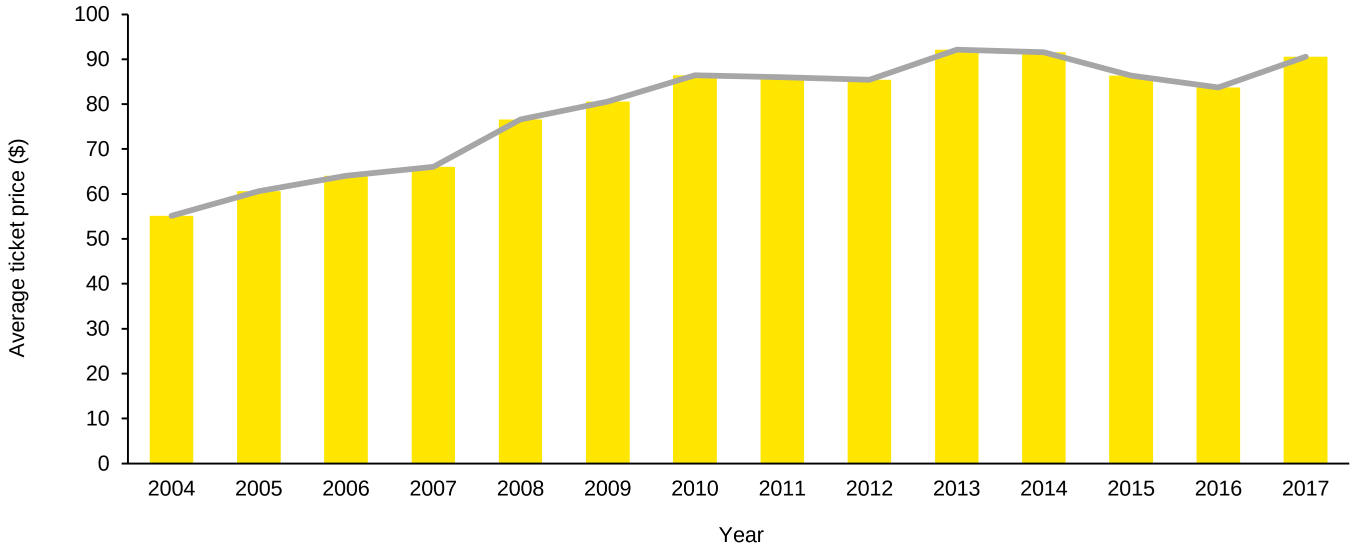

### Key Attendance Insights

- Total attendance has grown at a rate of 28.5% over the 2013 to 2017 period. While attendance has remained relatively consistent over most of the period, it has experienced growth of 22.6% between 2016 and 2017.
- The CAGR for attendance between 2008 and 2017 was 4.3%.
- Consistent with the growth in revenue, Contemporary music experienced the highest category increase in attendance (49.6%). Tasmania experienced the most significant growth in attendance (84.3%) in 2017.

# 1 Key Findings
## Overall Results



### Average Ticket Price (2004 – 2017)




### Key Average Ticket Price Insights

- Between 2008 and 2017 the average ticket price increased by 18.3%, representing a CAGR of 1.9%.
- The growth rate in average ticket price over this period has been subdued due to the decline in ticket price since it peaked at $92.16 in 2013.
- However, 2017 saw an increase in average ticket price to $90.59 from $83.72 in 2016 (8.2% increase).
- This growth was primarily driven by a large increase in the average ticket price in Contemporary music (23.9%) and Circus and Physical Theatre (12.9%).

# 1 Key Findings

## Total Revenue and Attendance by State/Territory



### Total Revenue and Attendance by State/Territory (2017)

| | Revenue | | | | Attendance | | | |
|---|---|---|---|---|---|---|---|---|
| State/Territory | Revenue (2017) | Share of Industry (2017) | Share of Industry (2016) | Change in Revenue from 2016 | Total Attendance* (2017) | Share of Industry (2017) | Share of Industry (2016) | Change in Attendance from 2016 |
| NSW | $615,837,613 | 32.7% | 37.1% | 16.2% | 6,893,117 | 29.9% | 32.3% | 13.5% |
| VIC | $639,876,934 | 34.0% | 30.8% | 45.3% | 7,364,313 | 32.0% | 28.9% | 35.6% |
| QLD | $263,878,152 | 14.0% | 12.6% | 46.4% | 3,196,581 | 13.9% | 13.5% | 26.5% |
| WA | $196,671,338 | 10.4% | 10.3% | 33.1% | 2,604,391 | 11.3% | 12.4% | 11.5% |
| SA | $123,525,390 | 6.6% | 6.6% | 31.0% | 2,100,226 | 9.1% | 9.6% | 16.9% |
| ACT | $24,794,403 | 1.3% | 1.4% | 26.7% | 360,392 | 1.6% | 1.7% | 15.0% |
| TAS | $16,203,732 | 0.9% | 1.0% | 9.9% | 441,938 | 1.9% | 1.3% | 84.3% |
| NT | $3,354,321 | 0.2% | 0.2% | 6.6% | 66,592 | 0.3% | 0.3% | 2.0% |
| **Total** | $1,884,141,882 | 100.0% | 100.0% | 31.7% | 23,027,550 | 100.0% | 100.0% | 22.6% |

*Based on both paid and unpaid tickets

# 1 Key Findings
## Overall State and Territory Results



**Between 2016 and 2017 the live performance industry experienced growth in both ticket sales revenue and attendance in every state and territory.**

### Both Victoria and Queensland experienced significant growth in revenue and attendance.

- **Queensland** experienced the highest growth in revenue and third highest growth in terms of attendance amongst all states and territories. Between 2016 and 2017, revenue increased by 46.4% (to $263.9m) and attendance increased by 26.5% (to 3.2m). This significant growth was primarily driven by major contemporary music performances including Adele and Paul McCartney, and major musicals including *Kinky Boots*, *Matilda* and *My Fair Lady*.
- **Victoria** experienced increases of 45.3% in revenue (to $639.9m) and 35.6% in attendance (to 7.4m) between 2016 and 2017. This increase in revenue and attendance was largely driven by growth in the following categories:
    - **Circus and Physical Theatre** experienced an increase of 351.4% in revenue and 158% in attendance, primarily attributable to Cirque du Soleil's tours of both *Toruk* and *Kooza* to Victoria.
    - **Contemporary Music** experienced an increase of 97.3% in revenue and 60.6% in attendance, driven by performances by major international artists such as Adele, Paul McCartney, Guns N' Roses, Bruce Springsteen and Justin Bieber.
    - **Musical Theatre** revenue increased by 59.2% and attendance by 56.3% due to performances of major musicals taking place including *The Book of Mormon*, *My Fair Lady* and *Aladdin.*
    - **Theatre** revenue increased by 19.3% and attendance by 42.5% due to high-profile performances such as the Melbourne season of the Pop-Up Globe's *Much Ado About Nothing*, *As You Like It*, *Othello* and *Henry V*, as well as *The Play That Goes Wrong*.

**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.**

### NSW experienced steady growth in both revenue and attendance.

- **NSW** experienced a steady increase in revenue of 16.2% (to $615.8m) and growth of 13.5% (to 6.9m) in attendance between 2016 and 2017. The increase in revenue was driven by significant increases in Festivals (Multi Category) (107.4%), Contemporary Music (71.4%), Festival (Contemporary Music) (26.4%) and Special Events (373.5%), offset by declines in Theatre (39.4%), Circus and Physical Theatre (35%), Opera (13.2%), Children's/Family (7.6%) and Musical Theatre (6.5%).
    - **Festivals (Multi Category)** revenue increased primarily due to the growth of Sydney Festival with shows such as the musical *Ladies in Black*. **Contemporary Music** revenue increased primarily due to performances by major international artists including Adele, Guns N' Roses and Paul McCartney among many others. **Festivals (Contemporary Music)** growth can be primarily attributed to the growth of major festivals such as Splendour in the Grass, Bluesfest and Groovin' the Moo.
    - **Theatre** revenue decreased primarily due to a 22.6% decline in average ticket prices, as well as less major commercial theatre productions in 2017 in comparison to 2016. For example, *Mrs Brown's Boys* which performed in NSW in 2016 did not take place in 2017. **Circus and Physical Theatre** revenue declined, primarily driven by less Cirque du Soleil performances in 2017 compared to 2016.

# 1 Key Findings

## Overall State and Territory Results



**Tasmania, ACT and NT experienced varying shifts in growth in both ticket sales revenue and attendance.**

- **Tasmania** achieved moderate growth in revenue (9.9% to $16.2m) between 2016 and 2017, as well as recording the highest growth (84.3% to 0.44m) in attendance amongst all states and territories. It should be noted that without the addition of data from the Theatre Royal (Hobart) for the first time, Tasmania would have recorded a slight decline (0.8%) in revenue in 2017.
- **Australian Capital Territory (ACT)** revenue increased by 26.7% (to $24.8m), while attendance grew by 15% (to 0.36m) between 2016 and 2017. This was driven by significant growth in the Musical Theatre, Festivals (Contemporary Music) and Children's/Family categories.
- **Northern Territory (NT)** experienced growth in revenue by 6.6% (to $3.4m), and slight growth in attendance by 2.0% (to 66.6k) between 2016 and 2017.

**WA experienced significant growth in revenue, while generating steady growth in attendance.**

**Revenue growth in WA follows year-on-year declines over the 2013-2016 period. Despite this, attendance has grown steadily, increasing by 21% between 2013 and 2017.**

- **WA** revenue increased by 33.1% (to $196.7m), while there was a 11.5% rise in attendance (to 2.6m) between 2016 and 2017. The growth in revenue was largely driven by increases in the following categories:
  - **Contemporary Music** witnessed significant growth of 98.7% (to $91.8m) in revenue, while there was an increase of 36.8% (to 0.93m) in attendance between 2016 and 2017. The growth was primarily driven by performances from internationally renowned artists such as Adele, Bruce Springsteen, Guns N' Roses, Justin Bieber and Paul McCartney.
  - **Circus and Physical Theatre** experienced significant growth in revenue of 416.6% (to $28m), and growth in attendance of 360.5% (to 0.28m) between 2016 and 2017, primarily attributable to Cirque du Soleil's tours of *Toruk* and *Kooza*.
  - **Festivals (Multi Category)** witnessed growth of 23.5% (to $13.7m) in revenue, while there was an increase of 5.8% (to 0.41m) in attendance between 2016 and 2017. Revenue growth was driven by major festivals such as Fringe World Festival (Perth), Perth Festival and Falls Festival (Fremantle) which took place for the first time in 2017.

# 1 Key Findings

## Overall State and Territory Results



**SA witnessed significant growth in revenue in 2017, unlike recent years in which revenue declined by 6.6% between 2014 and 2016.**

**SA has experienced steady growth in attendance each year since 2013, increasing by 40% between 2013 and 2017.**

- **SA** experienced significant growth in revenue of 31% (to $123.5m), while attendance increased by 16.9% (to 2.1m) between 2016 and 2017. Major categories which contributed to the growth in revenue were:
  - **Contemporary Music** generated growth in revenue of 113.9%, with a 50.9% increase in attendance, primarily driven by performances from major international artists such as Adele, Bruce Springsteen and Guns N' Roses among many others.
  - **Circus and Physical Theatre** revenue grew by 175%, with a 55% increase in attendance, primarily attributable to Cirque du Soleil's tour of *Toruk*.
  - **Festival (Contemporary Music)** experienced a growth of 35.1%, despite a 6.6% decline in attendance. Revenue growth was driven by major festivals such as Groovin' the Moo and St. Jerome's Laneway Festival.

**Victoria recorded the highest revenue and attendance amongst all the states and territories in Australia for the first time since 2010. Prior to 2017, NSW had consistently recorded the highest revenue and attendance.**

- Victoria represents the highest market share of revenue and attendance amongst all the states and territories in Australia, accounting for 34% and 32% of the national market share of revenue and attendance respectively in 2017. NSW recorded the second largest share of revenue and attendance, representing 32.7% and 29.9% respectively. Combined, Victoria and NSW generated approximately 66.7% of Australia's live performance revenue and 61.9% of attendance in 2017.
- The NSW and Victoria spend per capita on live performance events in 2017 was $77.81 and $100.20 respectively, which were above the national spend ($76.08 per capita). Victoria was replaced by WA ($113.81) as the state with the highest per capita spend in 2017, whilst NSW dropped to third highest (with Victoria second).
- NSW and Victoria accounted for 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 69.1% market share of revenue and 71.3% of attendance. Major annual festivals held in SA and WA included Adelaide Fringe, Adelaide Festival, WOMADelaide, Fringe World Festival (Perth) and Perth Festival.

# 1 Key Findings
## Total Revenue and Attendance by Category



### Total Revenue and Attendance by Category in 2017

| | Revenue | | | Attendance | | |
|---|---|---|---|---|---|---|
| Category | Revenue | % change in revenue (from 2016) | Share of industry | Attendance | % change in attendance (from 2016) | Share of industry |
| Ballet and Dance | $62,339,482 | 3.8% | 3.3% | 810,483 | -0.6% | 3.5% |
| Children's/Family | $51,308,258 | -5.5% | 2.7% | 1,305,672 | -5.1% | 5.7% |
| Circus and Physical Theatre | $116,542,574 | 58.7% | 6.2% | 1,165,111 | 38.9% | 5.1% |
| Classical Music | $77,883,209 | 1.5% | 4.1% | 1,318,421 | 8.1% | 5.7% |
| Comedy | $72,306,243 | -16.3% | 3.8% | 1,238,460 | -12.1% | 5.4% |
| Contemporary Music | $826,050,167 | 87.7% | 43.8% | 8,464,739 | 49.6% | 36.8% |
| Festivals (Multi-Category) | $54,635,677 | -3.5% | 2.9% | 1,866,148 | 20.5% | 8.1% |
| Festivals (Contemporary Music) | $100,657,080 | 26.0% | 5.3% | 852,628 | 26.7% | 3.7% |
| Musical Theatre | $416,802,525 | 19.9% | 22.1% | 4,041,827 | 22.6% | 17.6% |
| Opera | $36,349,186 | -21.4% | 1.9% | 369,228 | -9.5% | 1.6% |
| Special Events | $5,049,945 | -82.8% | 0.3% | 136,871 | -26.1% | 0.6% |
| Theatre | $64,217,536 | -19.3% | 3.4% | 1,457,962 | 7.9% | 6.3% |
| **Total** | $1,884,141,882 | 31.7% | 100.0% | 23,027,550 | 22.6% | 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 | $826,050,167 | 43.8% | Contemporary Music | 8,464,739 | 36.8% |
| Musical Theatre | $416,802,525 | 22.1% | Musical Theatre | 4,041,827 | 17.6% |
| Circus and Physical Theatre | $116,542,574 | 6.2% | Festivals (Multi Category) | 1,866,148 | 8.1% |
| Festivals (Contemporary Music) | $100,657,080 | 5.3% | Theatre | 1,457,962 | 6.3% |
| Classical Music | $77,883,209 | 4.1% | Classical Music | 1,318,421 | 5.7% |

## Top 3 Biggest Changes in Revenue by Category

| | Revenue Increase | | Revenue Decrease | |
|---|---|---|---|---|
| | Biggest Increase Revenue | | Biggest Decline Revenue | |
| No. | Category | Increase from 2016 | Category | Decrease from 2016 |
| 1 | Contemporary Music | 87.7% | Special Events | -82.8% |
| 2 | Circus and Physical Theatre | 58.7% | Opera | -21.4% |
| 3 | Festivals (Contemporary Music) | 26.0% | Theatre | -19.3% |

## Top 3 Biggest Changes in Attendance by Category

| | Attendance Increase | | Attendance Decrease | |
|---|---|---|---|---|
| | Biggest Increase Attendance | | Biggest Decline Attendance | |
| No. | Category | Increase from 2016 | Category | Decrease from 2016 |
| 1 | Contemporary Music | 49.6% | Special Events | -26.1% |
| 2 | Circus and Physical Theatre | 38.9% | Comedy | -12.1% |
| 3 | Festivals (Contemporary Music) | 26.7% | Opera | -9.5% |

# 1 Key Findings

## Overall Category Results



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

**While total ticket sales revenue and attendance increased by 31.7% and 22.6% 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.**

**Contemporary music, Circus and Physical Theatre, Festivals (Contemporary Music) and Musical Theatre events experienced significant increases in revenue and attendance in 2017. Contemporary Music and Circus and Physical Theatre in particular experienced record-breaking growth. Growth in these categories was primarily driven by major tours and events, particularly international tours that took place across Australia in 2017.**

- **Contemporary music** experienced the highest growth in revenue and attendance amongst all categories, generating 87.7% growth in revenue (to $826.1m) and 49.6% growth in attendance (to 8.5m) between 2016 and 2017. This is the highest recorded revenue and attendance for Contemporary music since 2004. Between 2004 and 2017 revenue in Contemporary music has increased by 323.5% and attendance has increased by 209.2%. The growth in Contemporary music in 2017 was primarily driven by major tours by internationally renowned artists such as Adele, Paul McCartney, Guns N' Roses, Bruce Springsteen and Justin Bieber. Additionally, an increase of the average ticket price by 23.9% (to $105.73) contributed to the increase in revenue.
- **Circus and Physical Theatre** experienced the second highest growth in ticket sales revenue and attendance, generating 58.7% growth in revenue (to $116.5m) and 38.9% growth in attendance (to 1.2m) between 2016 and 2017. This year Circus and Physical Theatre achieved its second highest levels of revenue and attendance since the creation of this category in 2009, with the highest revenue and attendance recorded in 2013, in which Cirque du Soleil toured *Michael Jackson: The Immortal* nationally. The significant growth in this category in 2017 was primarily attributed to Cirque du Soleil's tours of *Toruk* and *Kooza*. Additionally, an increase of the average ticket price by 12.9% (to $109.04) contributed to the increase in revenue.
- **Festivals (Contemporary Music)** experienced the third highest growth in ticket sales revenue and attendance, generating 26% growth in revenue (to $100.7m) and 26.7% growth in attendance (to 0.85m) between 2016 and 2017. The significant growth in this category in 2017 was primarily driven by major festivals such as Splendour in the Grass, Bluesfest and Groovin' the Moo. Additionally, a slight increase of the average ticket price by 0.9% (to $126.68) also contributed to the increase in revenue.
- **Musical Theatre** experienced significant growth in ticket sales revenue and attendance, generating 19.9% growth in revenue (to $416.8m) and 22.6% growth in attendance (to 4.0m) between 2016 and 2017. This is the highest recorded revenue and attendance generated by Musical Theatre since 2004. The average ticket price for Musical Theatre ($109.66) in 2017 was the second highest recorded, with the highest average ticket price occurring in 2016 ($111.21). Between 2004 and 2017 revenue in Musical Theatre has increased by 200.5% and attendance has increased by 118.8%. The significant growth in this category was primarily attributed to major musicals including *The Book of Mormon*, *Aladdin*, *Kinky Boots*, *My Fair Lady* and *Matilda*.

# 1 Key Findings

## Overall Category Results



**Children's/Family events, Comedy, Opera and Special Events experienced decreases in revenue and attendance in 2017. This is primarily due to the absence of some of the major events in 2017 that took place in recent years.**

- **Children's/Family** events experienced a decline of 5.5% in ticket sales revenue (to $51.3m) and a decrease in attendance of 5.1% (to 1.3m) in 2017. The decrease in average ticket price by 1.2% (to $42.35) in 2017 further contributed to the decline in revenue. The slight decline in this category was primarily due to less major national tours in 2017 compared to 2016. Major national tours that attracted large audiences included *Frozen (Disney on Ice)*, *Paw Patrol Live!* and performances by The Wiggles.
- **Comedy** experienced a decline of 16.3% in ticket sales revenue (to $72.3m) and a decrease in attendance of 12.1% (to 1.2m) in 2017. The decrease in average ticket price in 2017 by 4.9% (to $62.32) and less major national tours by international comedians contributed to the decline in revenue. However, this year Comedy recorded its second highest levels of revenue and attendance (2016 being the highest) since the creation of this category in 2009.
- **Opera** experienced a decline of 21.4% in ticket sales revenue (to $36.3m) and a decrease in attendance by 9.5% (to 0.37m) in 2017. The decrease in revenue is primarily attributed to a 20.8% decline (to $115.42) in the average ticket prices in 2017. Major opera performances in 2017 included *Carmen* (Opera on Sydney Harbour), *La Bohème*, *La Traviata*, *Tosca* and *Cavalleria Rusticana / Pagliacci* (Double Bill).
- **Special Events** experienced a decline of 82.8% in ticket sales revenue (to $5.04m) and a decrease in attendance by 26.1% (to 0.14m) in 2017. The decrease in revenue is primarily attributed to the substantial decline of 70.5% (to $50.43) to the average ticket price in 2017, driven by less major performances in this category compared to 2016. For example, the Royal Edinburgh Military Tattoo performed in 2016 and did not return in 2017. Examples of events which contributed to this category in 2017 were *Carols By Candlelight*, *Crossing Over with John Edward* and *Rockwiz Live*. The Special Events category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.

**Festivals (Multi Category) and Theatre experienced declines in revenue, despite increased attendance. Decline in the average ticket price for these categories in 2017 contributed to the decrease in revenue.**

- **Festivals (Multi Category)** revenue decreased by 3.5% (to $54.6m) in 2017, despite attendance increasing by 20.5% (to 1.9m).* The decrease in revenue is primarily due to the decrease in average ticket price by 7.5% (to $36.62) in 2017. Revenue has decreased over the last two years despite the growth in attendance. This is primarily attributed to the falling average ticket price over the last two years. Major festivals in this category include Adelaide Fringe, Fringe World Festival (Perth) and Perth Festival.
- **Theatre** experienced a decline in revenue by 19.3% (to $64.2m), despite attendance increasing by 7.9% (to 1.46m). The decrease in revenue is primarily due to the decrease in average ticket price by 26% (to $49.24) in 2017, as well as less major national commercial theatre tours in 2017 in comparison to 2016. Major attractions included high-profile theatre productions such as the Melbourne season of Pop-Up Globe’s *Much Ado About Nothing*, *As You Like It*, *Othello* and *Henry V*, as well as national tours of *1984* and *The Play That Goes Wrong*.

* Data was not provided for Falls Festival held in Lorne (VIC) and Byron Bay (NSW) in 2017, and attendance and revenue for Festivals (Multi Category) will be lower as a result.

# 1 Key Findings

## Overall Category Results

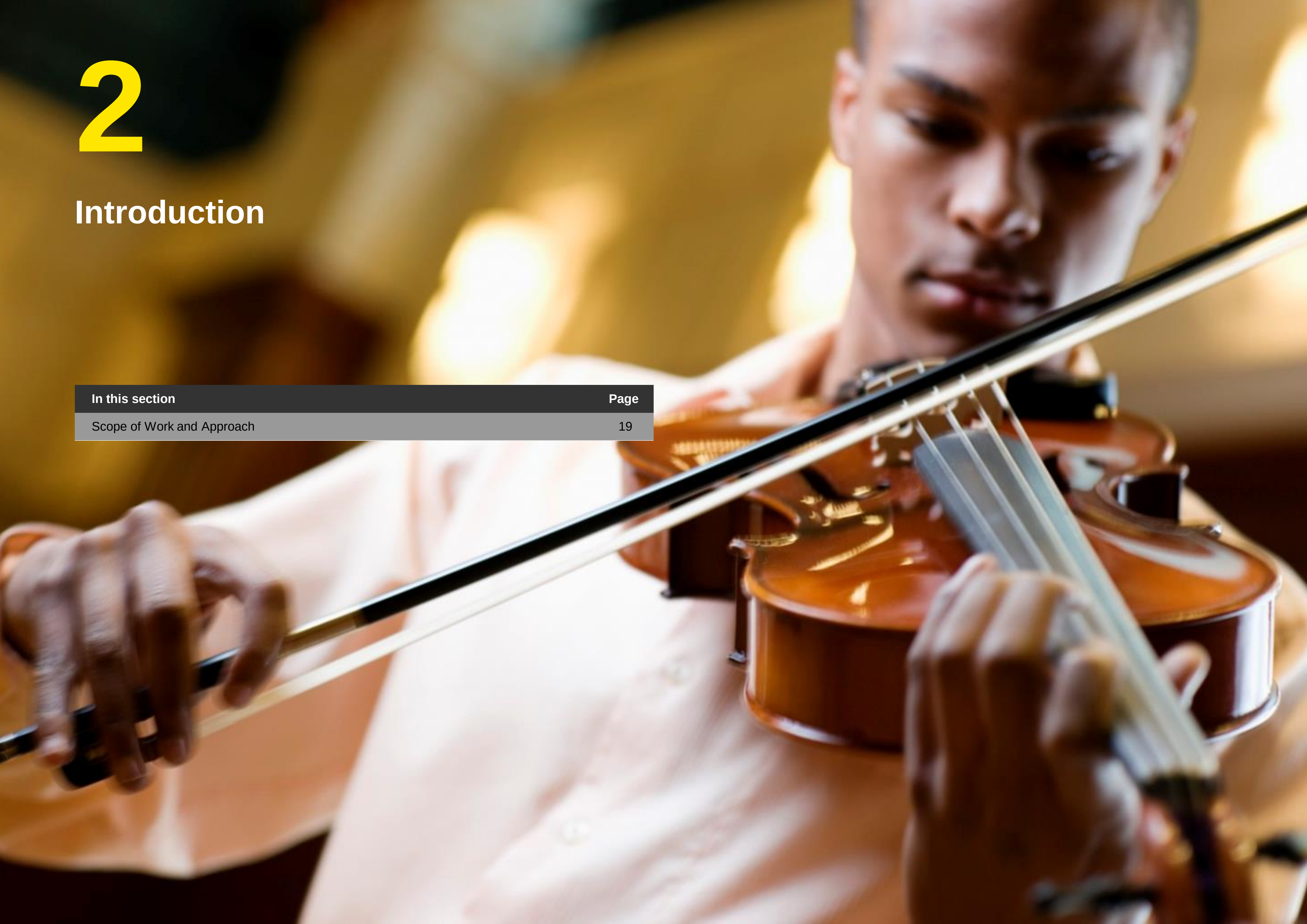


**Ballet and Dance and Classical Music both remained steady with a slight increase in revenue.**

- **Ballet and Dance** experienced a moderate increase in revenue by 3.8% (to $62.3m), despite a slight decline of 0.6% (to 0.8m) in attendance between 2016 and 2017. The increase in average ticket price by 3.6% (to $85.57) contributed to the slight increase in revenue. This year the Ballet and Dance category recorded its highest average ticket price since 2004. The slight increase in revenue was primarily driven by major performances such as *Alice's Adventures in Wonderland*, *Sleeping Beauty* and *Faster*.
- **Classical Music** experienced a slight increase in revenue by 1.5% (to $77.9m) and a moderate increase in attendance of 8.1% (to 1.3m). This is the highest revenue and highest attendance for Classical Music recorded since 2008. The growth in this category was primarily driven by performances inspired by popular films, including *Hans Zimmer Revealed* and the *Harry Potter Concert Series*.

**Consistent with previous years, Contemporary Music and Musical Theatre command the largest share of the live performance market respectively.**

- The top 5 categories accounted for approximately 81.6% of industry revenue (Contemporary Music, Musical Theatre, Circus and Physical Theatre, Festivals (Contemporary Music) and Classical Music) and 74.5% of industry attendance (Contemporary Music, Musical Theatre, Festivals (Multi Category), Theatre and Classical Music) in 2017.
- **Contemporary Music** and **Musical Theatre** represent the two largest categories in the industry generating 43.8% and 22.1% of revenue respectively, and 36.8% and 17.6% of attendance respectively. Combined, these two categories account for 66% of the live performance industry in terms of revenue and 54.3% of attendance.
- **Contemporary Music** still generates the largest live performance market share, generating 43.8% of industry revenue and 36.8% of industry attendance. At its peak in 2010, Contemporary Music commanded a 49.6% market share of revenue and 40.8% market share of attendance. However its share improved significantly in 2017 compared to 2016 where its share was 30.8% in revenue and 30.1% in attendance.



# 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 2017 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 2017 national survey data on an overall basis, by state and by event category.
- Conducting an analysis of the 2017 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 Report, EY compiled data from ticketing companies, self-ticketing venues, event promoters and the Australia Council for the Arts (collectively referred to in this study as the “Survey Participants”). The ticketing companies, self-ticketing venues and event promoters that provided data as part of this study are provided in Appendix A of this Report.

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

- Events which were wrongly categorised were reallocated.
- 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 Report does not include amateur performances.

