Live Performance Industry in Australia

2014 Ticket Attendance and Revenue Survey
Live Performance Australia

12 August 2015

Building a better working world

Building a better working world

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12 August 2015

Private and confidential

Dear Evelyn

Live Performance Industry in Australia: Ticket attendance and revenue survey

Further to the agreement between Ernst & Young (EY) and Live Performance Australia, we are pleased to present you with the final report for the 2014 Ticket Attendance and Revenue Survey Report (the "report"). We understand that the information contained within the report is to be used by Live Performance Australia as part of its own annual publication.

Restrictions on the report use

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

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

Basis of our work

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

If you would like to clarify any aspect of this study or discuss other related matters then please do not hesitate to contact me on (03) 9288 8830 or Matt Colston on (03) 9288 8628.

Yours sincerely

John Matthews
Partner

Matt Colston
Director

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Key findings

Background

This report presents the findings of ticket attendances and revenues for the Live Performance Industry for the 2014 calendar year. This follows on from the previous annual ticketing studies published by LPA since 2004, and by LPA in partnership with Ernst & Young (EY) since 2006. The Live Performance Industry encompasses performances, productions, previews and concerts that are performed in front of a live audience. Our analysis in this report groups events into 12 distinct categories based on the type of art form.

Overall results

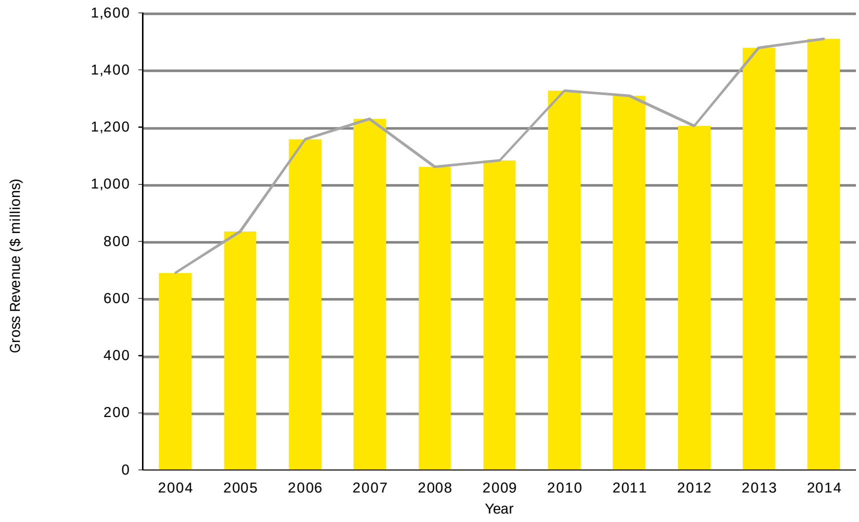
In 2014, growth in the Live Performance Industry subsided in what was overall a mixed year. Approximately 18.54 million tickets were issued to live entertainment events in Australia in 2014. This represents an increase of 3.4% on 2013 when 17.93 million tickets were issued to events. Ticket sales in 2014 generated total revenue of $1.51 billion, up 2% on 2013 when ticket sales totalled $1.48 billion. This increase in revenue occurred as a result of an increase in the total number of paid tickets, despite a decline in the average ticket price.

These gains were driven by the inclusion of four new data providers in the 2014 survey. On a like for like basis excluding the impact of these data providers, the Live Performance Industry experienced a slight decline in revenue (4.1%) and attendance (5%) between 2013 and 2014. Excluding the impact of the additional data providers, the total number of tickets issued in 2014 was 17.03 million, which generated total revenue of $1.42 billion. This result is consistent with a year of weaker consumer confidence across Australia. Consumer confidence measures the level of economic optimism that consumers have and as such, is an indicator of their willingness to spend. Overall, consumer confidence fell throughout 2014, ending the year at its lowest levels since 2011[1]. Despite the lower consumer confidence, the arts and recreation industry recorded positive productivity growth in 2013-14, outperforming other market sector industries such as retail trade and accommodation and food services[2].

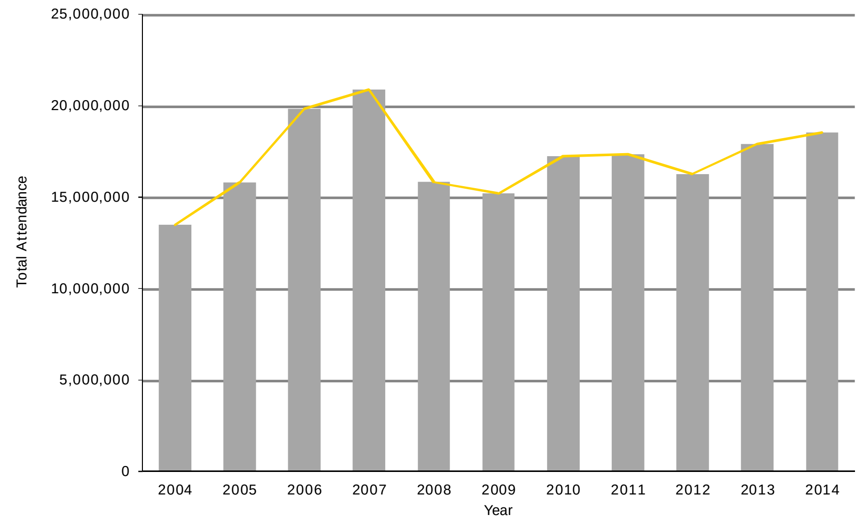
An analysis of longer term trends in the figures that follow provides an indication of how the Industry has performed in recent years. However, given the limitations outlined in Section 1.3, our trend analysis has only been performed on data from 2008 to 2014. The compound annual growth rates (CAGRs) for revenue and average ticket price between 2008 and 2014 were 6% and 3% respectively while the CAGR for attendance for the same period was 2.7%. In particular, average ticket price changes since 2008 have slightly outpaced the average annual inflation rate of 2.4% based on the consumer price index (CPI) over the same period.

[1] See for example The Westpac-Melbourne Institute Consumer Sentiment Index (http://melbourneinstitute.com/downloads/media_release/2014/CSI/PressReleaseCSI20141210.pdf)
[2] Productivity Commission 2015, PC Productivity Update

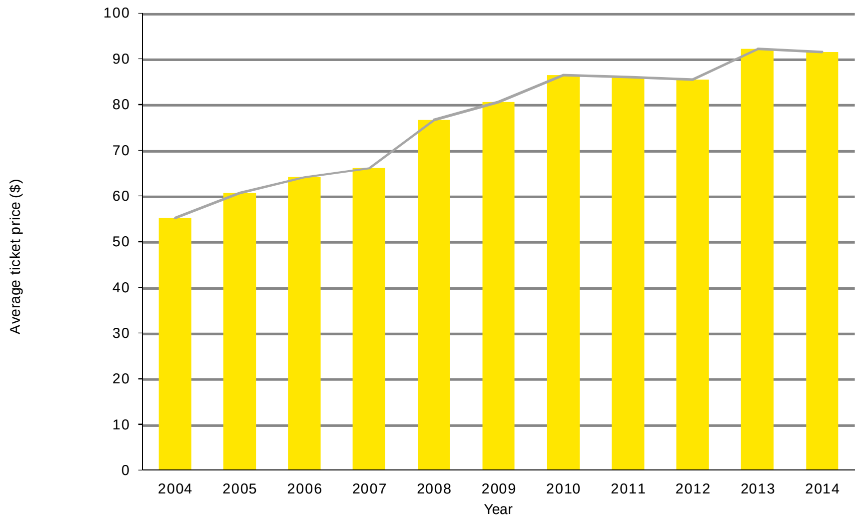
Total Revenue (2004-2014)



Total Attendances (2004-2014)



Average Ticket Price (2004-2014)



Result by State

Between 2013 and 2014, New South Wales experienced gains in terms of revenue, attendance and industry share. This was largely driven by growth in the Musical Theatre category, which included successful runs of *The Lion King* and *Strictly Ballroom* in Sydney. The Festivals (Multi-Category) and Circus and Physical Theatre categories also contributed to strong growth in New South Wales. In contrast, Victoria experienced declines on all three measures (revenue, attendance and industry share), with particularly significant declines experienced in the Contemporary Music and Circus and Physical Theatre categories. In particular, Cirque du Soleil did not return to Victoria in 2014, after performing two productions in 2013. In the Contemporary Music category, Pink did not return in 2014 after performing 18 shows in Melbourne in 2013, which helps to explain the decline in revenue and attendance in Victoria. Overall, the two states had combined revenue of $997.21 million and continued to account for approximately two-thirds of the entire Australian Live Performance Industry.

Across the other States and Territories, results were mixed. Notably, Tasmania and the Northern Territory experienced significant revenue growth (382.8% and 45.9% respectively). For Tasmania, at least part of this growth can be explained by the first time inclusion of data from Oztix and MONA[3]. In the Northern Territory, gains were driven by the Contemporary Music, Circus and Physical Theatre and Children's/Family categories. Each of those categories experienced an increase in the number of performances staged, with major shows including James Blunt and One Tropical Day (Contemporary Music), *Wunderkammer* by Circa (Circus and Physical Theatre), and The Wiggles and *Peppa Pig Live* (Children's/Family). South Australia also performed well, with an increase in revenue (7.5%) and attendance (7.8%). Attendance in Queensland also grew strongly (14.8%), but growth in revenue was unable to keep pace (1.9%). There were a number of categories that contributed to this movement in Queensland, including Comedy, Children's/Family, Opera and Festivals (Multi-Category). On the other hand, the Australian Capital Territory experienced a fall in both revenue and attendance, with the most significant decline occurring in the Circus and Physical Theatre category. Western Australia experienced a fall in revenue despite higher attendance, primarily due to a fall in the average ticket price in that State. There were multiple factors contributing to this result including the absence of any Cirque du Soleil performances, which generally have a high ticket price, and the inclusion of smaller performances through the Oztix data.

Table ES1: Total Revenue and Attendances by State/Territory (2013-2014)

State/ Territory	Revenue	Share of Industry (2014)	Share of Industry (2013)	Change in Revenue from 2013	Tickets	Share of Industry (2014)	Share of Industry (2013)	Change in Attendance from 2013
New South Wales	$547,173,799	36.3%	33.6%	10.0%	6,132,827	33.1%	32.7%	4.6%
Victoria	$450,034,039	29.8%	32.0%	-5.0%	5,318,537	28.7%	31.3%	-5.2%
Queensland	$203,918,468	13.5%	13.5%	1.9%	2,661,632	14.4%	12.9%	14.8%
Western Australia	$177,326,653	11.8%	13.1%	-8.7%	2,266,435	12.2%	12.0%	5.2%
South Australia	$100,944,048	6.7%	6.3%	7.5%	1,614,267	8.7%	8.4%	7.8%
ACT	$13,852,222	0.9%	1.0%	-8.3%	246,542	1.3%	2.0%	-29.8%
Tasmania	$11,600,525	0.8%	0.2%	382.8%	185,011	1.0%	0.4%	146.3%
Northern Territory	$3,114,197	0.2%	0.1%	45.9%	111,183	0.6%	0.3%	91.7%
Total	$1,507,963,952	100.0%	100.0%	2.0%	18,536,434	100.0%	100.0%	3.4%

A comparison of each state and territory's share of the Live Performance Industry against their population provides insight into spend per capita as well as the concentration of the industry relative to where people live. Table ES2 illustrates that Victoria, New South Wales and Western Australia command a larger share of both Live Performance revenue and attendance compared to their share of Australia's population. Although Victoria experienced a decline in revenue and attendance in

[3] MONA provided ticketing data for MONA FOMA and Dark Mofo, as well as some smaller Live Performance events.

2014, it still remained well above its share of the population and had the highest spend per capita both in 2014 and 2013. Across the other States and Territories, all had a smaller share of industry revenue compared to their population, although South Australia had a larger share of attendance.

Table ES2: Population and per capita results (2014)

State/Territory	Population (2014) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	7.57	32.0%	36.3%	33.1%	$73.29
Victoria	5.89	24.9%	29.8%	28.7%	$77.71
Queensland	4.75	20.1%	13.5%	14.4%	$43.47
Western Australia	2.58	10.9%	11.8%	12.2%	$69.52
South Australia	1.69	7.2%	6.7%	8.7%	$60.18
Australian Capital Territory	0.39	1.6%	0.9%	1.3%	$36.06
Tasmania	0.52	2.2%	0.8%	1.0%	$22.57
Northern Territory	0.24	1.0%	0.2%	0.6%	$12.84
Total	23.63	100%	100%	100%	$64.67

*Note: *Population is as of December 2014 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0*

Result by event category

As with previous years, the Contemporary Music and Musical Theatre categories represent the two largest categories in the industry, generating 40.1% and 21.2% of revenue, respectively. Combined, these two categories account for 61.4% of the Live Performance Industry in terms of gross revenue and 51.6% of total attendance. The top 3 revenue categories combined, which also includes Festivals (Single-Category), accounts for 70% of all industry revenue. The most significant gains were experienced by the Festivals (Multi-Category), Musical Theatre and Special Events categories.

The significant increases for Festivals (Multi-Category) can largely be explained by the inclusion of new data providers in 2014. *The Falls Music and Arts Festival* was included for the first time in 2014, and the significantly higher ticket prices for this festival contributed to strong gains in New South Wales, Victoria and Tasmania. In addition, the inclusion of *MONA FOMA* and *Dark Mofo* for the first time this year contributed to strong growth in Tasmania. The gains for Musical Theatre were primarily due to the number and calibre of performances, which included Disney's *The Lion King*, *Wicked, Grease*, *Les Misérables*, *Strictly Ballroom and The Rocky Horror Show*. This made 2014 the strongest year for Musical Theatre in terms of gross revenue since the survey began, although attendances were still slightly below those experienced in 2007. The Special Events category is also particularly variable from year to year as it is highly dependent on whether performances that cannot be classified into other categories take place. In particular, the *Mythbusters: Behind the Myths* show toured Australia for the first time in 2014, contributing to the strong growth in this category.

In contrast, the Circus and Physical Theatre category experienced some of the larger declines in both revenue and attendances, reversing the strong growth achieved in 2013. Although a number of shows returned in 2014, the category was unable to replicate its 2013 performance, which included two Cirque Du Soleil productions (*Ovo* and *Michael Jackson: The Immortal*), *Slava's Snowshow* and *Empire*. The Ballet and Dance and Theatre categories also experienced notable declines in revenue and attendance. For the Ballet and Dance category, there were declines in most states, with only Victoria and Tasmania achieving revenue growth. A number of popular international performances that occurred in 2013 did not return to Australia in 2014, including *Ballet Revolución*, *Stomp* and *Blaze*, along with tours by the Paris Opera Ballet and the Bolshoi Ballet. This helps to explain the decline in revenue and attendances. In the Theatre category, the declines were largely driven by the eastern states (New South Wales, Victoria and Queensland), with fewer performances staged by the AMPAG companies as well as fewer commercial performances.

Table ES3: Top 5 Categories – Revenue and Attendance

	Revenue			Attendance		
	Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
1	Contemporary Music	$604,963,041	40.1%	Contemporary Music	6,386,058	34.5%
2	Musical Theatre	$320,342,329	21.2%	Musical Theatre	3,182,478	17.2%
3	Festivals (Single-Category)	$129,210,058	8.6%	Theatre	1,504,367	8.1%
4	Theatre	$99,714,555	6.6%	Festivals (Single-Category)	1,281,339	6.9%
5	Classical Music	$64,870,493	4.3%	Children's/Family	1,214,273	6.6%

Table ES4: Top 3 Biggest Changes in Revenue by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2013	Category	Decrease from 2013
1	Festivals (Multi-Category)	86.6%	Circus and Physical Theatre	67.5%
2	Special Events	82.1%	Theatre	16.7%
3	Musical Theatre	65.6%	Ballet and Dance	16%

Table ES5: Top 3 Biggest Changes in Attendance by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2013	Category	Decrease from 2013
1	Special Events	85.7%	Circus and Physical Theatre	56.1%
2	Musical Theatre	52.6%	Ballet and Dance	21.3%
3	Festivals (Multi-Category)	34.7%	Theatre	18.3%

Table ES6: Total Revenue and Attendances by Category (2014)

Category	Revenue	% Change in Revenue (from 2013)	Share of Industry	Tickets	% Change in Attendance (from 2013)	Share of Industry
Ballet and Dance	$52,771,905	-16.0%	3.5%	767,890	-21.3%	4.1%
Children's/Family	$43,431,918	12.3%	2.9%	1,214,273	11.3%	6.6%
Circus and Physical Theatre	$46,094,984	-67.5%	3.1%	564,676	-56.1%	3.0%
Classical Music	$64,870,493	-8.0%	4.3%	1,015,122	-13.2%	5.5%
Comedy	$45,154,726	8.9%	3.0%	963,108	5.5%	5.2%
Contemporary Music	$604,963,041	-3.7%	40.1%	6,386,058	1.9%	34.5%
Festivals (Multi-Category)	$47,805,136	86.6%	3.2%	1,059,806	34.7%	5.7%
Festivals (Single-Category)	$129,210,058	20.3%	8.6%	1,281,339	21.6%	6.9%
Musical Theatre	$320,342,329	65.6%	21.2%	3,182,478	52.6%	17.2%
Opera	$42,620,749	-1.5%	2.8%	386,927	12.2%	2.1%
Special Events	$10,984,057	82.1%	0.7%	210,390	85.7%	1.1%
Theatre	$99,714,555	-16.7%	6.6%	1,504,367	-18.3%	8.1%
Total	$1,507,963,952	2.0%	100%	18,536,434	3.4%	100%

1. Introduction

1.1 Scope of work

Ernst & Young (EY) has been engaged by Live Performance Australia (LPA) to undertake a survey of ticket attendances and revenues for the Live Performance Industry for the 2014 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 promoters and the Australia Council for the Arts

- Compiling the 2014 national survey data on an overall basis, by state and by event category

- Performing an analysis of the 2014 national survey data on an overall basis (and in comparison to previous years), by state and by event category.

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

1.2 Approach

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

- The Adelaide Festival Centre Trust
- Araluen Centre for Arts & Entertainment NT
- The Arts Centre (Melbourne)
- Arts Projects Australia (WOMADelaide) SA
- Bluesfest
- Brisbane Powerhouse
- Canberra Ticketing
- Cirque du Soleil
- Darwin Entertainment Centre
- FringeTIX (Adelaide Fringe)
- Fringe World Festival (Perth)
- Hayes Theatre Co
- Melbourne Recital Centre
- MONA[4]
- Oztix
- The Ticket Group (previously Moshtix and Foxtix)
- Queensland Performing Arts Centre (Qtix)
- Sydney Opera House
- Ticketmaster
- Ticketek.

These companies were identified by LPA and provided both gross revenue and attendance data to EY for the 2014 calendar year. Gross revenue comprised revenue sourced from paid tickets only (i.e. it

[4] Data relating to Live Performance events only, as outlined in Section 1.4.

excludes sponsorships); while the attendance data provided and applied in the analysis included both paid and non-paid tickets[5]. Average ticket price data was calculated based on paid tickets only.

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

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

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

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

Table 1: Category descriptor guide (2014)

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

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

Category	Description
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
Festivals (Single-Category)	Festivals/events which contain a number of events but which fall into one category only
Musical Theatre	Staged productions which include music/drama/movement in popular form, primarily (but not limited to): Musicals 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

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

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

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

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

1.3 Limitations

As with previous studies, data on ticket revenues and attendances for the Live Performance Industry was limited to that provided by the Survey participants. While national in reach, the coverage of this Survey excludes events in some regional venues, free performances, and also schools' performances of the AMPAG companies. Small to medium companies and independent theatre are also under-represented as many of these companies either self-ticket or use ticketing service providers and venues not currently involved in the Survey. To capture these types of live performance events LPA and EY are producing a supplementary ticket attendance and revenue report for 2014 that will include data from the following organisations:

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

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

As part of our analysis, the 2014 data was compared against historical data sourced directly from Live Performance Australia's *Live Performance Industry in Australia 2006 - 2013 Reports*. EY note that we did not revisit the data collection and allocation methodology used in 2006 and 2007 as the historical data used to prepare the reports in these years was not provided in a disaggregated format. As such, EY was unable to query the accuracy of the allocation of events in these years.

Therefore caution should be applied when comparing data from 2008 to 2014 with data from previous years as inconsistencies may exist in the data collection methodology between the surveys performed in these seven years, and for previous surveys (where more detailed event specific information was not requested).

1.4 Changes in the 2014 Survey compared to prior years

We have made the following changes to the Survey in 2014 when compared to prior years:

- The inclusion of data from Brisbane Powerhouse, which included events across most categories.
- The inclusion of data from Hayes Theatre Co. This Sydney-based venue predominantly presents small-scale musical theatre and cabaret.
- The inclusion of data from MONA. MONA provided ticketing information for *MONA FOMA* and *Dark MOFO* in the category of Festivals (Multi-Category) as well as some smaller events in the Contemporary Music and Special Events categories.
- The inclusion of data from Oztix. Oztix provided ticketing information for events in most categories, with an emphasis on Contemporary Music and Festivals (Single-Category).

