

Ticket Attendance and Revenue Survey
2006 & 2007 Report

Live Entertainment Industry in Australia



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Introduction

Live Performance Australia (LPA) is pleased to present the 2006 and 2007 Report of the LPA Ticket Attendance and Revenue Survey. The Survey reports revenue and attendance figures across the live performance industry and for ten key industry categories. The Report now includes 4 years of historical data, making it a more valuable industry resource than ever.

The 2007 figures, total gross revenue of \$1.23 billion and 20.8 million tickets issued, show that the industry has experienced an increase in gross revenue of 38.8% in 2006 and a further 6.1% in 2007.

This substantial growth is consistent with the broader global market where live performance has grown in most major territories around the world. However, an industry such as ours is also cyclical, and recent growth must be viewed in this context. Further, the uncertain financial environment we are now experiencing may also impact on future surveys.

The LPA Ticket Attendance and Revenue Survey is a unique transactional-based Survey consisting of two data collection sources – the country's major Ticketing Service Providers and the Australian Major Performing Arts Group (AMPAG) companies, via the Australia Council for the Arts.

Ticketing companies provide their revenue and attendance data directly to the Survey consultants, excluding all events produced by AMPAG member companies. Each AMPAG company reports its own revenue and attendance figures

About LPA

Live Performance Australia (LPA) is the peak body for Australia's live entertainment and performing arts industry, and presenter of the annual Helpmann Awards®. LPA was established in 1917 and is registered as an employers' organisation under the Workplace Relations Act 1996.

LPA's Vision is to ensure the growth and long term sustainability of the Australian live entertainment and performing arts industry. We strive to maximise the value that Government, business and the Australian community attach to live performance. This is based on the significant contribution our industry makes to the cultural, commercial and economic wealth of our nation.

to the Australia Council for the Arts, which collates the results and provides them to the Survey consultants.

We know that the Survey underestimates the value of the industry as it does not capture all ticketed performances. In particular, regional venues do not currently contribute data for the Survey nor do some of the smaller self-ticketing venues or boutique ticketing agencies. It is our intention to broaden the reach of the Survey in the future so that the contribution of regional venues and smaller companies can be better reflected in the results.

We would like to acknowledge and thank the participating companies (listed on page 31) who devote time and resources to provide data to the Survey. Thanks also to our new Survey Consultants – Ernst & Young – as well as Wayne McKenna at the Major Performing Arts Board of the Australia Council for the Arts, for their efforts in compiling the data. The cooperation and effort of all parties involved is greatly appreciated.

Evelyn Richardson
Chief Executive
Live Performance Australia

November 2008



This Survey is proudly sponsored by Media Super, the industry super fund for print, media, entertainment and arts professionals.

www.mediasuper.com.au

Ticket Attendance and Revenue Results

This report covers the 2006 and 2007 years of the LPA Ticket Attendance and Revenue Survey: Live Entertainment Industry in Australia. The report also offers comparative data for the 2004 and 2005 years. It is based on data collected under the auspices of Live Performance Australia (LPA) and reports on paid and zero price tickets and associated revenue data.