### 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 Report excludes events in some regional venues as well as contract-fee performances by AMPAG companies. Small to medium companies and independent theatre are also under-represented as many of these companies either self-ticket or use ticketing service providers and venues not currently involved in the Report. LPA and EY are working towards improving the Report's inclusion of these events by increasing the supplementary dataset. Festivals are under-reported due to the following:

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

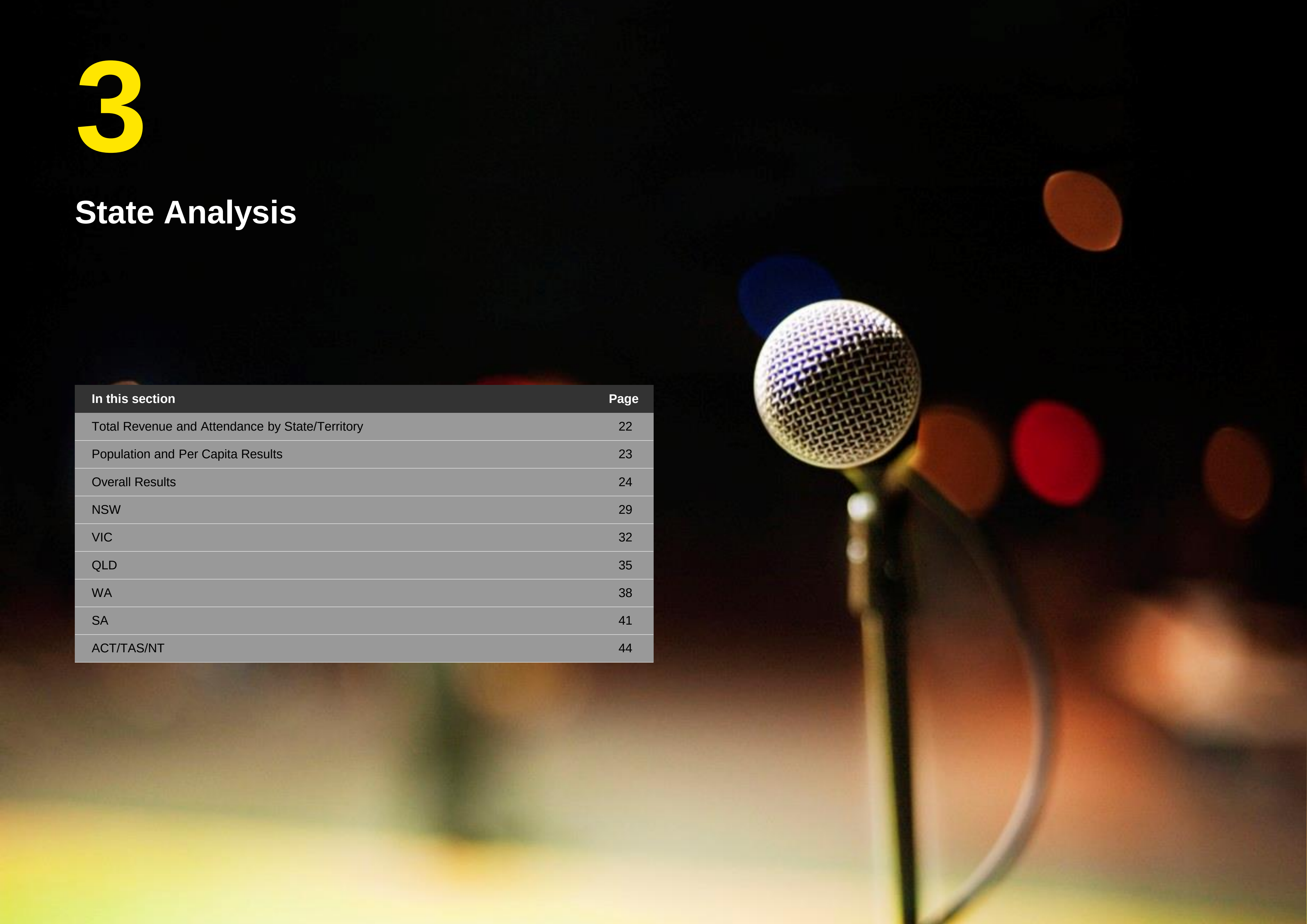
As part of our analysis, the 2017 data was compared against historical data sourced directly from Live Performance Australia's *Live Performance Industry in Australia 2006 - 2016 Reports*. EY acknowledges that we did not revisit the data collection and allocation methodology used in 2006 and 2007 as 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 2017 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 2017 Report compared to prior years

We have made the following changes to the Report in 2017 when compared to prior years:

- Unlike the previous years, in 2017 the supplementary dataset is incorporated along with the primary data and also presented as a separate section in the 2017 report.
- Perth Theatre Trust is a new data provider this year, providing data for their self-ticketed events. This is the first year Perth Theatre Trust has begun self-ticketing.
- In 2016, the category Festivals (Single-Category) was renamed as Festivals (Contemporary Music) to provide greater clarity to the definition. We have followed this in 2017 as well.



# 3

# State Analysis

# 3 State Analysis

## Total Revenue and Attendance by State/Territory



### Total Revenue and Attendance by State/Territory (2017)

| | Revenue | | | | Attendance | | | |
|---|---|---|---|---|---|---|---|---|
| State/Territory | Revenue | Share of Industry (2017) | Share of Industry (2016) | Change in Revenue from 2016 | Tickets | Share of Industry (2017) | Share of Industry (2016) | Change in Attendance from 2016 |
| New South Wales | $615,837,613 | 32.7% | 37.1% | 16.2% | 6,893,117 | 29.9% | 32.3% | 13.5% |
| Victoria | $639,876,934 | 34.0% | 30.8% | 45.3% | 7,364,313 | 32.0% | 28.9% | 35.6% |
| Queensland | $263,878,152 | 14.0% | 12.6% | 46.4% | 3,196,581 | 13.9% | 13.5% | 26.5% |
| Western Australia | $196,671,338 | 10.4% | 10.3% | 33.1% | 2,604,391 | 11.3% | 12.4% | 11.5% |
| South Australia | $123,525,390 | 6.6% | 6.6% | 31.0% | 2,100,226 | 9.1% | 9.6% | 16.9% |
| Australian Capital Territory | $24,794,403 | 1.3% | 1.4% | 26.7% | 360,392 | 1.6% | 1.7% | 15.0% |
| Tasmania | $16,203,732 | 0.9% | 1.0% | 9.9% | 441,938 | 1.9% | 1.3% | 84.3% |
| Northern Territory | $3,354,321 | 0.2% | 0.2% | 6.6% | 66,592 | 0.3% | 0.3% | 2.0% |
| Total | $1,884,141,882 | 100.0% | 100.0% | 31.7% | 23,027,550 | 100.0% | 100.0% | 22.6% |

*Based on both paid and unpaid tickets

# 3 State Analysis

## Population and Per Capita Results



### Population and Per Capita Results (2017)

| | Population | | Revenue | Attendance | Spending |
|---|---|---|---|---|---|
| State/Territory | Population (2017) (m) | Share of Population | Share of Industry Revenue | Share of Industry Attendance | Spend Per Capita |
| NSW | 7.92 | 32.0% | 32.7% | 29.9% | $77.81 |
| VIC | 6.39 | 25.8% | 34.0% | 32.0% | $100.20 |
| QLD | 4.97 | 20.0% | 14.0% | 13.9% | $53.15 |
| WA | 1.73 | 7.0% | 10.4% | 11.3% | $113.81 |
| SA | 2.58 | 10.4% | 6.6% | 9.1% | $47.79 |
| ACT | 0.42 | 1.7% | 1.3% | 1.6% | $47.26 |
| TAS | 0.52 | 2.1% | 0.9% | 1.9% | $65.68 |
| NT | 0.25 | 1.0% | 0.2% | 0.3% | $8.06 |
| **Total** | **24.77** | **100.0%** | **100.0%** | **100.0%** | **$76.08** |

**Per capita results**

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

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

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

- Majority of regional performances are not included in this per capita analysis and as such, performances in larger states with significant regional markets, such as Queensland, are under-reported.
- Cities such as Brisbane are constrained in their ability to host performances due to a smaller number of venues and hence capacity is limited.
- 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.

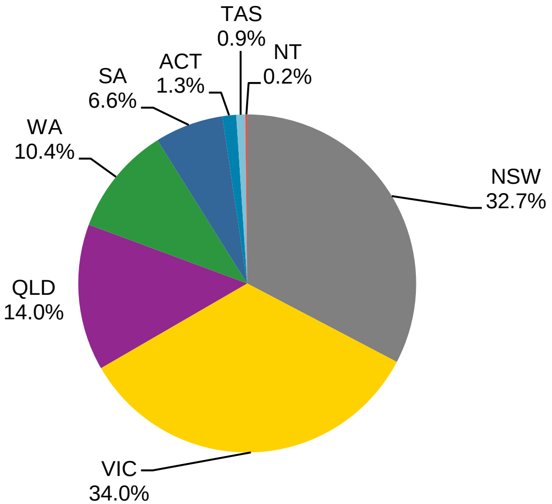
Victoria was replaced by WA as the state with the highest per capita spend in 2017, whilst NSW dropped to third highest (with Victoria second).

*Note: Population is as of December 2017 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0

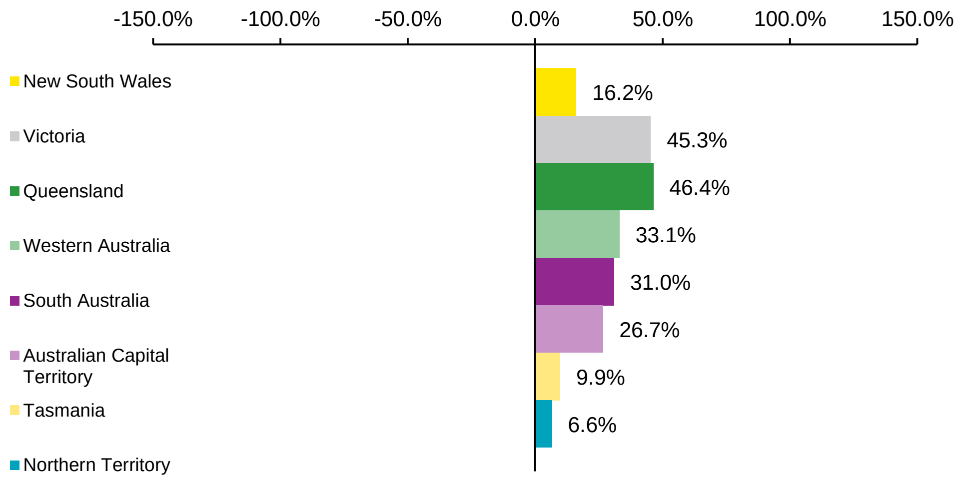
## 3 State Analysis
## Overall Results



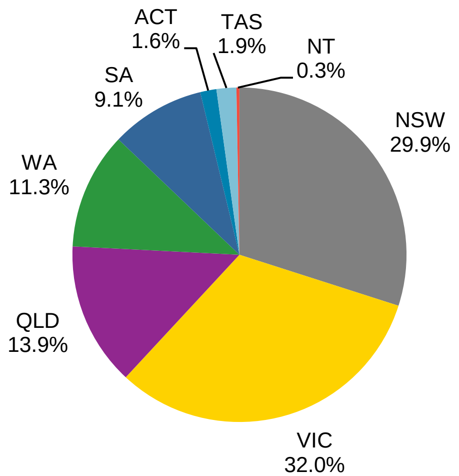
### Market Share (Revenue) by State/Territory 2017



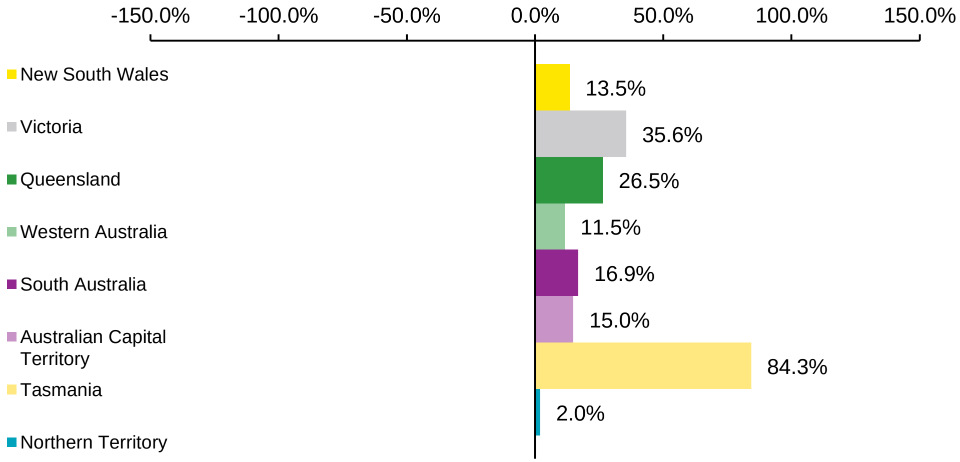

### Percentage Movement in Revenue by State/Territory (2016/17)




### Market Share (Attendance) by State/Territory 2017



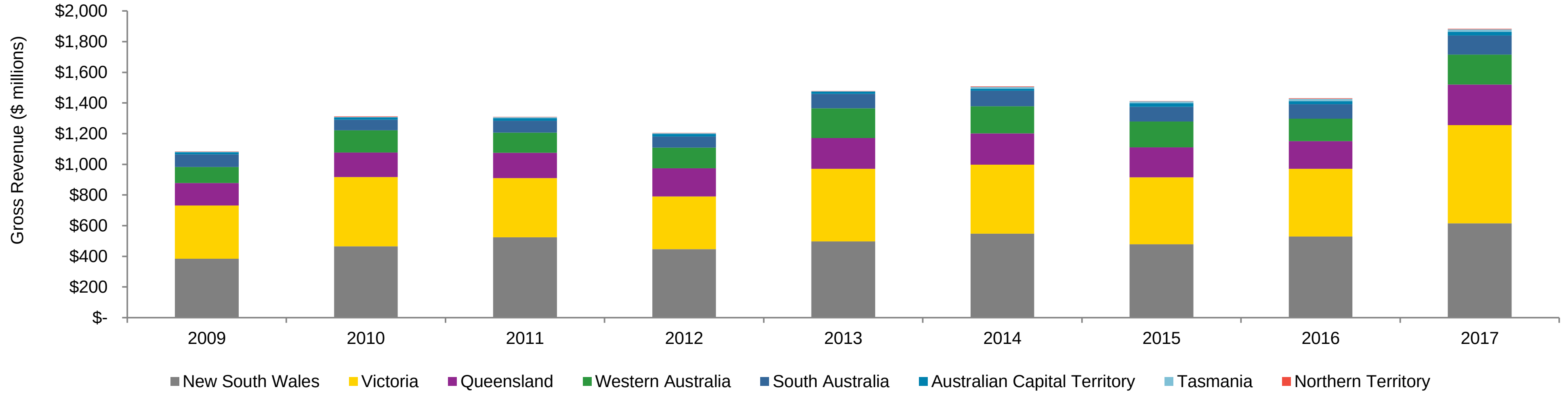

### Percentage Movement in Attendance by State/Territory (2016/17)



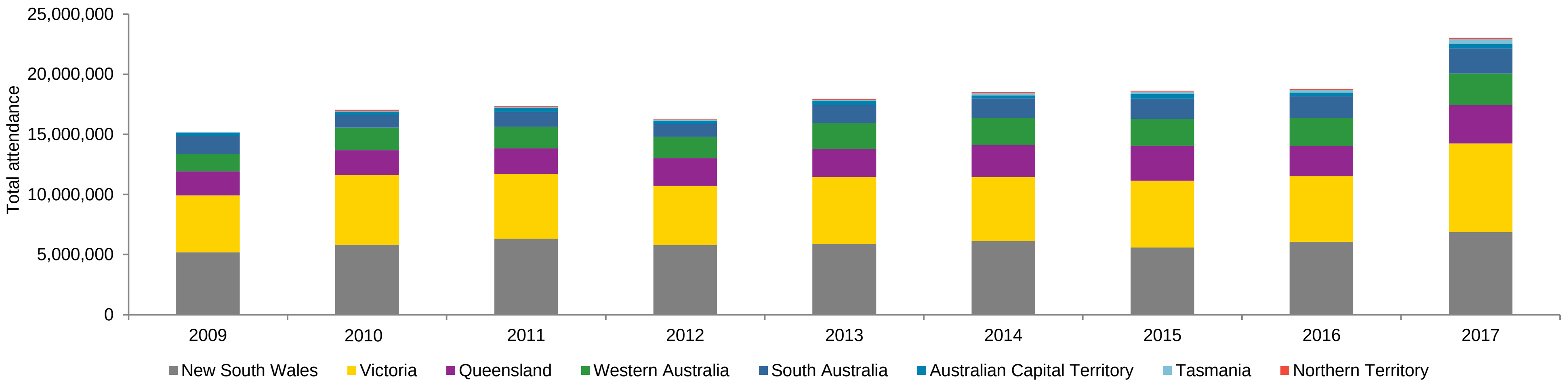
# 3 State Analysis
## Overall Results



### Total Revenue by State/Territory (2009-2017)




### Total Attendance by State/Territory (2009-2017)



# 3 State Analysis
## Overall Results



## Total Revenue by State/Territory (2009 – 2017)

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

## Total Attendance by State/Territory (2009 – 2017)

| Attendance | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Year | NSW | VIC | QLD | WA | SA | ACT | TAS | NT | Total |
| 2009 | 5,176,385 | 4,744,449 | 2,006,608 | 1,468,882 | 1,449,260 | 264,174 | 72,336 | 14,679 | 15,196,773 |
| 2010 | 5,818,163 | 5,820,603 | 2,043,327 | 1,879,408 | 1,035,243 | 304,168 | 59,753 | 96,872 | 17,057,537 |
| 2011 | 6,331,001 | 5,359,749 | 2,150,329 | 1,788,262 | 1,237,386 | 325,233 | 99,653 | 54,107 | 17,345,720 |
| 2012 | 5,795,757 | 4,916,559 | 2,302,462 | 1,791,795 | 1,053,997 | 271,525 | 97,972 | 43,663 | 16,273,730 |
| 2013 | 5,865,914 | 5,607,475 | 2,318,207 | 2,153,483 | 1,497,204 | 351,242 | 75,115 | 57,986 | 17,926,626 |
| 2014 | 6,132,827 | 5,318,537 | 2,661,632 | 2,266,435 | 1,614,267 | 246,542 | 185,011 | 111,183 | 18,536,434 |
| 2015 | 5,592,686 | 5,548,412 | 2,914,530 | 2,217,942 | 1,699,529 | 372,546 | 210,798 | 70,014 | 18,626,457 |
| 2016 | 6,073,498 | 5,431,066 | 2,527,535 | 2,334,951 | 1,797,087 | 313,386 | 239,778 | 65,287 | 18,782,588 |
| 2017 | 6,893,117 | 7,364,313 | 3,196,581 | 2,604,391 | 2,100,226 | 360,392 | 441,938 | 66,592 | 23,027,550 |

# 3 State Analysis
## Overall Results



### Revenue by Category and State/Territory in 2017

| | Revenue | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Category/State | NSW | VIC | QLD | WA | SA | ACT | TAS | NT | Total |
| Ballet and Dance | $22,844,773 | $20,601,691 | $11,276,651 | $4,176,098 | $1,681,542 | $1,172,557 | $491,081 | $95,089 | $62,339,482 |
| Children's/Family | $17,723,107 | $14,466,640 | $7,331,554 | $6,303,604 | $3,737,067 | $1,403,203 | $126,361 | $216,720 | $51,308,258 |
| Circus & Physical Theatre | $23,585,105 | $41,252,161 | $15,244,160 | $27,988,441 | $7,423,663 | $785,406 | $59,359 | $204,279 | $116,542,574 |
| Classical Music | $31,718,001 | $22,847,592 | $8,721,894 | $8,334,425 | $3,676,966 | $1,187,189 | $1,339,196 | $57,946 | $77,883,209 |
| Comedy | $22,432,444 | $27,308,508 | $8,798,783 | $9,637,700 | $2,318,807 | $1,126,162 | $228,929 | $454,909 | $72,306,243 |
| Contemporary Music | $270,132,096 | $255,868,353 | $134,362,095 | $91,814,332 | $57,743,443 | $7,196,456 | $6,826,581 | $2,106,811 | $826,050,167 |
| Festival (Multi Category) | $4,283,159 | $4,126,099 | $3,088,592 | $13,678,110 | $24,076,447 | $56,322 | $5,195,042 | $131,905 | $54,635,677 |
| Festival (Contemporary Music) | $55,062,137 | $13,311,335 | $13,748,705 | $7,293,546 | $3,116,202 | $6,433,244 | $1,659,803 | $32,110 | $100,657,080 |
| Musical Theatre | $117,076,415 | $205,633,762 | $52,407,074 | $21,401,406 | $16,176,774 | $4,098,263 | - | $8,831 | $416,802,525 |
| Opera | $26,377,416 | $6,084,818 | $1,540,034 | $1,641,981 | $529,674 | $77,934 | $97,329 | - | $36,349,186 |
| Special Events | $1,403,702 | $1,551,509 | $827,222 | $667,605 | $356,526 | $194,042 | $49,339 | - | $5,049,945 |
| Theatre | $23,199,257 | $26,824,466 | $6,531,388 | $3,734,090 | $2,688,279 | $1,063,624 | $130,712 | $45,721 | $64,217,536 |
| **Total** | **$615,837,613** | **$639,876,934** | **$263,878,152** | **$196,671,338** | **$123,525,390** | **$24,794,403** | **$16,203,732** | **$3,354,321** | **$1,884,141,882** |

### Attendance by Category and State/Territory in 2017

| | Attendance | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| **Category/State** | **NSW** | **VIC** | **QLD** | **WA** | **SA** | **ACT** | **TAS** | **NT** | **Total** |
| Ballet and Dance | 275,329 | 241,583 | 146,827 | 87,175 | 25,572 | 19,708 | 10,368 | 3,921 | 810,483 |
| Children's/Family | 448,361 | 365,026 | 173,345 | 164,166 | 83,057 | 51,051 | 11,472 | 9,194 | 1,305,672 |
| Circus & Physical Theatre | 228,596 | 418,666 | 146,324 | 278,845 | 75,326 | 12,876 | 1,234 | 3,244 | 1,165,111 |
| Classical Music | 428,600 | 442,737 | 146,358 | 164,679 | 63,803 | 23,512 | 46,515 | 2,217 | 1,318,421 |
| Comedy | 301,164 | 585,163 | 158,525 | 132,616 | 20,826 | 25,462 | 5,345 | 9,359 | 1,238,460 |
| Contemporary Music | 2,759,457 | 2,482,730 | 1,449,427 | 936,443 | 621,839 | 97,841 | 87,587 | 29,415 | 8,464,739 |
| Festival (Multi Category) | 57,770 | 138,036 | 87,307 | 410,115 | 920,261 | 777 | 248,178 | 3,704 | 1,866,148 |
| Festival (Contemporary Music) | 391,310 | 127,719 | 149,220 | 73,389 | 37,794 | 49,193 | 23,677 | 326 | 852,628 |
| Musical Theatre | 1,194,673 | 1,922,400 | 533,558 | 191,912 | 156,878 | 42,259 | - | 147 | 4,041,827 |
| Opera | 213,339 | 67,379 | 41,289 | 34,392 | 8,562 | 1,136 | 1,068 | 2,063 | 369,228 |
| Special Events | 43,292 | 38,230 | 23,674 | 21,592 | 6,996 | 2,409 | 678 | - | 136,871 |
| Theatre | 551,226 | 534,644 | 140,727 | 109,067 | 79,312 | 34,168 | 5,816 | 3,002 | 1,457,962 |
| **Total** | **6,893,117** | **7,364,313** | **3,196,581** | **2,604,391** | **2,100,226** | **360,392** | **441,938** | **66,592** | **23,027,550** |

# 3 State Analysis
## NSW



### NSW Revenue and Attendance

- In 2017, NSW generated $615.8m in ticket sales revenue and 6.89m in attendance.
- NSW recorded the second largest national share of industry revenue (32.7%) and attendance (29.9%), with Victoria generating the largest industry share. Prior to this year NSW had consistently recorded the highest revenue and attendance amongst all the states and territories in Australia.
- The NSW spend per capita in 2017 was $77.81, marginally higher than the national spend per capita ($76.08).
- Contemporary Music represented the highest share of NSW total attendance and revenue in 2017 among all the live performance categories, with a share of 40% and 43.9% respectively.
- Revenue and attendance both steadily increased in 2017, by 16.2% and 13.5% respectively. This increase in revenue and attendance was largely driven by growth in the following categories:
  - Contemporary music revenue and attendance increased by 71.4% and 44.5% respectively, driven by major international tours by artists such as Adele, Guns N' Roses, Paul McCartney and Drake amongst many others.
  - Festivals (Contemporary Music) revenue increased by 26.4% and attendance by 18.3%, with major festivals taking place in NSW including Splendour in the Grass, Bluesfest and Groovin' the Moo.
  - Festivals (Multi Category) experienced an increase of 107.4% in revenue and 39.2% in attendance when compared to 2016, primarily attributable to the growth of Sydney Festival with shows such as the musical *Ladies in Black*.

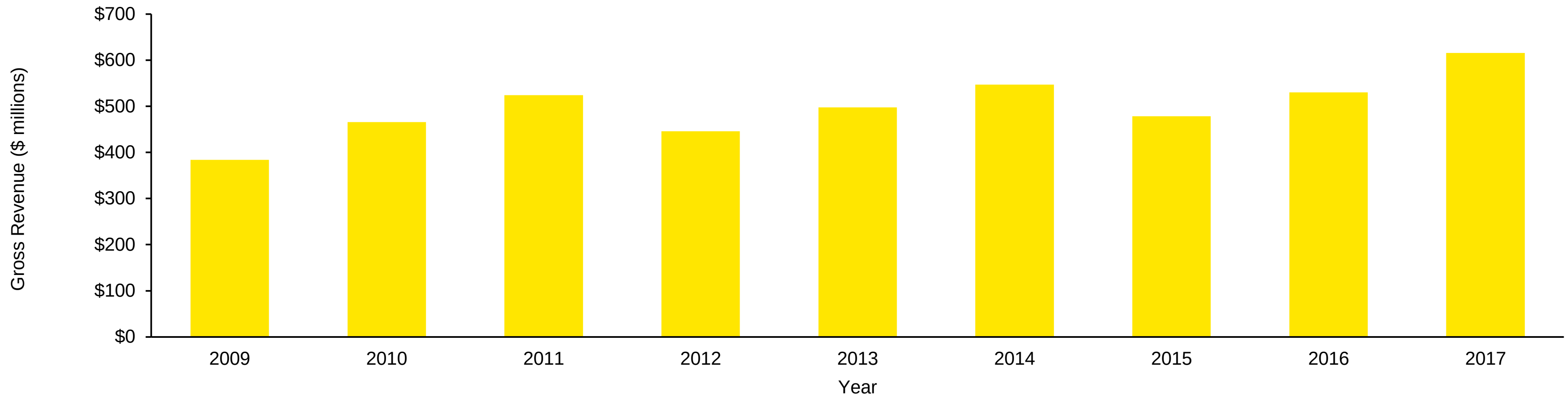
### NSW – Revenue and Attendance (2009 – 2017)

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

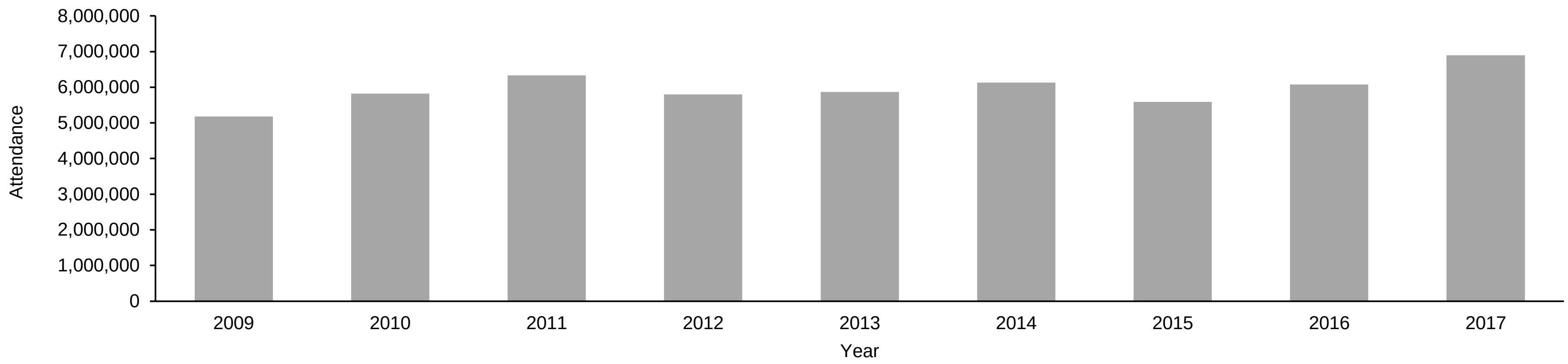
# 3 State Analysis
## NSW



### Gross Revenue – NSW (2009-2017)



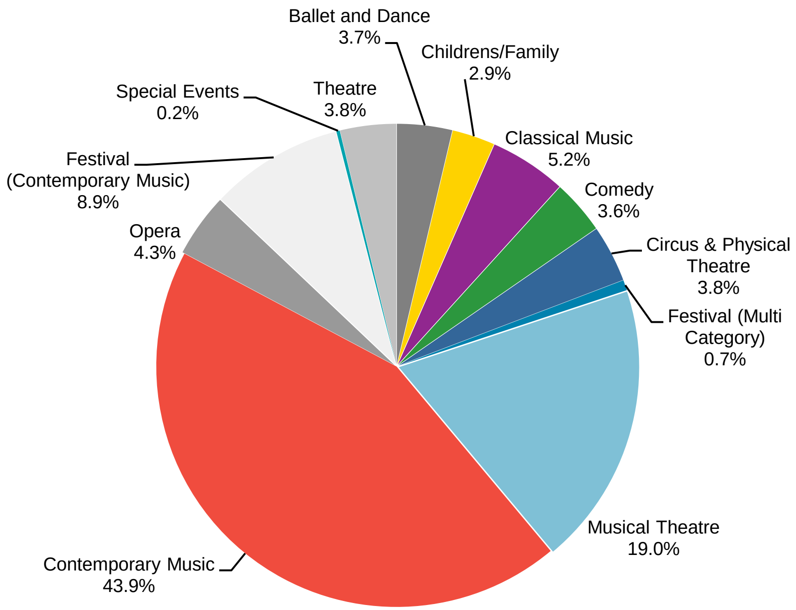

### Total Attendance – NSW (2009-2017)



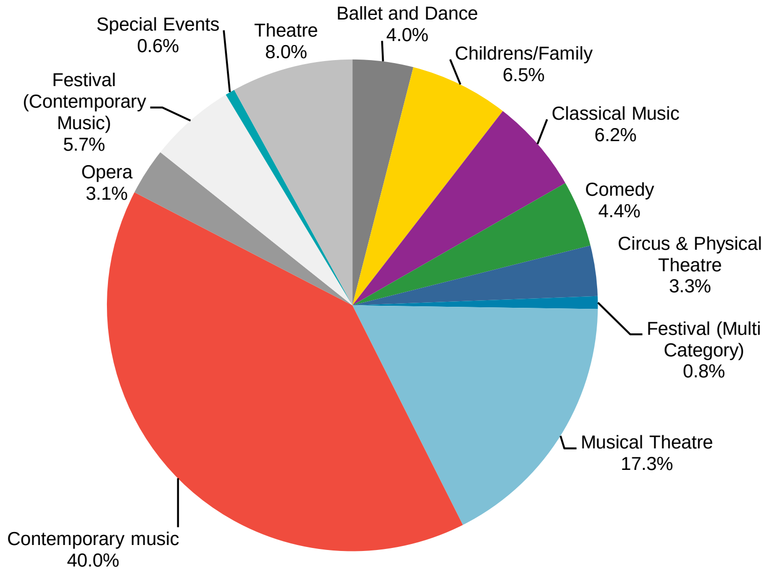
# 3 State Analysis
## NSW



### NSW Revenue by Category (2017)




### NSW Attendance by Category (2017)



# 3 State Analysis
## VIC



### VIC Revenue and Attendance

- Victoria recorded the highest revenue and attendance amongst all the states and territories in Australia, accounting for 34% and 32% of the industry market share of revenue and attendance respectively in 2017. Prior to this year NSW had consistently recorded the highest revenue and attendance.
- The spend per capita in Victoria in 2017 was $100.20, significantly higher than the national spend per capita ($76.08).
- Victoria experienced an increase in revenue and attendance by 45.3% and 35.6% respectively.
- Circus and Physical Theatre saw a significant increase in 2017 as revenue jumped to $41.3m from $9.13m (351.4%) and attendance increased by 158% when compared to 2016. This can be primarily attributed to the return of Cirque du Soleil in 2017, which performed earlier in 2015 but did not return in 2016.
- Consistent with 2015 and 2016, Contemporary Music was the most popular category in Victoria in 2017, accounting for 40% and 33.7% respectively of its total revenue and attendance. Contemporary Music increased by 97.3% in terms of revenue and 60.6% in terms of attendance in 2017. Major international artists that performed included Adele, Paul McCartney, Justin Bieber and Drake among many others.
- Musical Theatre revenue and attendance increased by 59.2% and 56.3% respectively due to the performance of major musicals in Melbourne such as *The Book of Mormon, Aladdin*, *Kinky Boots* and *My Fair Lady.*