On a like for like basis excluding the impact of the above mentioned additions, the total number of tickets issued in 2014 was 17.03 million, which generated total revenue of $1.42 billion.

When comparing 2014 data with that from previous years, the following should be noted in addition to the above changes:

- Fringe Tix (Adelaide Fringe Festival), Fringe World and Bluesfest were new ticket providers in 2013, somewhat addressing the under reporting in the festivals categories.

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

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

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

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

2. Ticket attendance and revenue results

2.1 Overview

In 2014, growth in the Live Performance Industry subsided following strong gains in 2013. The modest growth that was achieved is attributable to the inclusion of new data providers; removing their impact, the Industry experienced a slight decline in real terms. This result is consistent with a year of weaker consumer confidence across Australia. Consumer confidence measures the level of economic optimism that consumers have and as such, is an indicator of their willingness to spend. Overall, consumer confidence fell throughout 2014, ending the year at its lowest levels since 2011[6]. Despite the lower consumer confidence, the arts and recreation industry recorded positive productivity growth in 2013-14, outperforming other market sector industries such as retail trade and accommodation and food services[7].

Results across the categories were mixed. The Musical Theatre, Special Events and Festivals (Single-Category) categories achieved strong growth. Reasons for these gains varied. In the Musical Theatre category, there were a large number of high calibre performances that drew large audiences, including *The Lion King, Les Misérables, Grease, Wicked, Strictly Ballroom and The Rocky Horror Show*. The Special Events category tends to be volatile and is dependent on the number of performances that cannot be classified. In particular, the national tour of *Mythbusters Live* in 2014 contributed to the strong growth in this category. The increase for Festivals (Single-Category) was in part due to the first time inclusion of Oztix in the 2014 survey.

On the other hand, the Circus and Physical Theatre category experienced the largest decline in both revenue and attendances. The decline was in part due to the reduction in the number of Cirque du Soleil performances, but was further exacerbated by a number of other major performances not returning in 2014 including *Slava's Snowshow* and *Empire*.

2.2 Analysis of overall trends

In 2014, approximately 18.54 million tickets were issued to live performance events in Australia. This represents an increase of 3.4% on 2013 when 17.93 million tickets were issued to events. Of the 18.54 million total tickets, the number of paid tickets was 16.47 million, a slight increase from 16.05 million in 2013. The remaining 2.07 million issued in 2014 were complimentary, sponsor and zero-priced tickets[8], a rise from 1.88 million in 2013.

Ticket sales in 2014 generated total revenue of $1.51 billion, up 2% on 2013, when ticket sales totalled $1.48 billion. This increase in revenue occurred as a result of an increase in the total number of paid tickets, despite a decline in the average ticket price.

An analysis of longer term trends provides an indication of how the Industry has performed in recent years. However, given the limitations outlined in Section 1.3, our trend analysis has only been performed on data from 2008 to 2014. Between 2008 and 2014, industry revenue has increased by 42%, despite falling in 2011 and 2012. Over the same period, total attendance increased by 17%. The compound annual growth rates (CAGRs) for revenue and average ticket price between 2008 and 2014 were 6% and 3% respectively while the CAGR for attendance for the same period was 2.7%. In particular, average ticket price changes since 2008 have slightly outpaced the average annual inflation rate of 2.4% based on the consumer price index (CPI) over the same period. However, these trends do not account for the inclusion of new data providers over time. On a like for like basis, industry revenue increased by 21% between 2008 and 2014, with a CAGR of 3.2% and total attendance experienced a slight decline of approximately 6%.

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[6] See for example The Westpac-Melbourne Institute Consumer Sentiment Index (http://melbourneinstitute.com/downloads/media_release/2014/CSI/PressReleaseCSI20141210.pdf)

[7] Productivity Commission 2015, PC Productivity Update

[8] It is industry practice to issue sponsor tickets at zero priced, but these are effectively paid tickets via the sponsorship agreements. In this analysis, the ticketing revenue excludes any sponsorship revenue.

Table 2 summarises the changes in revenue, tickets and ticket price between 2004 and 2014.

Table 2: Total Revenue, Attendance and Average Ticket Price (2004-2014)

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

**Based on both paid and unpaid tickets*

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

Figure 1: Total Revenue (2004-2014)

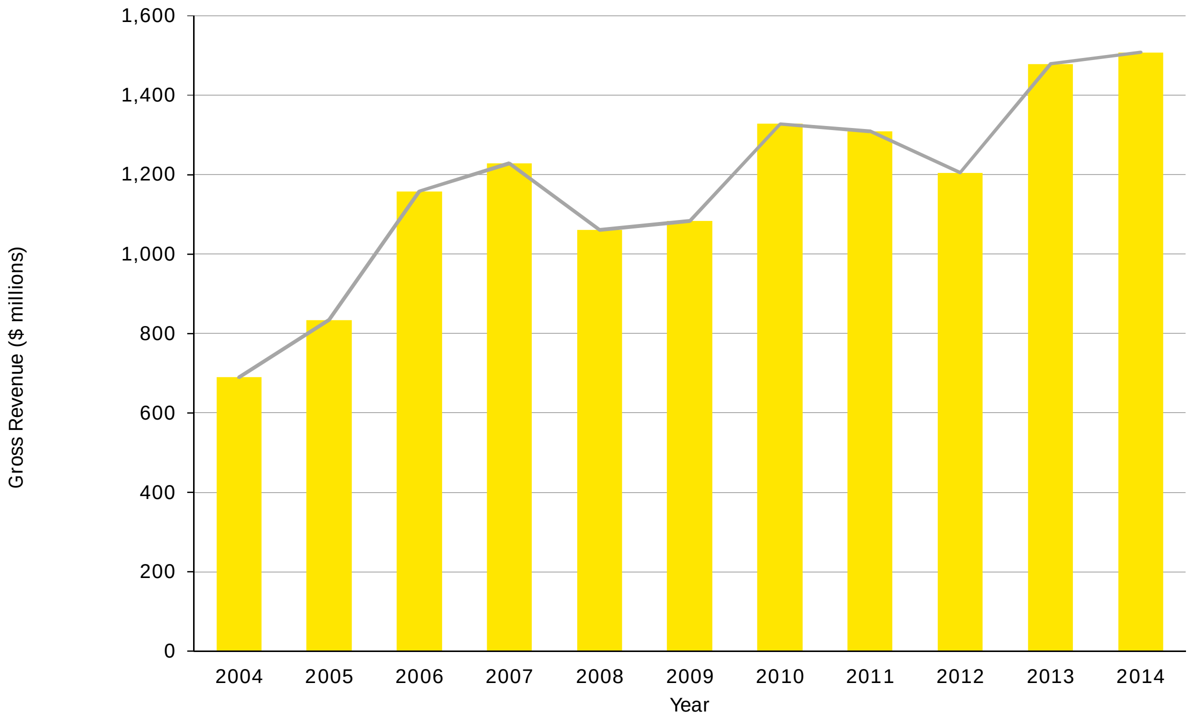


Figure 2: Total Attendances (2004-2014)

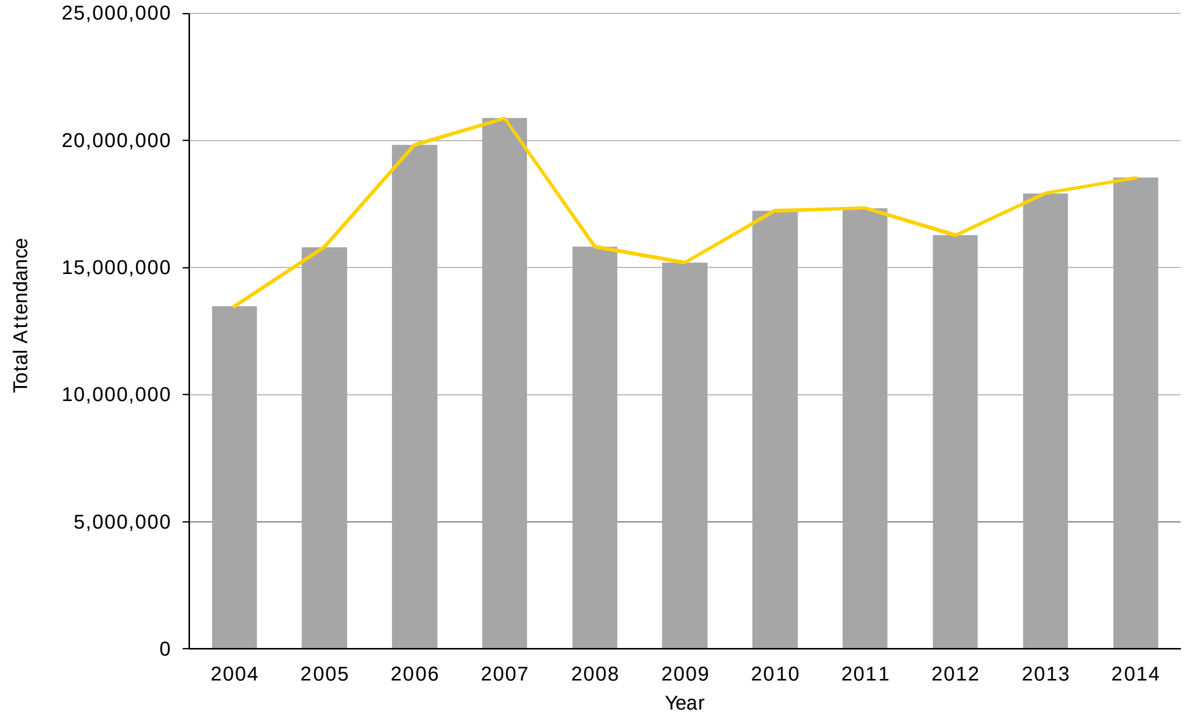
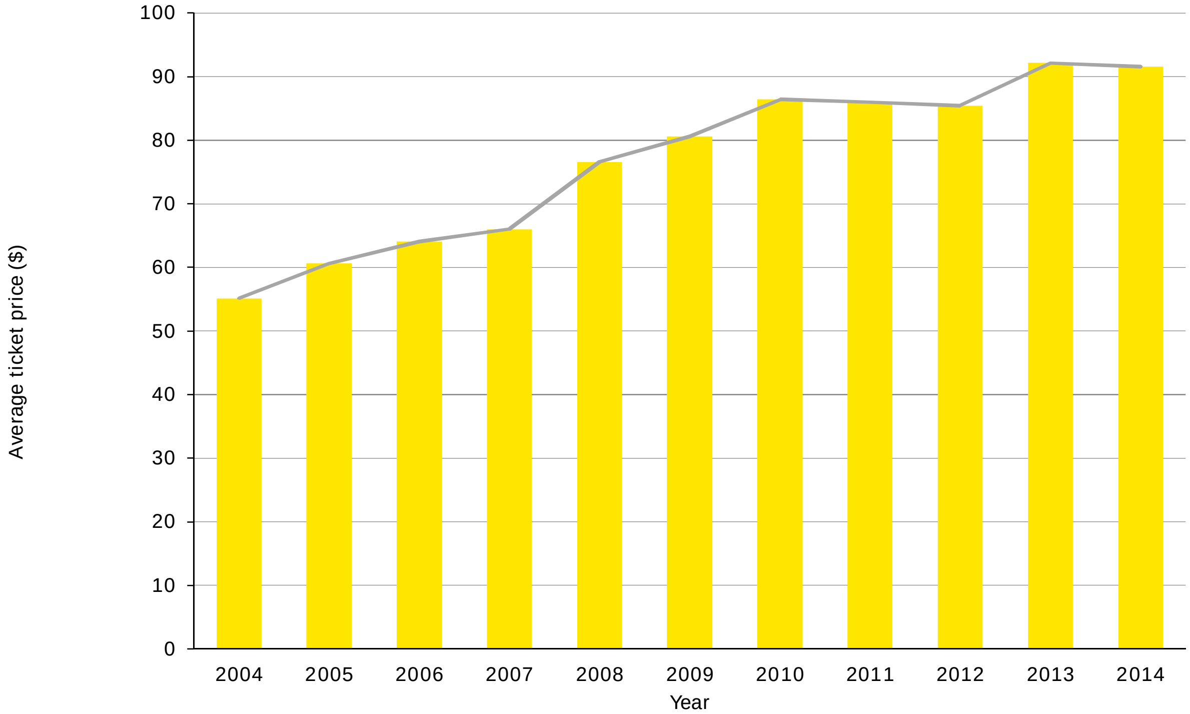


Figure 3: Average Ticket Price (2004-2014)



3. Revenue and attendance by state

3.1 Overall results

This section presents the revenues and attendances for all eight states and territories within Australia for 2014 as detailed in Table 3 below.

Between 2013 and 2014, New South Wales experienced gains in terms of revenue, attendance and industry share. This was largely driven by growth in the Musical Theatre category, which included successful runs of *The Lion King* and *Strictly Ballroom* in Sydney. The Festivals (Multi-Category) and Circus and Physical Theatre categories also contributed to strong growth in New South Wales. For Festivals (Multi-Category) this was largely due to the inclusion of *The Falls Music and Arts Festival* for the first time in 2014. In the Circus and Physical Theatre category, the strong results can largely be explained by Cirque du Soleil's performances of *Totem*.

In contrast, Victoria experienced declines on all three measures (revenue, attendance and industry share), with particularly significant declines experienced in the Contemporary Music and Circus and Physical Theatre categories. In particular, Cirque du Soleil did not return to Victoria in 2014, after performing two productions in the State during 2013. In the Contemporary Music category, Pink did not return in 2014 after performing 18 shows in Melbourne in 2013, which helps to explain the decline in revenue and attendance in Victoria. Overall, New South Wales and Victoria had combined revenue of $997.21 million and continued to account for approximately two-thirds of the entire Australian Live Performance Industry.

Across the other States and Territories, results were mixed. Notably, Tasmania and the Northern Territory experienced significant revenue growth (382.8% and 45.9% respectively). For Tasmania, at least part of this growth can be explained by the first time inclusion of data from Oztix and MONA. In the Northern Territory, gains were driven by the Contemporary Music, Circus and Physical Theatre and Children's/Family categories. Each of those categories experienced an increase in the number of performances staged, with major shows including James Blunt and One Tropical Day (Contemporary Music), *Wunderkammer* by Circa (Circus and Physical Theatre), and The Wiggles and *Peppa Pig Live* (Children's/Family). South Australia also performed well with increases in revenue (7.5%) and attendance (7.8%). Attendance in Queensland also grew strongly (14.8%), but growth in revenue was unable to keep pace (1.9%). There were a number of categories that contributed to this movement in Queensland, including Comedy, Children's/Family, Opera and Festivals (Multi-Category). On the other hand, the Australian Capital Territory experienced a fall in both revenue and attendance, with the most significant decline occurring in the Circus and Physical Theatre category. Western Australia experienced a fall in revenue despite higher attendance, primarily due to a fall in the average ticket price in that State. There were multiple factors contributing to this result including the absence of any Cirque du Soleil performances, which generally have a high ticket price, and the inclusion of smaller performances through the Oztix data.

Figure 6 and Figure 7 illustrate the year on year changes in revenue and attendance while Figure 8 and Figure 9 summarise revenue and attendance by State and Territory between 2009 and 2014. Table 6 and Table 7 provide a breakdown of total revenue and attendance by Category and State/Territory.

Table 3: Total Revenue and Attendances by State/Territory (2013-2014)

State/Territory	Revenue	Share of Industry (2014)	Share of Industry (2013)	Change in Revenue from 2013	Tickets	Share of Industry (2014)	Share of Industry (2013)	Change in Attendance from 2013
New South Wales	$547,173,799	36.3%	33.6%	10.0%	6,132,827	33.1%	32.7%	4.6%
Victoria	$450,034,039	29.8%	32.0%	-5.0%	5,318,537	28.7%	31.3%	-5.2%
Queensland	$203,918,468	13.5%	13.5%	1.9%	2,661,632	14.4%	12.9%	14.8%
Western Australia	$177,326,653	11.8%	13.1%	-8.7%	2,266,435	12.2%	12.0%	5.2%
South Australia	$100,944,048	6.7%	6.3%	7.5%	1,614,267	8.7%	8.4%	7.8%
Australian Capital Territory	$13,852,222	0.9%	1.0%	-8.3%	246,542	1.3%	2.0%	-29.8%
Tasmania	$11,600,525	0.8%	0.2%	382.8%	185,011	1.0%	0.4%	146.3%
Northern Territory	$3,114,197	0.2%	0.1%	45.9%	111,183	0.6%	0.3%	91.7%
Total	$1,507,963,952	100.0%	100.0%	2.0%	18,536,434	100.0%	100.0%	3.4%

Figure 4: Market Share (Revenue) by State/Territory (2014)

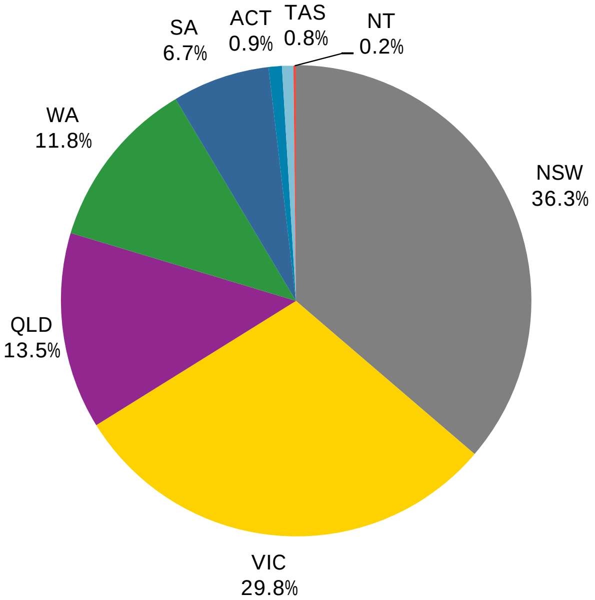


Figure 5: Market Share (Attendance) by State/Territory (2014)

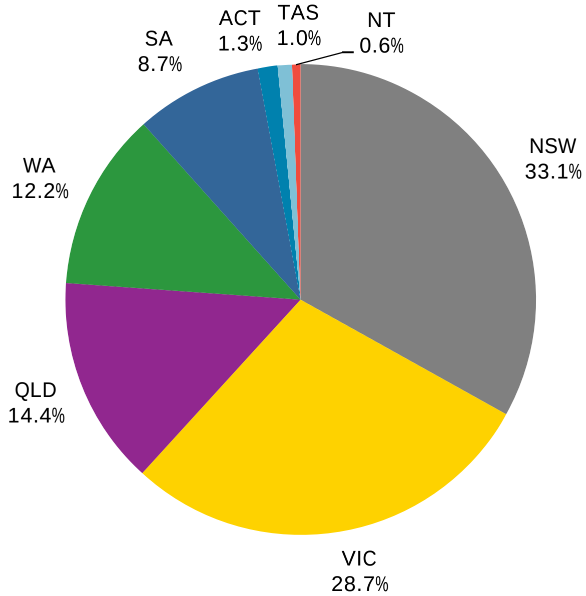


Figure 6: Percentage Movement in Revenue by State/Territory (2013-14)

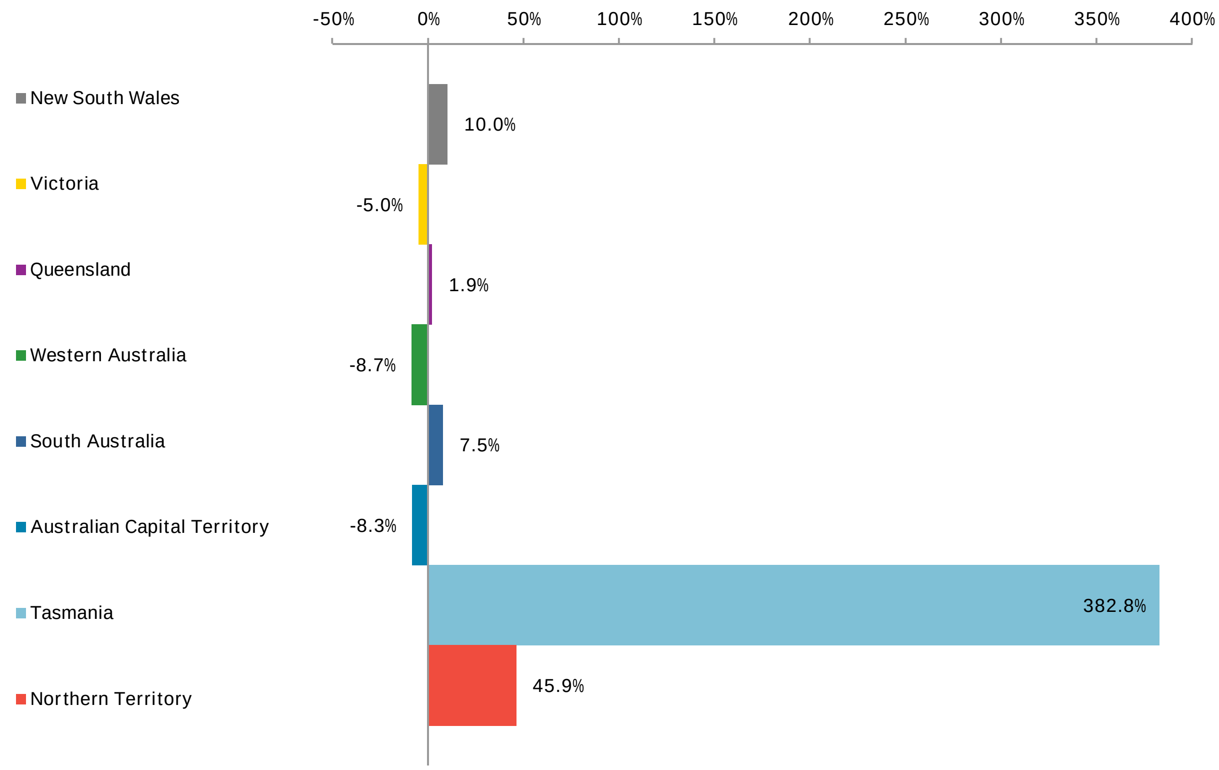


Figure 7: Percentage Movement in Attendance by State/Territory (2013-14)