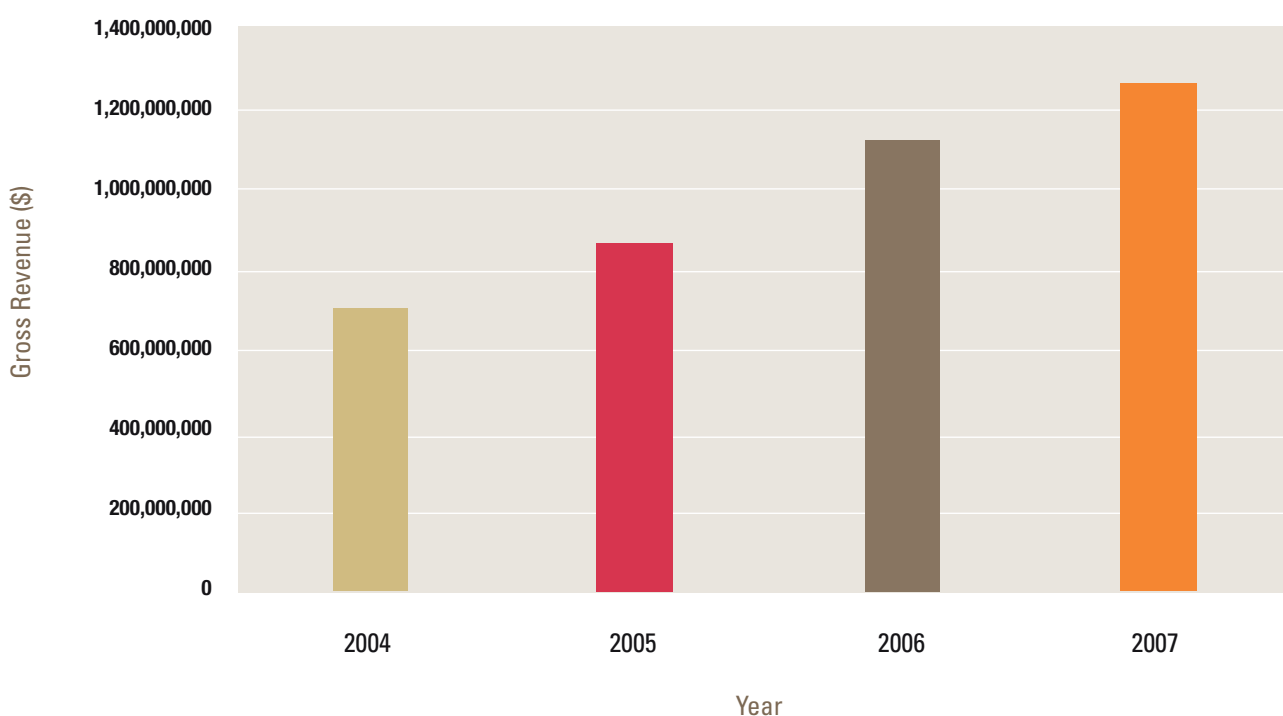
Revenue and attendance is the aggregate of figures supplied by participating ticketing companies and the Australia Major Performing Arts Group (AMPAG) through the Australia Council for the Arts, as listed on page 31.

The National Attendance and Revenue report for 2006 and 2007 is presented in two sections. The first presents the attendance and revenue data collated from 2004 to 2007 across all of the ten live performance event categories as classified in the survey. The second section of the report presents and analyses the attendance and revenue data from 2004 to 2007 by category of live entertainment.

Table 1 Total Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth (%)	Tickets	Growth (%)	Average Ticket Price (\$)	Growth	CPI Adjusted Average Ticket Price (\$)
2004	\$689,599,070		13,477,231		\$55.13		
2005	\$834,337,206	21.0%	15,808,790	17.3%	\$60.62	10.0%	\$56.78
2006	\$1,158,064,526	38.8%	19,835,756	25.5%	\$64.08	5.7%	\$58.48
2007	\$1,228,658,664	6.1%	20,887,365	5.3%	\$66.03	3.1%	\$60.23

Figure 1: Gross Revenue (2004-2007)



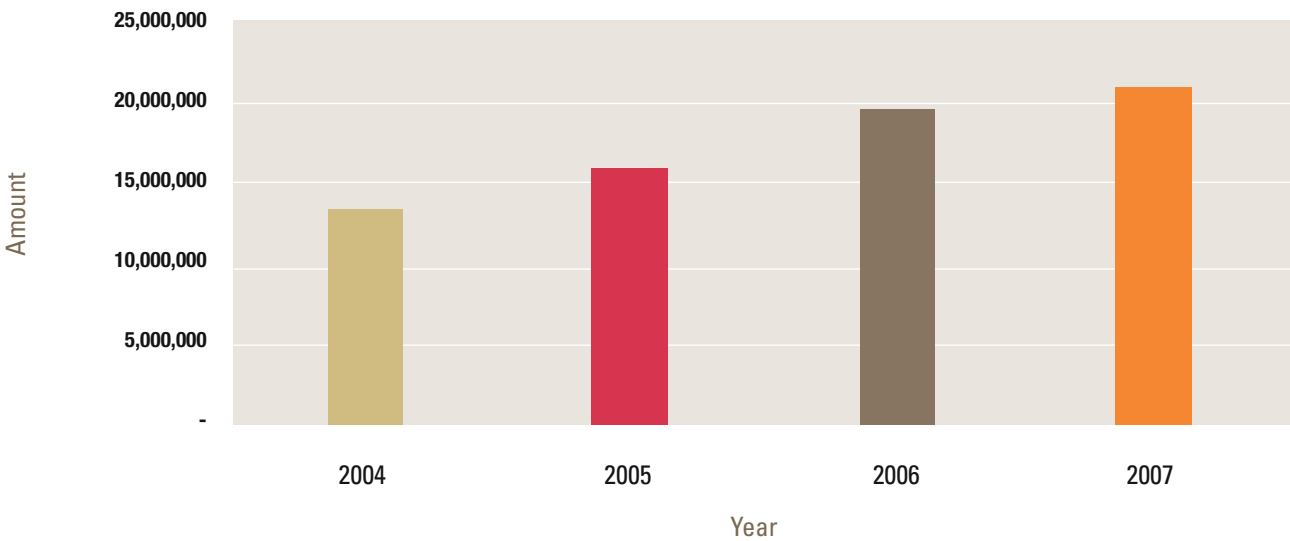
Overall Analysis

The primary drivers behind gross revenue are the number of shows, venue size, and the quality of the product. As shown in *Figure 1* on page 4, there was a significant increase in gross revenue of 38.8% in 2006 and a further 6.1% increase in 2007.