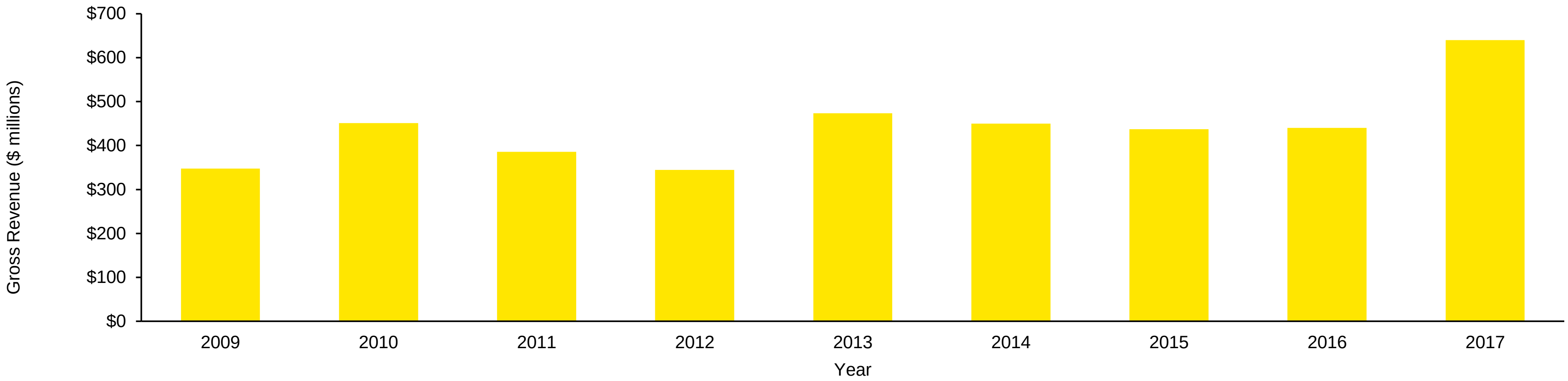
### VIC – Revenue and Attendance (2009 – 2017)

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

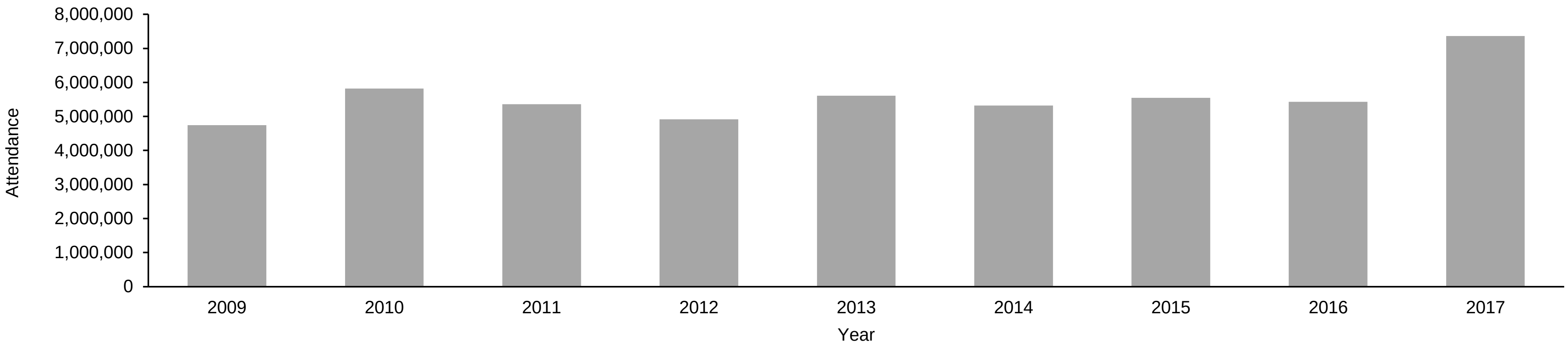
# 3 State Analysis
## VIC



### Gross Revenue – VIC (2009-2017)



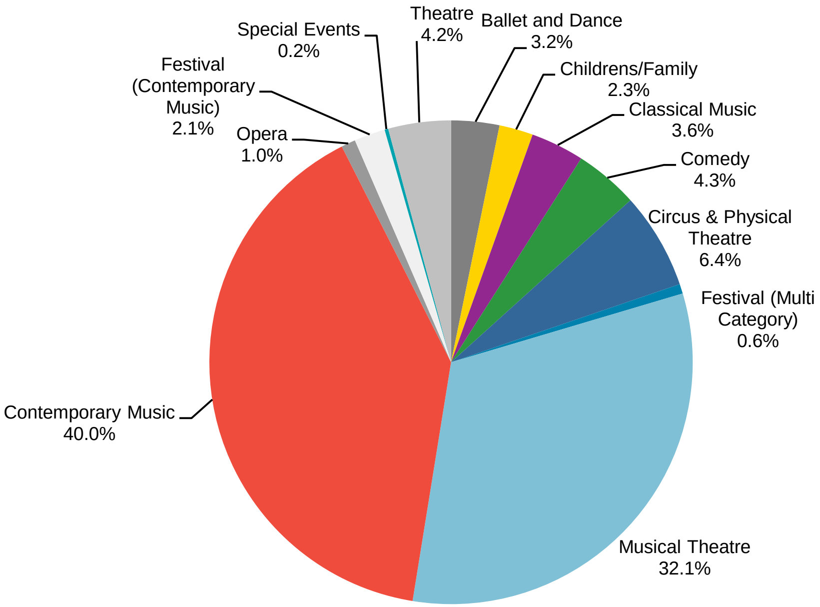

### Total Attendance – VIC (2009-2017)



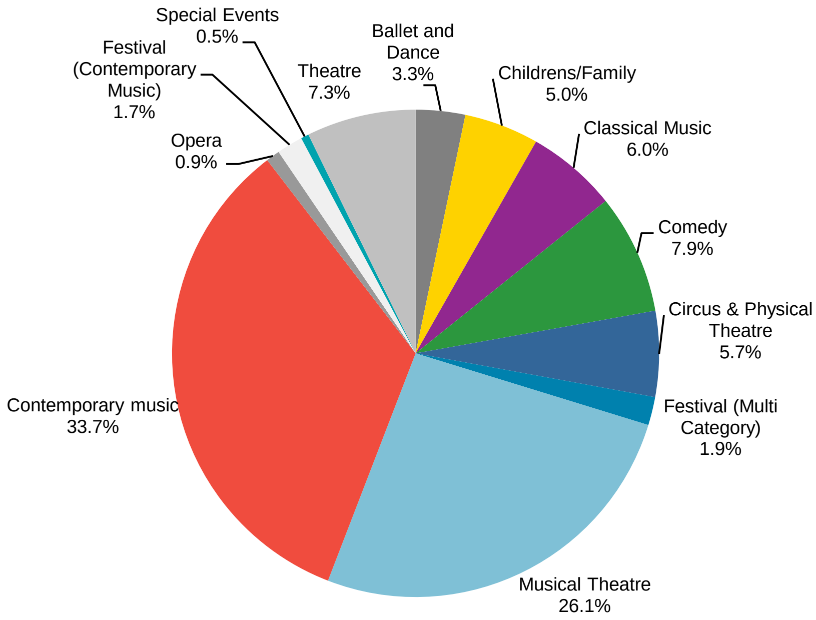
# 3 State Analysis
## VIC



### VIC Revenue by Category (2017)




### VIC Attendance by Category (2017)



# 3 State Analysis
## QLD



### QLD Revenue and Attendance

- In 2017, Queensland generated $263.9m in ticket sales revenue and 3.2m in attendance.
- Queensland's spend per capita in 2017 was $53.15, lower than the national spend per capita ($76.08).
- Queensland experienced the largest increase in revenue (46.4%) among all states and territories, following two consecutive prior years of decreasing revenue. Attendance also significantly increased by 26.5%.
- Contemporary Music increased in revenue and attendance by 94% and 51.7% respectively driven by high-profile major international tours including Adele, Paul McCartney, Justin Bieber and Bruce Springsteen among many others. Contemporary Music was the largest contributor to Queensland's live performance revenue and attendance, representing 50.9% and 45.3% of Queensland's market share respectively.
- Musical Theatre revenue and attendance increased by 34.4% and 32.5% respectively, primarily due to major musical performances in Brisbane including *Kinky Boots*, *Matilda* and *My Fair Lady*.
- Festivals (Contemporary Music) also recorded a 47% increase in revenue and 44.6% increase in attendance, driven by the growth of major festivals that take place in Queensland include CMC Rocks Qld, Gympie Muster and Groovin' the Moo.

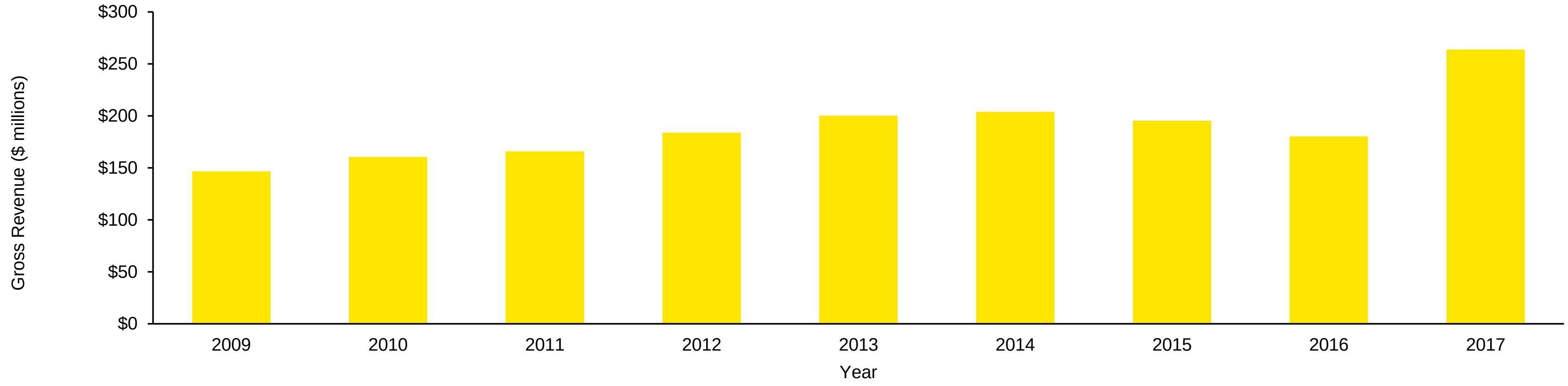
### QLD – Revenue and Attendance (2009 – 2017)

| | Revenue | | Attendance | |
|---|---|---|---|---|
| Year | Revenue | % Growth in Revenue | Attendance | % Growth in Attendance |
| 2009 | $146,567,867 | | 2,006,608 | |
| 2010 | $160,520,942 | 9.5% | 2,043,327 | 1.8% |
| 2011 | $165,840,931 | 3.3% | 2,150,329 | 5.2% |
| 2012 | $183,775,420 | 10.8% | 2,302,462 | 7.1% |
| 2013 | $200,178,524 | 8.9% | 2,318,207 | 0.7% |
| 2014 | $203,918,468 | 1.9% | 2,661,632 | 14.8% |
| 2015 | $195,336,838 | -4.2% | 2,914,530 | 9.5% |
| 2016 | $180,304,512 | -7.7% | 2,527,535 | -13.3% |
| 2017 | $263,878,152 | 46.4% | 3,196,581 | 26.5% |

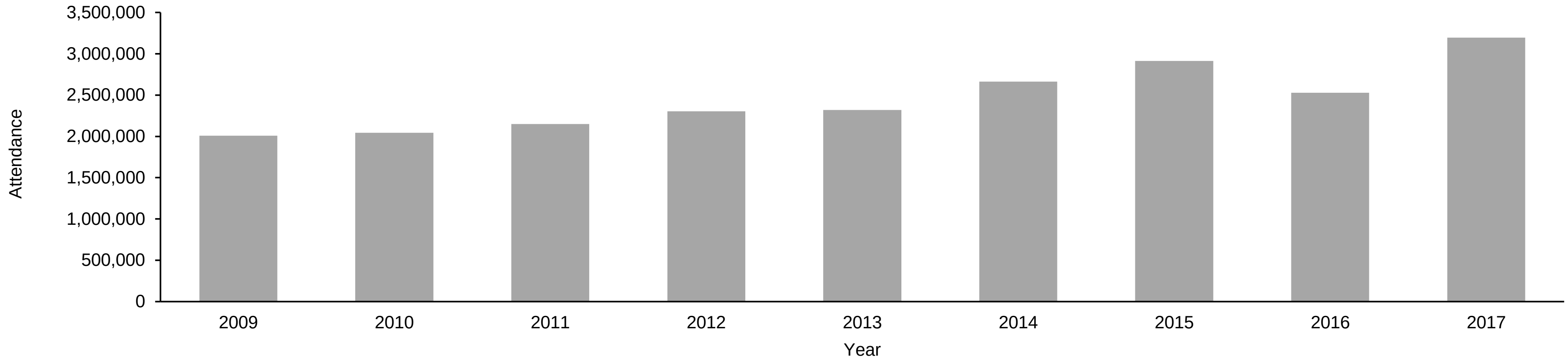
# 3 State Analysis
## QLD



### Gross Revenue – QLD (2009-2017)



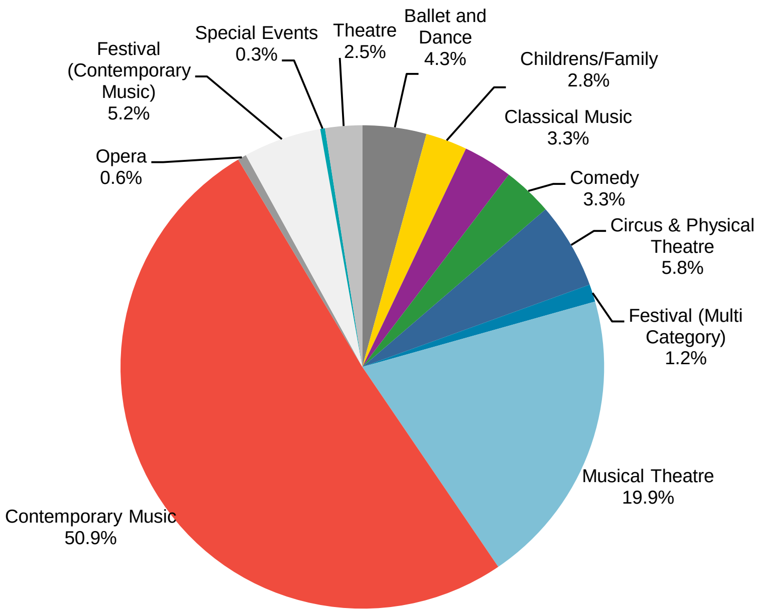

### Total Attendance – QLD (2009-2017)



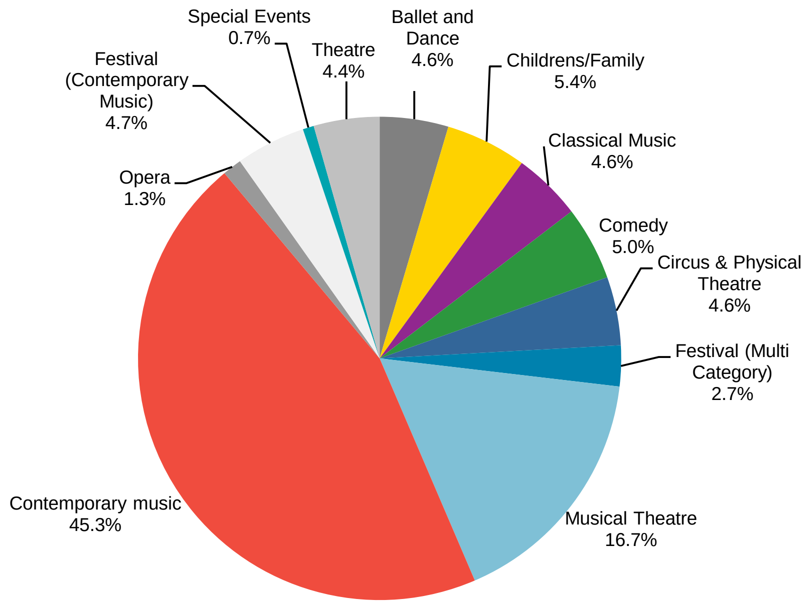
# 3 State Analysis
## QLD



### QLD Revenue by Category (2017)




### QLD Attendance by Category (2017)



# 3 State Analysis
## WA



### WA Revenue and Attendance

- In 2017, WA generated $196.67m in revenue and 2.60m in attendance.
- WA recorded the highest state or territory per capita spend ($113.81), significantly higher than the national per capita spend of $76.08.
- Contemporary Music contributed the largest share of WA total attendance and revenue in 2017 among all the live performance categories, with a share of 36.0% and 46.7% respectively.
- In 2017, WA experienced an increase in revenue by 33.1% and attendance by 11.5%.
  - Circus and Physical Theatre recorded the largest increase in revenue (416.6%) and attendance (360.5%), primarily attributed to the first return of Cirque du Soleil to WA since 2015 with tours of *Kooza* and *Toruk*.
  - Contemporary Music revenue increased by 98.7% and attendance increased by 36.8% primarily due to tours by major international artists including Adele, Bruce Springsteen, Guns N' Roses and Justin Bieber among many others.
  - Festivals (Multi Category) increased in revenue by 23.5% and in attendance by 5.8%. Major festivals in WA include Fringe World Festival, Perth Festival and Falls Festival (Fremantle) which took place for the first time in 2017.

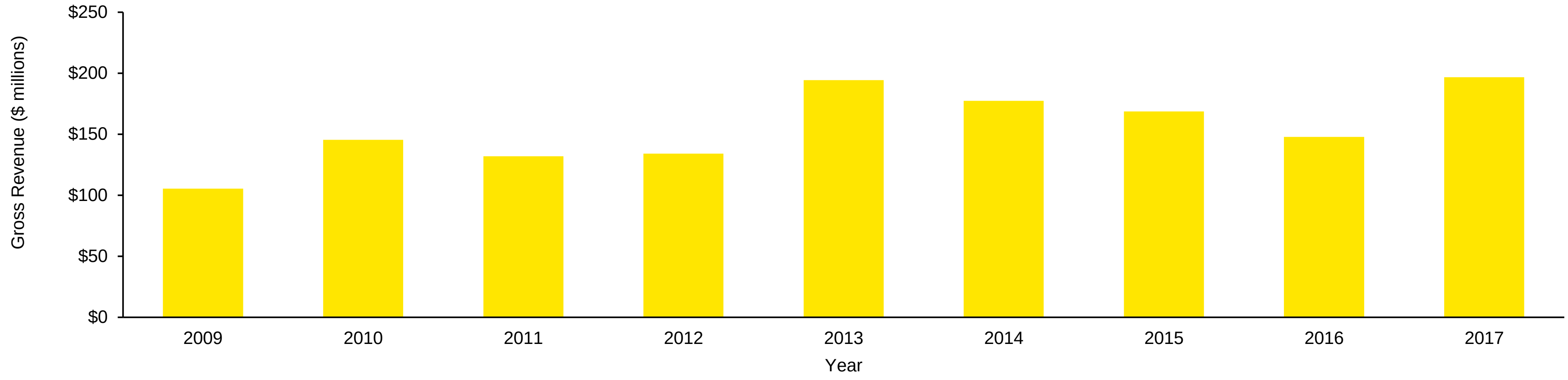
### WA – Revenue and Attendance (2009 – 2017)

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

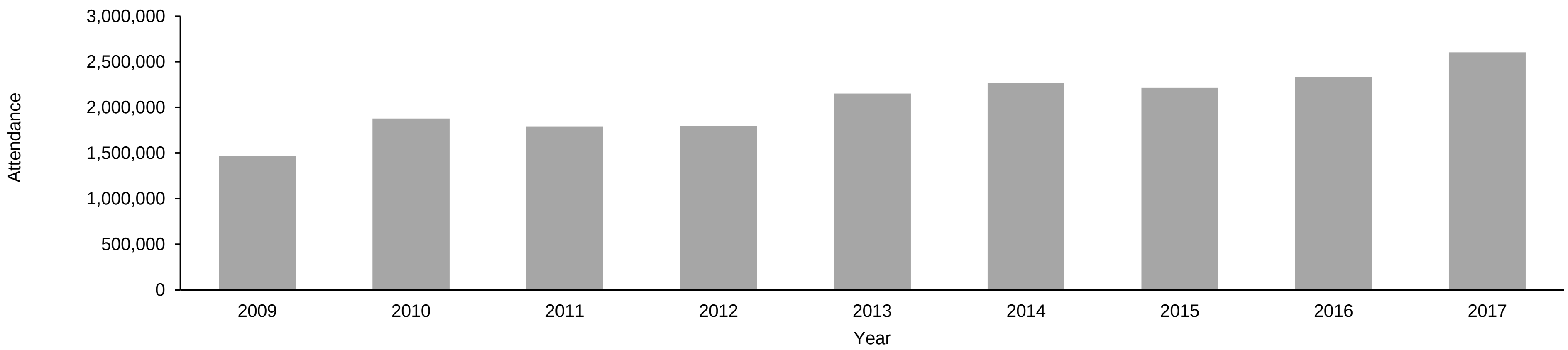
# 3 State Analysis
## WA



### Gross Revenue – WA (2009-2017)



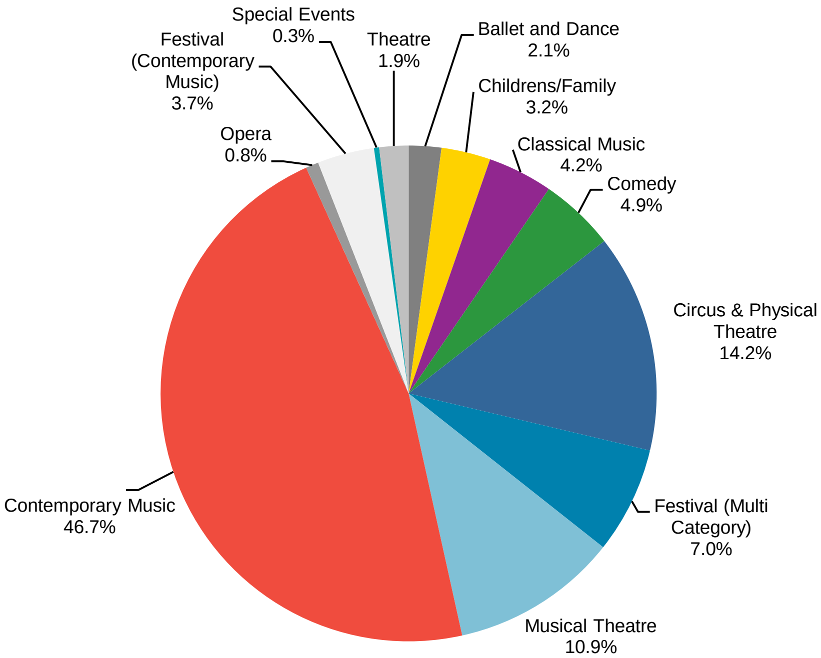

### Total Attendance – WA (2009-2017)



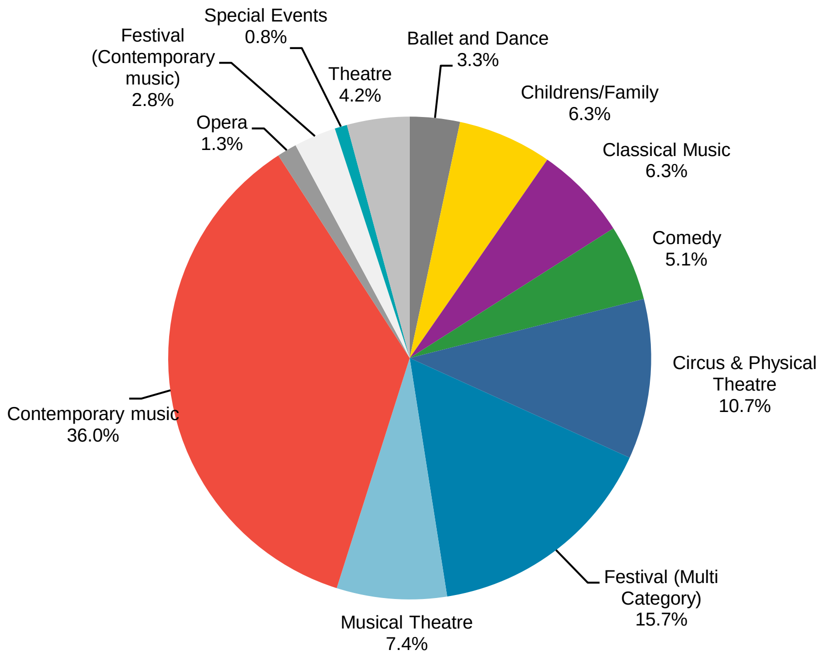
# 3 State Analysis
## WA



### WA Revenue by Category (2017)




### WA Attendance by Category (2017)



# 3 State Analysis
## SA



### SA Revenue and Attendance

- In 2017, SA generated $123.52m in ticket sales revenue and 2.10m in attendance.
- SA's per capita spend in 2017 was $47.79, lower than the national per capita spend of $76.08.
- Contemporary Music contributed the largest share to SA total revenue in 2017 among all the live performance categories, with a share of 46.7%. Festivals (Multi Category) contributed the largest share to SA total attendance, with a share of 43.8%.
- SA revenue increased by 31.0% and attendance by 16.9%. It was primarily driven by growth in the following categories:
  - Circus and Physical Theatre revenue increased by 175% and attendance by 55% primarily due to the return of Cirque Du Soleil in 2017 with performances of *Toruk*.
  - Revenue and attendance of Contemporary Music increased by 113.9% and 50.9% respectively, primarily due to tours by major international artists including Adele, Yusuf / Cat Stevens, Guns N' Roses and Bruce Springsteen among many others.
  - Festivals (Contemporary Music) revenue increased by 35.1%. Major festivals that take place in SA include Groovin' the Moo and St. Jerome's Laneway Festival.