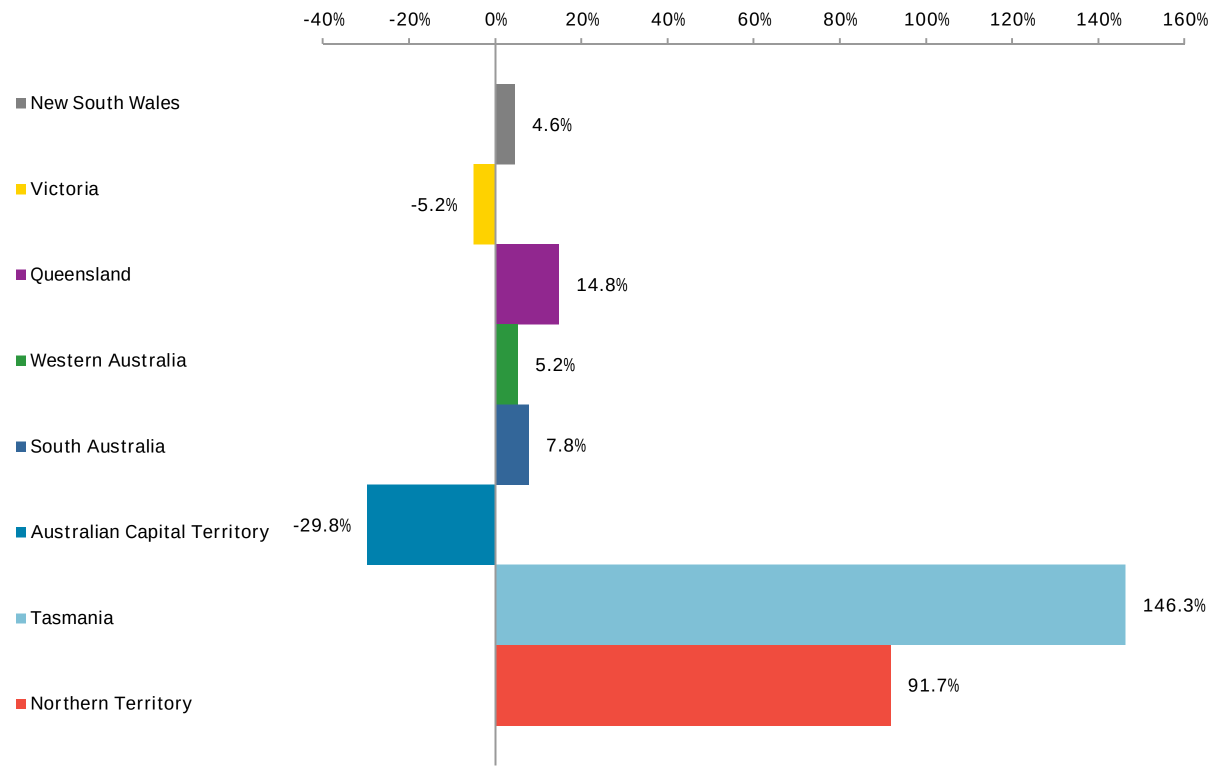


Figure 8: Total Revenue by State/Territory (2009-2014)

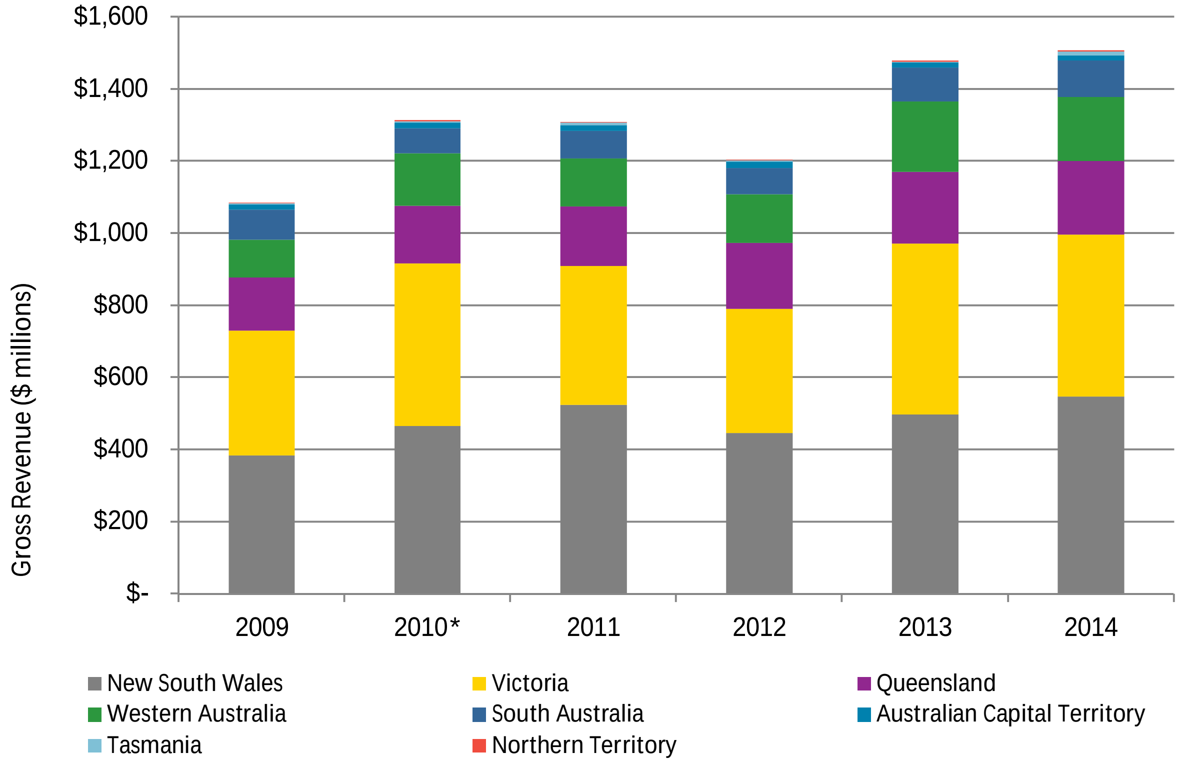
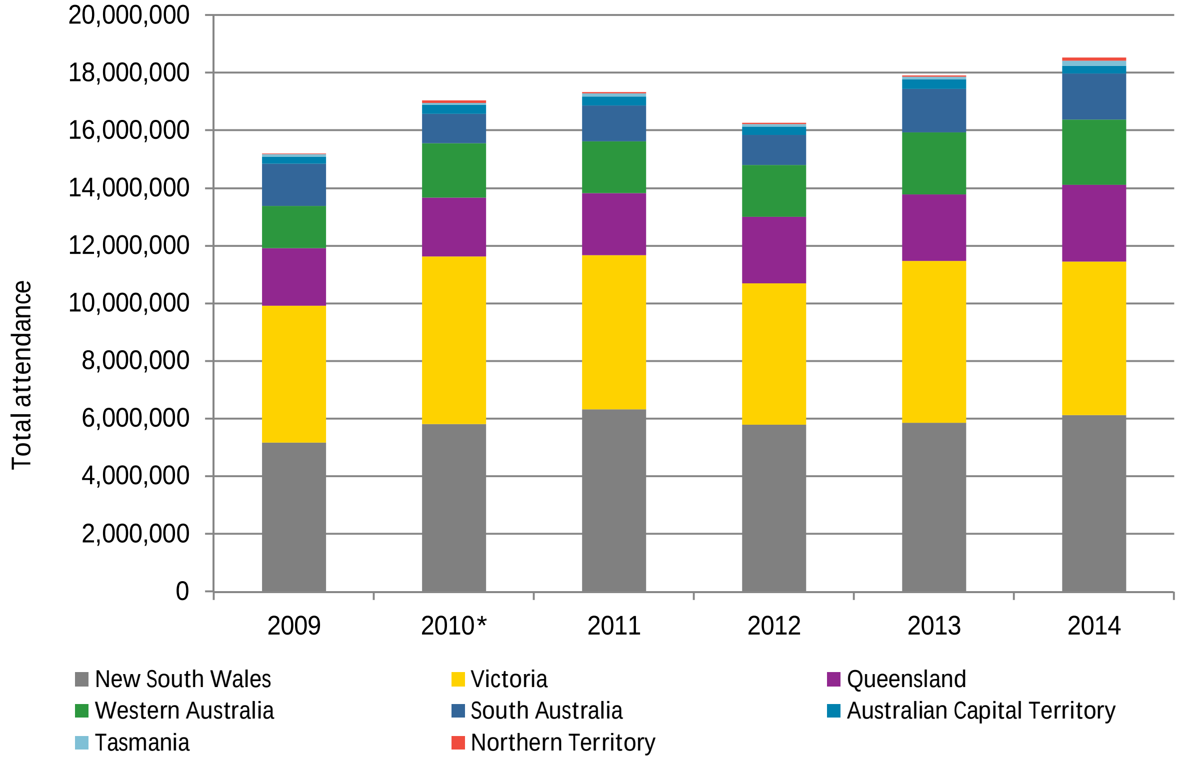


Figure 9: Total Attendance by State/Territory (2009-2014)



** Revenue and attendance for events unallocated by State/Territory in 2010 is not shown, accounting for $14.11 million in revenue and 183,603 tickets.*

Table 4: Total Revenue by State/Territory (2009-2014) ($ millions)

	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
2009	$383.71	$347.31	$146.57	$105.31	$82.33	$14.15	$3.54	$0.41	$1,083.33
2010*	$465.76	$451.05	$160.52	$145.48	$68.54	$15.25	$3.78	$3.31	$1,327.81
2011	$523.90	$385.64	$165.84	$131.94	$77.22	$16.18	$6.74	$1.73	$1,309.19
2012	$446.06	$344.39	$183.78	$134.13	$73.54	$17.29	$4.22	$1.47	$1,204.89
2013	$497.46	$473.52	$200.18	$194.31	$93.86	$15.10	$2.40	$2.13	$1,478.98
2014	$547.17	$450.03	$203.92	$177.33	$100.94	$13.85	$11.60	$3.11	$1,507.96

** Revenue for events unallocated by State/Territory in 2010 is not shown, accounting for $14.11 million in revenue.*

Table 5: Total Attendance by State/Territory (2009-2014)

	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	15,198,782
2010*	5,818,163	5,820,603	2,043,327	1,879,408	1,035,243	304,168	59,753	96,872	17,241,139
2011	6,331,001	5,359,749	2,150,329	1,788,262	1,237,386	325,233	99,653	54,107	17,347,731
2012	5,795,757	4,916,559	2,302,462	1,791,795	1,053,997	271,525	97,972	43,663	16,275,742
2013	5,865,914	5,607,475	2,318,207	2,153,483	1,497,204	351,242	75,115	57,986	17,928,639
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

** Attendance for events unallocated by State/Territory in 2010 is not shown, accounting for 183,603 tickets.*

Table 6: Revenue by Category and State/Territory in 2014

	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$17,870,525	$16,056,666	$10,263,143	$5,112,304	$2,264,949	$802,842	$143,445	$258,031	$52,771,905
Children's/Family	$16,475,125	$11,009,505	$4,812,655	$7,416,109	$2,226,697	$1,008,615	$192,890	$290,323	$43,431,918
Circus & Physical Theatre	$28,235,676	$7,274,044	$5,347,577	$3,296,917	$1,190,826	$402,294	$0	$347,651	$46,094,984
Classical Music	$26,346,741	$19,144,067	$5,982,897	$7,329,279	$3,589,586	$1,367,703	$1,025,723	$84,498	$64,870,493
Comedy	$11,064,298	$20,201,691	$5,663,585	$5,362,062	$726,904	$1,275,106	$205,547	$655,533	$45,154,726
Contemporary Music	$193,030,699	$182,724,476	$86,998,740	$87,844,228	$45,829,337	$4,836,355	$2,490,063	$1,209,143	$604,963,041
Festivals (Multi-Category)	$12,359,382	$7,588,917	$1,994,449	$4,487,163	$16,583,347	$266,471	$4,525,407	*	$47,805,136
Festivals (Single-Category)	$54,581,636	$23,889,369	$20,269,980	$23,514,734	$5,412,989	$1,520,838	$20,513	*	$129,210,058
Musical Theatre	$120,109,680	$120,268,393	$46,998,926	$15,825,026	$15,078,072	$162,896	$1,899,336	$0	$320,342,329
Opera	$28,053,377	$9,128,735	$2,485,857	$1,403,469	$1,296,985	$252,327	$0	*	$42,620,749
Special Events	$4,021,578	$1,912,828	$1,166,483	$2,615,072	$894,000	$216,857	$157,240	*	$10,984,057
Theatre	$35,025,083	$30,835,349	$11,934,177	$13,120,291	$5,850,356	$1,925,052	$940,361	$83,886	$99,714,555
Total	$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

** NT and ACT data have been combined for the Festival (Multi-Category), Festival (Single-Category), Opera and Special Events categories*

Note: State totals in ACT and NT reflect revenue in that Territory and do not sum across categories due to combining of data

Table 7: Attendance by Category and State/Territory in 2014

	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	211,842	215,721	180,925	102,368	31,265	15,143	2,828	7,798	767,890
Children's/Family	457,996	293,575	157,827	184,057	61,249	37,108	11,263	11,198	1,214,273
Circus & Physical Theatre	281,368	121,422	84,913	39,191	23,485	7,036	-	7,261	564,676
Classical Music	354,862	329,969	115,633	115,636	49,570	24,588	22,095	2,769	1,015,122
Comedy	195,863	512,230	115,866	86,032	10,897	26,330	2,334	13,556	963,108
Contemporary Music	2,105,725	1,820,228	970,993	877,048	432,612	80,351	46,888	52,213	6,386,058
Festivals (Multi-Category)	79,712	43,494	83,878	179,697	593,926	9,857	69,242	*	1,059,806
Festivals (Single-Category)	470,031	212,957	224,765	227,482	125,291	19,695	1,118	*	1,281,339
Musical Theatre	1,130,189	1,202,139	469,308	183,763	173,204	3,827	20,048	-	3,182,478
Opera	206,788	96,312	44,743	19,680	15,049	4,355	-	*	386,927
Special Events	94,478	23,014	24,044	50,889	8,196	8,045	1,724	*	210,390
Theatre	543,973	447,476	188,737	200,592	89,523	23,862	7,471	2,733	1,504,367
Total	6,132,827	5,318,537	2,661,632	2,266,435	1,614,267	246,542	185,011	111,183	18,536,434

** NT and ACT data have been combined for the Festival (Multi-Category), Festival (Single-Category), Opera and Special Events categories*

Note: State totals in ACT and NT reflect revenue in that Territory and do not sum across categories due to combining of data

3.2 Per capita results

A comparison of each state and territory's share of the Live Performance Industry against their population provides insight into spend per capita as well as the concentration of the Industry relative to where people live. Table 8 illustrates that Victoria, New South Wales and Western Australia command a larger share of both Live Performance revenue and attendance compared to their share of Australia's population. Although Victoria experienced a decline in revenue and attendance in 2014, it still remained well above its share of the population and had the highest spend per capita both in 2014 and 2013. Across the other States and Territories, all had a smaller share of industry revenue compared to their population, although South Australia had a larger share of attendance.

There exist several possible explanations for these disproportional results:

- Some of Australia's largest performing arts companies are based in New South Wales and Victoria and as such stage the bulk of their performances in Sydney and Melbourne, for example Opera Australia (Sydney), Melbourne Symphony Orchestra, Sydney Symphony Orchestra and The Australian Ballet (Melbourne).

- Destination NSW and The Victorian Major Events Company are particularly active in the major events market and as such have been successful in attracting major live performance events to these states. For example, Destination NSW attracted the world premiere of *Strictly Ballroom* and the return of Disney's *The Lion King* and The Victorian Major Events Company secured Australia's premiere of *Les Misérables*. In other categories, Destination NSW secured investment in Handa Opera on Sydney Harbour and continued investment in *Vivid Sydney*.

- The majority of regional performances are not included in this Survey and as such, performances in larger states with significant regional markets, such as Queensland, are under-reported. To capture these types of live performance events LPA and EY are producing a supplementary ticket attendance and revenue report for 2014 that will include data from regional venue members of the Australian Performing Arts Centres Association (APACA).

- Further, cities such as Brisbane are constrained in their ability to host performances due to a smaller number of venues and hence capacity, compared to Melbourne for example.

- South Australia's larger share of attendance can partly be explained by the inclusion of Adelaide Fringe data. This festival attracted high attendance to numerous low cost events.

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

Table 8: Population and per capita results (2014)

State/Territory	Population (2014) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	7.57	32.0%	36.3%	33.1%	$73.29
Victoria	5.89	24.9%	29.8%	28.7%	$77.71
Queensland	4.75	20.1%	13.5%	14.4%	$43.47
Western Australia	2.58	10.9%	11.8%	12.2%	$69.52
South Australia	1.69	7.2%	6.7%	8.7%	$60.18
Australian Capital Territory	0.39	1.6%	0.9%	1.3%	$36.06
Tasmania	0.52	2.2%	0.8%	1.0%	$22.57
Northern Territory	0.24	1.0%	0.2%	0.6%	$12.84
Total	23.63	100%	100%	100%	$64.67

*Note: *Population is as of December 2014 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0*

4. Category analysis

4.1 Overall highlights

This section presents the largest categories by revenue and attendance (Table 9) as well as the categories which experienced the greatest movements in revenue and attendance (Table 10 and Table 11). As with previous years, the Contemporary Music and Musical Theatre categories represent the two largest categories in the industry, generating 40.1% and 21.2% of revenue, respectively. Combined, these two categories account for 61.4% of the Live Performance Industry in terms of gross revenue and 51.6% of total attendance. The top 3 revenue categories combined, which also includes Festivals (Single-Category) in 2014, accounts for 70% of all industry revenue.

The most significant gains were experienced by the Festivals (Multi-Category), Musical Theatre and Special Events categories. The significant increases for Festivals (Multi-Category) can largely be explained by the inclusion of new data providers in 2014. *The Falls Music and Arts Festival* was included for the first time in 2014, and the significantly higher ticket prices for this festival increased the overall ticket price and contributed to strong gains. In addition, the inclusion of *MONA FOMA* and *Dark Mofo* for the first time this year contributed to strong growth in Tasmania.

The gains for Musical Theatre were primarily due to the number and calibre of performances, which included *Grease*, *Les Misérables*, *The Lion King* and *Wicked*. The Special Events category is also particularly variable from year to year as it is highly dependent on whether performances that cannot be classified into other categories take place. In particular, the national tour of *Mythbusters Live* in 2014 contributed to the strong growth in this category.

In contrast, the Circus and Physical Theatre category experienced some of the larger declines in both revenue and attendance, reversing the strong growth achieved in 2013. Although a number of shows returned in 2014, the category was unable to replicate its 2013 performance, which included two Cirque Du Soleil productions (*Ovo* and *Michael Jackson: The Immortal*), *Slava's Snowshow* and *Empire*.

Other categories to experience significant declines were Ballet and Dance and Theatre. For the Ballet and Dance category, there were declines in most states, with only Victoria and Tasmania achieving revenue growth. A number of popular international performances that occurred in 2013 did not return to Australia in 2014, including *Ballet Revolución*, *Stomp* and *Blaze*, along with tours by the Paris Opera Ballet and the Bolshoi Ballet. This helps to explain the decline in revenue and attendances. In the Theatre category, the declines were largely driven by the eastern states (New South Wales, Victoria and Queensland), with fewer performances staged by the AMPAG companies as well as fewer commercial performances.