In 2006, a total of 18,073,276 paid tickets were issued for live performance events (*Figure 2*). Complimentary, sponsor and zero priced tickets issued totalled 1,762,480¹. The total number of tickets issued 19,835,756, generated a gross revenue of \$1,158,064,526. In comparison to the prior year, this represents an increase of \$323,727,320, or 38.8%.

In 2007, a total of 18,606,439 paid tickets were issued for live performance events. Complimentary, sponsor and zero priced tickets issued totalled 2,280,926. The total number of tickets, 20,887,365, generated a gross revenue of \$1,228,658,664. In comparison to the prior year, this represents an increase of \$70,594,138, or 6.1%.

Figure 2: Ticket Attendance (2004-2007)



6 ¹It is industry practice to issue sponsor tickets at zero price, but these are effectively paid tickets via the sponsorship arrangement.

When considering the average ticket price, only paid tickets are shown (Figure 3). The average ticket price for 2006 was \$64.08, which represents a 5.7% increase from 2005. In 2007, the average ticket price was \$66.03, representing a 3.1% increase from 2006.

Figure 4 below shows the quarterly gross revenue for all categories for 2004 to 2007.

There does not appear to be a matching trend across all four years, however, some revenue figures were significantly outside the mean ("outliers").

Figure 3: Average Ticket Price (2004-2007)