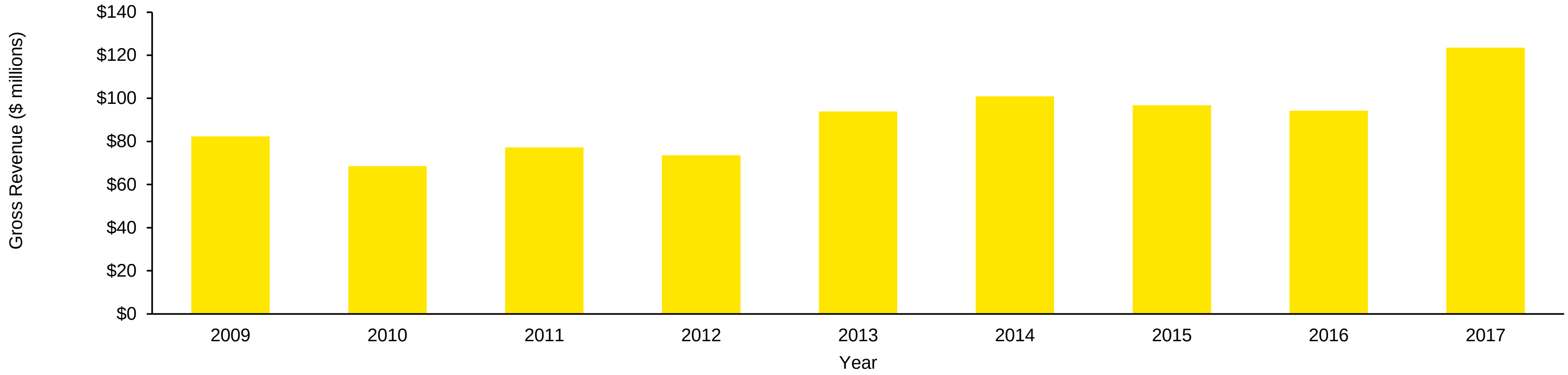
### SA – Revenue and Attendance (2009 – 2017)

| | Revenue | | Attendance | |
|---|---|---|---|---|
| Year | Revenue | % Growth in Revenue | Attendance | % Growth in Attendance |
| 2009 | $82,326,982 | | 1,449,260 | |
| 2010 | $68,538,320 | -16.7% | 1,035,243 | -28.6% |
| 2011 | $77,215,957 | 12.7% | 1,237,386 | 19.5% |
| 2012 | $73,536,693 | -4.8% | 1,053,997 | -14.8% |
| 2013 | $93,864,893 | 27.6% | 1,497,204 | 42.1% |
| 2014 | $100,944,048 | 7.5% | 1,614,267 | 7.8% |
| 2015 | $96,804,782 | -4.1% | 1,699,529 | 5.3% |
| 2016 | $94,316,578 | -2.6% | 1,797,087 | 5.7% |
| 2017 | $123,525,390 | 31.0% | 2,100,226 | 16.9% |

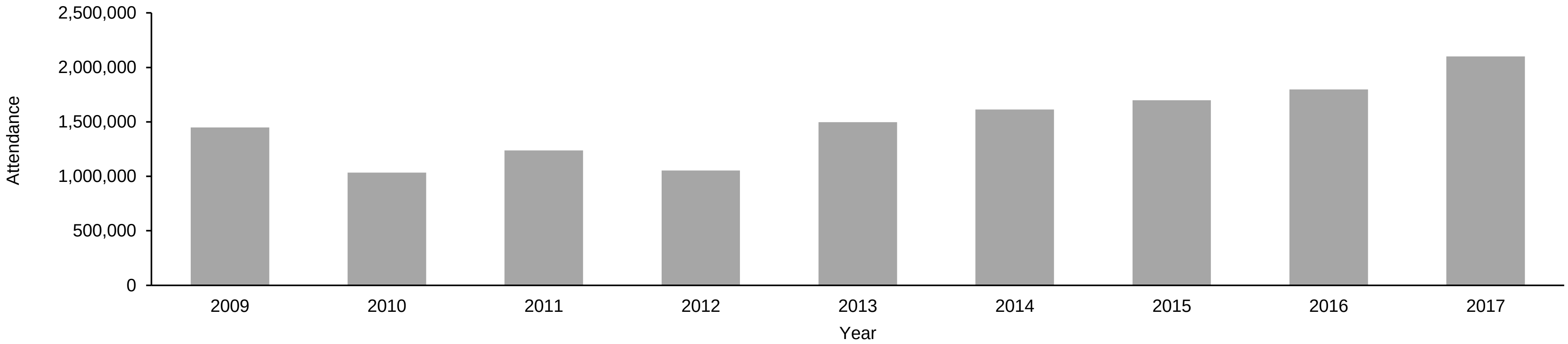
# 3 State Analysis
## SA



### Gross Revenue – SA (2009-2017)




### Total Attendance – SA (2009-2017)

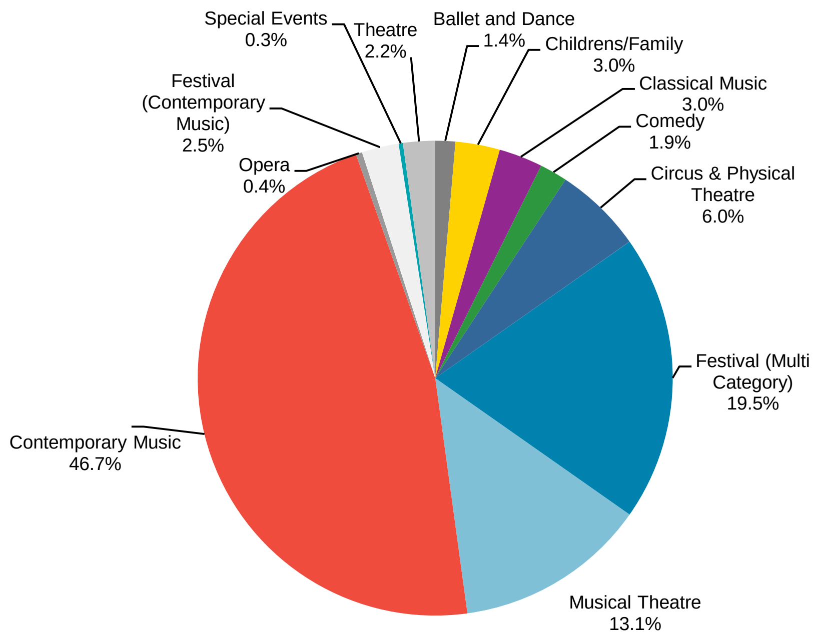


# 3 State Analysis

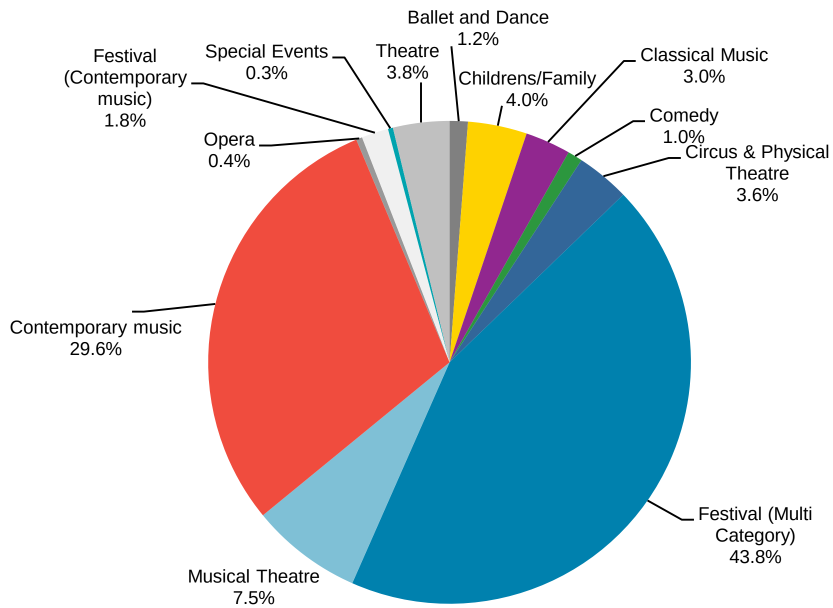
## SA



### SA Revenue by Category (2017)




### SA Attendance by Category (2017)



# 3 State Analysis
## ACT/TAS/NT



### ACT, TAS and NT Revenue and Attendance

- In 2017, ACT/TAS/NT combined increased in revenue by 18.4% to $44.4m and attendance by 40.5% to 0.87m.
- Among these three states and territories, ACT saw the highest increase in revenue by 26.7% and Tasmania saw the highest increase in attendance by 84.3%.
- ACT revenue increased to $24.8m and attendance to 0.36m with a $47.26 per capita spend. This rise was due to increases in revenue and attendance in Special Events, Musical Theatre and Festivals (Contemporary Music).
- Tasmania revenue increased by 9.9% to $16.2m and attendance increased to 0.44m by 84.3% with a $65.68 per capita spend. Tasmania experienced significant growth in Festivals (Contemporary Music) and Contemporary Music with performances by major artists including Elton John, Midnight Oil and Cold Chisel.
- NT recorded an increase of 6.6% in revenue and 2% in attendance, with the lowest national per capita spend of $8.06. Classical Music generated the highest growth with 1,431.3% increase in revenue and 1,879.5% in attendance due to more Classical Music events recorded in 2017 compared to 2016, particularly by Darwin Symphony Orchestra.

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

*TAS revenue increased significantly due to incorporating “Supplementary data” along with main data in 2017. Without the Supplementary data, TAS declined by 0.8% in revenue in 2017.*

### ACT/TAS/NT – Revenue and Attendance (2009 – 2017)

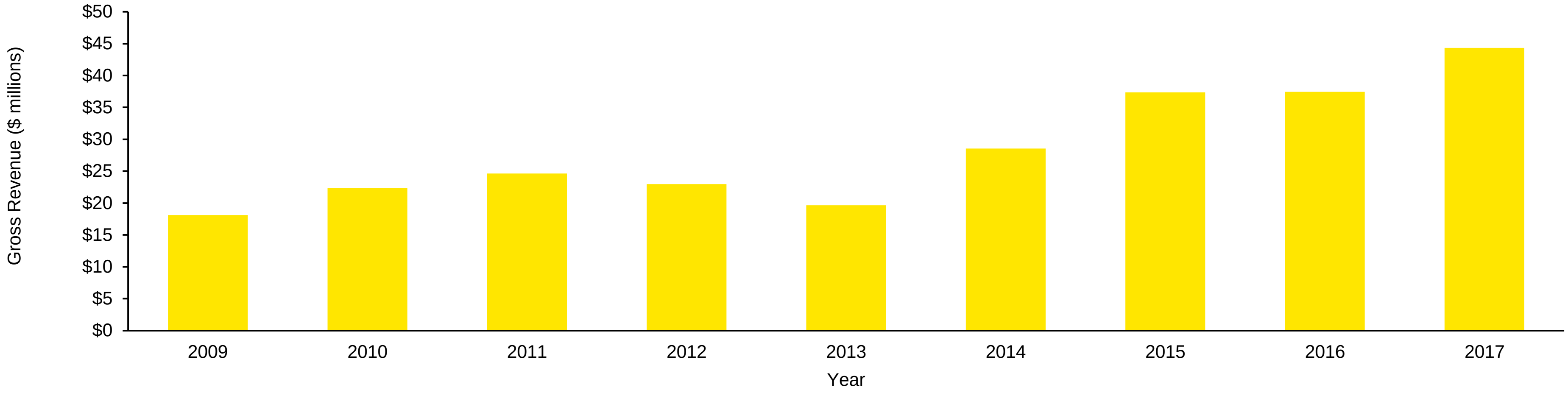
| | Revenue | | Attendance | |
|---|---|---|---|---|
| Year | Revenue | % Growth in Revenue | Attendance | % Growth in Attendance |
| 2009 | $18,103,869 | | 351,189 | |
| 2010 | $22,345,107 | 23.4% | 460,793 | 31.2% |
| 2011 | $24,646,007 | 10.3% | 478,993 | 3.9% |
| 2012 | $22,986,999 | -6.7% | 413,160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

# 3 State Analysis

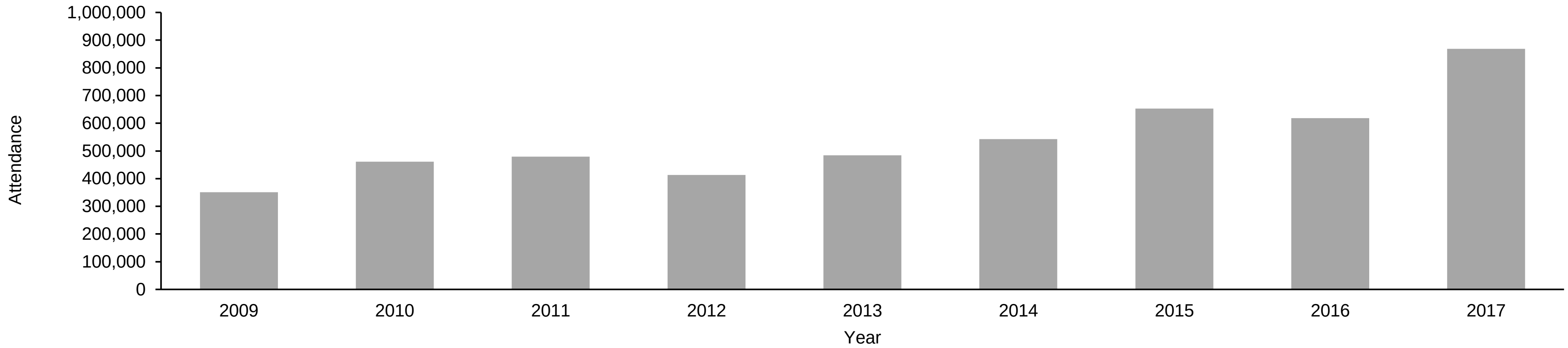
## ACT/TAS/NT



### Gross Revenue – ACT/TAS/NT (2009-2017)




### Total Attendance – ACT/TAS/NT (2009-2017)

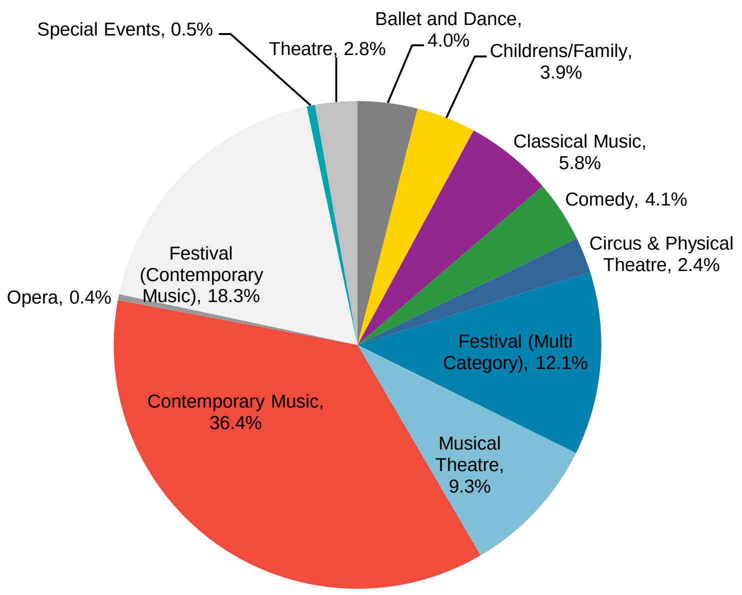



Note: ACT/TAS/NT revenue and attendance numbers have been combined for confidentiality purposes.

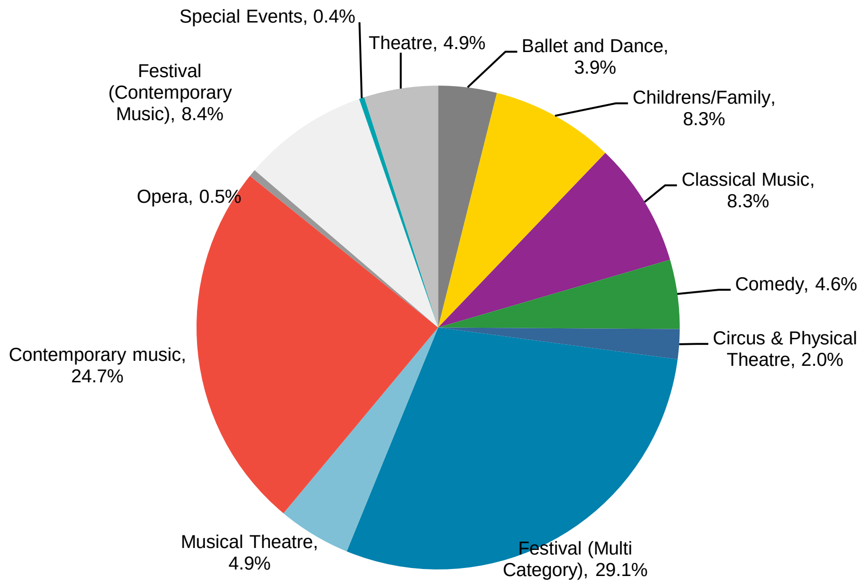
# 3 State Analysis
## ACT/TAS/NT



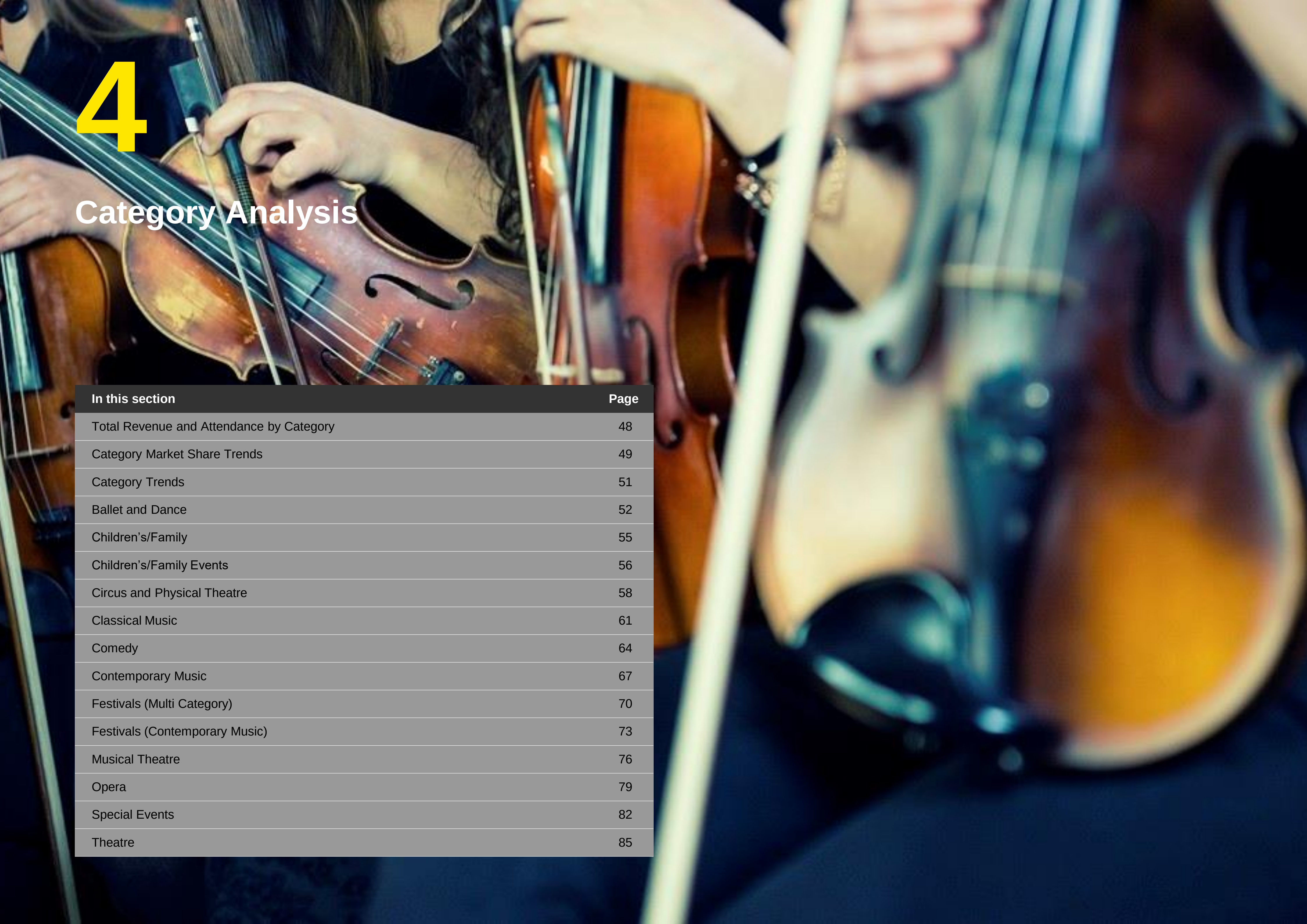
### ACT/TAS/NT Revenue by Category (2017)




### ACT/TAS/NT Attendance by Category (2017)




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



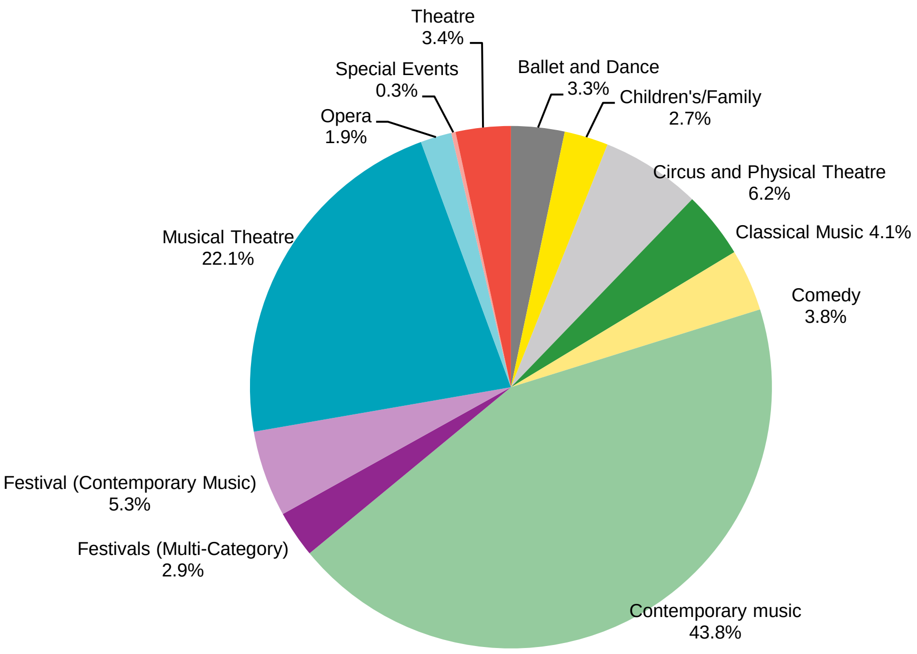
### Total Revenue and Attendance by Category in 2017

| | Revenue | | | Attendance | | |
|---|---|---|---|---|---|---|
| **Category** | **Revenue** | **% change in revenue (from 2016)** | **Share of industry 2017** | **Attendance** | **% change in attendance (from 2016)** | **Share of industry 2017** |
| Ballet and Dance | $62,339,482 | 3.8% | 3.3% | 810,483 | -0.6% | 3.5% |
| Children's/Family | $51,308,258 | -5.5% | 2.7% | 1,305,672 | -5.1% | 5.7% |
| Circus and Physical Theatre | $116,542,574 | 58.7% | 6.2% | 1,165,111 | 38.9% | 5.1% |
| Classical Music | $77,883,209 | 1.5% | 4.1% | 1,318,421 | 8.1% | 5.7% |
| Comedy | $72,306,243 | -16.3% | 3.8% | 1,238,460 | -12.1% | 5.4% |
| Contemporary Music | $826,050,167 | 87.7% | 43.8% | 8,464,739 | 49.6% | 36.8% |
| Festivals (Multi-Category) | $54,635,677 | -3.5% | 2.9% | 1,866,148 | 20.5% | 8.1% |
| Festivals (Contemporary Music) | $100,657,080 | 26.0% | 5.3% | 852,628 | 26.7% | 3.7% |
| Musical Theatre | $416,802,525 | 19.9% | 22.1% | 4,041,827 | 22.6% | 17.6% |
| Opera | $36,349,186 | -21.4% | 1.9% | 369,228 | -9.5% | 1.6% |
| Special Events | $5,049,945 | -82.8% | 0.3% | 136,871 | -26.1% | 0.6% |
| Theatre | $64,217,536 | -19.3% | 3.4% | 1,457,962 | 7.9% | 6.3% |
| **Total** | $1,884,141,882 | 31.7% | 100.0% | 23,027,550 | 22.6% | 100.0% |

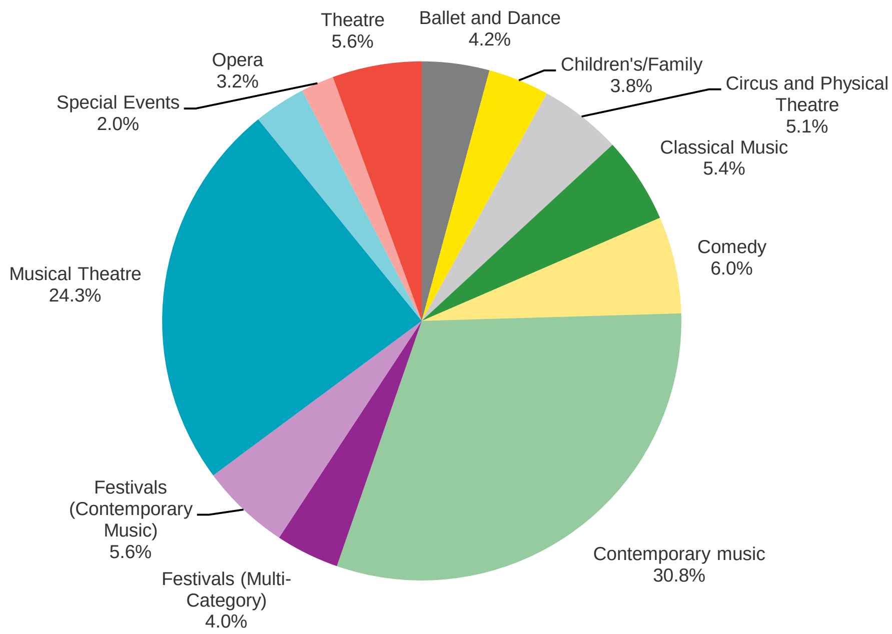
# 4 Category Analysis
## Category Market Share Trends



### Gross Revenue by Category (2017)



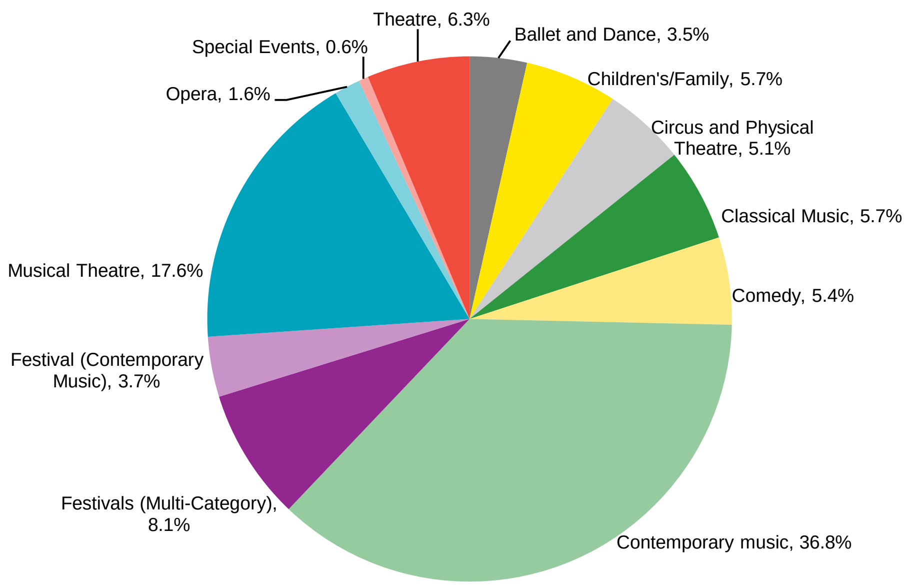

### Gross Revenue by Category (2016)



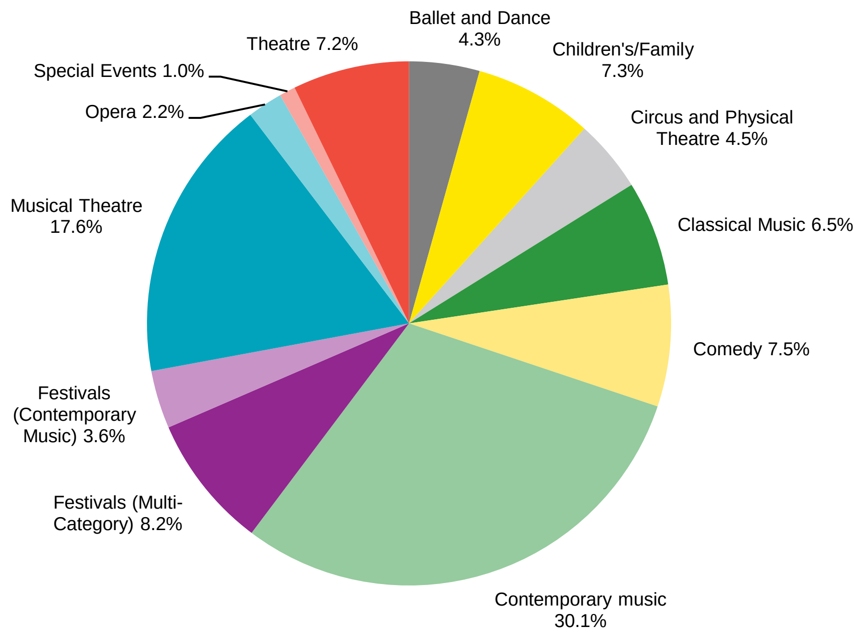
# 4 Category Analysis
## Category Market Share Trends



### Total Attendance by Category (2017)




### Total Attendance by Category (2016)

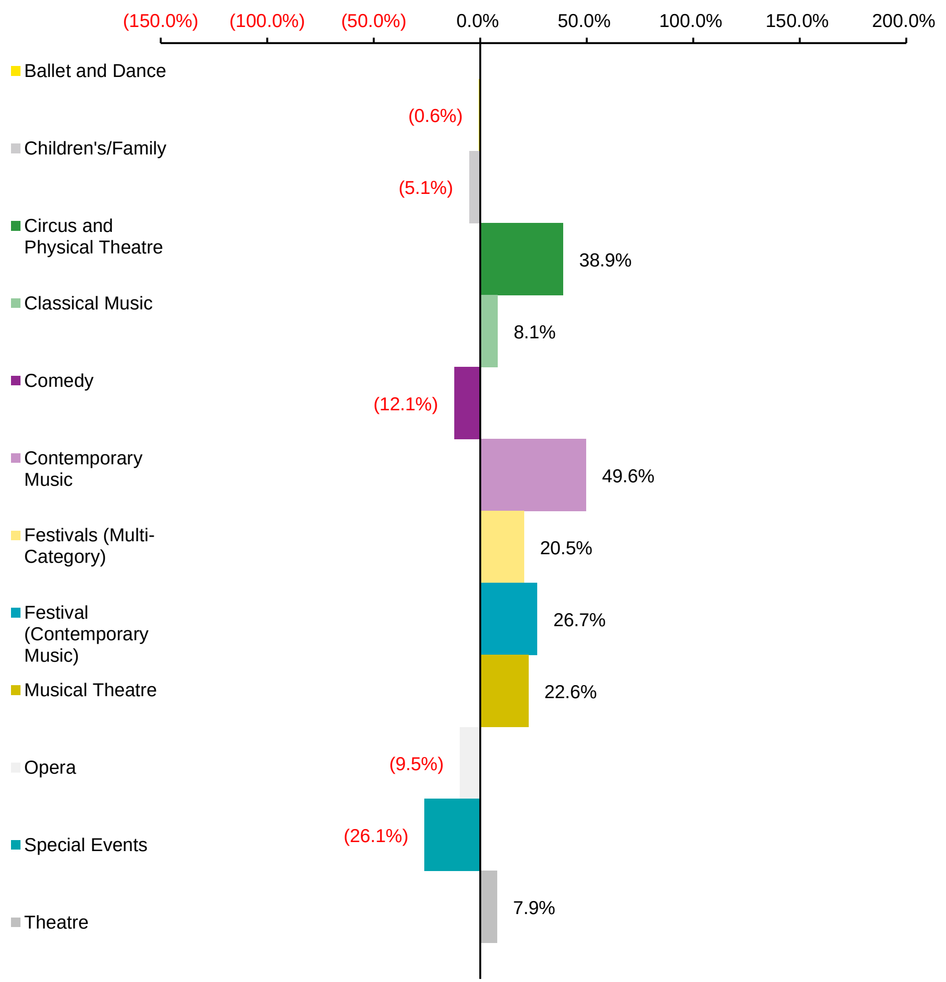


# 4 Category Analysis
## Category Trends



### Percentage Movement in Revenue by Category (2016-17)


### Percentage Movement in Attendance by Category (2016-2017)



# 4 Category Analysis
## Ballet and Dance



### National Overview

- The Ballet and Dance category experienced an increase in ticket sales revenue by 3.8% (from $60.1m in 2016 to $62.3m in 2017) despite a slight decline in attendance by 0.6% (from 0.82m in 2016 to 0.81m in 2017). The average ticket price increased by 3.6% from $82.59 in 2016 to $85.57 in 2017. The slight increase in revenue was primarily driven by major performances such as *Alice's Adventures in Wonderland*, *Sleeping Beauty* and *Faster*.
- 70.3% of revenue and 67.8% 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 4.9% and an increase in attendance by 4.8%.
- NSW, Victoria and Queensland generated the most revenue and attendance in this category, with a national market share of approximately 36.6%, 33% and 18.1% respectively in revenue and 34%, 29.8% and 18.1% respectively in attendance. These three states generated 87.8% of national Ballet and Dance revenue and 81.9% of attendance in 2017.
- NT experienced the most significant growth in revenue (48.9%) and attendance (74%) in Ballet and Dance, driven by performances from companies such as Melbourne Ballet Company (*Empyrean* and *Arche*), Melbourne City Ballet (*A Midsummer Night's Dream*) and Okareka Dance Company (*Mana Wahine*). QLD experienced the second highest growth in revenue (22.9%) despite a slight decline in attendance (7%). The growth in revenue was driven by major performances including *The Winter's Tale*, *Swan Lake*, *The Nutcracker* and *Sleeping Beauty*.