Table 9: Top 5 Categories – Revenue and Attendance

	Revenue			Attendance		
	Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
1	Contemporary Music	$604,963,041	40.1%	Contemporary Music	6,386,058	34.5%
2	Musical Theatre	$320,342,329	21.2%	Musical Theatre	3,182,478	17.2%
3	Festivals (Single-Category)	$129,210,058	8.6%	Theatre	1,504,367	8.1%
4	Theatre	$99,714,555	6.6%	Festivals (Single-Category)	1,281,339	6.9%
5	Classical Music	$64,870,493	4.3%	Children's/Family	1,214,273	6.6%

Table 10: Top 3 Biggest Changes in Revenue by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2013	Category	Decrease from 2013
1	Festivals (Multi-Category)	86.6%	Circus and Physical Theatre	67.5%
2	Special Events	82.1%	Theatre	16.7%
3	Musical Theatre	65.6%	Ballet and Dance	16.0 %

Table 11: Top 3 Biggest Changes in Attendance by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2013	Category	Decrease from 2013
1	Special Events	85.7%	Circus and Physical Theatre	56.1%
2	Musical Theatre	52.6%	Ballet and Dance	21.3%
3	Festivals (Multi-Category)	34.7%	Theatre	18.3%

4.2 Category trends

This section presents an analysis for each of the 12 event categories, as defined in Table 1. Table 12 shows the total revenue and attendances by category for 2014. Figure 10 and Figure 11 illustrate the breakdown of the Live Performance Industry in Australia based on share of gross revenue by category in 2014 and 2013. Figure 12 and Figure 13 illustrate the industry breakdown based on share of total attendance by category in 2014 and 2013.

Figure 14 and Figure 15 illustrate the year on year revenue and attendance movements by category, while Figure 16 and Figure 17 present time series data of the market shares of each event category over the past 11 years of the Survey in terms of ticket revenues and attendances.

Additionally, Table 13 below shows the average ticket price by category for the past 5 years.

Table 12: Total Revenue and Attendances by Category (2014)

Category	Revenue	% Change in Revenue (from 2013)	Share of Industry	Tickets	% Change in Attendance (from 2013)	Share of Industry
Ballet and Dance	$52,771,905	-16.0%	3.5%	767,890	-21.3%	4.1%
Children's/Family	$43,431,918	12.3%	2.9%	1,214,273	11.3%	6.6%
Circus and Physical Theatre	$46,094,984	-67.5%	3.1%	564,676	-56.1%	3.0%
Classical Music	$64,870,493	-8.0%	4.3%	1,015,122	-13.2%	5.5%
Comedy	$45,154,726	8.9%	3.0%	963,108	5.5%	5.2%
Contemporary Music	$604,963,041	-3.7%	40.1%	6,386,058	1.9%	34.5%
Festivals (Multi-Category)	$47,805,136	86.6%	3.2%	1,059,806	34.7%	5.7%
Festivals (Single-Category)	$129,210,058	20.3%	8.6%	1,281,339	21.6%	6.9%
Musical Theatre	$320,342,329	65.6%	21.2%	3,182,478	52.6%	17.2%
Opera	$42,620,749	-1.5%	2.8%	386,927	12.2%	2.1%
Special Events	$10,984,057	82.1%	0.7%	210,390	85.7%	1.1%
Theatre	$99,714,555	-16.7%	6.6%	1,504,367	-18.3%	8.1%
Total	$1,507,963,952	2.0%	100.0%	18,536,434	3.4%	100.0%

Table 13: Average Ticket Prices by Category (2008-2014)

Year	2008	2009	2010	2011	2012	2013	2014	CAGR
Ballet and Dance	$60.67	$63.33	$64.86	$71.93	$77.93	$74.69	$80.82	4.9%
Children's/Family	$34.24	$32.38	$34.23	$43.87	$43.17	$38.17	$38.27	1.9%
Circus and Physical Theatre	N/A	$47.98	$43.03	$86.81	$103.67	$118.91	$88.60	13.1%
Classical Music	$84.81	$74.01	$60.43	$68.82	$60.34	$73.18	$75.05	-2.0%
Comedy	N/A	$54.06	$51.53	$55.07	$53.55	$48.82	$50.55	-1.3 %
Contemporary Music	$101.35	$108.61	$102.78	$103.45	$100.27	$110.50	$107.60	1.0%
Festival (Multi-Category)	$52.11	$33.60	$43.12	$57.02	$59.58	$34.59	$48.41	-1.2%
Festival (Single-Category)	$60.91	$81.19	$119.39	$138.97	$128.71	$130.46	$136.91	14.5%
Musical Theatre	$89.23	$93.54	$98.84	$92.79	$97.08	$100.94	$105.70	2.9%
Opera	$114.46	$111.62	$112.86	$124.66	$126.84	$145.28	$124.92	1.5%
Special Events	$43.60	$67.79	$88.67	$57.28	$57.58	$73.18	$86.90	12.2%
Theatre	$46.92	$46.58	$51.47	$56.14	$59.86	$72.88	$73.83	7.8%
All Categories	$76.60	$80.57	$86.43	$85.99	$85.46	$92.16	$91.57	3.0%

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

Figure 10: Gross Revenue by Category (2014)

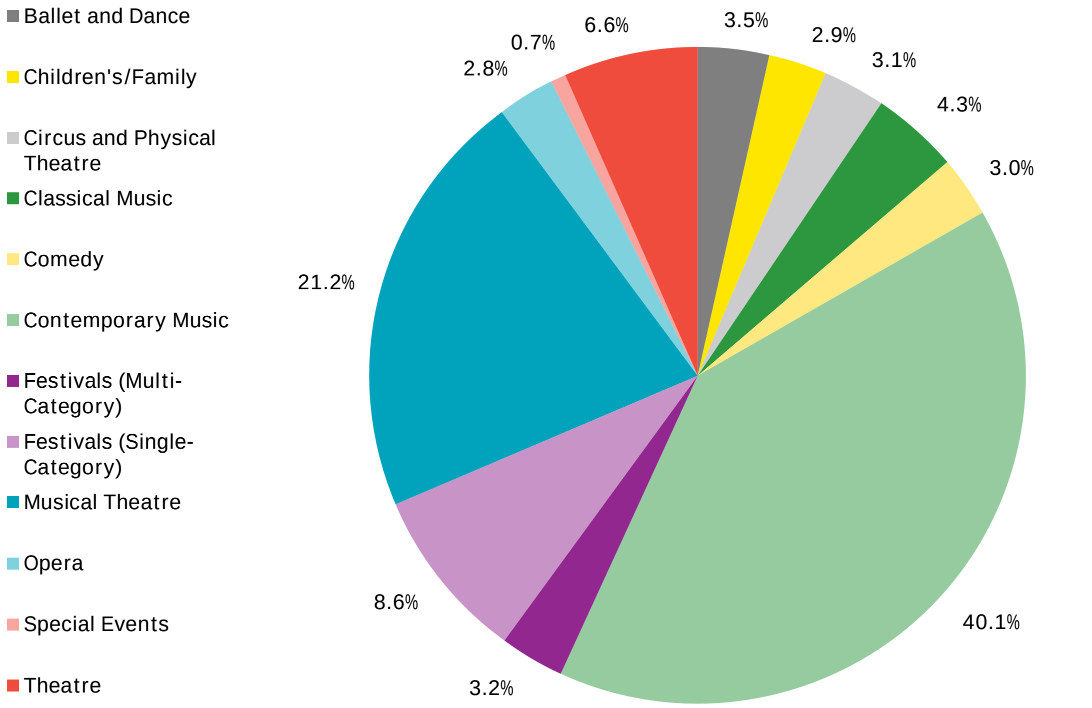


Figure 11: Gross Revenue by Category (2013)

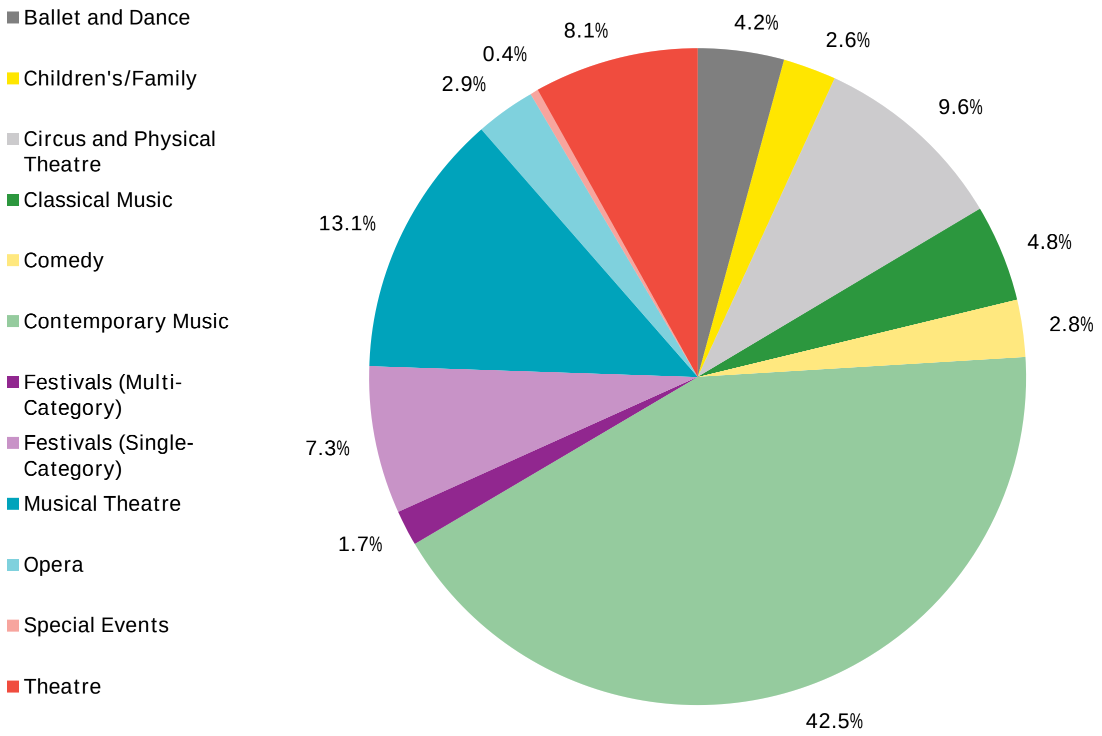


Figure 12: Total Attendance by Category (2014)

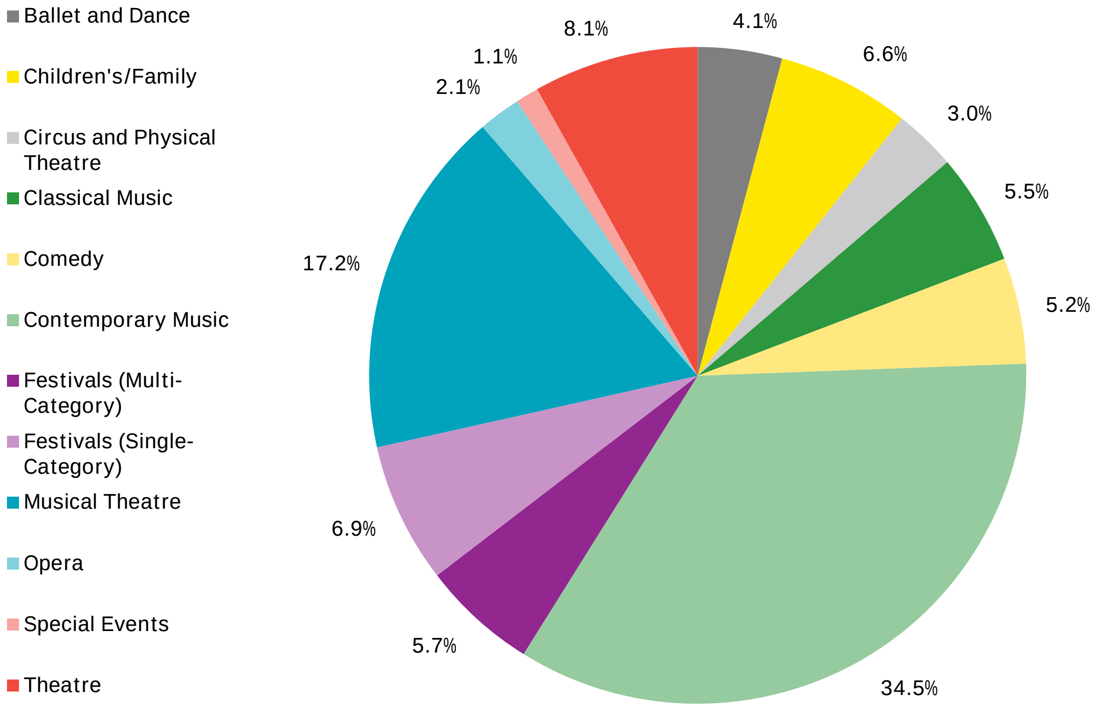


Figure 13: Total Attendance by Category (2013)

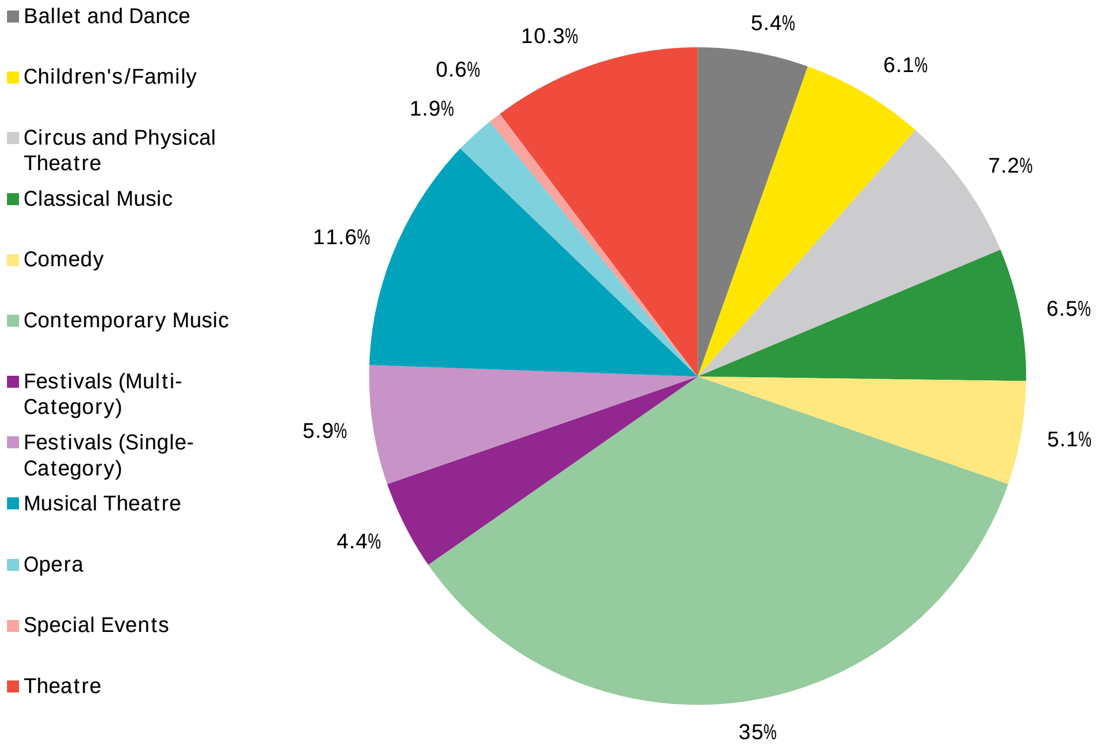


Figure 14: Percentage Movement in Revenue by Category (2013-2014)

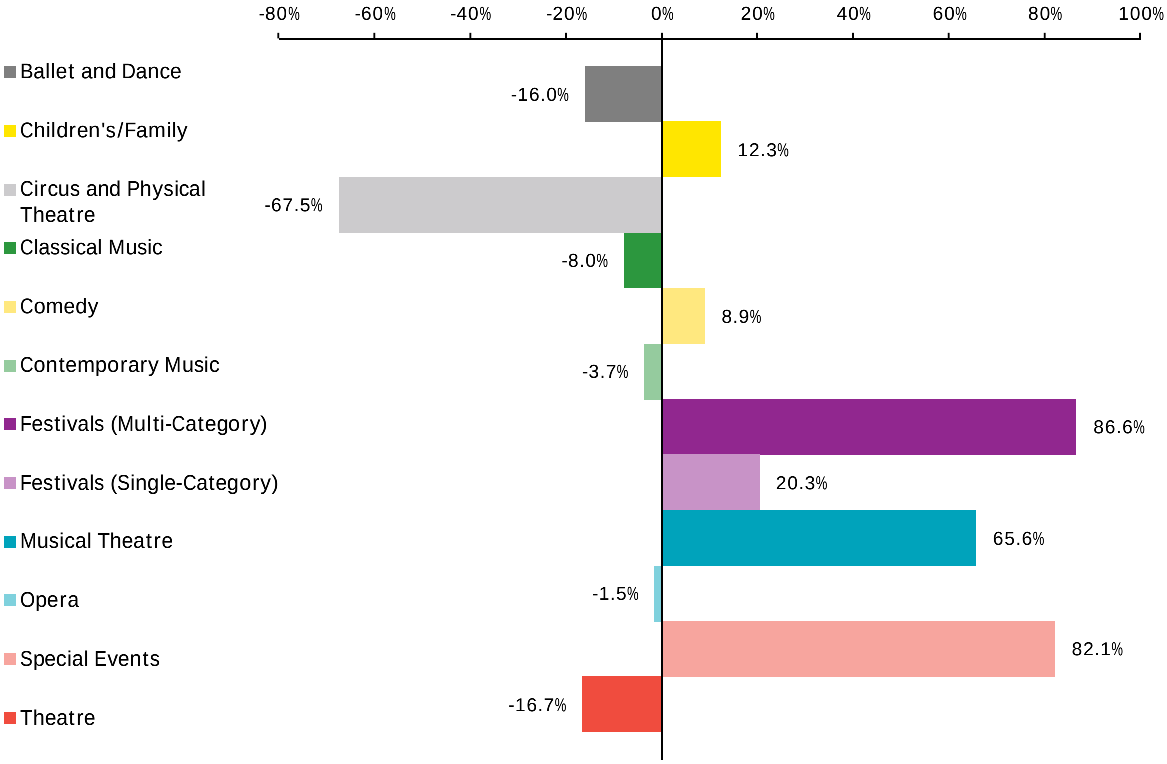


Figure 15: Percentage Movement in Attendance by Category (2013-2014)

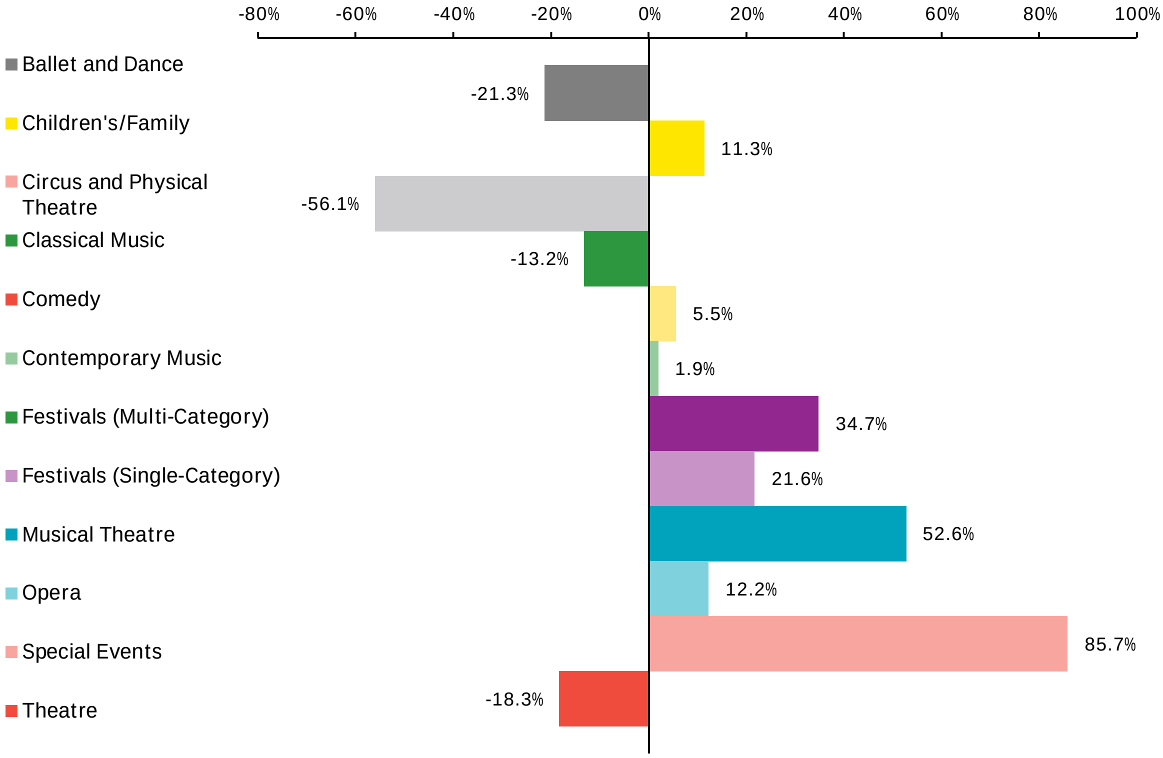


Figure 16: Market Shares (Gross Revenue) by Category (2004-2014)