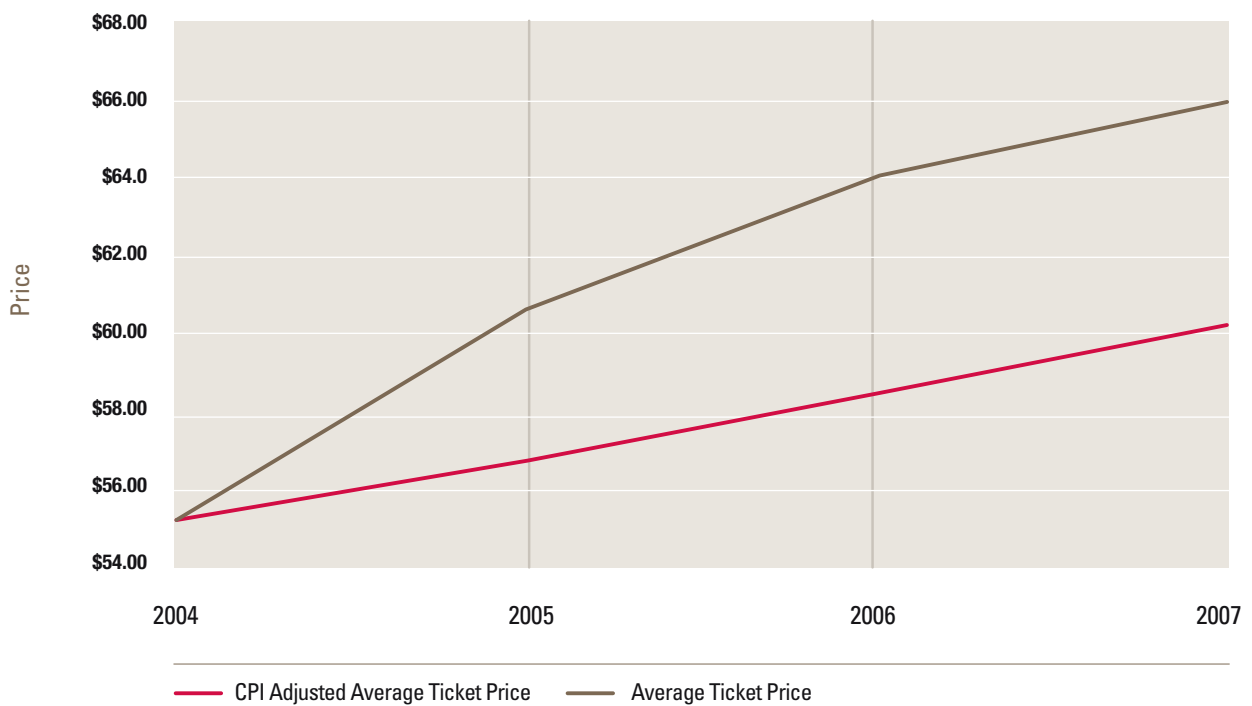
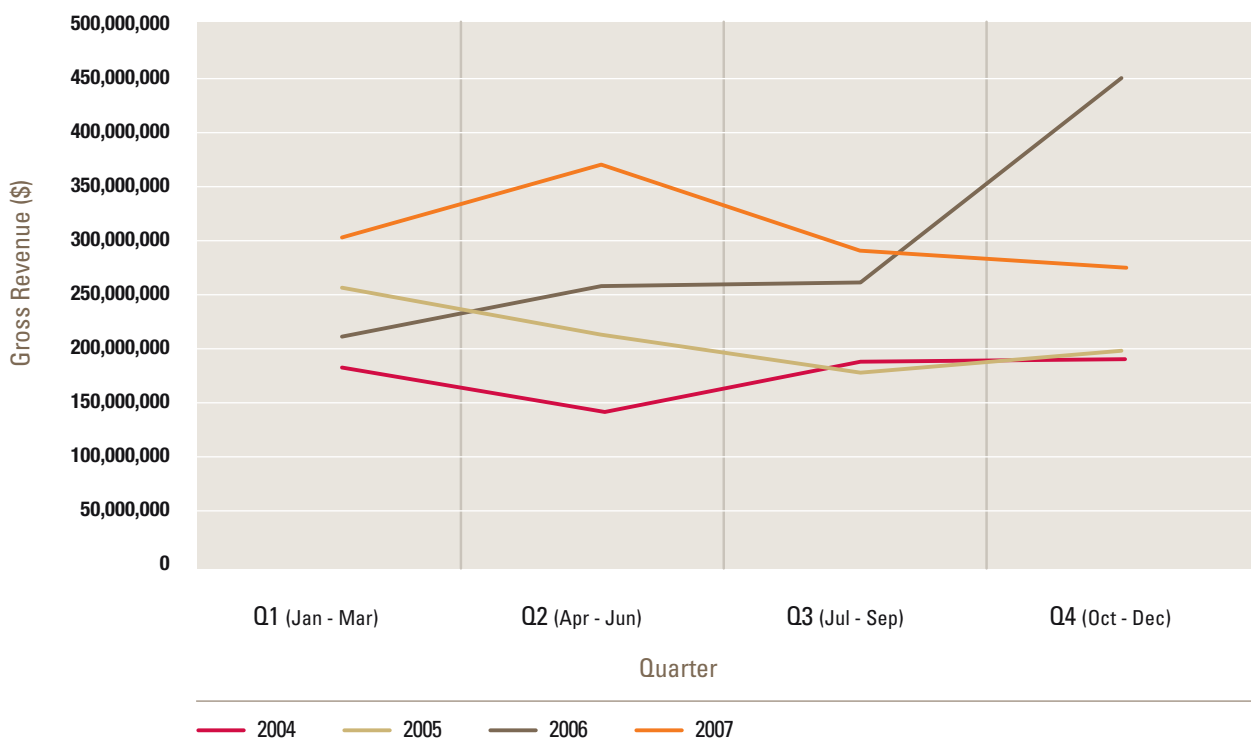


Figure 4: Gross Revenue by Quarter (2004-2007)



A significant increase occurred in the fourth quarter of 2006. This is primarily driven by the Non Classical Music category, which increased by \$174.2m when compared to the fourth quarter in 2005.

The second quarter of 2007 shows a significant increase on the second quarter of previous years. This is primarily driven by Non Classical Music which increased by \$52.8m when compared to the second quarter of 2006.

Category Analysis

As demonstrated in *Figure 5* the largest revenue generating categories in 2006 are Non-Classical music, Musical Theatre, Theatre and Special Events/Other. These categories account for 73.4% of the gross revenue for the year. *Table 2* below details the gross revenue and total ticket attendance for 2006.