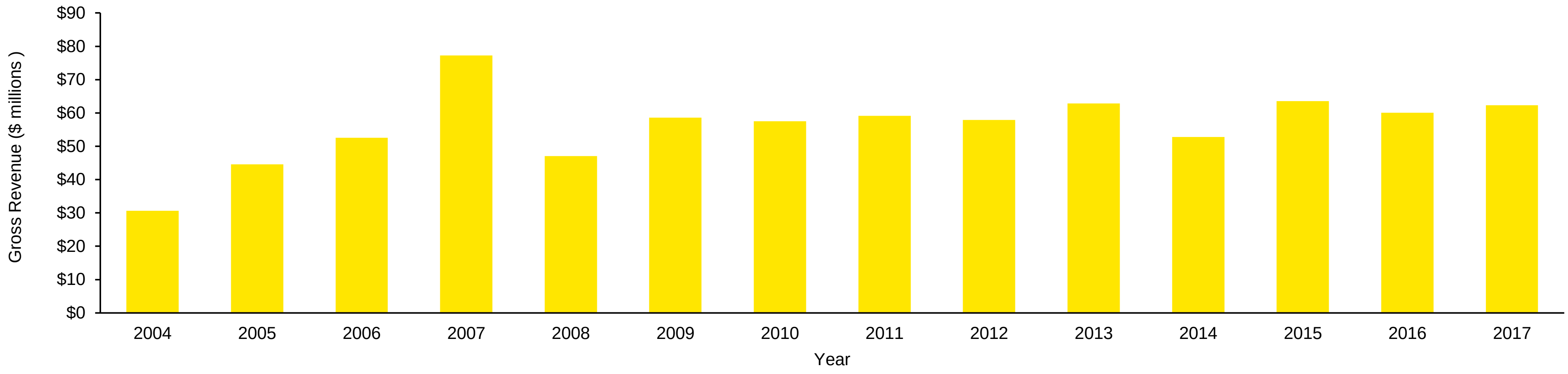
### Ballet and Dance – Revenue and Attendance (2004 – 2017)

| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $30,664,060 | - | 682,755 | - | $50.07 | - |
| 2005 | $44,563,085 | 45.3% | 930,639 | 36.3% | $52.76 | 5.4% |
| 2006 | $52,523,644 | 17.9% | 1,113,849 | 19.7% | $50.52 | -4.2% |
| 2007 | $77,287,071 | 47.1% | 1,457,306 | 30.8% | $57.39 | 13.6% |
| 2008 | $47,051,946 | -39.1% | 934,533 | -35.9% | $60.67 | 5.7% |
| 2009 | $58,570,704 | 24.5% | 1,050,763 | 12.4% | $63.33 | 4.4% |
| 2010 | $57,509,401 | -1.8% | 1,023,077 | -2.6% | $64.86 | 2.4% |
| 2011 | $59,164,135 | 2.9% | 947,846 | -7.4% | $71.93 | 10.9% |
| 2012 | $57,865,897 | -2.2% | 920,193 | -2.9% | $77.93 | 8.3% |
| 2013 | $62,832,992 | 8.6% | 976,336 | 6.1% | $74.69 | -4.2% |
| 2014 | $52,771,905 | -16.0% | 767,890 | -21.3% | $80.82 | 8.2% |
| 2015 | $63,522,318 | 20.4% | 859,095 | 11.9% | $84.36 | 4.4% |
| 2016 | $60,079,595 | -5.4% | 815,458 | -5.1% | $82.59 | -2.1% |
| 2017 | $62,339,482 | 3.8% | 810,483 | -0.6% | $85.57 | 3.6% |

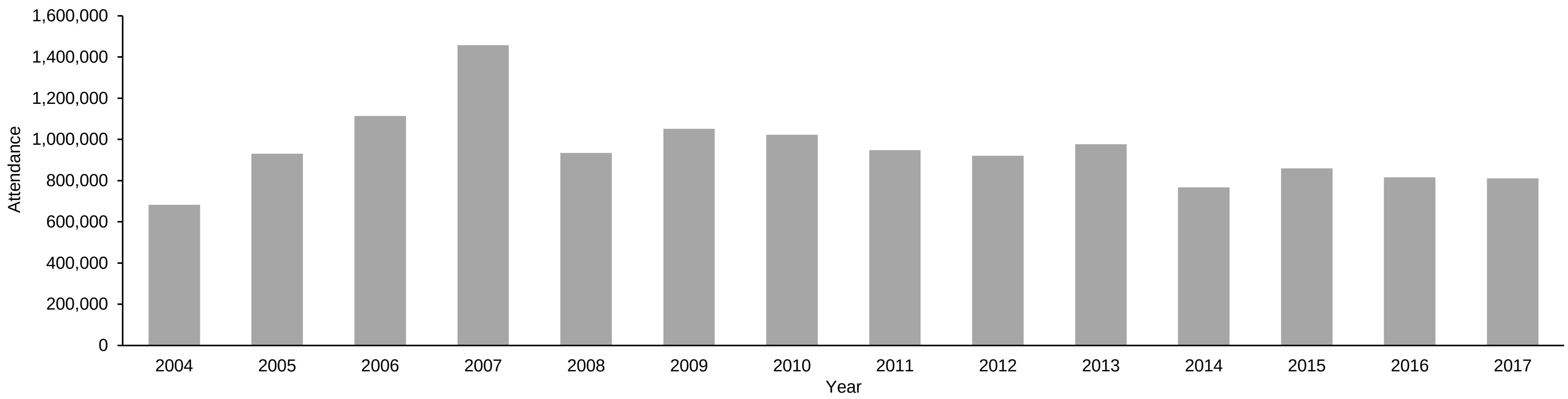
# 4 Category Analysis
## Ballet and Dance



### Ballet and Dance – Gross Revenue (2004-2017)



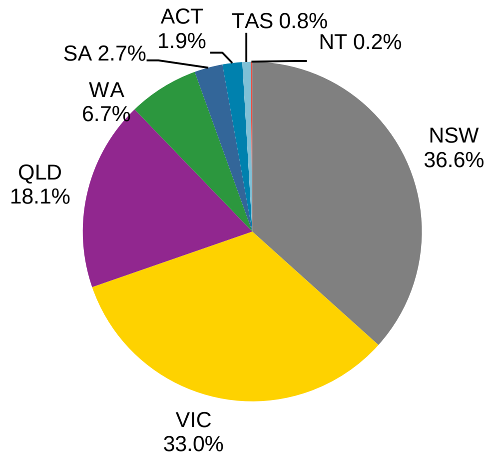

### Ballet and Dance – Total Attendance (2004-2017)



# 4 Category Analysis
## Ballet and Dance



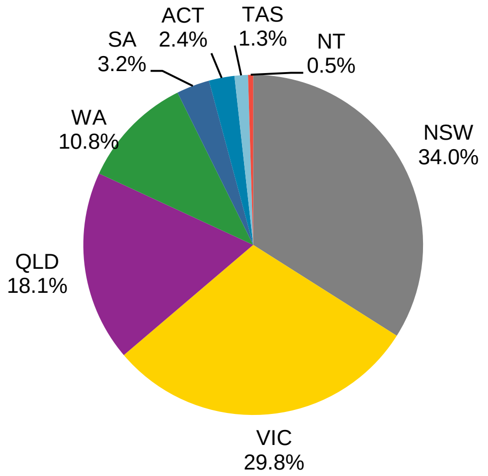
### Ballet and Dance – Revenue by State/Territory




### Ballet and Dance – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $22,844,773 | 36.6% | -1.7% |
| VIC | $20,601,691 | 33.0% | 12.5% |
| QLD | $11,276,651 | 18.1% | 22.9% |
| WA | $4,176,098 | 6.7% | -15.3% |
| SA | $1,681,542 | 2.7% | -48.6% |
| ACT | $1,172,557 | 1.9% | 8.5% |
| TAS | $491,081 | 0.8% | - |
| NT | $95,089 | 0.2% | 48.9% |
| **Total** | **$62,339,482** | **100.0%** | **3.8%** |

### Ballet and Dance – Attendance by State/Territory




### Ballet and Dance – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 275,329 | 34.0% | 0.5% |
| VIC | 241,583 | 29.8% | 12.7% |
| QLD | 146,827 | 18.1% | -7.0% |
| WA | 87,175 | 10.8% | -13.9% |
| SA | 25,572 | 3.2% | -39.7% |
| ACT | 19,708 | 2.4% | -15.6% |
| TAS | 10,368 | 1.3% | - |
| NT | 3,921 | 0.5% | 74.0% |
| **Total** | **810,483** | **100.0%** | **-0.6%** |

# 4 Category Analysis
## Children's/Family



### National Overview

- Children's/Family events experienced a decline in both revenue and attendance. Revenue decreased by 5.5% from $54.3m in 2016 to $51.3m in 2017, and attendance decreased by 5.1% from 1.38m in 2016 to 1.31m in 2017. The average ticket price decreased by 1.2% from $42.87 in 2016 to $42.35 in 2017. The slight decline in this category was primarily due to less major national tours in 2017 compared to 2016.
- Major national tours that attracted large audiences included *Frozen (Disney on Ice)*, *Paw Patrol Live!* and performances by The Wiggles.
- ACT was the only state or territory which recorded significant growth in both revenue and attendance. ACT revenue in this category increased by 46.7% from $0.96m in 2016 to $1.4m in 2017, with attendance increasing by 64.8% from 31k in 2016 to 51.1k in 2017. Growth was primarily attributed to more Children's/Family events taking place in 2017 compared to 2016.
- Victoria and QLD recorded moderate growth of 7.7% and 6.6% in revenue respectively. Victoria experienced slight growth in attendance of 0.6%, while QLD recorded a decline of 1.9% in attendance in 2017. NSW, WA, SA, and NT all experienced declines in both revenue and attendance. Tasmania experienced a decline in revenue (60.5%) despite a slight increase in attendance (1.9%), primarily attributed to less touring shows in 2017 compared to 2016.

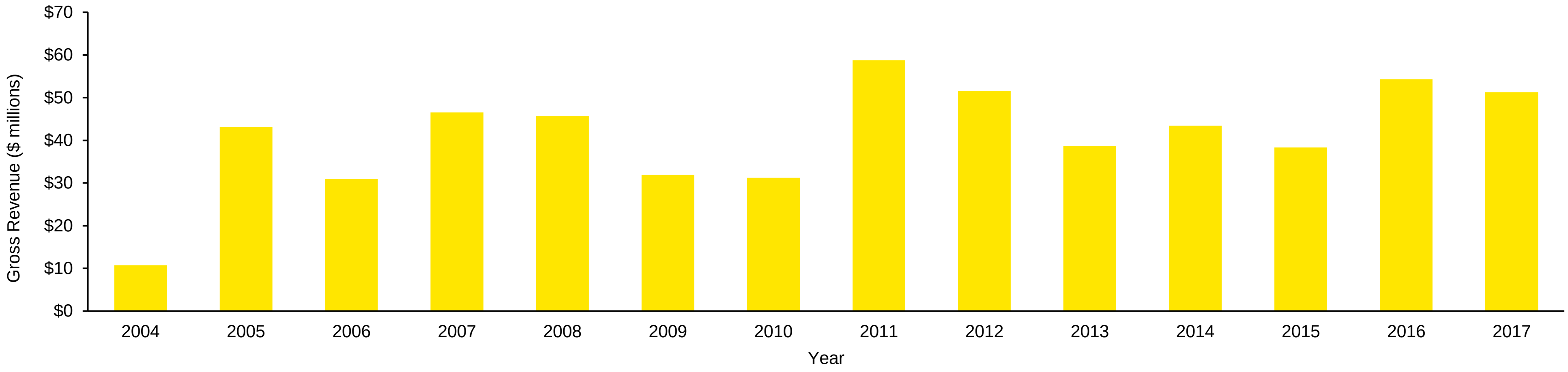
### Children's/Family Events – Revenue and Attendance (2004 – 2017)

| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $10,737,662 | - | 515,276 | - | $21.25 | - |
| 2005 | $43,108,863 | 301.5% | 1,271,239 | 146.7% | $35.52 | 67.1% |
| 2006 | $30,944,086 | -28.2% | 1,114,427 | -12.3% | $28.96 | -18.5% |
| 2007 | $46,535,403 | 50.4% | 1,393,942 | 25.1% | $36.49 | 26.0% |
| 2008 | $45,647,441 | -1.9% | 1,455,400 | 4.4% | $34.24 | -6.2% |
| 2009 | $31,904,974 | -30.1% | 1,076,332 | -26.0% | $32.38 | -5.4% |
| 2010 | $31,247,780 | -2.1% | 974,624 | -9.4% | $34.23 | 5.7% |
| 2011 | $58,777,398 | 88.1% | 1,453,012 | 49.1% | $43.87 | 28.1% |
| 2012 | $51,587,317 | -12.2% | 1,300,334 | -10.5% | $43.17 | -1.6% |
| 2013 | $38,684,410 | -25.0% | 1,090,598 | -16.1% | $38.17 | -11.6% |
| 2014 | $43,431,918 | 12.3% | 1,214,273 | 11.3% | $38.27 | 0.3% |
| 2015 | $38,368,367 | -11.7% | 1,081,003 | -11.0% | $39.15 | 2.3% |
| 2016 | $54,316,058 | 41.6% | 1,376,254 | 27.3% | $42.87 | 9.5% |
| 2017 | $51,308,258 | -5.5% | 1,305,672 | -5.1% | $42.35 | -1.2% |

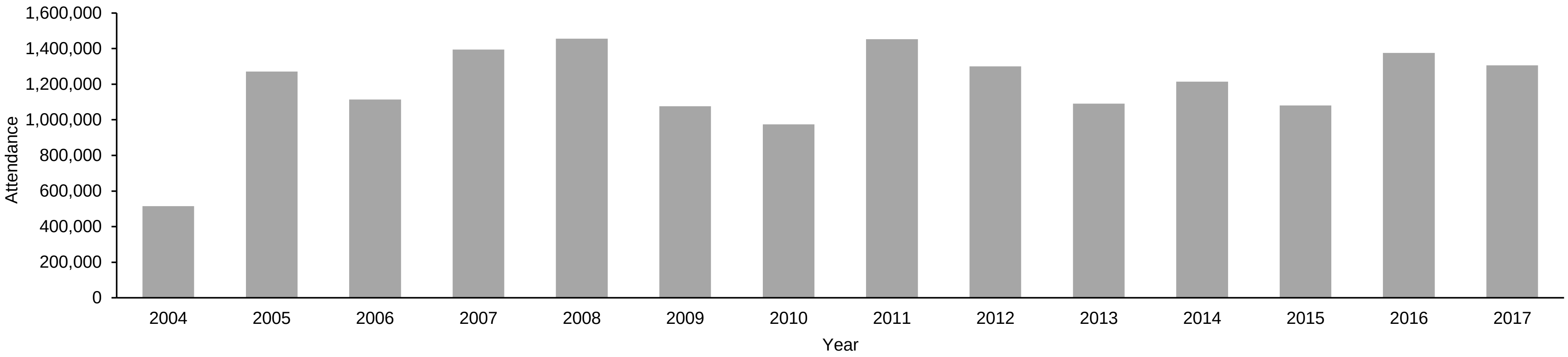
# 4 Category Analysis
## Children's/Family Events



### Children's/Family Events – Gross Revenue (2004-2017)



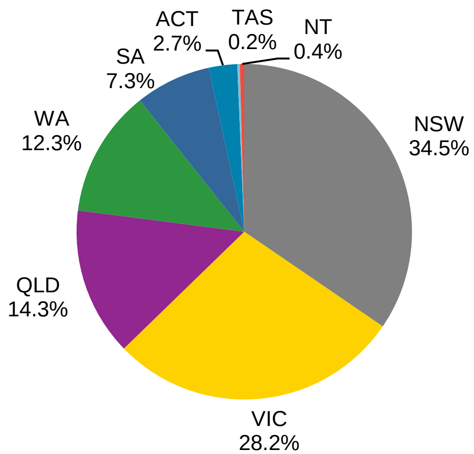

### Children's/Family Events – Total Attendance (2004-2017)



# 4 Category Analysis
## Children's/Family Events



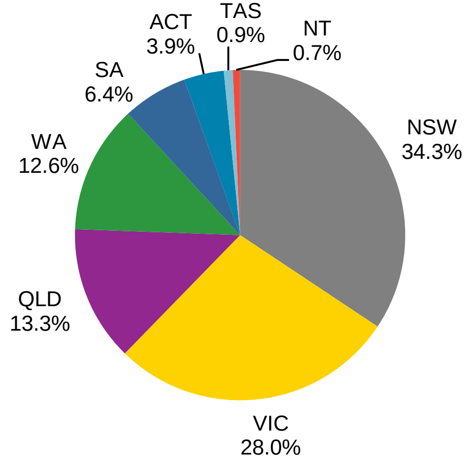
### Children's/Family Events – Revenue by State/Territory




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

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $17,723,107 | 34.5% | -7.6% |
| VIC | $14,466,640 | 28.2% | 7.7% |
| QLD | $7,331,554 | 14.3% | 6.6% |
| WA | $6,303,604 | 12.3% | -32.3% |
| SA | $3,737,067 | 7.3% | -4.6% |
| ACT | $1,403,203 | 2.7% | 46.7% |
| TAS | $126,361 | 0.2% | -60.5% |
| NT | $216,720 | 0.4% | -32.9% |
| **Total** | **$51,308,258** | **100.0%** | **-5.5%** |

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




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

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 448,361 | 34.3% | -2.0% |
| VIC | 365,026 | 28.0% | 0.6% |
| QLD | 173,345 | 13.3% | -1.9% |
| WA | 164,166 | 12.6% | -27.5% |
| SA | 83,057 | 6.4% | -16.1% |
| ACT | 51,051 | 3.9% | 64.8% |
| TAS | 11,472 | 0.9% | 1.9% |
| NT | 9,194 | 0.7% | -21.5% |
| **Total** | **1,305,672** | **100.0%** | **-5.1%** |

# 4 Category Analysis
## Circus and Physical Theatre



### National Overview

- The Circus and Physical Theatre category experienced the second highest growth in both ticket sales revenue and in attendance in 2017 (after Contemporary Music). Circus and Physical Theatre recorded an increase of 58.7% in ticket sales revenue from $73.4m in 2016 to $116.5m in 2017 and an increase in attendance by 38.9% from 0.84m in 2016 to 1.17m in 2017. Additionally, the growth in revenue is supported by the increase in average ticket price by 12.9% from $96.56 in 2016 to $109.04 in 2017.
- 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 significant growth in revenue and attendance can be primarily attributed to Cirque du Soleil holding more performances in 2017 compared to 2016. In 2017 the Cirque du Soleil tours of *Kooza* and *Toruk* in Victoria, WA, NSW, Queensland, and SA significantly contributed to the revenue in this category. Other major events in this category included performances by The Unbelievables, Crazy Horse Paris and The Illusionists.
- Positive and negative growth experienced in each state and territory was primarily driven by the presence or absence of performances by Cirque du Soleil in 2017 in comparison to 2016. Victoria, SA and WA has shown significant growth in revenue in 2017, while NSW, Tasmania and ACT experienced significant declines.

### Circus and Physical Theatre – Revenue and Attendance (2009 – 2017)

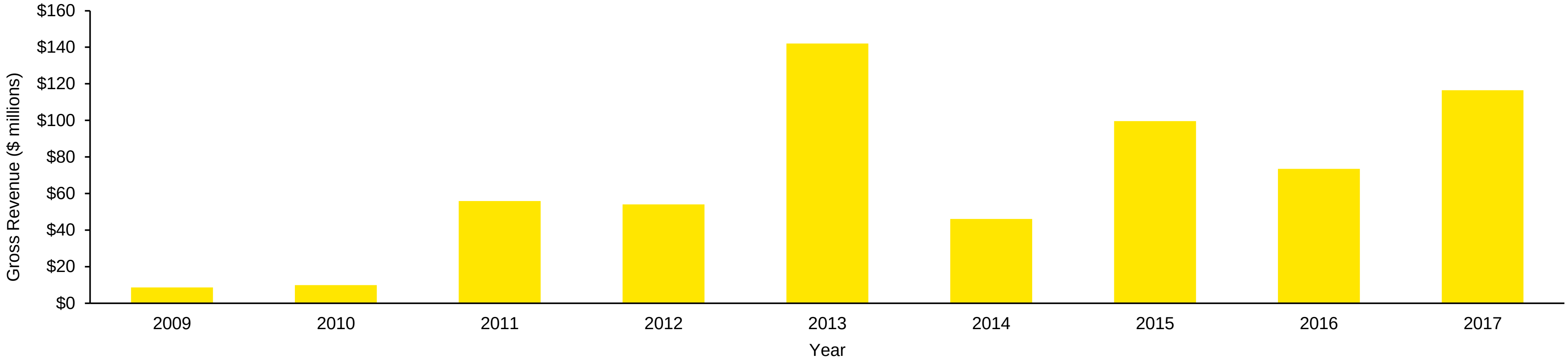
| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2009 | $8,601,990 | N/A | 198,274 | N/A | $47.98 | N/A |
| 2010 | $9,900,116 | 15.1% | 265,837 | 34.1% | $43.03 | -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% |
| 2017 | $116,542,574 | 58.7% | 1,165,111 | 38.9% | $109.04 | 12.9% |

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.

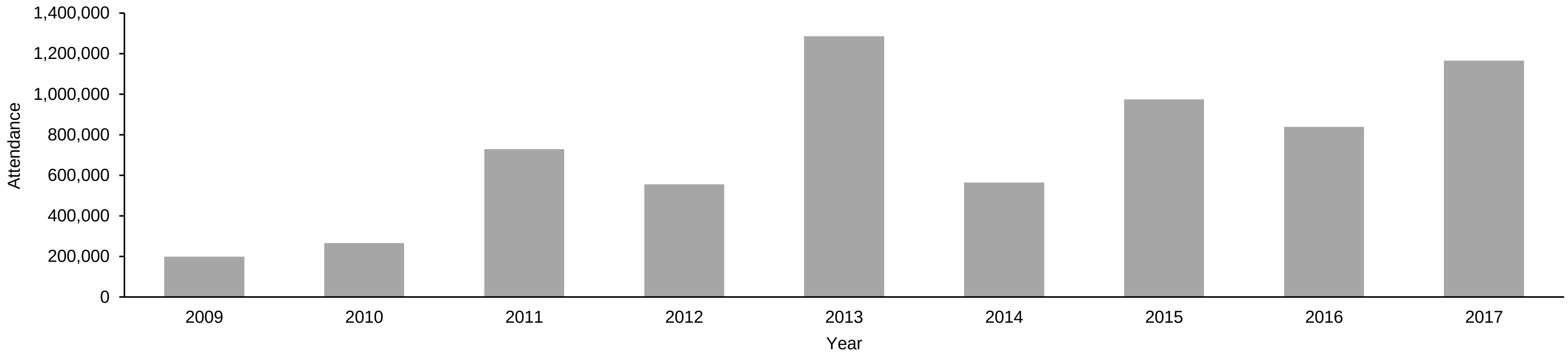
# 4 Category Analysis
## Circus and Physical Theatre



### Circus and Physical Theatre – Gross Revenue (2009-2017)



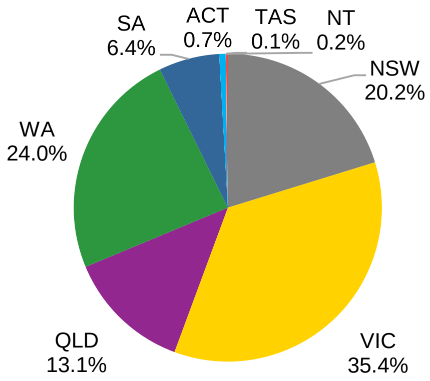

### Circus and Physical Theatre – Total Attendance (2009-2017)



# 4 Category Analysis
## Circus and Physical Theatre



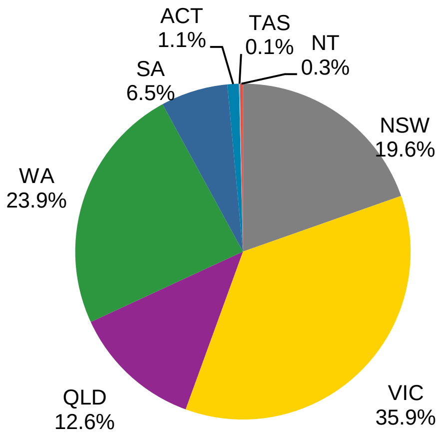
### Circus and Physical Theatre – Revenue by State/Territory




### Circus and Physical Theatre – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $23,585,105 | 20.2% | -35.0% |
| VIC | $41,252,161 | 35.4% | 351.4% |
| QLD | $15,244,160 | 13.1% | -0.7% |
| WA | $27,988,441 | 24.0% | 416.6% |
| SA | $7,423,663 | 6.4% | 175.0% |
| ACT | $785,406 | 0.7% | -19.8% |
| TAS | $59,359 | 0.1% | -98.3% |
| NT | $204,279 | 0.2% | 21.2% |
| **Total** | **$116,542,574** | **100.0%** | **58.7%** |

### Circus and Physical Theatre – Attendance by State/Territory




### Circus and Physical Theatre – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 228,596 | 19.6% | -33.9% |
| VIC | 418,666 | 35.9% | 158.0% |
| QLD | 146,324 | 12.6% | -7.3% |
| WA | 278,845 | 23.9% | 360.5% |
| SA | 75,326 | 6.5% | 55.0% |
| ACT | 12,876 | 1.1% | -37.7% |
| TAS | 1,234 | 0.1% | -96.8% |
| NT | 3,244 | 0.3% | -25.2% |
| **Total** | **1,165,111** | **100.0%** | **38.9%** |

# 4 Category Analysis
## Classical Music



### National Overview

- Classical Music experienced a slight increase in revenue by 1.5% from $76.8m in 2016 to $77.9m in 2017, and an increase in attendance by 8.1% from 1.22m in 2016 to 1.32m in 2017. This is the highest revenue and highest attendance for Classical Music recorded since 2008. This is the second consecutive 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 average ticket price decreased slightly between 2016 and 2017 by 1.7% from $78.43 to $77.12.
- As with the previous years, the majority of revenue (67.8%) and attendance (69.8%) 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 5.5% and an increase in attendance by 12.9%.
- The growth in this category was primarily driven by performances inspired by popular films, including *Hans Zimmer Revealed* and the *Harry Potter Concert Series.*

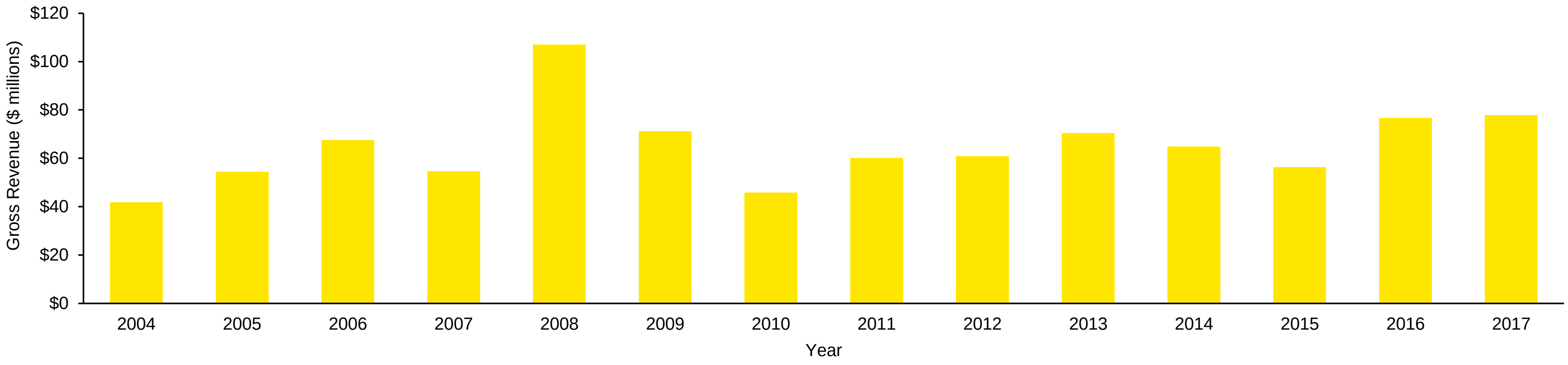
### Classical Music – Revenue and Attendance (2004 – 2017)

| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $41,875,659 | - | 1,062,071 | - | $43.21 | - |
| 2005 | $54,395,768 | 29.9% | 1,154,340 | 8.7% | $52.95 | 22.5% |
| 2006 | $67,568,915 | 24.2% | 1,571,748 | 36.2% | $46.93 | -11.4% |
| 2007 | $54,615,181 | -19.2% | 1,104,146 | -29.8% | $55.85 | 19.0% |
| 2008 | $107,050,440 | 96.0% | 1,478,281 | 33.9% | $84.81 | 51.9% |
| 2009 | $71,273,338 | -33.4% | 1,120,002 | -24.2% | $74.01 | -12.7% |
| 2010 | $45,882,050 | -35.6% | 962,132 | -14.1% | $60.43 | -18.3% |
| 2011 | $60,096,039 | 31.0% | 1,048,115 | 8.9% | $68.82 | 13.9% |
| 2012 | $60,884,219 | 1.3% | 1,254,963 | 19.7% | $60.34 | -12.3% |
| 2013 | $70,481,841 | 15.8% | 1,169,643 | -6.8% | $73.18 | 21.3% |
| 2014 | $64,870,493 | -8.0% | 1,015,122 | -13.2% | $75.05 | 2.6% |
| 2015 | $56,395,824 | -13.1% | 993,906 | -2.1% | $71.50 | -4.7% |
| 2016 | $76,764,404 | 36.1% | 1,219,293 | 22.7% | $78.43 | 9.7% |
| 2017 | $77,883,209 | 1.5% | 1,318,421 | 8.1% | $77.12 | -1.7% |