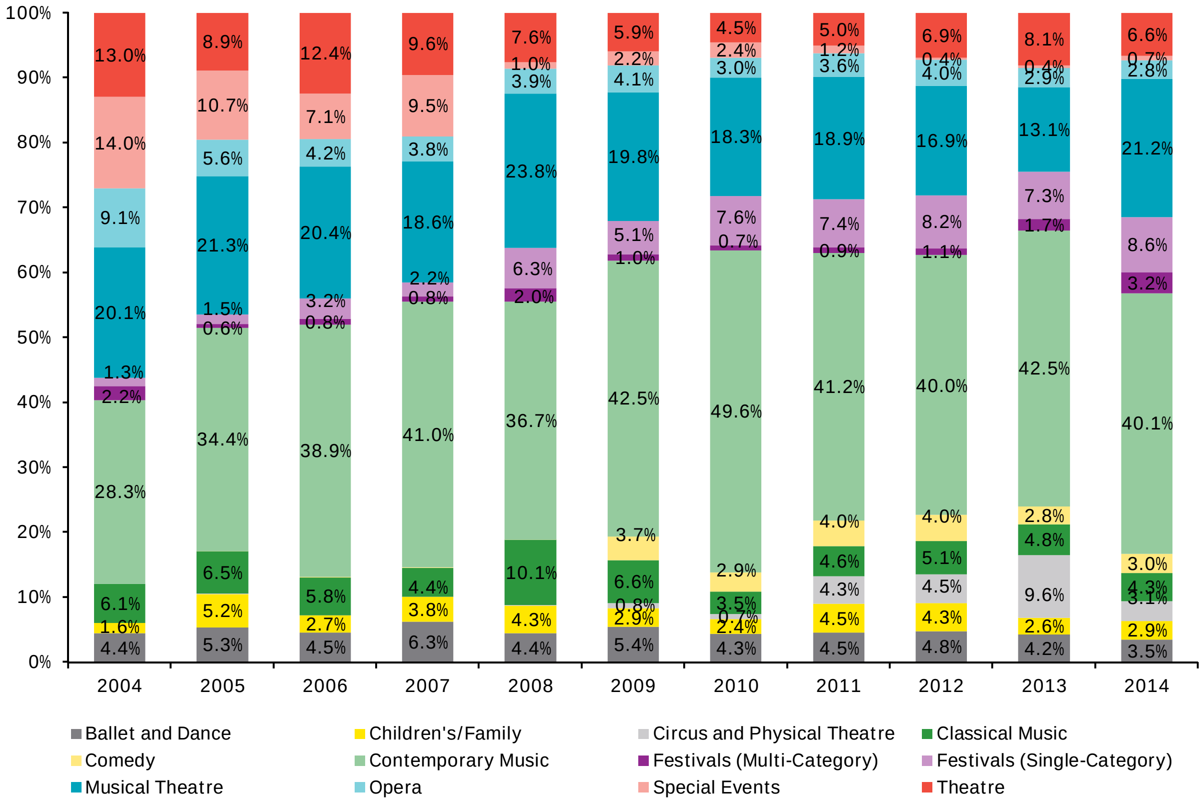
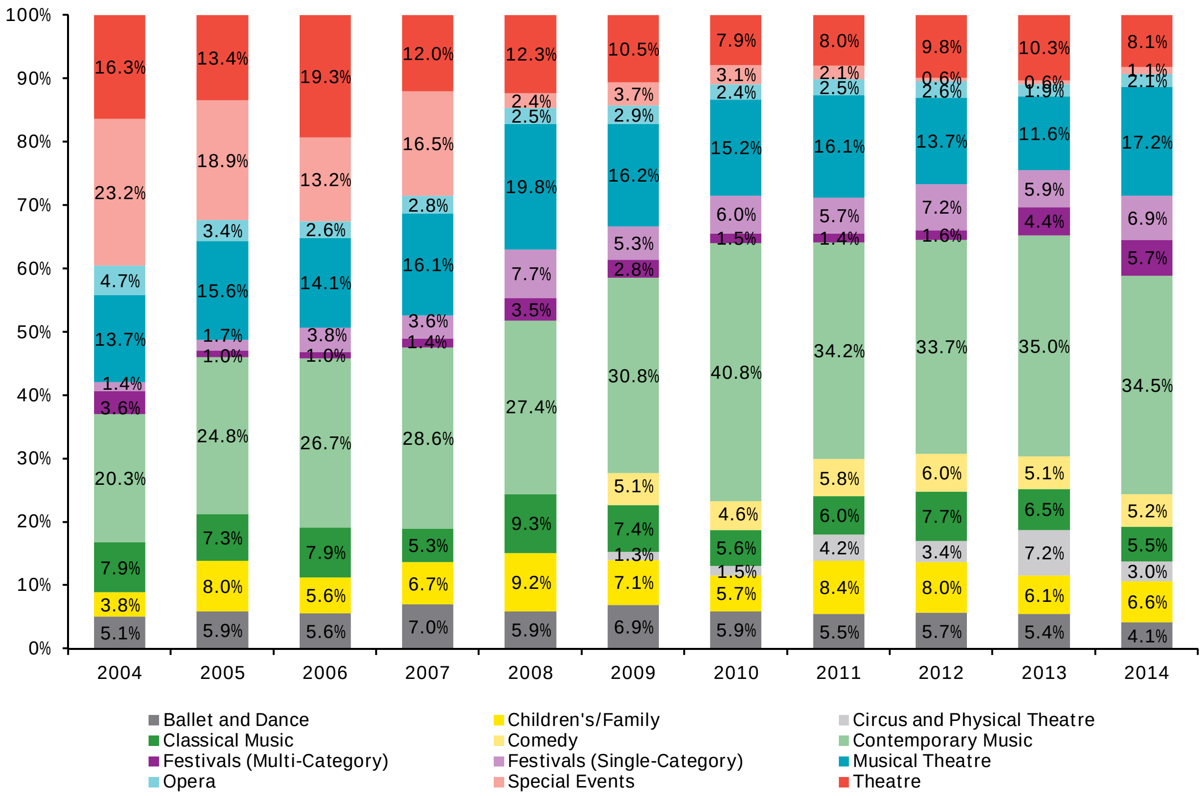


Figure 17: Market Shares (Attendances) by Category (2004-2014)



4.3 Ballet and Dance

4.3.1 National Overview

The Ballet and Dance category experienced a significant decrease in both gross revenue and attendance in 2014. Gross revenue decreased by 16% from $62.83 million in 2013 to $52.77 million in 2014, the lowest result since 2009. Total attendances also decreased by 21.3% over the same time frame. In contrast, the average ticket price increased by 8.2% from $74.69 to $80.82, which explains why the percentage decrease in attendances exceeded the decline in revenue.

Major performances in the Ballet and Dance category in 2014 included a national tour of *Shadowland*, the American Ballet Theatre's season in Queensland which included performances of *Swan Lake* and *Three Masterpieces* and Matthew Bourne's *Swan Lake* performed in Melbourne and Sydney. Other performances in this category included Red Bull Flying Bach and Shen Yun. In particular, performances of Matthew Bourne's *Swan Lake* in Victoria contributed to revenue gains in that State.

However, a number of popular international performances that occurred in 2013 did not return to Australia in 2014, including *Ballet Revolución*, *Stomp* and *Blaze*, along with tours by the Paris Opera Ballet and the Bolshoi Ballet. This helps to explain the decline in revenue and attendances.

In contrast, the AMPAG companies experienced moderate growth in 2014, with local productions accounting for the majority of gross revenue in this event category. Major companies within this group included The Australian Ballet, The Queensland Ballet, Sydney Dance Company, Bangarra Dance Theatre and West Australian Ballet.

Figure 18: Ballet and Dance – Gross Revenue (2004-2014)

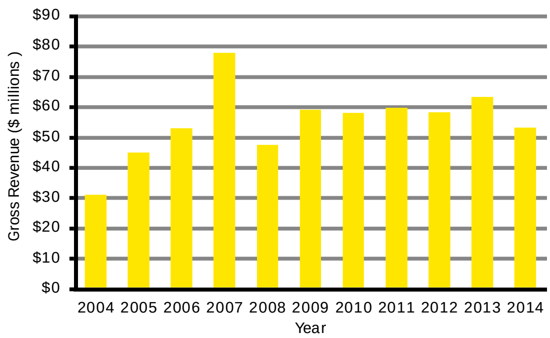


Figure 19: Ballet and Dance – Total Attendance (2004-2014)

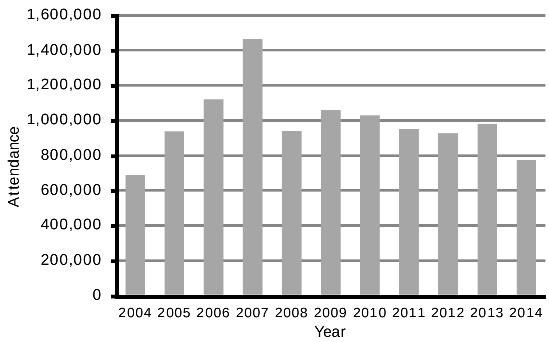


Table 14: Ballet and Dance – Revenue and Attendance (2004-2014)

	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%

4.3.2 State/Territory Breakdown

Figure 20: Ballet and Dance – Revenue by State/Territory (2014)

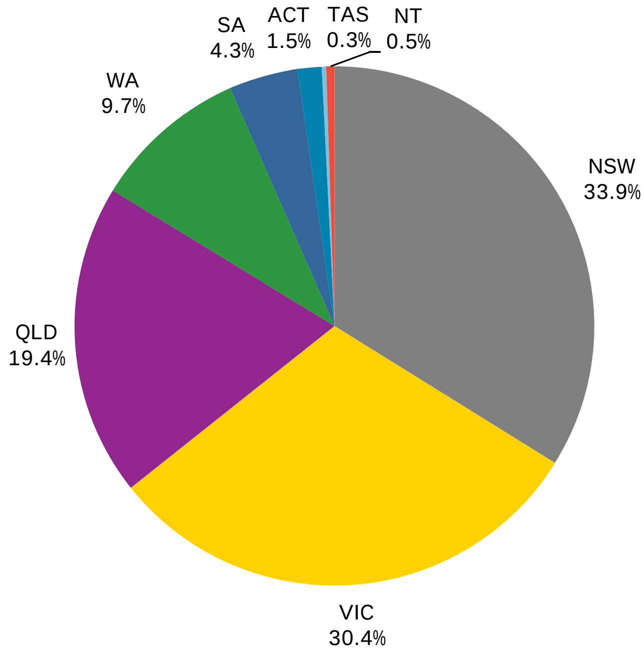


Table 15: Ballet and Dance – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$17,870,525	33.9%	-4.0%
VIC	$16,056,666	30.4%	5.7%
QLD	$10,263,143	19.4%	-1.0%
WA	$5,112,304	9.7%	-0.8%
SA	$2,264,949	4.3%	0.4%
ACT	$808,842	1.5%	-0.5%
TAS	$143,445	0.3%	0.2%
NT	$258,031	0.5%	-0.1%
Total	$52,771,905	100%	

Figure 21: Ballet and Dance – Attendance by State/Territory (2014)

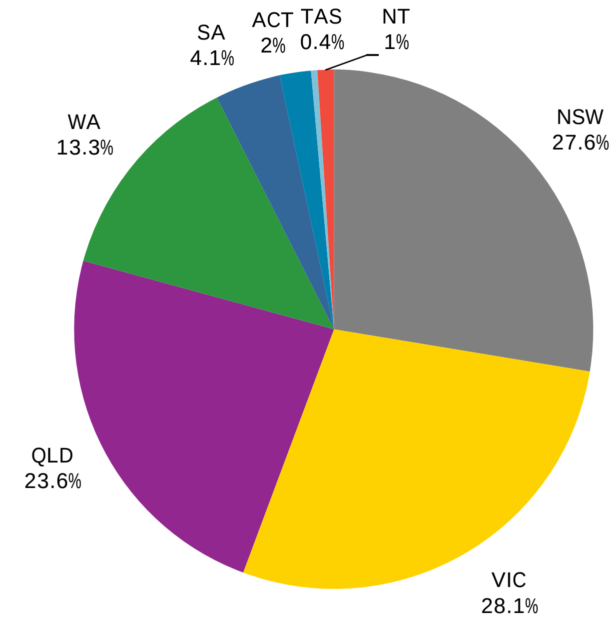


Table 16: Ballet and Dance – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	211,842	27.6%	-2.4%
VIC	215,721	28.1%	4.4%
QLD	180,925	23.6%	3.0%
WA	102,368	13.3%	1.6%
SA	31,265	4.1%	0.9%
ACT	15,143	2.0%	-7.3%
TAS	2,828	0.4%	0.1%
NT	7,798	1.0%	-0.2%
Total	767,890	100%	

4.4 Children's/Family Events

4.4.1 National Overview

2014 saw increases in gross revenue and attendance for the Children's/Family Events category, contrasting the declines experienced in 2013. Gross revenue rose by 12.3% from $38.68 million in 2013 to $43.43 million in 2014. Total attendance grew by 11.3% while the average ticket price did not experience great movement.

Major events in 2014 in this category were *Disney on Ice*, *Peppa Pig Live*, *Horrible Histories* and a tour by The Wiggles. All of these major events toured nationally. Other children's favourites which toured in 2014 included *Barbie Live*, the *13-Storey Treehouse*, *Angelina Ballerina the Mousical* and *Disney Live*.

Figure 22: Children's/Family Events – Gross Revenue (2004-2014)

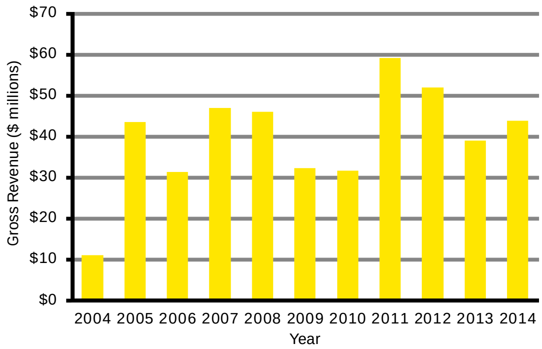


Figure 23: Children's/Family Events – Total Attendance (2004-2014)

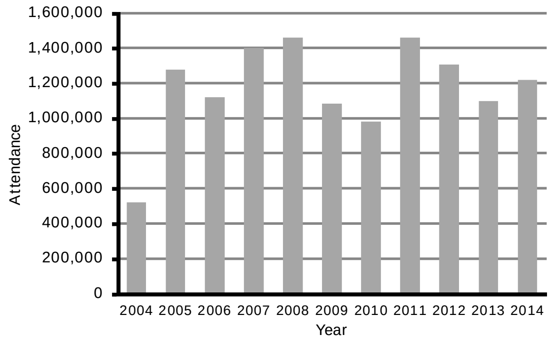


Table 17: Children's/Family Events – Revenue and Attendance (2004-2014)

	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%

4.4.2 State/Territory Breakdown

Figure 24: Children's/Family Events – Revenue by State/Territory (2014)

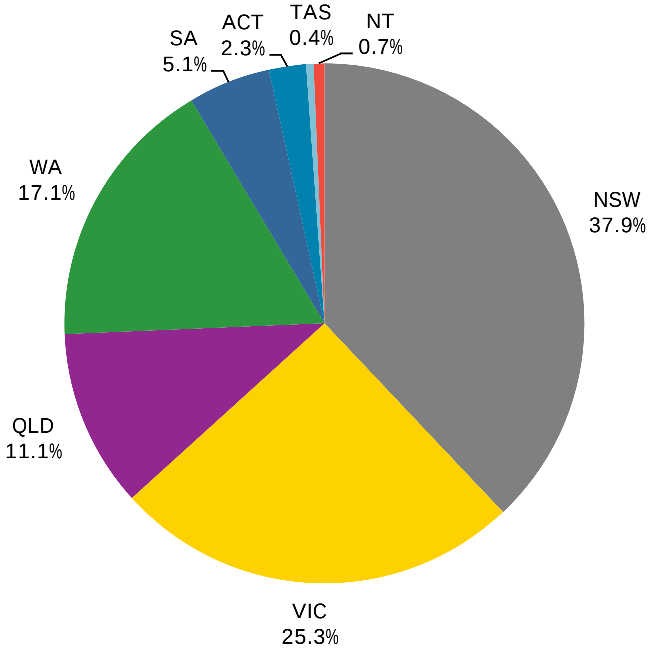


Table 18: Children's/Family Events – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$16,475,125	37.9%	-0.7%
VIC	$11,009,505	25.3%	-3.8%
QLD	$4,812,655	11.1%	2.3%
WA	$7,416,109	17.1%	3.2%
SA	$2,226,697	5.1%	-2.1%
ACT	$1,008,615	2.3%	0.5%
TAS	$192,890	0.4%	0.1%
NT	$290,323	0.7%	0.5%
Total	$43,431,918	100%	

Figure 25: Children's/Family Events – Attendance by State/Territory (2014)

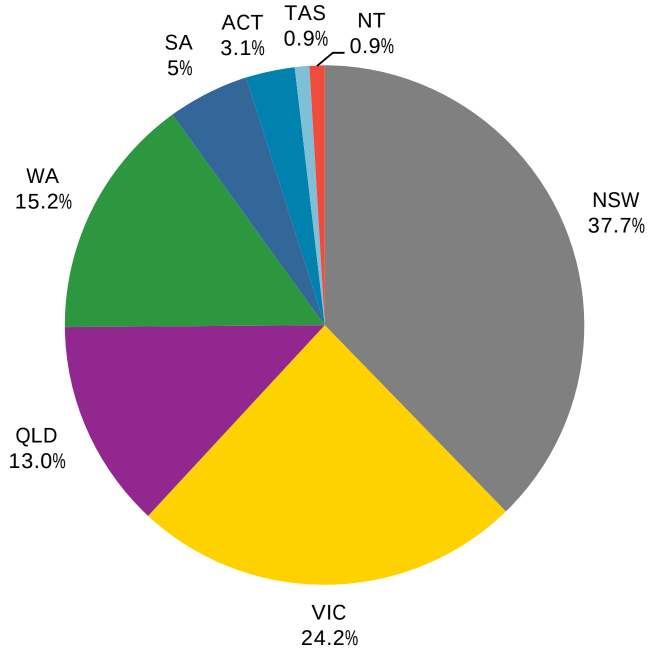


Table 19: Children's/Family Events – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	457,996	37.7%	-0.6%
VIC	293,575	24.2%	-3.9%
QLD	157,827	13.0%	4.1%
WA	184,057	15.2%	2.6%
SA	61,249	5.0%	-3.4%
ACT	37,108	3.1%	0.6%
TAS	11,263	0.9%	-0.1%
NT	11,198	0.9%	0.5%
Total	1,214,273	100%	

4.5 Circus and Physical Theatre

4.5.1 National Overview

The Circus and Physical Theatre category experienced sharp declines across the board between 2013 and 2014, in contrast to the strong growth experienced in 2013. Gross revenue decreased by 67.5% from $142.03 million to $46.09 million while total attendance decreased by 56.1%. The average ticket price also declined by 25.5% from $118.91 to $88.50.

Cirque du Soleil once again dominated this category, although the reduction in the number of its performances in 2014 helps to explain the significant decline in revenue and attendance. Following the success of its two 2013 productions (*Ovo* and *Michael Jackson: The Immortal)*, Cirque du Soleil commenced the national *Totem* tour in Sydney during 2014, with the tour continuing into 2015. The timing of *Totem* over two calendar years helps to explain the skewed distribution of revenue and attendance by state. Only Sydney performances have been included in the 2014 Survey. Later performances of *Totem* in other states do not correspond to this survey period.

A number of other major events in the Circus and Physical Theatre category that were staged in 2013 did not return in 2014, including *Empire* presented by Spiegelworld and *Slava's Snowshow*.

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

Figure 26: Circus and Physical Theatre – Gross Revenue (2009-2014)

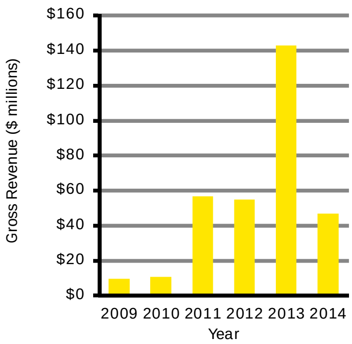


Figure 27: Circus and Physical Theatre – Total Attendance (2009-2014)

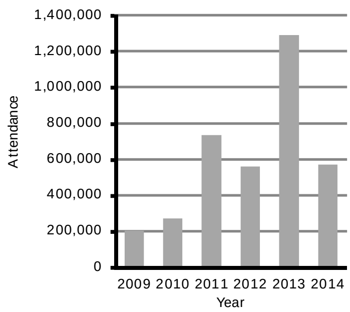


Table 20: Circus and Physical Theatre – Revenue and Attendance (2009-2014)

	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%

4.5.2 State/Territory Breakdown

Figure 28: Circus and Physical Theatre – Revenue by State/Territory (2014)

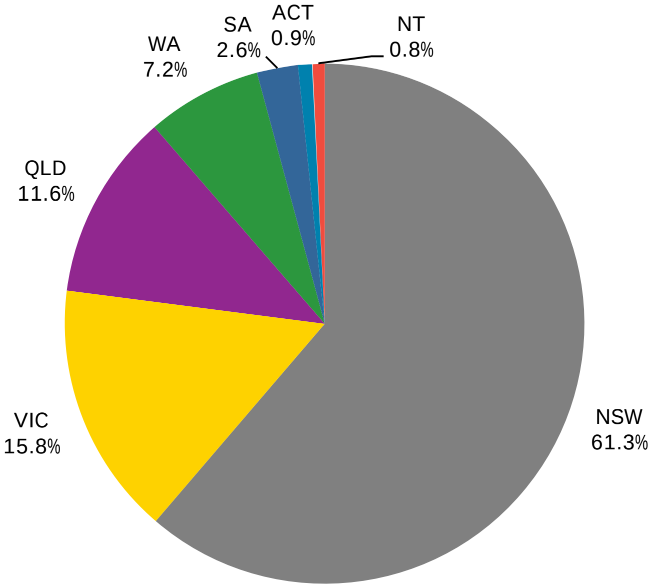


Table 21: Circus and Physical Theatre – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$28,235,676	61.3%	45.7%
VIC	$7,274,044	15.8%	-18.2%
QLD	$5,347,577	11.6%	-0.2%
WA	$3,296,917	7.2%	-21.4%
SA	$1,190,826	2.6%	-6.3%
ACT	$402,294	0.9%	-0.4%
TAS	$0	0.0%	0.0%
NT	$347,651	0.8%	0.7%
Total	$46,094,984	100%	

Figure 29: Circus and Physical Theatre – Attendance by State/Territory (2014)

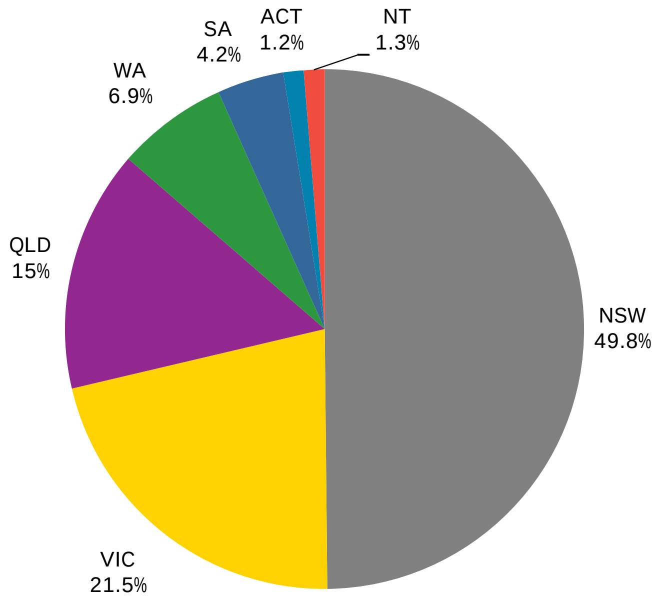


Table 22: Circus and Physical Theatre – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	281,368	49.8%	33.8%
VIC	121,422	21.5%	-11.7%
QLD	84,913	15.0%	1.0%
WA	39,191	6.9%	-18.2%
SA	23,485	4.2%	-5.5%
ACT	7,036	1.2%	-0.5%
TAS	-	0.0%	0.0%
NT	7,261	1.3%	1.2%
Total	564,676	100%	

4.6 Classical Music

4.6.1 National Overview

Between 2013 and 2014, the Classical Music category experienced a decrease in revenue and attendance. Gross revenue fell by 8% from $70.48 million to $64.87 million while total attendance fell by 13.2%. The increase in average ticket price by 2.6% from $73.18 to $75.05 was insufficient to offset the decline in attendance.

As with previous years, the majority of revenue and ticket sales in the Classical Music category came from the AMPAG companies in 2014. Major companies include The Australian Chamber Orchestra, the Melbourne Symphony Orchestra, the Sydney Symphony Orchestra, the Queensland Symphony Orchestra, the West Australian Symphony Orchestra, the Australian Brandenburg Orchestra, Adelaide Symphony Orchestra, Tasmanian Symphony Orchestra and Musica Viva Australia. In 2014, these companies had fewer performances compared to 2013, which helps to explain the decrease in attendance and gross revenue.

Outside of AMPAG, there were further declines in revenue and attendance in 2014, with fewer performances overall. Major performances in this category included tours by Andrea Bocelli and the London Symphony Orchestra. However, popular performer André Rieu did not return in 2014, impacting on revenue and attendance.

Figure 30: Classical Music – Gross Revenue (2004-2014)

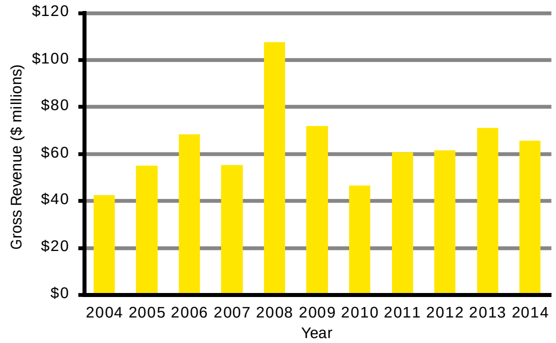


Figure 31: Classical Music – Total Attendance (2004-2014)

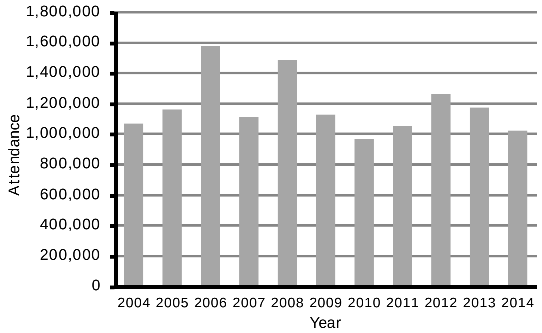


Table 23: Classical Music – Revenue and Attendance (2004-2014)

	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%

4.6.2 State/Territory Breakdown

Figure 32: Classical Music – Revenue by State/Territory (2014)

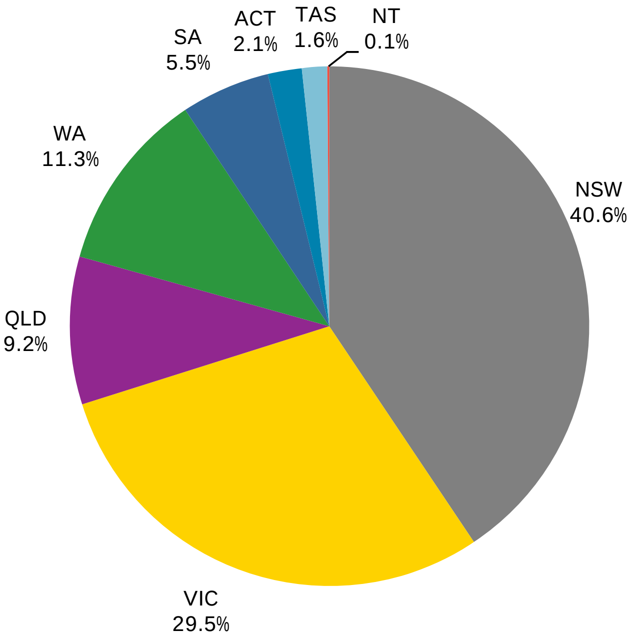


Table 24: Classical Music – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$26,346,741	40.6%	0.7%
VIC	$19,144,067	29.5%	1.6%
QLD	$5,982,897	9.2%	-0.6%
WA	$7,329,279	11.3%	-0.9%
SA	$3,589,586	5.5%	-0.2%
ACT	$1,367,703	2.1%	-0.4%
TAS	$1,025,723	1.6%	-0.2%
NT	$84,498	0.1%	0.1%
Total	$64,870,493	100%	

Figure 33: Classical Music –Attendance by State/Territory (2014)

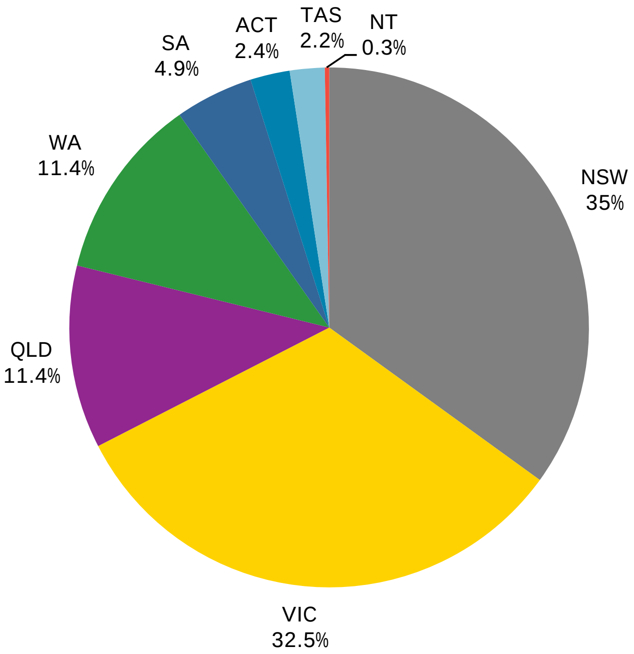


Table 25: Classical Music – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	354,862	35.0%	-0.2%
VIC	329,969	32.5%	-0.1%
QLD	115,633	11.4%	1.2%
WA	115,636	11.4%	1.1%
SA	49,570	4.9%	-0.4%
ACT	24,588	2.4%	-0.4%
TAS	22,095	2.2%	-1.4%
NT	2,769	0.3%	0.2%
Total	1,015,122	100%	

4.7 Comedy

4.7.1 National Overview

The Comedy category experienced gains in attendance and revenue between 2013 and 2014, although revenue and attendances remained lower than 2011 and 2012 figures. Gross revenue increased by 8.9% from $41.47 million to $45.15 million. Total attendance rose by 5.5% while the average ticket price increased by 3.5% from $48.82 to $50.55.

As in previous years, revenue and attendances in the Comedy category largely came from the *Melbourne International Comedy Festival* and *Sydney Comedy Festival*. In 2014, the *Brisbane Comedy Festival* was also captured through new data provider the Brisbane Powerhouse, which helps to explain the strong growth in that state.

Notable comedians that toured in 2014 included Dave Chappelle, Bill Bailey, Gabriel Iglesias, Wayne Brady, Alan Davies, Jeff Dunham and John Cleese. Local comedians that toured in 2014 included Denise Scott, Dave Hughes, Pam Ann and Anh Do.

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

Figure 34: Comedy – Gross Revenue (2009-2014)

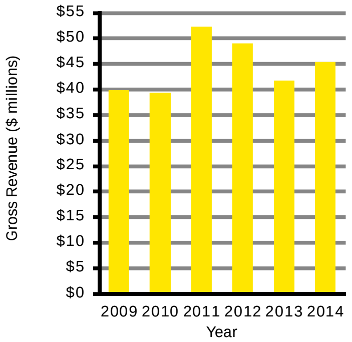


Figure 35: Comedy – Total Attendance (2009-2014)

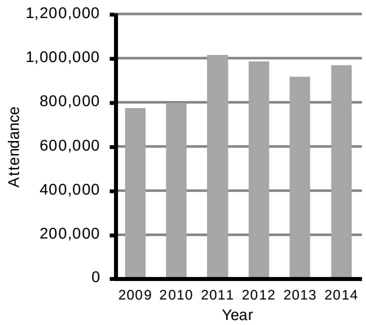


Table 26: Comedy – Revenue and Attendance (2009-2014)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$39,570,117	N/A	661,445	N/A	$44.07	N/A
2010	$39,048,164	-1.3%	792,713	19.8%	$51.53	16.9%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	-6.4%	981,035	-3.0%	$53.55	-2.8%
2013	$41,473,321	-14.8%	912,131	-7.0%	$48.82	-8.8%
2014	$45,154,726	8.9%	963,108	5.5%	$50.55	3.5%

4.7.2 State/Territory Breakdown

Figure 36: Comedy – Revenue by State/Territory (2014)

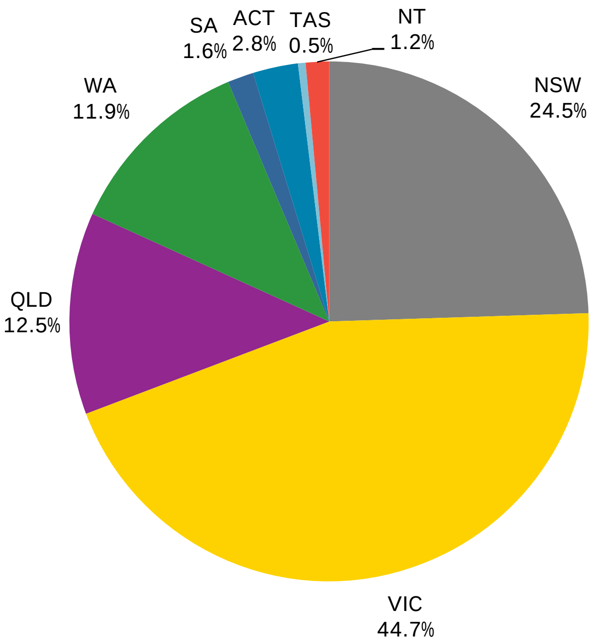


Table 27: Comedy – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$11,064,298	24.5%	-2.1%
VIC	$20,201,691	44.7%	-0.5%
QLD	$5,663,585	12.5%	4.4%
WA	$5,362,062	11.9%	-2.0%
SA	$726,904	1.6%	-0.6%
ACT	$1,275,106	2.8%	0.2%
TAS	$205,547	0.5%	N/A
NT	$655,533	1.5%	N/A
Total	$45,154,726	100%	

Figure 37: Comedy – Attendance by State/Territory (2014)

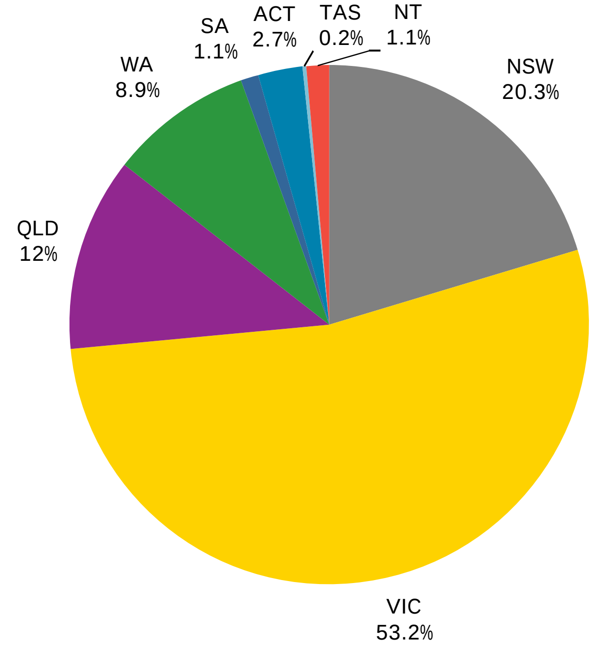


Table 28: Comedy – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	195,863	20.3%	-1.5%
VIC	512,230	53.2%	-3.5%
QLD	115,866	12.0%	6.0%
WA	86,032	8.9%	-1.2%
SA	10,897	1.1%	-0.7%
ACT	26,330	2.7%	0.3%
TAS	2,334	0.2%	N/A
NT	13,556	1.4%	N/A
Total	963,108	100%	

Notes: N/A signifies where States/Territories were combined in 2013 due to single events occurring.

4.8 Contemporary Music

4.8.1 National Overview

In 2014, the Contemporary Music category experienced modest growth in total attendance, but a decline in total revenue. Although total attendance increased by 1.9%, gross revenue fell by 3.7% from $628.13 million to $604.96 million. The fall in gross revenue can be explained by the 2.6% decrease in the average ticket price and an increase in the number of zero priced tickets. Larger declines would have been experienced in this category if it were not for the inclusion of new ticket providers in 2014. In particular, the inclusion of Oztix data captured more local artists and smaller performances that were previously under-reported. This also helps to explain the fall in the average ticket price.

Despite the generally weak result, the Contemporary Music category continues to be the biggest in the Live Performance Industry, commanding 40.1% of revenue and 34.5% of attendance of the Live Performance Industry's share. Comparatively, in 2010 Contemporary Music commanded 49.6% of revenue and 40.8% of attendance of the Live Performance Industry's share. However, the annual variability of this category strongly reflects the number of big-name artists which tour in any given year, particularly the number of stadium tours. These figures do not include music festivals, which are categorised under Festivals (Single-Category).

In 2014, major tours included Katy Perry, The Rolling Stones and Bruce Springsteen. However, none of these tours matched the scale of Pink's 2013 tour (with 48 Australian shows), which helps to explain the weaker result in 2014. Other international artists which toured Australia included Eminem, Michael Bublé, Justin Timberlake, Robbie Williams and Kanye West. Australian artists that toured in 2014 included Keith Urban, Nick Cave, Bliss n Eso, Hunters and Collectors, and Jimmy Barnes.

Figure 38: Contemporary Music – Gross Revenue (2004-2014)

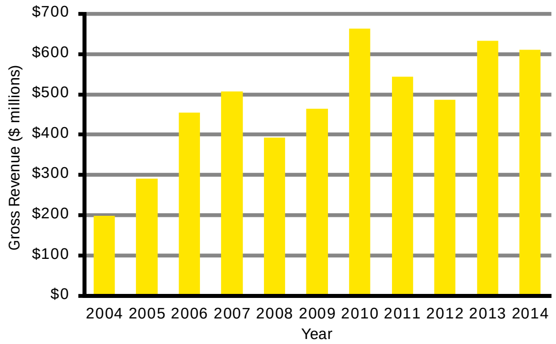


Figure 39: Contemporary Music – Total Attendance (2004-2014)

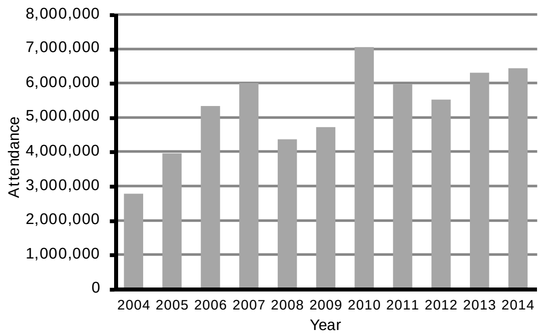


Table 29: Contemporary Music – Revenue and Attendance (2004-2014)

	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%

4.8.2 State/Territory Breakdown

Figure 40: Contemporary Music – Revenue by State/Territory (2014)

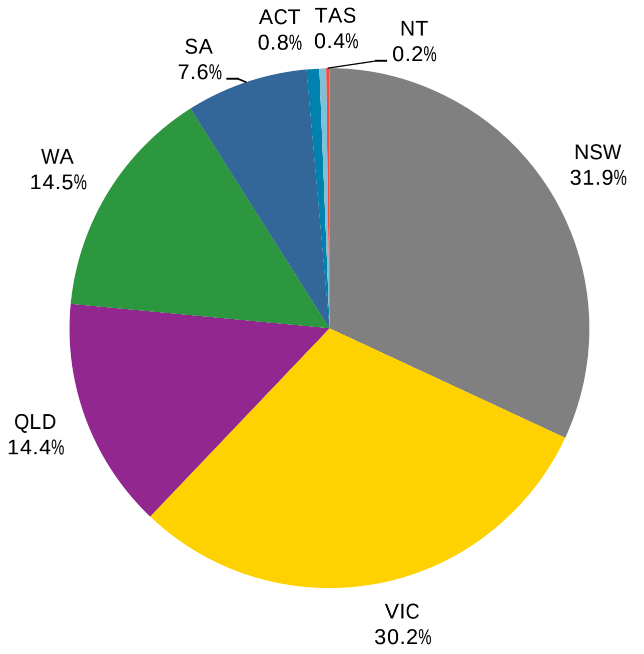


Table 30: Contemporary Music – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$193,030,699	31.9%	-2.5%
VIC	$182,724,476	30.2%	-3.4%
QLD	$86,998,740	14.4%	-1.2%
WA	$87,844,228	14.5%	4.5%
SA	$45,829,337	7.6%	2.0%
ACT	$4,836,355	0.8%	0.2%
TAS	$2,490,063	0.4%	0.3%
NT	$1,209,143	0.2%	0.1%
Total	$604,963,041	100%	

Figure 41: Contemporary Music – Attendance by State/Territory (2014)

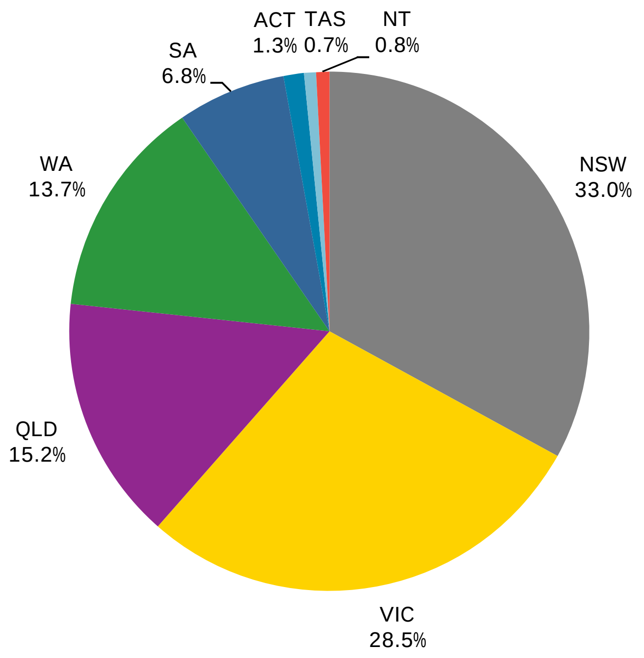


Table 31: Contemporary Music – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	2,105,725	33.0%	-4.1%
VIC	1,820,228	28.5%	-3.3%
QLD	970,993	15.2%	1.0%
WA	877,048	13.7%	4.2%
SA	432,612	6.8%	0.9%
ACT	80,351	1.3%	0.2%
TAS	46,888	0.7%	0.5%
NT	52,213	0.8%	0.6%
Total	6,386,058	100%	

4.9 Festivals (Multi-Category)

4.9.1 National Overview

In the period 2013 to 2014, Festivals (Multi-Category) increased significantly in terms of revenue and attendance. Gross revenue increased by 86.6% from $25.62 million to $47.81 million. The increase in total attendance was less pronounced at 34.7% and thus the stronger result in revenue is mostly explained by a rise in ticket prices. The average ticket price increased from $34.59 in 2013 to $48.41 in 2014, an increase of 39.9%.