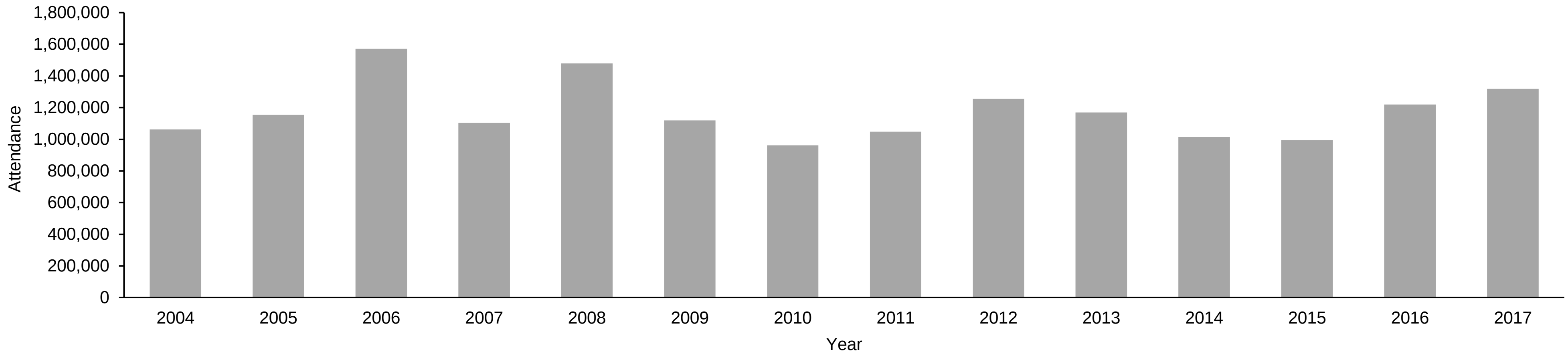
# 4 Category Analysis
## Classical Music



### Classical Music – Gross Revenue (2004-2017)



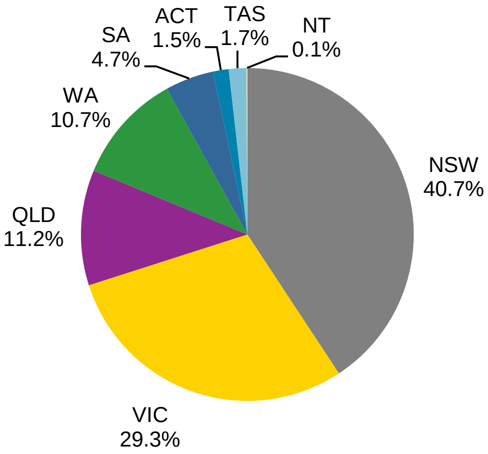

### Classical Music – Total Attendance (2004-2017)



# 4 Category Analysis
## Classical Music



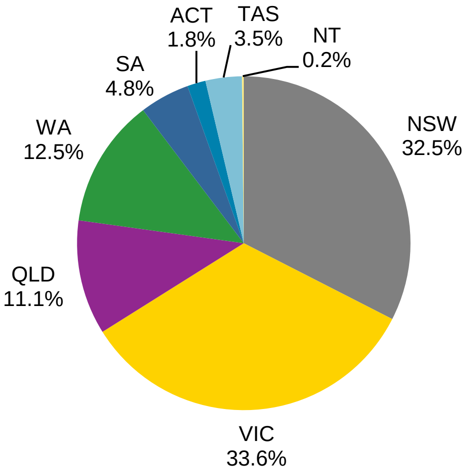
### Classical Music – Revenue by State/Territory




### Classical Music – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $31,718,001 | 40.7% | -2.6% |
| VIC | $22,847,592 | 29.3% | 14.0% |
| QLD | $8,721,894 | 11.2% | 0.7% |
| WA | $8,334,425 | 10.7% | 10.9% |
| SA | $3,676,966 | 4.7% | -28.7% |
| ACT | $1,187,189 | 1.5% | -9.7% |
| TAS | $1,339,196 | 1.7% | -10.3% |
| NT | $57,946 | 0.1% | 1431.3% |
| **Total** | **$77,883,209** | **100.0%** | **1.5%** |

### Classical Music – Attendance by State/Territory




### Classical Music – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 428,600 | 32.5% | 4.5% |
| VIC | 442,737 | 33.6% | 13.1% |
| QLD | 146,358 | 11.1% | 8.8% |
| WA | 164,679 | 12.5% | 12.8% |
| SA | 63,803 | 4.8% | -12.3% |
| ACT | 23,512 | 1.8% | -1.2% |
| TAS | 46,515 | 3.5% | 14.9% |
| NT | 2,217 | 0.2% | 1879.5% |
| **Total** | **1,318,421** | **100.0%** | **8.1%** |

# 4 Category Analysis
## Comedy



### National Overview

- In 2016 the Comedy category recorded the highest ticket sales revenue and attendance since this category was introduced in 2009. However, in 2017 the Comedy category experienced a decline both in ticket sales revenue and attendance. Revenue decreased by 16.3% from $86.4m in 2016 to $72.3m in 2017, and attendance decreased by 12.1% from 1.41m in 2016 to 1.24m in 2017. This is the first year since 2013 where this category experienced a decline in both revenue and attendance. From 2013 to 2016, this category witnessed three consecutive years of growth in both revenue and attendance. The decline in average ticket price by 4.9% from $65.54 in 2016 to $62.32 in 2017, as well as less major national tours by international comedians contributed to the decline in revenue.
- Major high-profile comedians that headlined tours in 2017 included international comedians Jerry Seinfeld, Chris Rock, Russell Howard as well as local comedians Carl Barron and Judith Lucy & Denise Scott.
- In 2017, all states and territories except NSW and Tasmania experienced a decline in revenue. All states except Tasmania witnessed a decline in attendance. In 2017, Tasmania was the only state or territory which experienced growth both in revenue (43.1%) and in attendance (82.1%), primarily driven by more comedy performances in 2017 compared with 2016. However, its impact is minimal as it represents only 0.3% in revenue and 0.4% in attendance of the overall market share in Comedy.
- NSW experienced moderate growth in revenue (4.6%) despite a slight decline (0.3%) in attendance. Victoria is the highest contributor to this category both in revenue and in attendance, representing 37.8% of the market share in revenue and 47.2% of the total attendance, primarily due to the Melbourne International Comedy Festival. NSW and Victoria combined generated around 68.8% of the total market share of revenue and 71.6% of total attendance in the Comedy category.

### Comedy– Revenue and Attendance (2009 – 2017)

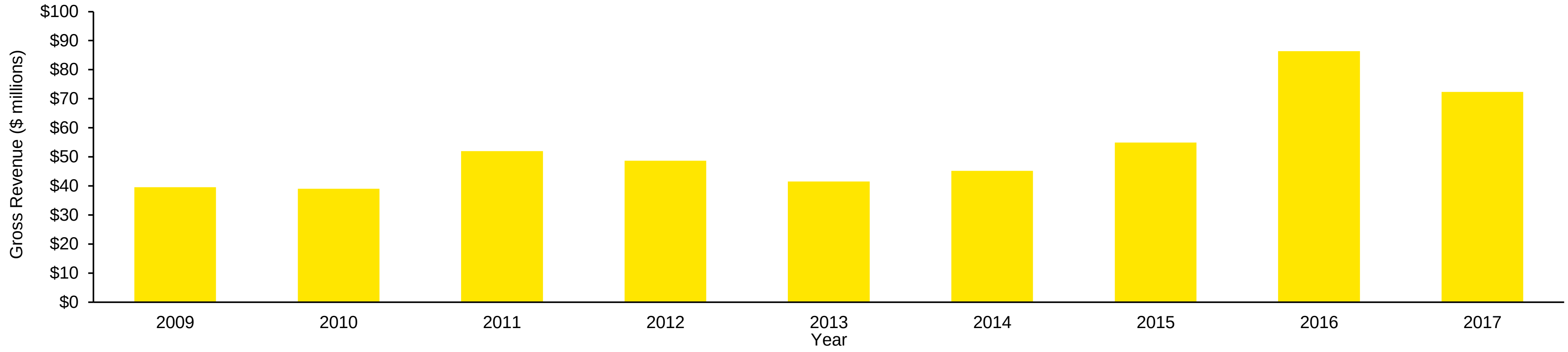
| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2009 | $39,570,117 | - | 769,058 | - | $54.06 | - |
| 2010 | $39,048,164 | -1.3% | 792,713 | 3.1% | $51.53 | -4.7% |
| 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% |
| 2017 | $72,306,243 | -16.3% | 1,238,460 | -12.1% | $62.32 | -4.9% |

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.

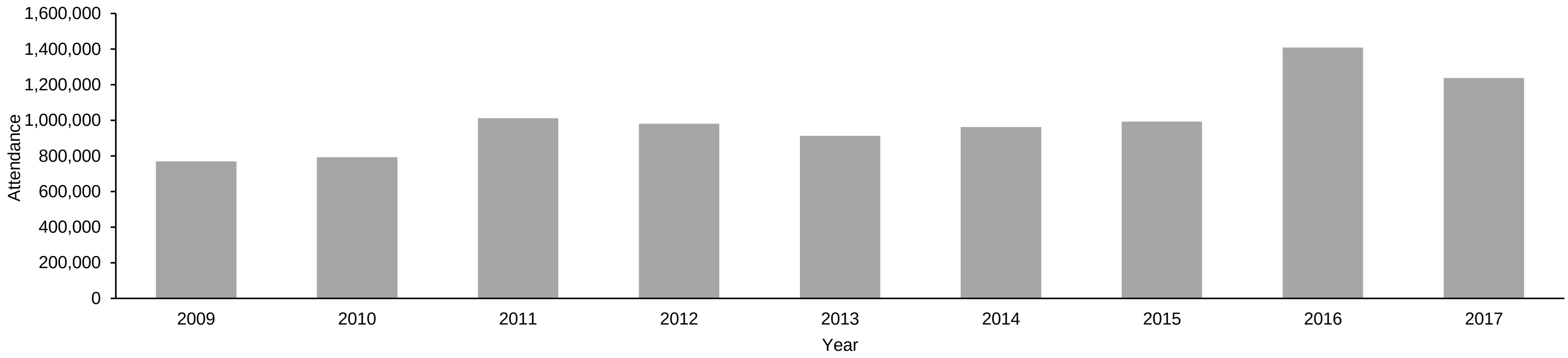
# 4 Category Analysis
## Comedy



### Comedy – Gross Revenue (2009-2017)



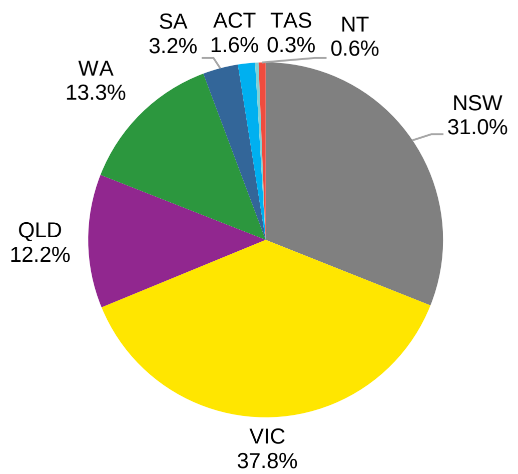

### Comedy – Total Attendance (2009-2017)



# 4 Category Analysis
## Comedy



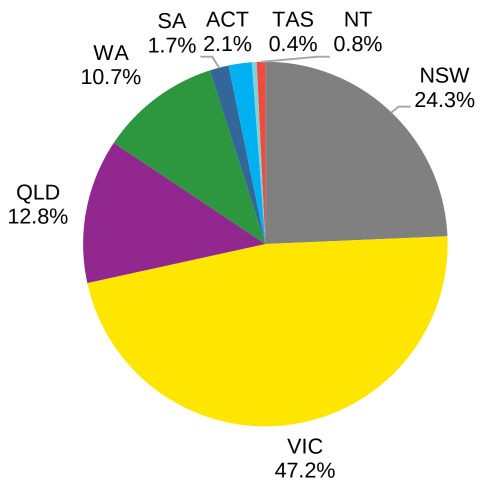
### Comedy – Revenue by State/Territory




### Comedy – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $22,432,444 | 31.0% | 4.6% |
| VIC | $27,308,508 | 37.8% | -22.8% |
| QLD | $8,798,783 | 12.2% | -20.2% |
| WA | $9,637,700 | 13.3% | -20.9% |
| SA | $2,318,807 | 3.2% | -25.8% |
| ACT | $1,126,162 | 1.6% | -50.3% |
| TAS | $228,929 | 0.3% | 43.1% |
| NT | $454,909 | 0.6% | -43.3% |
| **Total** | **$72,306,243** | **100.0%** | **-16.3%** |

### Comedy – Attendance by State/Territory




| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 301,164 | 24.3% | -0.3% |
| VIC | 585,163 | 47.2% | -11.9% |
| QLD | 158,525 | 12.8% | -9.6% |
| WA | 132,616 | 10.7% | -23.1% |
| SA | 20,826 | 1.7% | -48.4% |
| ACT | 25,462 | 2.1% | -29.9% |
| TAS | 5,345 | 0.4% | 82.1% |
| NT | 9,359 | 0.8% | -39.6% |
| **Total** | 1,238,460 | 100.0% | -12.1% |

# 4 Category Analysis
## Contemporary Music



### National Overview

- In 2017 the Contemporary Music category recorded the highest growth in ticket sales revenue (87.7%), from $440.1m in 2016 to $826.1m in 2017, and the highest growth in attendance (49.6%) from 5.7m in 2016 to 8.5m in 2017. This is the first year of growth in revenue since 2013 and the highest revenue and attendance recorded for Contemporary Music since this Report was established in 2004. The increase in average ticket price by 23.9% from $85.35 in 2016 to $105.73 in 2017 further contributed to the increase in revenue.
- Contemporary Music still generates the highest market share of revenue (43.8%) and attendance (36.8%) among all the categories. Although Contemporary Music's market share increased substantially in 2017, it is still short of its peak in 2010, where Contemporary Music commanded 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 or arena tours that attract large audiences. Major international artists that toured Australia in 2017 included Adele, Paul McCartney, Guns N' Roses, Bruce Springsteen, Justin Bieber, Drake, Yusuf / Cat Stevens, Ariana Grande and the Dixie Chicks. Local performances included Sia, Midnight Oil, Paul Kelly, Tina Arena and Human Nature. The growth in Contemporary Music revenue is primarily due to the large number of prominent acts with arena or stadium tours that attracted large crowds and toured to almost all the five major cities in 2017.
- NSW and Victoria combined generated 63.7% of market share in revenue (32.7% and 31%) and 61.9% share in attendance (32.6% and 29.3%). All the states or territories except ACT experienced significant growth in both revenue and attendance in 2017. ACT witnessed slight growth in revenue and attendance. Tasmania experienced the highest growth (210.2%) in revenue and attendance (97.3%), primarily driven by performances by major artists including Elton John, Midnight Oil and Cold Chisel.
- Note: these figures do not include music festivals, which are categorised under Festivals (Contemporary Music).

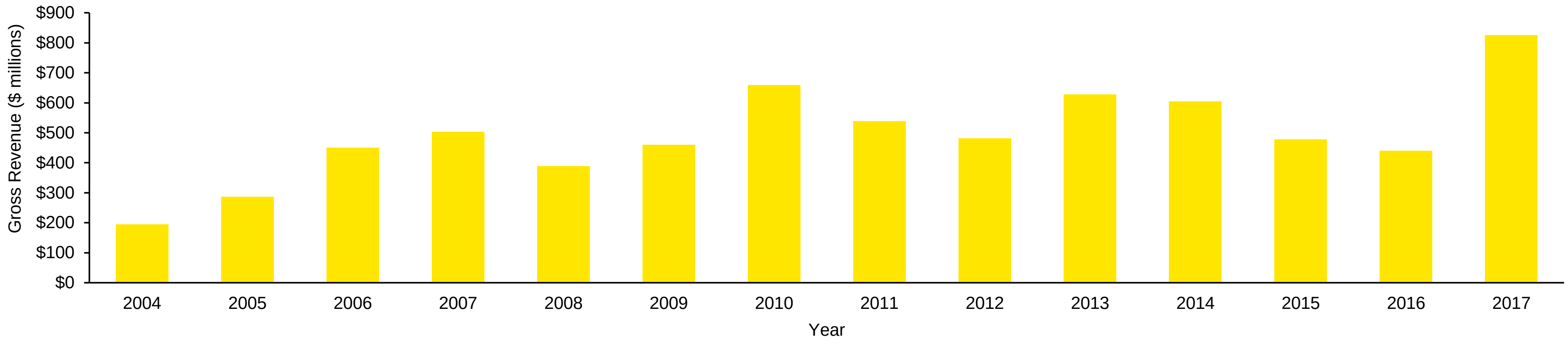
### Contemporary Music – Revenue and Attendance (2004 – 2017)

| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $195,058,791 | | 2,737,873 | | $77.09 | |
| 2005 | $287,201,319 | 47.2% | 3,924,276 | 43.3% | $83.37 | 8.1% |
| 2006 | $450,855,531 | 57.0% | 5,295,988 | 35.0% | $92.78 | 11.3% |
| 2007 | $503,240,419 | 11.6% | 5,975,561 | 12.8% | $90.49 | -2.5% |
| 2008 | $389,160,746 | -22.7% | 4,330,620 | -27.5% | $101.35 | 12.0% |
| 2009 | $460,443,027 | 18.3% | 4,682,805 | 8.1% | $108.61 | 7.2% |
| 2010 | $659,102,048 | 43.1% | 7,028,235 | 50.1% | $102.78 | -5.4% |
| 2011 | $539,274,481 | -18.2% | 5,939,618 | -15.5% | $103.45 | 0.6% |
| 2012 | $482,180,550 | -10.6% | 5,484,257 | -7.7% | $100.27 | -3.1% |
| 2013 | $628,130,146 | 30.3% | 6,266,137 | 14.3% | $110.50 | 10.2% |
| 2014 | $604,963,041 | -3.7% | 6,386,058 | 1.9% | $107.60 | -2.6% |
| 2015 | $477,904,944 | -21.0% | 5,554,811 | -13.0% | $96.38 | -10.4% |
| 2016 | $440,083,629 | -7.9% | 5,658,753 | 1.9% | $85.35 | -11.4% |
| 2017 | $826,050,167 | 87.7% | 8,464,739 | 49.6% | $105.73 | 23.9% |

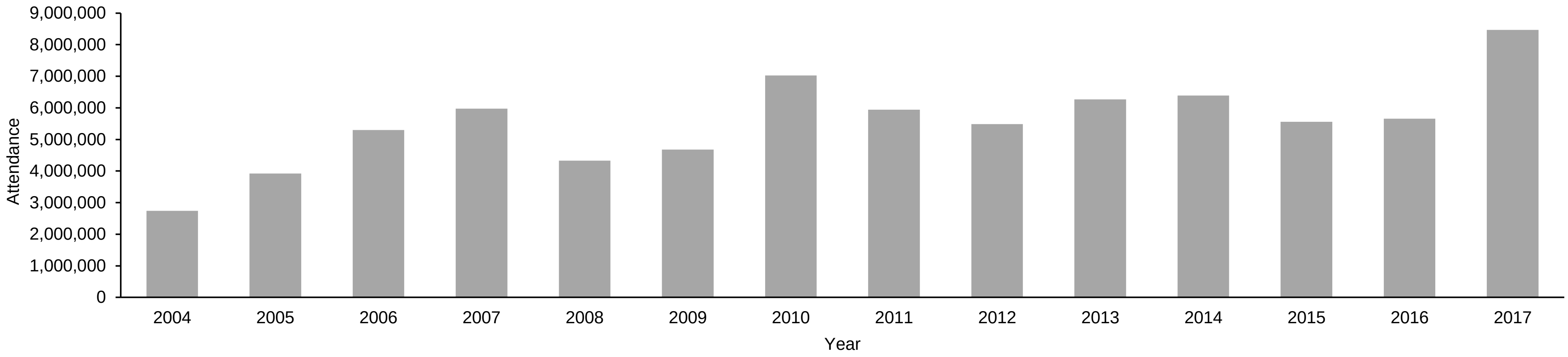
# 4 Category Analysis
## Contemporary Music



### Contemporary Music – Gross Revenue (2004-2017)



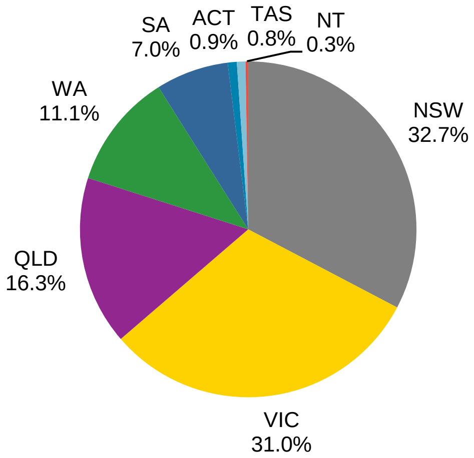

### Contemporary Music – Total Attendance (2004-2017)



# 4 Category Analysis
## Contemporary Music



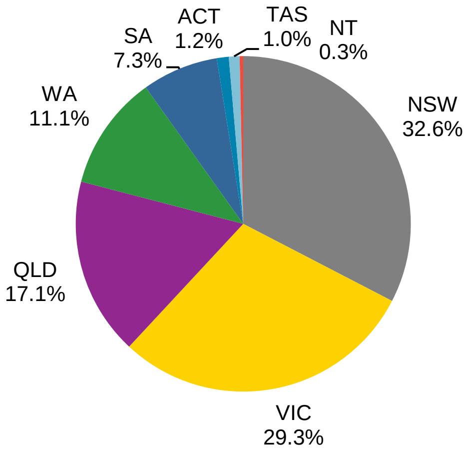
### Contemporary Music – Revenue by State/Territory




### Contemporary Music – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $270,132,096 | 32.7% | 71.4% |
| VIC | $255,868,353 | 31.0% | 97.3% |
| QLD | $134,362,095 | 16.3% | 94.0% |
| WA | $91,814,332 | 11.1% | 98.7% |
| SA | $57,743,443 | 7.0% | 113.9% |
| ACT | $7,196,456 | 0.9% | 1.4% |
| TAS | $6,826,581 | 0.8% | 210.2% |
| NT | $2,106,811 | 0.3% | 107.3% |
| **Total** | **$826,050,167** | **100.0%** | **87.7%** |

### Contemporary Music – Attendance by State/Territory




### Contemporary Music – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 2,759,457 | 32.6% | 44.5% |
| VIC | 2,482,730 | 29.3% | 60.6% |
| QLD | 1,449,427 | 17.1% | 51.7% |
| WA | 936,443 | 11.1% | 36.8% |
| SA | 621,839 | 7.3% | 50.9% |
| ACT | 97,841 | 1.2% | 8.1% |
| TAS | 87,587 | 1.0% | 97.3% |
| NT | 29,415 | 0.3% | 80.0% |
| **Total** | **8,464,739** | **100.0%** | **49.6%** |

# 4 Category Analysis
## Festivals (Multi Category)



### National Overview

- In 2017, Festivals (Multi Category) ticket sales revenue decreased by 3.5% to $54.6m, despite an increase in attendance by 20.5% to 1.87m.
- The average ticket price decreased by 7.5% to $36.62 in 2017.
- Festivals (Multi Category) contributed a share of 2.9% to the total revenue and 8.1% to the total attendance.
- SA and WA generate the majority of revenue and attendance in Festivals (Multi Category), with a combined 69.1% market share of revenue and 71.3% market share of attendance in this category.
- Festivals (Multi Category) in SA experienced a decrease in revenue by 2.8% despite an increase in attendance by 18.2%, primarily attributed to the fall in average ticket prices. Major festivals in SA include Adelaide Fringe, Adelaide Festival, Adelaide Cabaret Festival and WOMADelaide. Tasmania also experienced a decrease in revenue (16.3%) despite a significant increase in attendance (179%), primarily driven by an increase in attendance at the MONA festivals (Mona Foma and Dark MoFo).
- WA, NSW and NT all experienced increases in revenue and attendance. WA experienced an increase in revenue by 23.5% and an increase in attendance by 5.8% in Festivals (Multi Category). Major festivals in WA include Fringe World Festival, Perth Festival and Falls Festival (Fremantle) which took place for the first time in 2017. NSW also experienced a significant increase in revenue (107.4%) and attendance (39.2%) when compared to 2016, primarily attributable to the growth of Sydney Festival with shows such as the musical *Ladies in Black*.
- Victoria and ACT recorded declines in revenue (by 55.9% and 86.9% respectively), and attendance (by 5% and 92.1% respectively), primarily due to less festival events recorded in 2017. Queensland recorded an increase in revenue (16.6%) despite declining in attendance by 8.2%.
- Data was not provided for Falls Festival held in Lorne (VIC) and Byron Bay (NSW) in 2017, and attendance and revenue for Festivals (Multi Category) will be lower as a result.

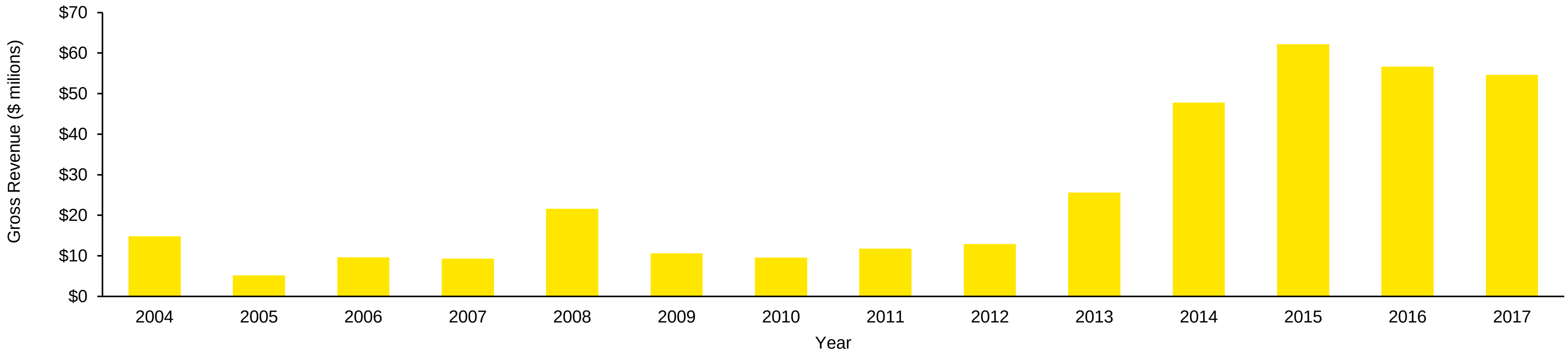
### Festivals (Multi-Category) – Revenue and Attendance (2004 – 2017)

| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $14,842,476 | | 483,858 | | $32.26 | |
| 2005 | $5,170,934 | -65.2% | 157,228 | -67.5% | $39.13 | 21.3% |
| 2006 | $9,633,454 | 86.3% | 201,711 | 28.3% | $56.72 | 44.9% |
| 2007 | $9,318,441 | -3.3% | 294,296 | 45.9% | $44.09 | -22.3% |
| 2008 | $21,615,824 | 132.0% | 551,810 | 87.5% | $52.11 | 18.2% |
| 2009 | $10,642,917 | -50.8% | 431,061 | -21.9% | $33.60 | -35.5% |
| 2010 | $9,570,915 | -10.1% | 263,464 | -38.9% | $43.12 | 28.3% |
| 2011 | $11,777,244 | 23.1% | 242,222 | -8.1% | $57.02 | 32.2% |
| 2012 | $12,916,787 | 9.7% | 260,623 | 7.6% | $59.58 | 4.5% |
| 2013 | $25,622,029 | 98.4% | 786,530 | 201.8% | $34.59 | -41.9% |
| 2014 | $47,805,136 | 86.6% | 1,059,806 | 34.7% | $48.41 | 39.9% |
| 2015 | $62,162,178 | 30.0% | 1,486,599 | 40.3% | $50.32 | 3.9% |
| 2016 | $56,641,751 | -8.9% | 1,549,007 | 4.2% | $39.57 | -21.4% |
| 2017 | $54,635,677 | -3.5% | 1,866,148 | 20.5% | $36.62 | -7.5% |

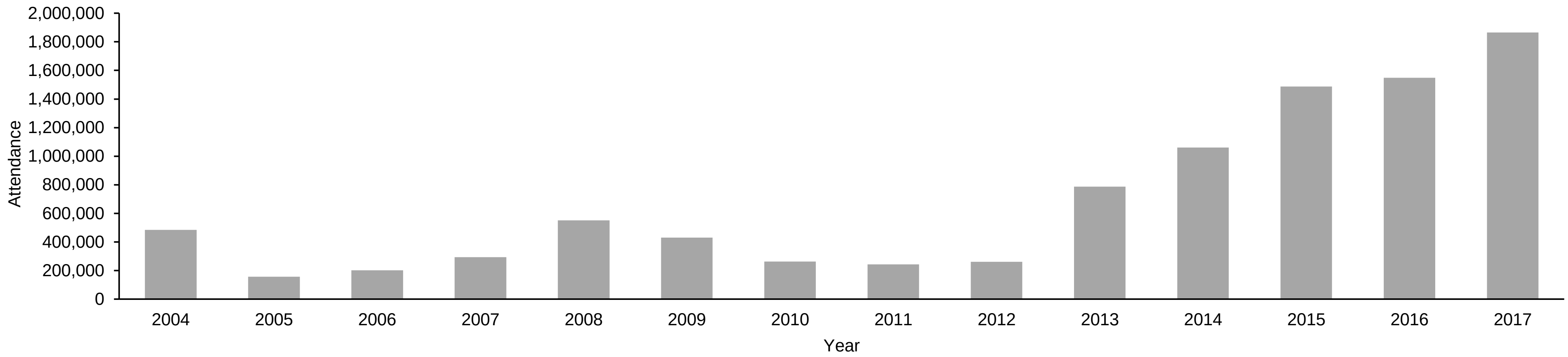
# 4 Category Analysis
## Festivals (Multi Category)



### Festivals (Multi-Category) – Gross Revenue (2004-2017)



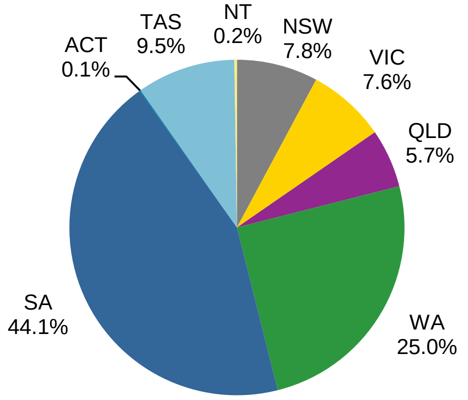

### Festivals (Multi-Category) – Total Attendance (2004-2017)



# 4 Category Analysis
## Festivals (Multi Category)



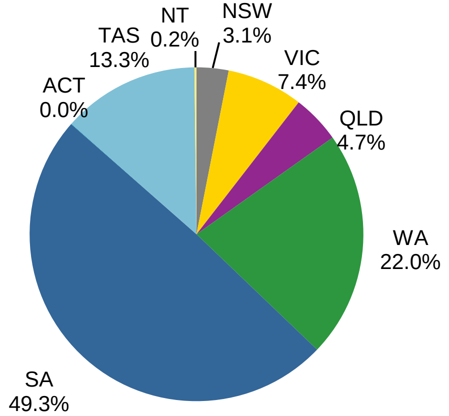
### Festivals (Multi-Category) – Revenue by State/Territory




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

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $4,283,159 | 7.8% | 107.4% |
| VIC | $4,126,099 | 7.6% | -55.9% |
| QLD | $3,088,592 | 5.7% | 16.6% |
| WA | $13,678,110 | 25.0% | 23.5% |
| SA | $24,076,447 | 44.1% | -2.8% |
| ACT | $56,322 | 0.1% | -86.9% |
| TAS | $5,195,042 | 9.5% | -16.3% |
| NT | $131,905 | 0.2% | 84.9% |
| **Total** | **$54,635,677** | **100.0%** | **-3.5%** |

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




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

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 57,770 | 3.1% | 39.2% |
| VIC | 138,036 | 7.4% | -5.0% |
| QLD | 87,307 | 4.7% | -8.2% |
| WA | 410,115 | 22.0% | 5.8% |
| SA | 920,261 | 49.3% | 18.2% |
| ACT | 777 | 0.0% | -92.1% |
| TAS | 248,178 | 13.3% | 179.9% |
| NT | 3,704 | 0.2% | 64.3% |
| **Total** | 1,866,148 | 100.0% | 20.5% |

# 4 Category Analysis
## Festivals (Contemporary Music)



### National Overview

- The Festivals (Contemporary Music) category experienced a significant increase in revenue by 26% to $100.7m and in attendance by 26.7% to 0.85m.
- The average ticket price increased by 0.9% to $126.68 in 2017.
- Festivals (Contemporary Music) contributed a share of 5.3% to the total revenue and 3.7% to the total attendance.
- NSW generates the highest market share in revenue (54.7%) and attendance (45.9%) in Festivals (Contemporary Music). NSW revenue in this category increased by 26.4% and attendance by 18.3%, primarily driven by growth in major festivals taking place in NSW including Splendour in the Grass, Bluesfest and Groovin' the Moo.
- Queensland was the second highest contributor (after NSW) to this category, with a 13.7% share in revenue and 17.5% share in attendance. Queensland recorded a 47% increase in revenue and 44.6% increase in attendance in this category, primarily driven by growth in major festivals that take place in Queensland including CMC Rocks Qld, Gympie Muster and Groovin' the Moo. ACT and Tasmania experienced significant growth in revenue (225.1% and 805.3% respectively) and attendance (158.2% and 233% respectively), primarily due to more events being recorded.
- NT experienced a decline in revenue by 94.2% and by 96.2% in attendance in 2017. This is due to less events taking place or being reported for NT in 2017. Data was not provided for the Darwin based BASSINTHEGRASS festival, and attendance and revenue for Festivals (Contemporary Music) will be lower as a result. Victoria also experienced a slight decline in revenue (5.1%) due to lower average ticket prices overall, despite an increase in attendance (42.9%) due to the growth in attendance of major festivals that take place in Victoria including St. Jerome's Laneway Festival and Groovin' the Moo.
- WA experienced slight declines in revenue (7.6%) and attendance (1.1%).