The above changes can be largely explained by the inclusion of a number of new events in the 2014 Survey. *The Falls Music and Arts Festival* was included for the first time in 2014, and the significantly higher ticket prices for this festival increased the overall ticket price and contributed to strong gains in New South Wales, Victoria and Tasmania. In addition, the inclusion of *MONA FOMA* and *Dark Mofo* for the first time this year contributed to strong growth in Tasmania.

South Australia continued to dominate in this category due to the *WOMADelaide Music*, *Arts and Dance Festival* and *Adelaide Fringe*, which is the second largest Fringe Festival in the world after Edinburgh. Western Australia also performed well, in large part due to the strong growth of the *Fringe World* Festival in Perth.

Other major events in this category in 2014 included the annual *Sydney Festival*, *Brisbane Festival*, *Perth International Arts Festival* and *Melbourne Festival*.

Figure 42: Festivals (Multi-Category) – Gross Revenue (2004-2014)

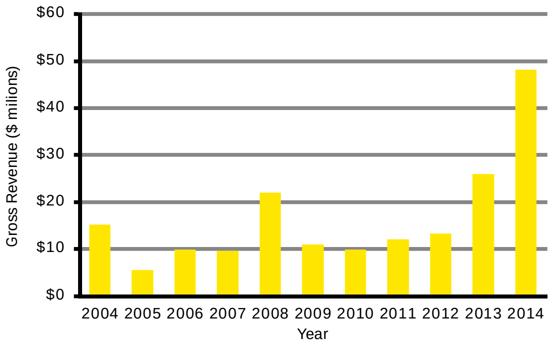


Figure 43: Festivals (Multi-Category) – Total Attendance (2004-2014)

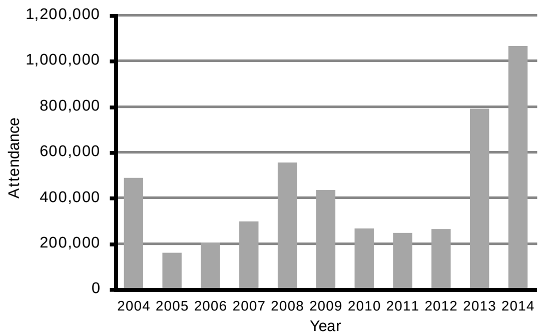


Table 32: Festivals (Multi-Category) – Revenue and Attendance (2004-2014)

	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%

Note: The significant increases for Festivals (Multi-Category) between 2012 and 2013 can be largely explained by the first time inclusion of data for Adelaide Fringe and Perth's *Fringe World* festivals in 2013.

4.9.2 State/Territory Breakdown

Figure 44: Festivals (Multi-Category) – Revenue by State/Territory (2014)

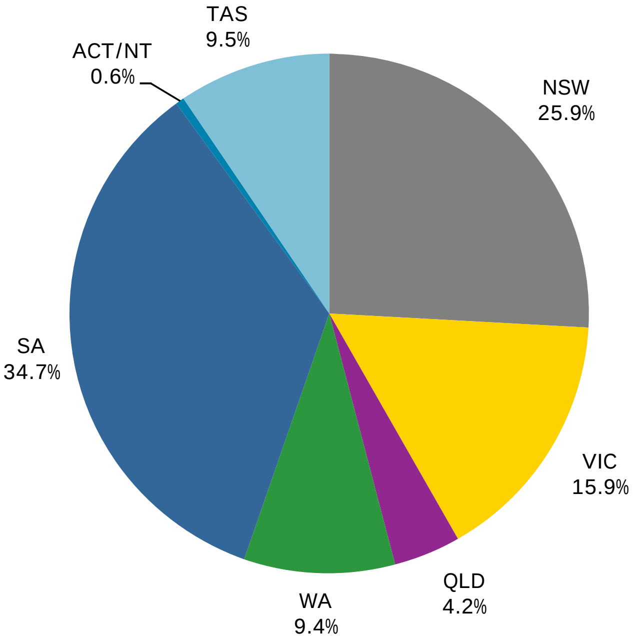


Table 33: Festivals (Multi-Category) – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$12,359,382	25.9%	19.5%
VIC	$7,588,917	15.9%	10.2%
QLD	$1,994,449	4.2%	-1.7%
WA	$4,487,163	9.4%	-1.1%
SA**	$16,583,347	34.7%	-33.5%
ACT/NT*	$266,471	0.6%	-2.9%
TAS	$4,525,407	9.5%	9.5%
Total	$47,805,136	100%	

Figure 45: Festivals (Multi-Category) – Attendance by State/Territory (2014)

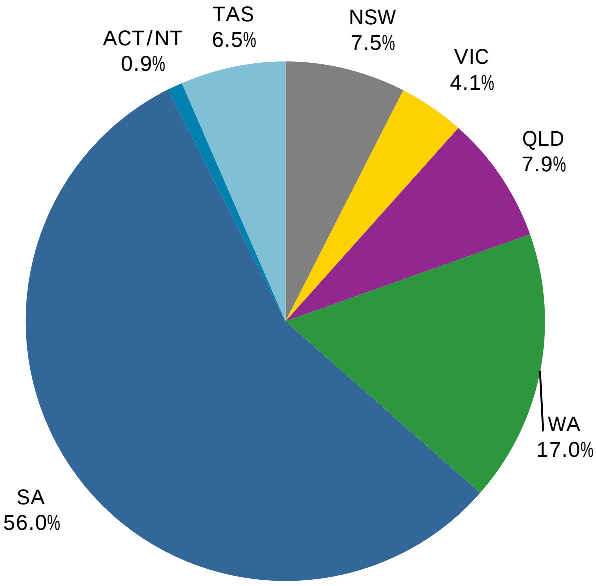


Table 34: Festivals (Multi-Category) –Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	79,712	7.5%	2.9%
VIC	43,494	4.1%	-0.9%
QLD	83,878	7.9%	1.5%
WA	179,697	17.0%	3.3%
SA**	593,926	56.0%	-8.2%
ACT/NT*	9,857	0.9%	-5.2%
TAS	69,242	6.5%	6.5%
Total	982,549	100%	

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

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

4.10 Festivals (Single-Category)

4.10.1 National Overview

There was strong growth in revenue and attendance for Festivals (Single-Category) in 2014. Gross revenue increased by 20.3% from $107.37 million to $129.21 million. Total attendances experienced a gain of 21.6%, while ticket prices increased by a more modest 4.9%.

The above changes can largely be explained by the first time inclusion of a number of new data providers in 2014. In particular, Oztix provided ticketing services to a number of major festivals including *Meredith Music Festival* and *Soundwave.* This also helps to explain the strong growth in Queensland, with Oztix providing ticketing services for *Soundwave* in Brisbane and *Big Day Out* on the Gold Coast. On a like for like basis excluding the impact of new data providers, Festivals (Single-Category) experienced a decline in revenue and attendance.

Other major festivals in 2014 included *Splendour in the Grass*, *Bluesfest*, *Future Music Festival*, *Stereosonic*, *Groovin' the Moo and St. Jerome's Laneway Festival*.

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

Figure 46: Festivals (Single-Category) – Gross Revenue (2004-2014)

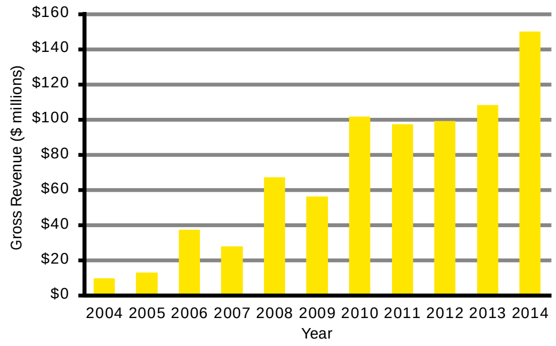


Figure 47: Festivals (Single-Category) – Total Attendance (2004-2014)

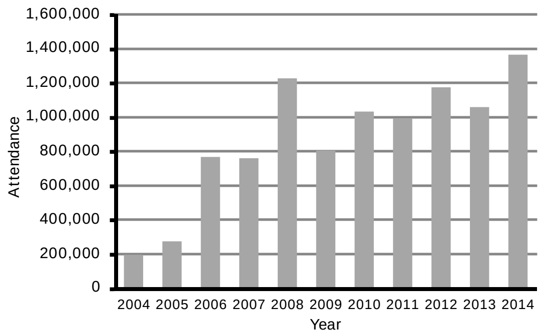


Table 35: Festivals (Single-Category) – Revenue and Attendance (2004-2014)

	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%

4.10.2 State/Territory Breakdown

Figure 48: Festivals (Single-Category) – Revenue by State/Territory (2014)

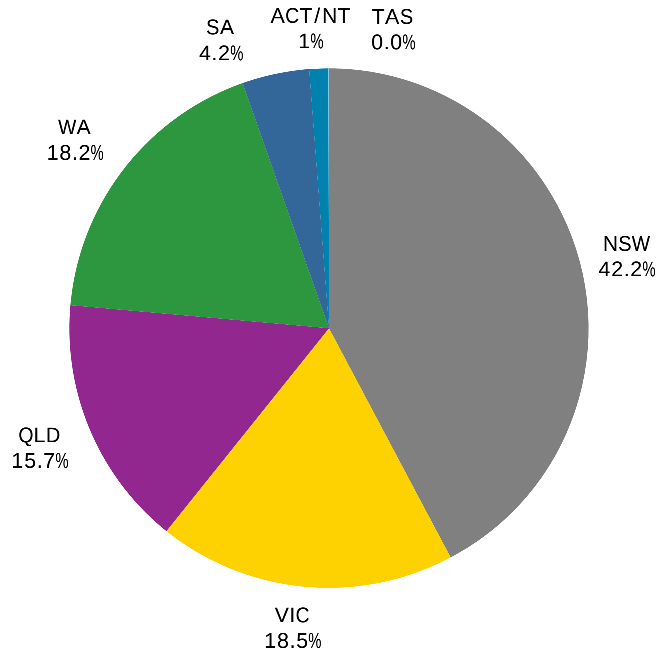


Table 36: Festivals (Single-Category) – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$54,581,636	42.2%	-9.2%
VIC	$23,889,369	18.5%	3.7%
QLD	$20,269,980	15.7%	7.7%
WA	$23,514,734	18.2%	-0.9%
SA	$5,412,989	4.2%	-0.6%
ACT/NT*	$1,520,838	1.2%	-0.6%
TAS	$20,513	0.0%	-0.1%
Total	$129,210,058	100%	

Figure 49: Festivals (Single-Category) – Attendance by State/Territory (2014)

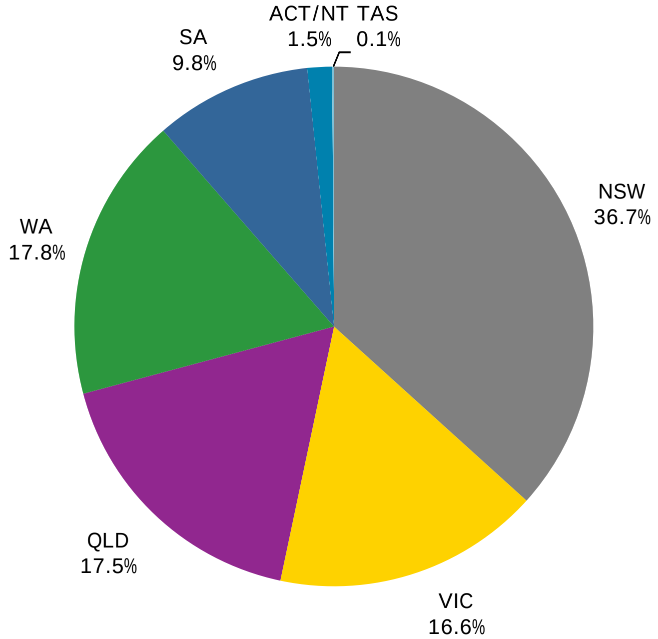


Table 37: Festivals (Single-Category) – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	470,031	36.7%	-4.5%
VIC	212,957	16.6%	-1.7%
QLD	224,765	17.5%	8.5%
WA	227,482	17.8%	0.4%
SA	125,291	9.8%	-2.2%
ACT/NT*	19,695	1.5%	-0.5%
TAS	1,118	0.1%	0.0%
Total	1,281,339	100%	

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

4.11 Musical Theatre

4.11.1 National Overview

The Musical Theatre category experienced strong growth between 2013 and 2014, which reflects the general volatility in the number of musical theatre productions presented nationally in any given year. Gross revenue rose by 65.6% from $193.39 million in 2013 to $320.34 million in 2014. Total attendance increased by 52.6%, whilst the increase in the average ticket price was more modest at 4.7%. This makes 2014 the strongest year for Musical Theatre in terms of gross revenue since the survey began, although attendances were still slightly below those experienced in 2007.

Major events in the Musical Theatre category in 2014 included Disney's *The Lion King, Les Misérables, Grease, Wicked, Strictly Ballroom and The Rocky Horror Show*. The world premiere season of *King Kong* also finished its run in early 2014, but with a relatively small number of shows occurring in the current survey period.

New South Wales experienced particularly strong growth, resulting in a significant gain in industry share. This was in large part due to successful runs of *The Lion King* and *Strictly Ballroom* in Sydney. Although industry share only increased slightly in Victoria, that State also experienced overall growth in both revenue and attendances in 2014. Both *The Lion King* and *Strictly Ballroom* have 2015 seasons in Melbourne.

The AMPAG companies also experienced growth in the Musical Theatre category in 2014, with Opera Australia co-presenting *The King and I* with John Frost.

Figure 50: Musical Theatre – Gross Revenue (2004-2014)

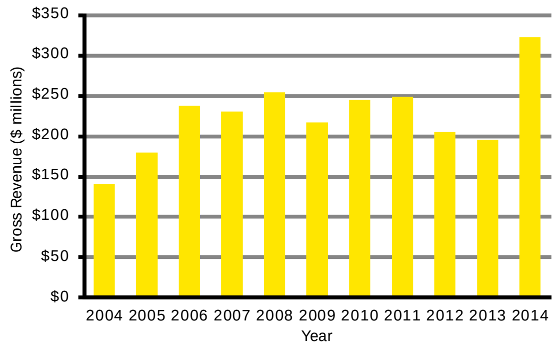


Figure 51: Musical Theatre – Total Attendance (2004-2014)

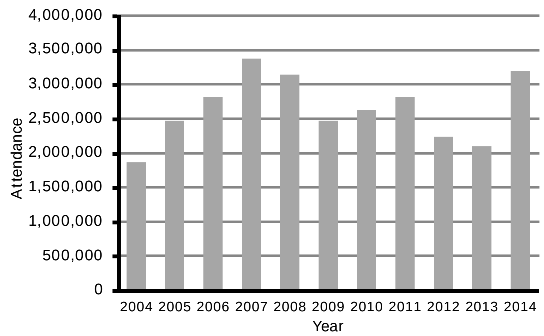


Table 38: Musical Theatre – Revenue and Attendance (2004-2014)

	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%

4.11.2 State/Territory Breakdown

Figure 52: Musical Theatre – Revenue by State/Territory (2014)

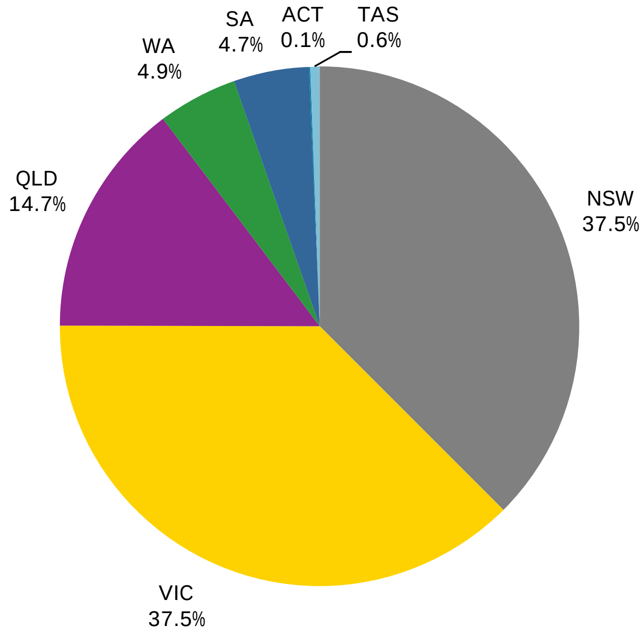


Table 39: Musical Theatre – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$120,109,680	37.5%	11.1%
VIC	$120,268,393	37.5%	0.6%
QLD	$46,998,926	14.7%	-2.9%
WA	$15,825,026	4.9%	-10.5%
SA	$15,078,072	4.7%	1.1%
ACT	$162,896	0.1%	0.1%
TAS	$1,899,336	0.6%	0.6%
NT	$0	0.0%	0.0%
Total	$320,342,329	100%	

Figure 53: Musical Theatre – Attendance by State/Territory (2014)

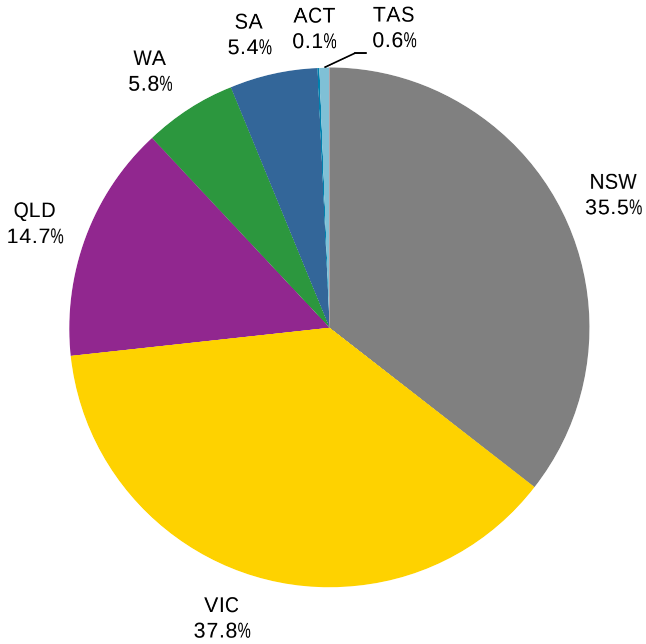


Table 40: Musical Theatre – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	1,130,189	35.5%	8.6%
VIC	1,202,139	37.8%	1.1%
QLD	469,308	14.7%	-4.3%
WA	183,763	5.8%	-7.9%
SA	173,204	5.4%	1.8%
ACT	3,827	0.1%	0.1%
TAS	20,048	0.6%	0.6%
NT	-	0.0%	0.0%
Total	3,182,478	100%	

4.12 Opera

4.12.1 National Overview

In 2014, the Opera category experienced a slight decrease in revenue and an increase in total attendances. Gross revenue declined by 1.5% from $43.28 million to $42.62 million while total attendance grew by 12.2%. The decrease in average ticket price by 14% from $145.28 to $124.92 helps to explain the decrease in revenue despite the growth in attendance.

The majority of ticket sales and thus revenue came from productions which were staged by AMPAG companies. Within AMPAG, Opera Australia was the largest company in 2014, followed by Opera Queensland, West Australian Opera Company and The State Opera of South Australia.

In 2014 there was an increase in the number of Opera performances by the AMPAG companies, which helps to explain the increase in attendance for the category. Notably, Opera Australia staged its regular spring season in Melbourne during 2014, following limited performances of *The Ring Cycle* in 2013 which replaced the regular season and contributed to the higher average ticket price for 2013.

Major performances by Opera Australia included *Madama Butterfly*, *Carmen*, *Rigoletto* and *Eugene Onegin*. In particular, performances of *Madama Butterfly* for the highly successful Handa Opera on Sydney Harbour further strengthened New South Wales in this category.

Outside of AMPAG, other notable Opera performances in 2014 included *La Traviata* by Victorian Opera and *Opera in the Reservoir* performances by the Underground Opera Company in Brisbane.

Figure 54: Opera – Gross Revenue (2004-2014)

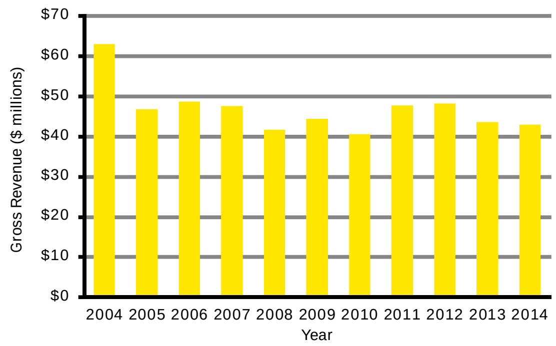


Figure 55: Opera – Total Attendance (2004-2014)

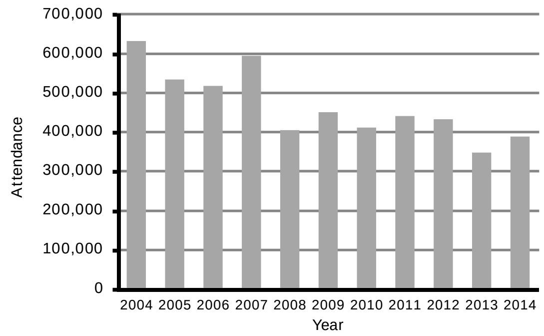


Table 41: Opera – Revenue and Attendance (2004-2014)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$62,562,433		629,808		$108.88	
2005	$46,390,544	-25.8%	531,595	-15.6%	$94.38	-13.3%
2006	$48,331,324	4.2%	515,927	-2.9%	$102.40	8.5%
2007	$47,249,031	-2.2%	591,605	14.7%	$85.28	-16.7%
2008	$41,316,885	-12.6%	402,549	-32.0%	$114.46	34.2%
2009	$44,044,027	6.6%	448,096	11.3%	$111.62	-2.5%
2010	$40,128,943	-8.9%	409,541	-8.6%	$112.86	1.1%
2011	$47,305,786	17.9%	439,041	7.2%	$124.66	10.5%
2012	$47,843,971	1.1%	430,904	-1.9%	$126.84	1.8%
2013	$43,283,705	-9.5%	344,761	-20.0%	$145.28	14.5%
2014	$42,620,749	-1.5%	386,927	12.2%	$124.92	-14.0%

4.12.2 State/Territory Breakdown

Figure 56: Opera – Revenue by State/Territory (2014)

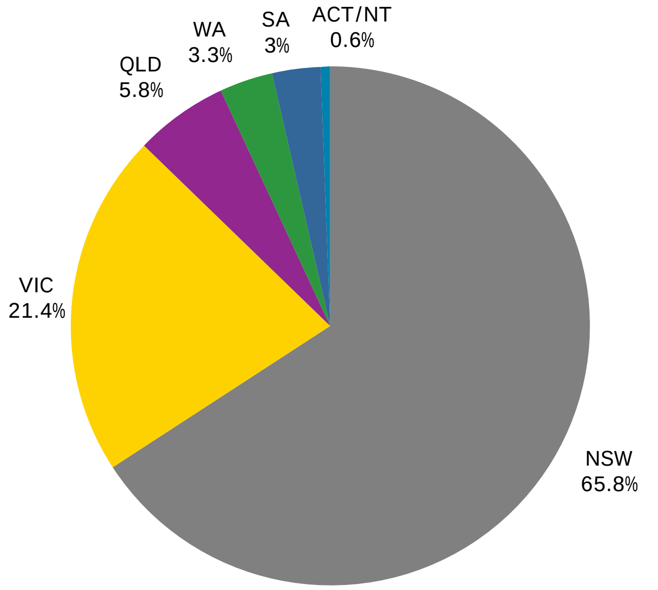


Table 42: Opera – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$28,053,377	65.8%	4.6%
VIC	$9,128,735	21.4%	-6.0%
QLD	$2,485,857	5.8%	2.7%
WA	$1,403,469	3.3%	-1.1%
SA	$1,296,985	3.0%	-0.7%
ACT/NT*	$252,327	0.6%	0.5%
TAS	$0	0.0%	0.0%
Total	$42,620,749	100%	

Figure 57: Opera – Attendance by State/Territory (2014)

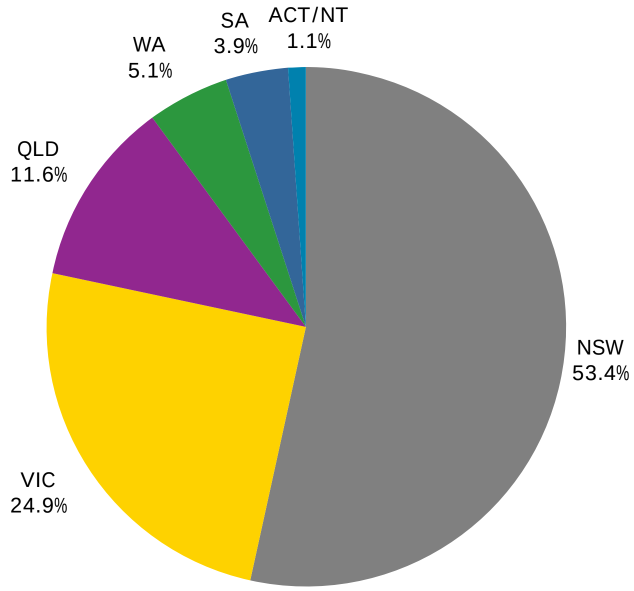


Table 43: Opera – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	206,788	53.4%	-2.6%
VIC	96,312	24.9%	0.9%
QLD	44,743	11.6%	5.9%
WA	19,680	5.1%	-2.9%
SA	15,049	3.9%	-2.1%
ACT/NT*	4,355	1.1%	0.8%
TAS	-	0.0%	0.0%
Total	386,927	100%	

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

4.13 Special Events

4.13.1 National Overview

As with previous years, the Special Events category is particularly variable as it is highly dependent on whether performances that cannot be classified into other categories take place. In the period 2013 to 2014, revenue in the Special Events category increased by 82.1% from $6.03 million to $10.98 million. Total attendances grew more strongly, increasing by 85.7%, but this included significant growth in zero priced tickets. This explains why revenue growth was somewhat softer than growth in attendance despite a 18.8% increase in the average ticket price.

The increase in this category can be explained by the aforementioned fluctuation in events. Major events in this category in 2014 included *Mythbusters Live*, *Rockwiz Live* and a tour by Brian Cox. In particular, the *Mythbusters: Behind the Myths* show toured Australia for the first time in 2014, contributing to growth in all states where it was performed (Victoria, South Australia, New South Wales, Western Australia and Queensland).

Figure 58: Special Events – Gross Revenue (2004-2014)

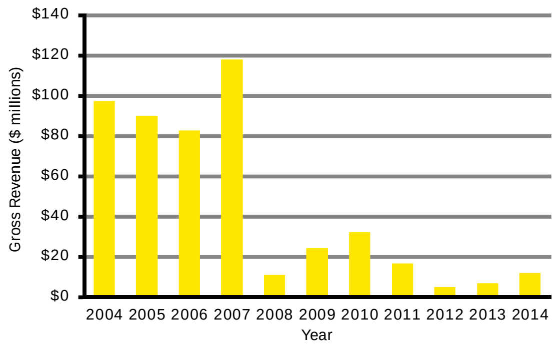


Figure 59: Special Events – Total Attendance (2004-2014)

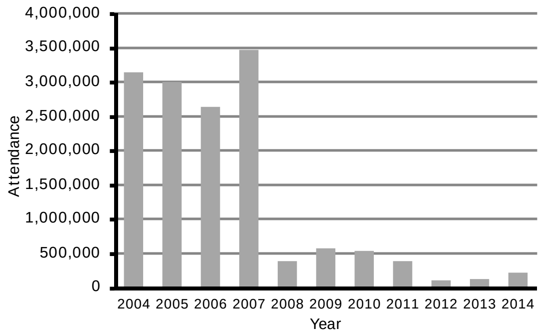


Table 44: Special Events – Revenue and Attendance (2004-2014)

	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%

4.13.2 State/Territory Breakdown

Figure 60: Special Events – Revenue by State/Territory (2014)

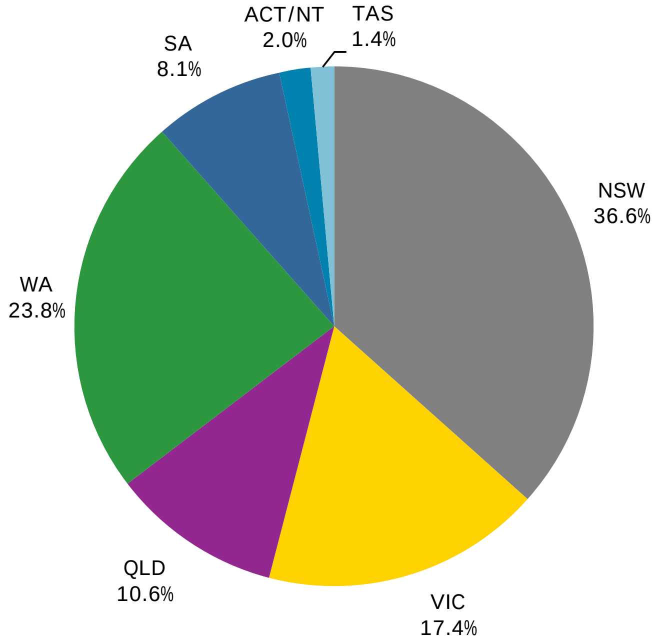


Table 45: Special Events – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$4,021,578	36.6%	0.3%
VIC	$1,912,828	17.4%	-1.0%
QLD	$1,166,483	10.6%	-1.7%
WA	$2,615,072	23.8%	3.1%
SA	$894,000	8.1%	5.1%
ACT/NT *	$216,857	2.0%	N/A
TAS	$157,240	1.4%	N/A
Total	$10,984,057	100%	

Figure 61: Special Events – Attendance by State/Territory (2014)

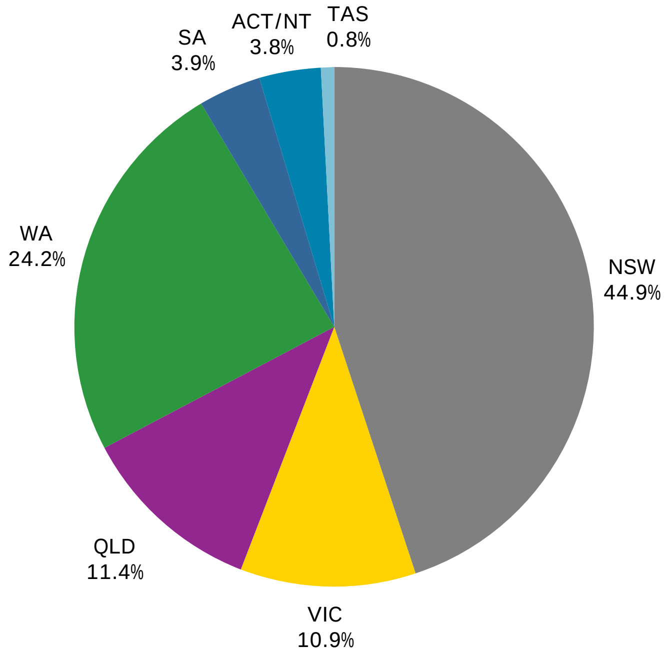


Table 46: Special Events – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	94,478	44.9%	-1.3%
VIC	23,014	10.9%	-5.0%
QLD	24,044	11.4%	1.2%
WA	50,889	24.2%	11.1%
SA	8,196	3.9%	-1.0%
ACT/NT*	8,045	3.8%	N/A
TAS	1,724	0.8%	N/A
Total	210,390	100%	

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

N/A signifies where States/Territories were combined in 2013 due to single events occurring.

4.14 Theatre

4.14.1 National Overview

The Theatre category experienced declines in revenue and attendance in 2014, in contrast to the strong gains achieved in 2013. Gross revenue fell from $119.65 million to $99.71 million, or by 16.7%. Total attendances decreased by 18.3%, while the average ticket price increased slightly from $72.88 to $73.83.

As with previous years, performances through the AMPAG companies generated a large share of ticket sales and revenue. In 2014, the AMPAG companies staged fewer theatre performances compared to 2013, which helps to explain the fall in revenue and attendance. Major companies within AMPAG include Sydney Theatre Company and Melbourne Theatre Company. Major performances by these companies included *Macbeth*, *Cyrano de Bergerac* and *Noises Off* by Sydney Theatre Company and *The Speechmaker*, *Pennsylvania Avenue* and *Private Lives* by Melbourne Theatre Company.

Commercial theatre tours also experienced declines in 2014 with fewer performances than in 2013. Major commercial performances included national tours of *Mrs Browns Boys*, *The Last Confession* and *Wogboys*. *A Murder is Announced* also continued its national tour, which was performed over two calendar years. All of these major performances were staged in Western Australia in 2014, which helps to explain the strong growth in that state of 61% in revenue and 35% in attendance.

Figure 62: Theatre – Gross Revenue (2004-2014)

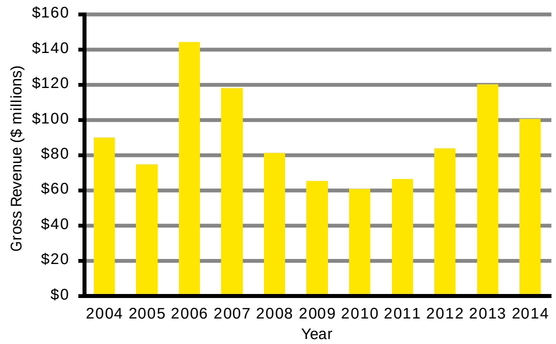


Figure 63: Theatre – Total Attendance (2004-2014)

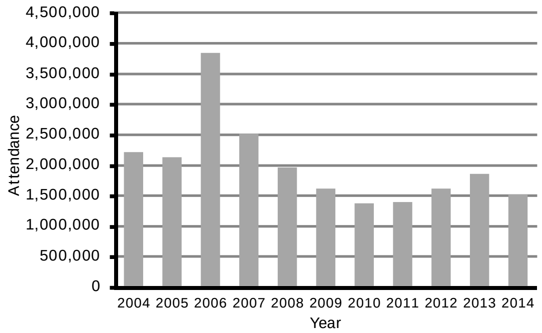


Table 47: Theatre – Revenue and Attendance (2004-2014)

	Revenue	Growth (%)	Total attendance	Growth (%)	Average ticket price	Growth (%)
2004	$89,417,616		2,202,812		$43.87	
2005	$73,988,892	-17.3%	2,117,854	-3.9%	$38.04	-13.3%
2006	$143,564,232	94.0%	3,828,254	80.8%	$39.42	3.6%
2007	$117,382,525	-18.2%	2,505,458	-34.6%	$50.42	27.9%
2008	$80,476,671	-31.4%	1,944,188	-22.4%	$46.92	-6.9%
2009	$76,192,784	-5.3%	1,710,204	-12.0%	$51.34	9.4%
2010	$60,151,139	-21.1%	1,354,336	-20.8%	$51.47	0.2%
2011	$65,880,712	9.5%	1,380,622	1.9%	$56.14	9.1%
2012	$82,973,259	25.9%	1,601,425	16.0%	$59.86	6.6%
2013	$119,647,414	44.2%	1,842,177	15.0%	$72.88	21.8%
2014	$99,714,555	-16.7%	1,504,367	-18.3%	$73.83	1.3%

Note: 2008 revenue and ticketing data for the Theatre category is not directly comparable to the 2009-2014 ticketing data due to the introduction of new categories being Comedy, and Circus and Physical Theatre. A large number of events which were previously in the Theatre category are now reallocated into these new categories. As a result, this has contributed to the decrease in reported revenue and attendances in this category.

4.14.2 State/Territory Breakdown

Figure 64: Theatre – Revenue by State/Territory (2014)

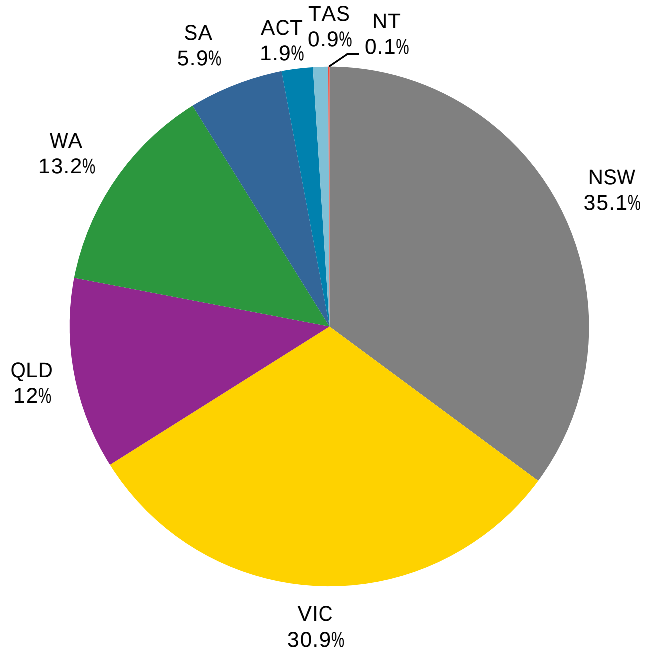


Table 48: Theatre – Revenue by State/Territory (2014)

State/ Territory	Revenue	Proportion	Industry Share Change from 2013
NSW	$35,025,083	35.1%	-2.4%
VIC	$30,835,349	30.9%	-8.7%
QLD	$11,934,177	12.0%	0.9%
WA	$13,120,291	13.2%	6.3%
SA	$5,850,356	5.9%	2.2%
ACT	$1,925,052	1.9%	0.7%
TAS	$940,361	0.9%	0.9%
NT	$83,886	0.1%	0.0%
Total	$99,714,555	100%	

Figure 65: Theatre – Attendance by State/Territory (2014)

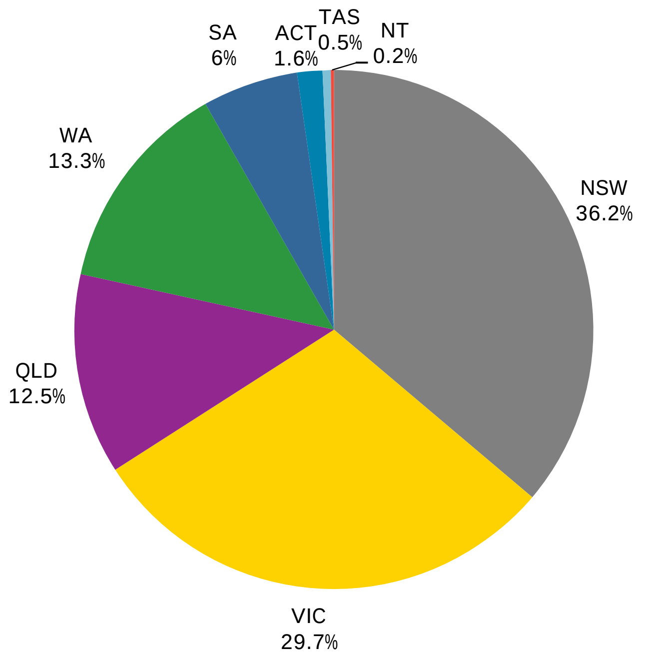


Table 49: Theatre – Attendance by State/Territory (2014)

State/ Territory	Attendance	Proportion	Industry Share Change from 2013
NSW	543,973	36.2%	-3.8%
VIC	447,476	29.7%	-5.6%
QLD	188,737	12.5%	1.6%
WA	200,592	13.3%	5.3%
SA	89,523	6.0%	2.0%
ACT	23,862	1.6%	0.0%
TAS	7,471	0.5%	0.5%
NT	2,733	0.2%	0.1%
Total	1,504,367	100%	

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Appendix A Survey Participants

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

AMPAG Companies:

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

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