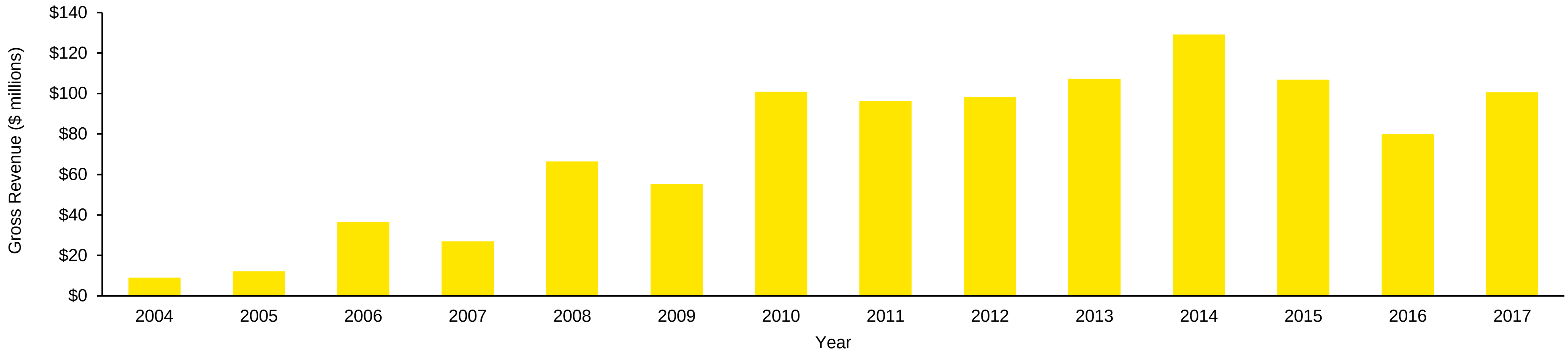
### Festivals (Contemporary Music)– Revenue and Attendance (2004 – 2017)

| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $9,015,128 | | 190,260 | | $54.69 | |
| 2005 | $12,128,384 | 34.5% | 269,208 | 41.5% | $63.05 | 15.3% |
| 2006 | $36,576,877 | 201.6% | 761,920 | 183.0% | $50.93 | -19.2% |
| 2007 | $26,972,082 | -26.3% | 753,247 | -1.1% | $39.00 | -23.4% |
| 2008 | $66,429,106 | 146.3% | 1,221,972 | 62.2% | $60.91 | 56.2% |
| 2009 | $55,275,589 | -16.8% | 800,145 | -34.5% | $81.19 | 33.3% |
| 2010 | $100,918,020 | 82.6% | 1,028,170 | 28.5% | $119.39 | 47.1% |
| 2011 | $96,453,486 | -4.4% | 984,946 | -4.2% | $138.97 | 16.4% |
| 2012 | $98,365,490 | 2.0% | 1,169,233 | 18.7% | $128.71 | -7.4% |
| 2013 | $107,367,780 | 9.2% | 1,053,419 | -9.9% | $130.46 | 1.4% |
| 2014 | $129,210,058 | 20.3% | 1,281,339 | 21.6% | $136.91 | 4.9% |
| 2015 | $106,825,241 | -17.3% | 1,300,025 | 1.5% | $117.72 | -14.0% |
| 2016 | $79,865,326 | -25.2% | 672,771 | -48.2% | $125.60 | 6.7% |
| 2017 | $100,657,080 | 26.0% | 852,628 | 26.7% | $126.68 | 0.9% |

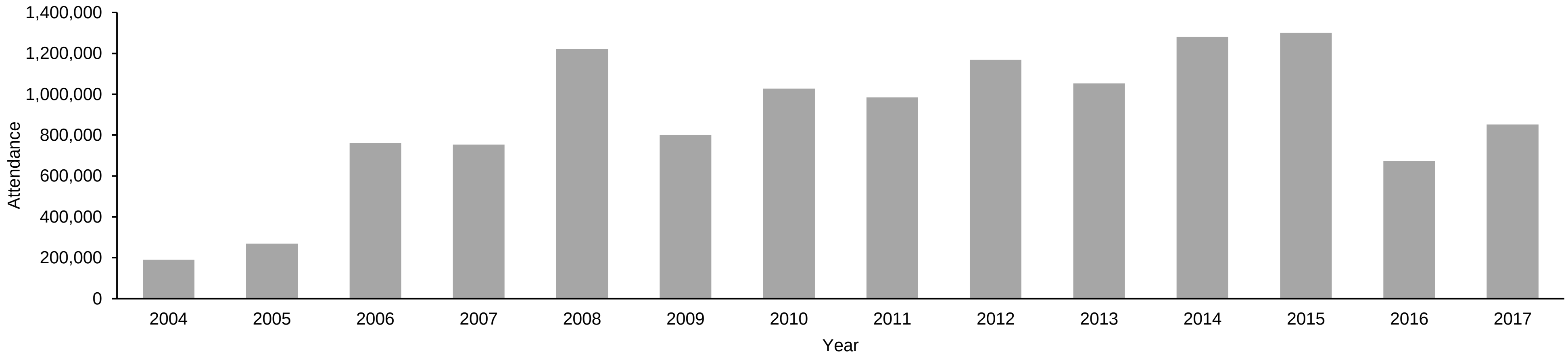
# 4 Category Analysis
## Festivals (Contemporary Music)



### Festivals (Contemporary Music) – Gross Revenue (2004-2017)



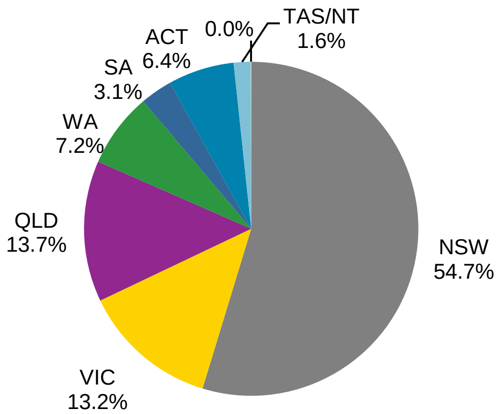

### Festivals (Contemporary Music) – Total Attendance (2004-2017)



# 4 Category Analysis
## Festivals (Contemporary Music)



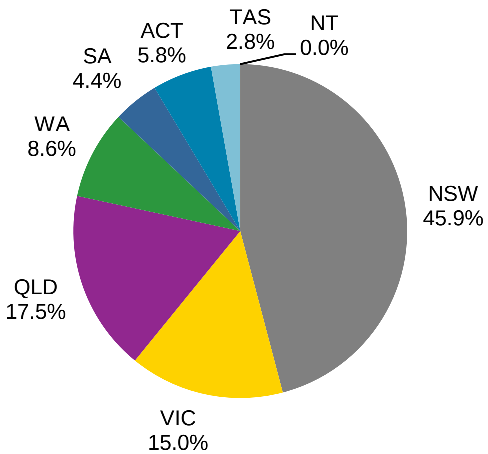
### Festivals (Contemporary Music) – Revenue by State/Territory




### Festivals (Contemporary Music) – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $55,062,137 | 54.7% | 26.4% |
| VIC | $13,311,335 | 13.2% | -5.1% |
| QLD | $13,748,705 | 13.7% | 47.0% |
| WA | $7,293,546 | 7.2% | -7.6% |
| SA | $3,116,202 | 3.1% | 35.1% |
| ACT | $6,433,244 | 6.4% | 225.1% |
| TAS | $1,659,803 | 1.6% | 805.3% |
| NT | $32,110 | 0.0% | -94.2% |
| **Total** | **$100,657,080** | **100.0%** | **26.0%** |

### Festivals (Contemporary Music) – Attendance by State/Territory




### Festivals (Contemporary Music) – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 391,310 | 45.9% | 18.3% |
| VIC | 127,719 | 15.0% | 42.9% |
| QLD | 149,220 | 17.5% | 44.6% |
| WA | 73,389 | 8.6% | -1.1% |
| SA | 37,794 | 4.4% | -6.6% |
| ACT | 49,193 | 5.8% | 158.2% |
| TAS | 23,677 | 2.8% | 233.0% |
| NT | 326 | 0.0% | -96.2% |
| **Total** | **852,628** | **100.0%** | **26.7%** |

# 4 Category Analysis
## Musical Theatre



### National Overview

- The Musical Theatre category experienced an increase in revenue by 19.9% from $347.7m in 2016 to $416.8m in 2017 and attendance by 22.6% from 3.3m in 2016 to 4.0m in 2017. The growth in revenue is slightly offset by the slight decrease in average ticket price by 1.4% from $111.21 in 2016 to $109.66 in 2017. 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 *The Book of Mormon*, *Aladdin*, *Beautiful: The Carole King Musical*, *Matilda*, *Kinky Boots, Muriel's Wedding* and *My Fair Lady*.
- Victoria generated the highest market share of revenue (49.3%) and attendance (47.6%) in Musical Theatre. Victoria recorded the highest growth in revenue (59.2%) and attendance (56.3%) in this category. Major musicals that performed in Victoria included *The Book of Mormon*, *My Fair Lady*, *Aladdin*, and *Kinky Boots*. Queensland experienced significant growth of 34.4% in revenue and 32.5% in attendance. Major musicals that performed in Queensland included *Kinky Boots*, *My Fair Lady*, *Matilda* and *The Bodyguard*.
- WA and SA experienced declines in revenue (40.2% and 2.4% respectively) and attendance (43.5% and 7.4% respectively) due to less major musical performances taking place in these states in 2017 compared to 2016. For example, in 2016 major musical *The Lion King* performed a season in Perth, and *The Sound of Music* performed in both WA and SA.
- NSW experienced a decrease in revenue by 6.5% despite moderate growth in attendance by 6%. Major musicals that performed in NSW included *Aladdin*, *Kinky Boots*, *Beautiful: The Carole King Musical*, *Muriel's Wedding* and *My Fair Lady*.

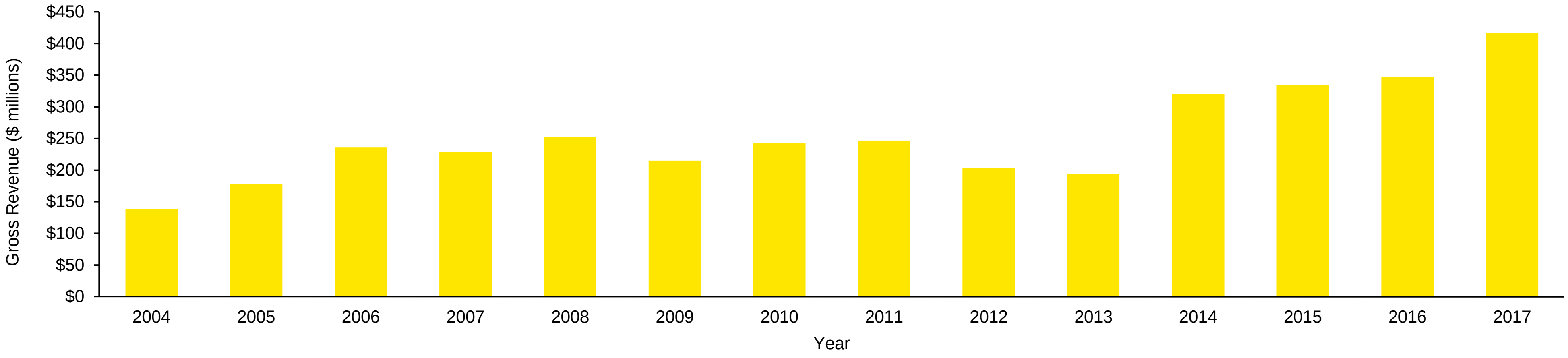
### Musical Theatre – Revenue and Attendance (2004 – 2017)

| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $138,718,880 | | 1,847,505 | | $76.34 | |
| 2005 | $178,032,172 | 28.3% | 2,460,314 | 33.2% | $76.01 | -0.4% |
| 2006 | $235,922,584 | 32.5% | 2,806,153 | 14.1% | $86.18 | 13.4% |
| 2007 | $228,854,618 | -3.0% | 3,358,727 | 19.7% | $70.50 | -18.2% |
| 2008 | $252,199,267 | 10.2% | 3,129,729 | -6.8% | $89.23 | 26.6% |
| 2009 | $214,959,848 | -14.8% | 2,458,212 | -21.5% | $93.54 | 4.8% |
| 2010 | $242,897,364 | 13.0% | 2,612,507 | 6.3% | $98.84 | 5.7% |
| 2011 | $246,792,376 | 1.6% | 2,799,918 | 7.2% | $92.79 | -6.1% |
| 2012 | $203,278,606 | -17.6% | 2,224,068 | -20.6% | $97.08 | 4.6% |
| 2013 | $193,389,763 | -4.9% | 2,085,131 | -6.2% | $100.94 | 4.0% |
| 2014 | $320,342,329 | 65.6% | 3,182,478 | 52.6% | $105.70 | 4.7% |
| 2015 | $334,869,038 | 4.5% | 3,258,734 | 2.4% | $108.13 | 2.3% |
| 2016 | $347,684,296 | 3.8% | 3,298,051 | 1.2% | $111.21 | 2.9% |
| 2017 | $416,802,525 | 19.9% | 4,041,827 | 22.6% | $109.66 | -1.4% |

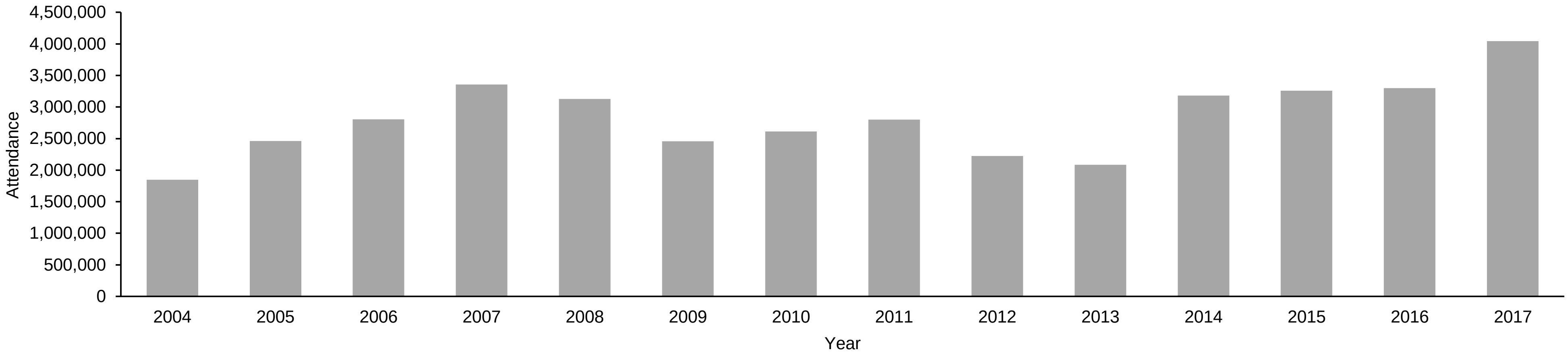
# 4 Category Analysis
## Musical Theatre



### Musical Theatre – Gross Revenue (2004-2017)



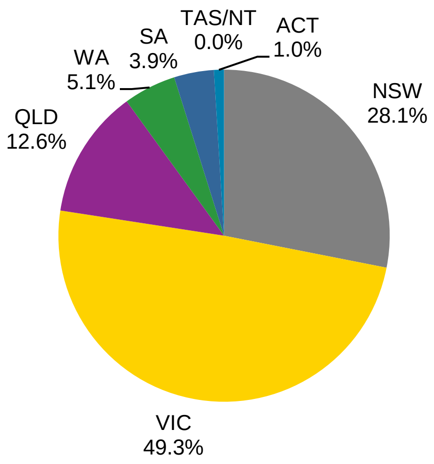

### Musical Theatre – Total Attendance (2004-2017)



# 4 Category Analysis
## Musical Theatre



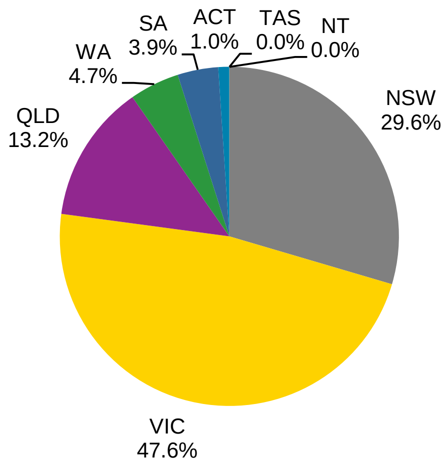
### Musical Theatre – Revenue by State/Territory




### Musical Theatre – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $117,076,415 | 28.1% | -6.5% |
| VIC | $205,633,762 | 49.3% | 59.2% |
| QLD | $52,407,074 | 12.6% | 34.4% |
| WA | $21,401,406 | 5.1% | -40.2% |
| SA | $16,176,774 | 3.9% | -2.4% |
| ACT | $4,098,263 | 1.0% | 112.4% |
| TAS | $0 | 0.0% | - |
| NT | $8,831 | 0.0% | 333.3% |
| **Total** | $416,802,525 | 100.0% | 19.9% |

### Musical Theatre – Attendance by State/Territory




### Musical Theatre – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 1,194,673 | 29.6% | 6.0% |
| VIC | 1,922,400 | 47.6% | 56.3% |
| QLD | 533,558 | 13.2% | 32.5% |
| WA | 191,912 | 4.7% | -43.5% |
| SA | 156,878 | 3.9% | -7.4% |
| ACT | 42,259 | 1.0% | 42.7% |
| TAS | - | 0.0% | - |
| NT | 147 | 0.0% | 98.6% |
| **Total** | 4,041,827 | 100.0% | 22.6% |

# 4 Category Analysis
## Opera



### National Overview

- Opera experienced a decline in ticket sales revenue by 21.4% from $46.2m in 2016 to $36.3m in 2017, with attendance declining by 9.5% from 0.41m in 2016 to 0.37m in 2017. The decrease in average ticket price by 20.8% from $145.80 in 2016 to $115.42 in 2017 further contributed to the decline in revenue.
- 94.6% of revenue and 90.4% 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 opera companies overall experienced a decrease in revenue by 22% and a decrease in attendance by 10%.
- Major opera performances in 2017 included *Carmen* (Opera on Sydney Harbour), *La Bohème*, *La Traviata*, *Tosca* and *Cavalleria Rusticana / Pagliacci* (Double Bill).
- NSW and Victoria generated the majority of Opera revenue and attendance, with a combined 89.3% of revenue market share (72.6% and 16.7% respectively) and 76% of attendance market share (57.8% and 18.2% respectively). All states and territories except Queensland (2.1%) and WA (37.3%) recorded declines in revenue in 2017 and in attendance only Queensland (31.3%) and NT (7.8%) reported growth.

### Opera – Revenue and Attendance (2004 – 2017)

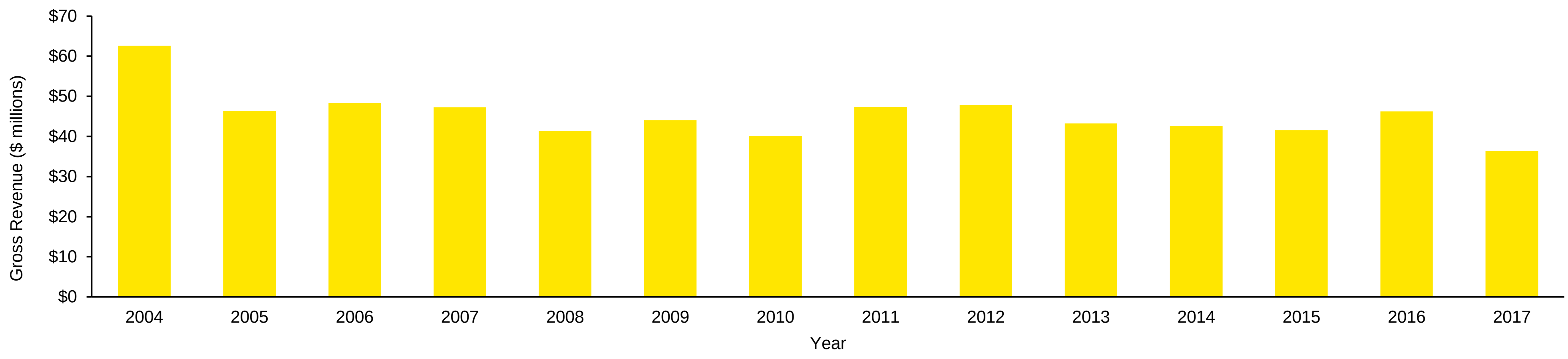
| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $62,562,433 | | 629,808 | | $108.88 | |
| 2005 | $46,390,544 | -25.8% | 531,595 | -15.6% | $94.38 | -13.3% |
| 2006 | $48,331,324 | 4.2% | 515,927 | -2.9% | $102.40 | 8.5% |
| 2007 | $47,249,031 | -2.2% | 591,605 | 14.7% | $85.28 | -16.7% |
| 2008 | $41,316,885 | -12.6% | 402,549 | -32.0% | $114.46 | 34.2% |
| 2009 | $44,044,808 | 6.6% | 448,096 | 11.3% | $111.62 | -2.5% |
| 2010 | $40,128,943 | -8.9% | 409,541 | -8.6% | $112.86 | 1.1% |
| 2011 | $47,305,786 | 17.9% | 439,041 | 7.2% | $124.66 | 10.5% |
| 2012 | $47,843,971 | 1.1% | 430,904 | -1.9% | $126.84 | 1.8% |
| 2013 | $43,283,705 | -9.5% | 344,761 | -20.0% | $145.28 | 14.5% |
| 2014 | $42,620,749 | -1.5% | 386,927 | 12.2% | $124.92 | -14.0% |
| 2015 | $41,505,346 | -2.6% | 433,198 | 12.0% | $121.43 | -2.8% |
| 2016 | $46,247,521 | 11.4% | 407,965 | -5.8% | $145.80 | 20.1% |
| 2017 | $36,349,186 | -21.4% | 369,228 | -9.5% | $115.42 | -20.8% |

# 4 Category Analysis

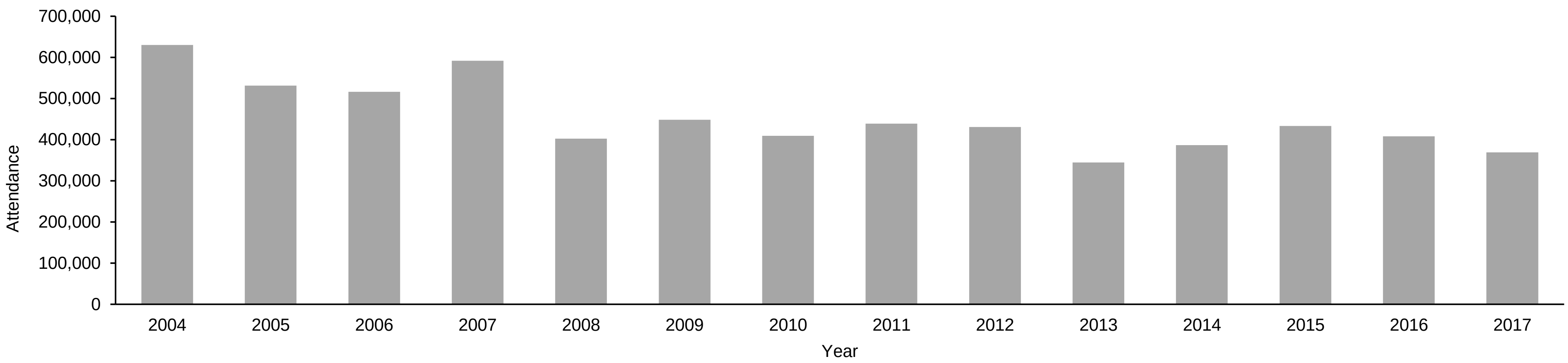
## Opera



### Opera – Gross Revenue (2004-2017)




### Opera – Total Attendance (2004-2017)

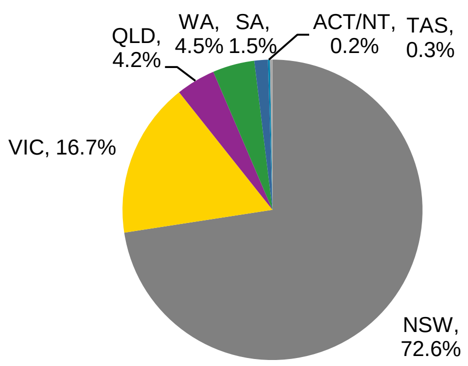


# 4 Category Analysis

## Opera



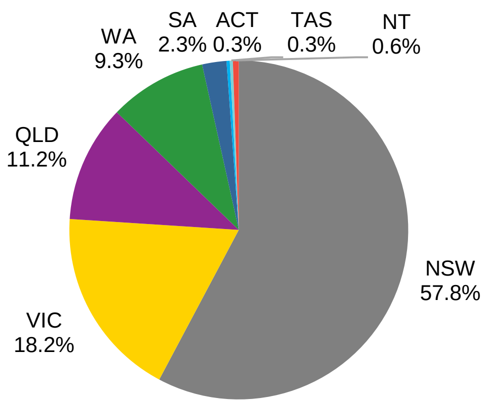
### Opera – Revenue by State/Territory




### Opera – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $26,377,416 | 72.6% | -13.2% |
| VIC | $6,084,818 | 16.7% | -46.8% |
| QLD | $1,540,034 | 4.2% | 2.1% |
| WA | $1,641,981 | 4.5% | 37.3% |
| SA | $529,674 | 1.5% | -60.9% |
| ACT | $77,934 | 0.2% | -72.2% |
| TAS | $97,329 | 0.3% | - |
| NT | - | 0.0% | -100.0% |
| **Total** | **$36,349,186** | **100.0%** | **-21.4%** |

### Opera – Attendance by State/Territory




### Opera – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 213,339 | 57.8% | -8.4% |
| VIC | 67,379 | 18.2% | -22.3% |
| QLD | 41,289 | 11.2% | 31.3% |
| WA | 34,392 | 9.3% | -2.7% |
| SA | 8,562 | 2.3% | -48.0% |
| ACT | 1,136 | 0.3% | -63.5% |
| TAS | 1,068 | 0.3% | - |
| NT | 2,063 | 0.6% | 7.8% |
| **Total** | **369,228** | **100.0%** | **-9.5%** |

# 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 decline in revenue by 82.8% from $29.3m in 2016 to $5.0m in 2017. Attendance in the Special Events category declined substantially by 26.1% from 0.19m in 2016 to 0.14m in 2017. The average ticket price decreased substantially by 70.5% from $170.90 in 2016 to $50.43 in 2017, which further contributed to the decline in revenue, driven by less major performances in this category compared to 2016. For example, the Royal Edinburgh Military Tattoo performed in 2016 and did not return in 2017.
- Examples of events which contributed to this category in 2017 were *Carols By Candlelight*, *Crossing Over with John Edward* and *Rockwiz Live*.

### Special Events – Revenue and Attendance (2004 – 2017)

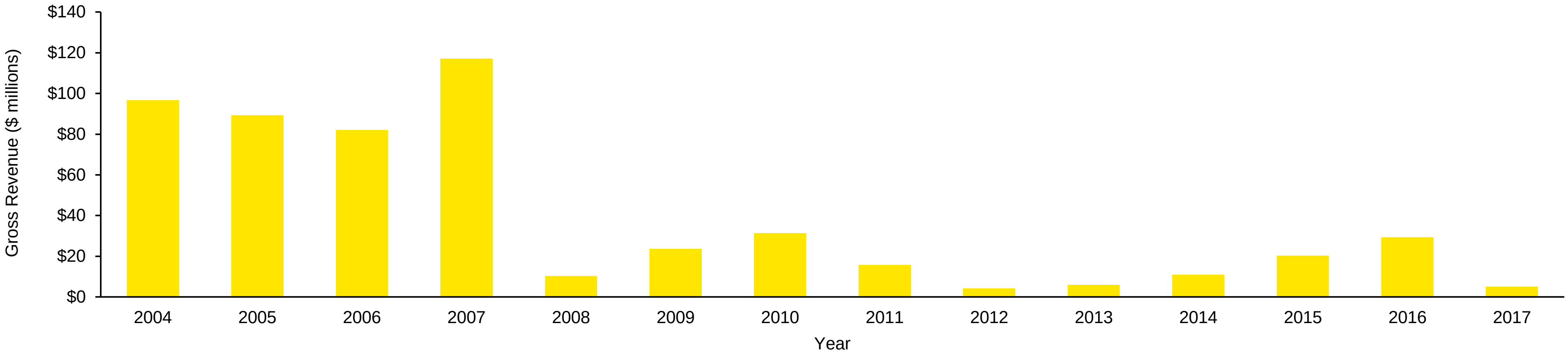
| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $96,706,366 | | 3,125,013 | | $45.43 | |
| 2005 | $89,357,246 | -7.6% | 2,992,097 | -4.3% | $31.50 | -30.7% |
| 2006 | $82,143,879 | -8.1% | 2,625,779 | -12.2% | $42.64 | 35.4% |
| 2007 | $117,203,892 | 42.7% | 3,453,077 | 31.5% | $48.56 | 13.9% |
| 2008 | $10,324,979 | -91.2% | 374,623 | -89.2% | $43.60 | -10.2% |
| 2009 | $23,602,096 | 128.6% | 559,434 | 49.3% | $67.79 | 55.5% |
| 2010 | $31,449,876 | 33.3% | 526,503 | -5.9% | $88.67 | 30.8% |
| 2011 | $15,799,946 | -49.8% | 370,239 | -29.7% | $57.28 | -35.4% |
| 2012 | $4,250,001 | -73.1% | 91,189 | -75.4% | $57.58 | 0.5% |
| 2013 | $6,030,274 | 41.9% | 113,294 | 24.2% | $73.18 | 27.1% |
| 2014 | $10,984,057 | 82.1% | 210,390 | 85.7% | $86.90 | 18.8% |
| 2015 | $20,340,607 | 85.2% | 556,914 | 164.7% | $42.26 | -51.4% |
| 2016 | $29,310,579 | 44.1% | 185,104 | -66.8% | $170.90 | 304.4% |
| 2017 | $5,049,945 | -82.8% | 136,871 | -26.1% | $50.43 | -70.5% |

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.

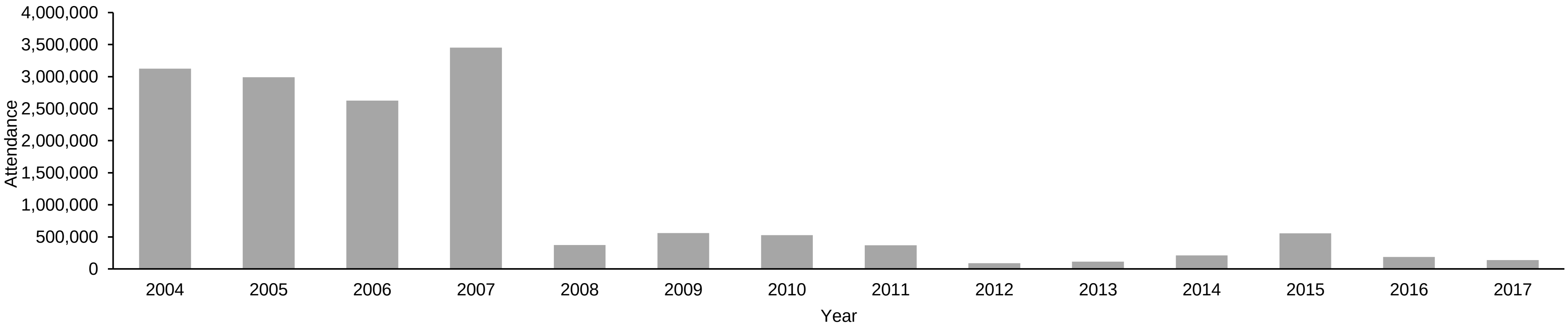
# 4 Category Analysis
## Special Events



### Special Events – Gross Revenue (2004-2017)



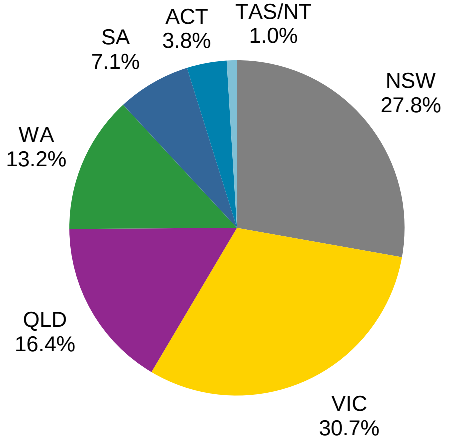

### Special Events – Total Attendance (2004-2017)



# 4 Category Analysis
## Special Events



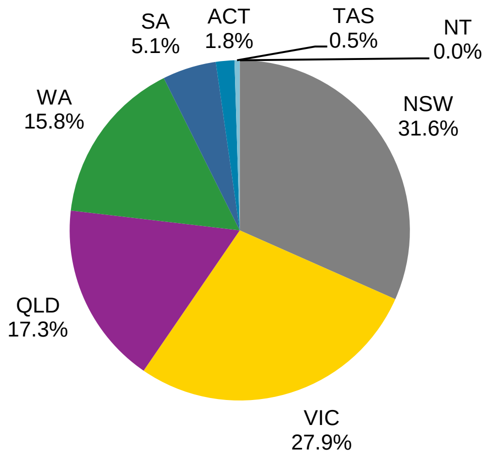
### Special Events – Revenue by State/Territory




### Special Events – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $1,403,702 | 27.8% | 373.5% |
| VIC | $1,551,509 | 30.7% | -94.4% |
| QLD | $827,222 | 16.4% | 7.9% |
| WA | $667,605 | 13.2% | 326.5% |
| SA | $356,526 | 7.1% | 117.2% |
| ACT | $194,042 | 3.8% | 102.9% |
| TAS | $49,339 | 1.0% | - |
| NT | $0 | 0.0% | - |
| **Total** | $5,049,945 | 100.0% | -82.8% |

### Special Events – Attendance by State/Territory




### Special Events – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 43,292 | 31.6% | 989.7% |
| VIC | 38,230 | 27.9% | -76.5% |
| QLD | 23,674 | 17.3% | 79.2% |
| WA | 21,592 | 15.8% | 1026.3% |
| SA | 6,996 | 5.1% | 234.4% |
| ACT | 2,409 | 1.8% | 108.6% |
| TAS | 678 | 0.5% | - |
| NT | - | 0.0% | - |
| **Total** | 136,871 | 100.0% | -26.1% |

# 4 Category Analysis

## Theatre



### National Overview

- The Theatre category experienced a decrease in ticket sales revenue by 19.3% from $79.6m in 2016 to $64.2m in 2017 despite moderate growth in attendance by 7.9% from $1.35m in 2016 to $1.46m in 2017. The decline in revenue was primarily attributed to the decline in average ticket prices by 26% from $66.51 in 2016 to $49.24 in 2017, as well as less major national commercial theatre tours in 2017 in comparison to 2016. For example, *Mrs Brown's Boys* which toured nationally in 2016 did not take place in 2017.
- 64.2% of revenue and 70.7% 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 theatre companies overall experienced a decrease in revenue by 16.9% and an increase in attendance by 15%.
- Major attractions included high-profile theatre productions such as the Melbourne season of Pop-Up Globe's *Much Ado About Nothing, As You Like It*, *Othello* and *Henry V*, as well as national tours of *1984* and *The Play That Goes Wrong*.
- Victoria was the only state or territory to experience a growth in revenue by 19.3%, primarily driven by the Melbourne season of the Pop-Up Globe. All the states and territories except NSW and Tasmania experienced growth in attendance. NSW and Victoria generated the majority of Theatre revenue and attendance, with a combined 77.9% of market share in revenue (36.1% and 41.8% respectively) and 74.5% of market share in attendance (37.8% and 36.7% respectively).

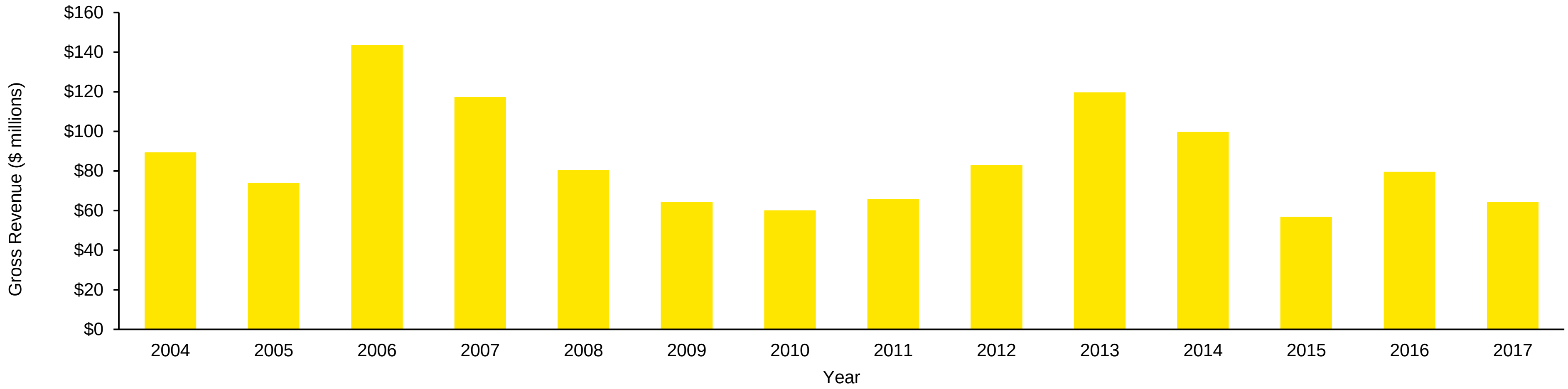
### Theatre – Revenue and Attendance (2004 – 2017)

| | Revenue | | Attendance | | Average Ticket Price | |
|---|---|---|---|---|---|---|
| Year | Revenue | Growth (%) | Total attendance | Growth (%) | Average Ticket Price | Growth (%) |
| 2004 | $89,417,616 | | 2,202,812 | | $43.87 | |
| 2005 | $73,988,892 | -17.3% | 2,117,854 | -3.9% | $38.04 | -13.3% |
| 2006 | $143,564,232 | 94.0% | 3,828,254 | 80.8% | $39.42 | 3.6% |
| 2007 | $117,382,525 | -18.2% | 2,505,458 | -34.6% | $50.42 | 27.9% |
| 2008 | $80,476,671 | -31.4% | 1,944,188 | -22.4% | $46.92 | -6.9% |
| 2009 | $64,440,541 | -19.9% | 1,602,591 | -17.6% | $46.58 | -0.7% |
| 2010 | $60,151,139 | -6.7% | 1,354,336 | -15.5% | $51.47 | 10.5% |
| 2011 | $65,880,712 | 9.5% | 1,380,622 | 1.9% | $56.14 | 9.1% |
| 2012 | $82,973,259 | 25.9% | 1,601,425 | 16.0% | $59.86 | 6.6% |
| 2013 | $119,647,414 | 44.2% | 1,842,177 | 15.0% | $72.88 | 21.8% |
| 2014 | $99,714,555 | -16.7% | 1,504,367 | -18.3% | $73.83 | 1.3% |
| 2015 | $56,831,724 | -43.0% | 1,135,128 | -24.5% | $56.81 | -23.0% |
| 2016 | $79,584,271 | 40.0% | 1,351,653 | 19.1% | $66.51 | 17.1% |
| 2017 | $64,217,536 | -19.3% | 1,457,962 | 7.9% | $49.24 | -26.0% |

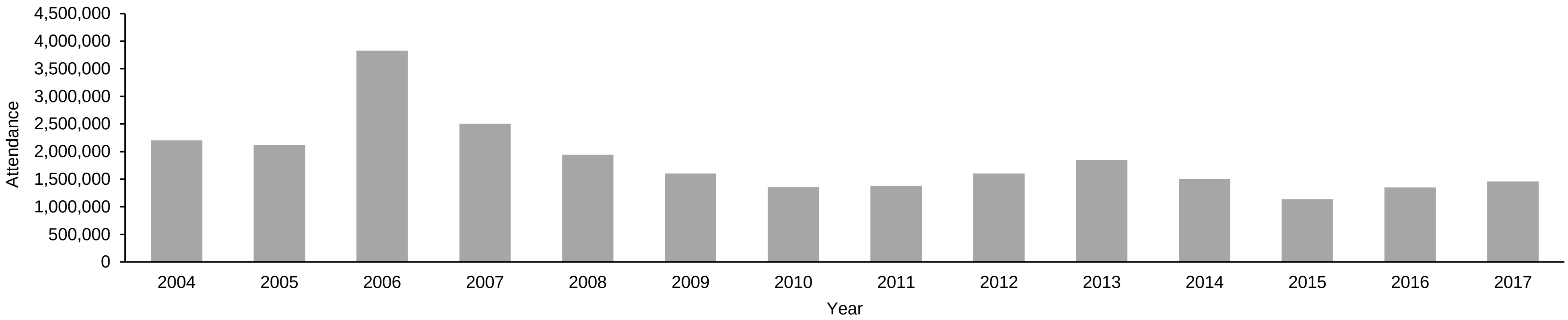
# 4 Category Analysis
## Theatre



### Theatre – Gross Revenue (2004-2017)



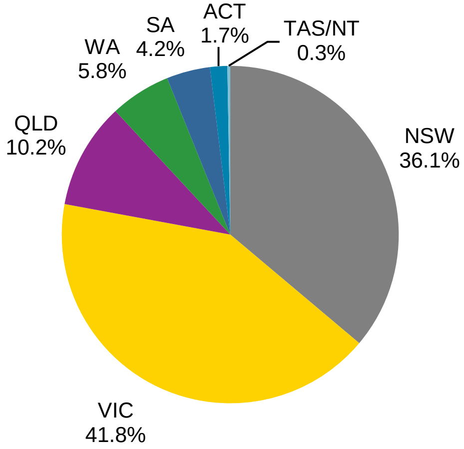

### Theatre – Total Attendance (2004-2017)



# 4 Category Analysis
## Theatre



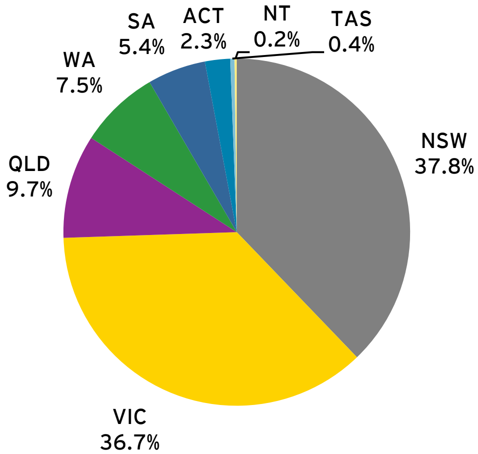
### Theatre – Revenue by State/Territory




### Theatre – Revenue by State/Territory

| State/ Territory | Revenue | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | $23,199,257 | 36.1% | -39.4% |
| VIC | $26,824,466 | 41.8% | 19.3% |
| QLD | $6,531,388 | 10.2% | -1.9% |
| WA | $3,734,090 | 5.8% | -39.3% |
| SA | $2,688,279 | 4.2% | -32.5% |
| ACT | $1,063,624 | 1.7% | -8.0% |
| TAS | $130,712 | 0.2% | -82.8% |
| NT | $45,721 | 0.1% | -39.5% |
| **Total** | $64,217,536 | 100.0% | -19.3% |

### Theatre – Attendance by State/Territory




### Theatre – Attendance by State/Territory

| State/ Territory | Attendance | Market share proportion | Change from 2016 (%) |
|---|---|---|---|
| NSW | 551,226 | 37.8% | -13.7% |
| VIC | 534,644 | 36.7% | 42.5% |
| QLD | 140,727 | 9.7% | 13.4% |
| WA | 109,067 | 7.5% | 3.7% |
| SA | 79,312 | 5.4% | 6.1% |
| ACT | 34,168 | 2.3% | 36.9% |
| TAS | 5,816 | 0.4% | -7.8% |
| NT | 3,002 | 0.2% | 39.6% |
| **Total** | 1,457,962 | 100.0% | 7.9% |

# 5

# Supplementary Data Providers

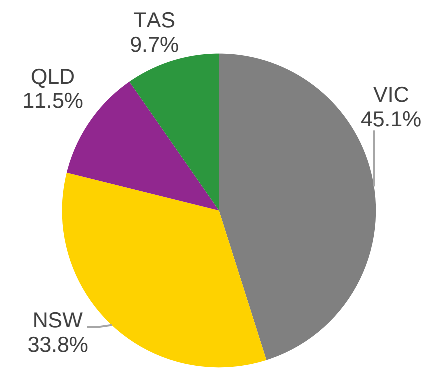
# 5 Supplementary Data Providers
## Analysis by State



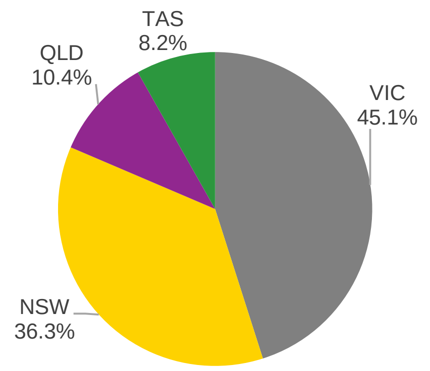
| Category | Attendance | | | Revenue |
|---|---|---|---|---|
| | Paid | Zero-Priced and Comps | Total | Total ticket Revenue* |
| VIC | 167,392 | 16,171 | 183,563 | 7,359,675 |
| NSW | 134,083 | 13,925 | 148,008 | 5,509,349 |
| QLD | 39,684 | 2,611 | 42,295 | 1,868,308 |
| TAS | 31,284 | 2,045 | 33,329 | 1,578,189 |
| **Total** | 372,443 | 34,752 | 407,195 | 16,315,520 |

- **Prior to 2017, this supplementary dataset was reported separately to the primary data and was referred to as "Supplementary" data. However, this year the supplementary data is incorporated along with the main data and also presented separately in this section. Supplementary data providers consist largely of participating regional venues, and a small number of metropolitan venues, that self-ticket (see Appendix A for participant list). The intention of this dataset is to increase representation in the Report of regional and metropolitan live performance activity. LPA and EY aim to continue to grow this dataset in future Reports.**
- Victoria represents the highest market share in revenue (45.1%) and in attendance (45.1%). Victoria reported $7.4m revenue and 0.18m attendance. Major performances include Carl Barron, Tina Arena and The Wiggles. NSW represents the second largest market share in revenue (33.8%) and in attendance (36.3%). NSW reported $5.5m revenue and 0.15m attendance. Major performances include *Rockwiz Live* and *iD* by Cirque Eloize. Combined, Victoria and NSW represent around 78.9% of the market share in revenue and 81.4% of total attendance.
- Queensland represents 11.5% market share in revenue and 10.4% in attendance. Queensland reported $1.9m revenue and 42.3k attendance. Major performances include *Rhythms of Ireland*, *Strassman's "iTedE"* and The Wiggles. Tasmania represents 9.7% market share in revenue and 8.2% in attendance. Tasmania reported $1.6m revenue and 33.3k attendance.
- Overall the supplementary data in total represents $16.3m in revenue and 0.4m in attendance. However, note that only live performance activity by participating self-ticketed regional and metropolitan venues are included in this Report.

### Market Share (Revenue) by State/Territory 2017




### Market Share (Attendance) by State/Territory 2017




*Total ticket revenue has been rounded to the nearest dollar

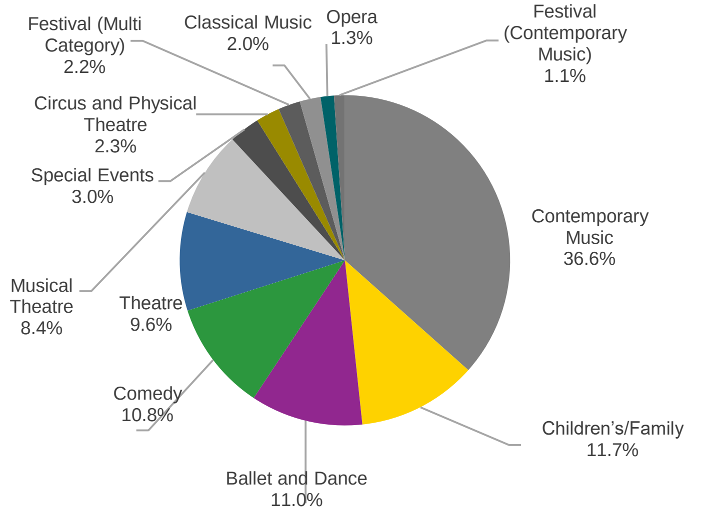
# 5 Supplementary Data Providers
## Analysis by Category



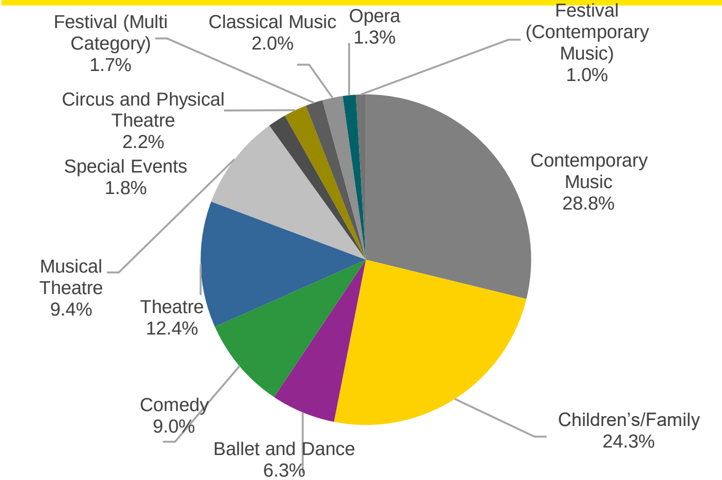
| Category | Attendance | | | Revenue |
|---|---|---|---|---|
| | Paid | Zero-Priced and Comps | Total | Total ticket Revenue* |
| Contemporary Music | 110,453 | 6,887 | 117,340 | 5,967,946 |
| Children's/Family | 88,799 | 10,061 | 98,860 | 1,914,690 |
| Ballet and Dance | 23,512 | 2,082 | 25,594 | 1,793,809 |
| Comedy | 35,143 | 1,385 | 36,528 | 1,756,512 |
| Theatre | 42,232 | 8,112 | 50,344 | 1,573,405 |
| Musical Theatre | 35,508 | 2,592 | 38,100 | 1,364,321 |
| Special Events | 6,722 | 476 | 7,198 | 491,652 |
| Circus and Physical Theatre | 8,495 | 649 | 9,144 | 381,768 |
| Festival (Multi Category) | 6,021 | 819 | 6,840 | 353,490 |
| Classical Music | 7,432 | 699 | 8,131 | 332,709 |
| Opera | 4,531 | 646 | 5,177 | 212,858 |
| Festival (Contemporary Music) | 3,595 | 344 | 3,939 | 172,362 |
| Total | 372,443 | 34,752 | 407,195 | 16,315,520 |

- Contemporary Music represents the highest market share in revenue (36.6%) and in attendance (28.8%). This category reported $6m in revenue and 0.12m attendance. Major performances included Tina Arena and the Apia Good Times Tour.
- Children's/Family events represent the second highest market share in revenue (11.7%) and attendance (24.3%). This category reported $1.9m revenue and 98.9k attendance. Major performances included The Wiggles and *Deadly 60 – Pole to Pole*.
- Ballet and Dance represents the third highest market share in revenue (11%) and sixth highest in attendance (6.3%). This category reported $1.8m revenue and 25.6k attendance.
- Opera and Festivals (Contemporary Music) generate the lowest revenue and attendance.

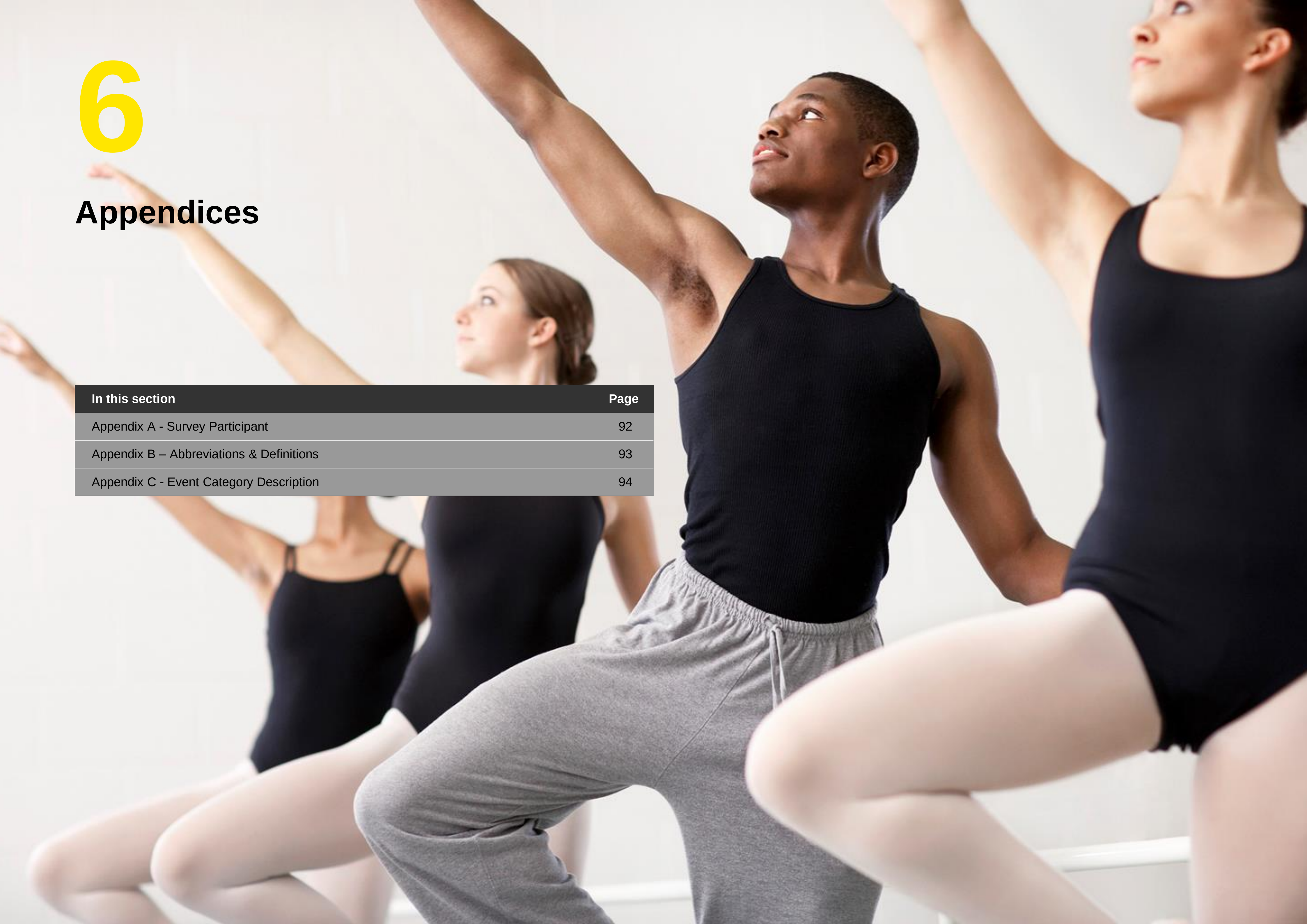
### Market Share (Revenue) by Category 2017




### Market Share by Attendance 2017




*Total ticket revenue has been rounded to the nearest dollar



# 6

# Appendices

# 6 Appendices

## Appendix A - Survey Participant



The following companies provided both gross revenue and attendance data to EY for the 2017 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)
Perth Theatre Trust
The Ticket Group (Moshtix)
Queensland Performing Arts Centre (Qtix)
Sydney Opera House
Ticketmaster
Ticketek

**Supplementary Data Providers:**

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

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

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## Appendix B – Abbreviations & Definitions



| Abbreviation | Definition |
|---|---|
| $ | Australian Dollar |
| % | Percentage |
| AMPAG | Australian Major Performing Arts Group |
| 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 |

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## Appendix C - Event Category Description



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

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