Figure 5: Gross Revenue by Category (2006)

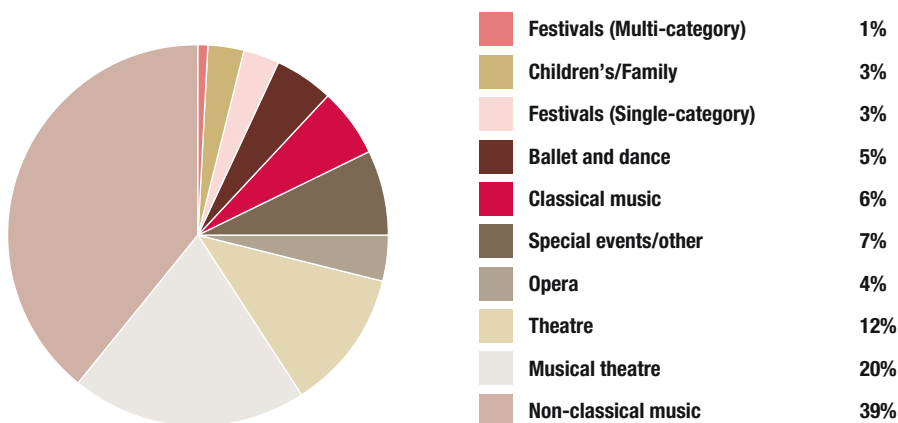


Table 2: Total Revenue and Attendance by Category (2006)

	Revenue (\$)	Revenue (%)	Tickets	Tickets (%)
Ballet & Dance	\$52,523,644	4.5%	1,113,849	5.6%
Children's/Family	\$30,944,086	2.7%	1,114,427	5.6%
Classical Music	\$67,568,915	5.8%	1,571,748	7.9%
Festivals (Multi-Category)	\$9,633,454	0.8%	201,711	1.0%
Festivals (Single Category)	\$36,576,877	3.2%	761,920	3.8%
Musical Theatre	\$235,922,584	20.4%	2,806,153	14.2%
Non-Classical Music	\$450,855,531	38.9%	5,295,988	26.7%
Opera	\$48,331,324	4.2%	515,927	2.6%
Special Events/Other	\$82,143,879	7.1%	2,625,779	13.3%
Theatre	\$143,564,232	12.4%	3,828,254	19.3%
Total National	\$1,158,064,526	100%	19,835,756	100%

In 2007 the top four revenue generating categories were the same as 2006; Non Classical Music, Musical Theatre, Theatre and Special Events/Other (*Figure 6*). These categories accounted for 78.7% of the total gross revenue for the year. *Table 3* below details the gross revenue and total ticket attendance for 2007.

The Category Descriptor guide on page 9 explains the types of performances contained within each Category.

Figure 6: Gross Revenue by Category (2007)

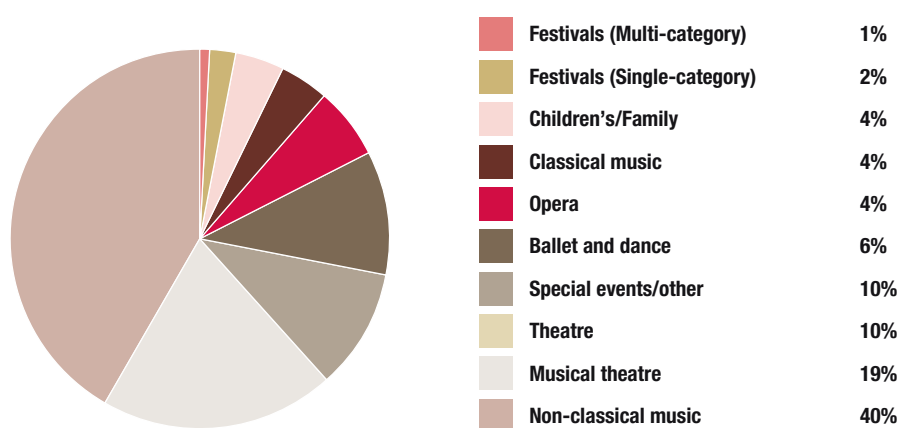


Table 3: Total Revenue and Attendance by Category (2007)

	Revenue (\$)	Revenue	Tickets	Tickets (%)
Ballet & Dance	\$77,287,071	6.3%	1,457,306	7.0%
Children's/Family	\$46,535,403	3.8%	1,393,942	6.7%
Classical Music	\$54,615,181	4.4%	1,104,146	5.3%
Festivals Multi-Category	\$9,318,441	0.8%	294,296	1.4%
Festivals Single Category	\$26,972,082	2.2%	753,247	3.6%
Musical Theatre	\$228,854,618	18.6%	3,358,727	16.1%
Non-Classical Music	\$503,240,419	41.0%	5,975,561	28.6%
Opera	\$47,249,031	3.8%	591,605	2.8%
Special Events/Other	\$117,203,892	9.5%	3,453,077	16.5%
Theatre	\$117,382,525	9.6%	2,505,458	12.0%
Total National	\$1,228,658,663	100%	20,887,365	100%

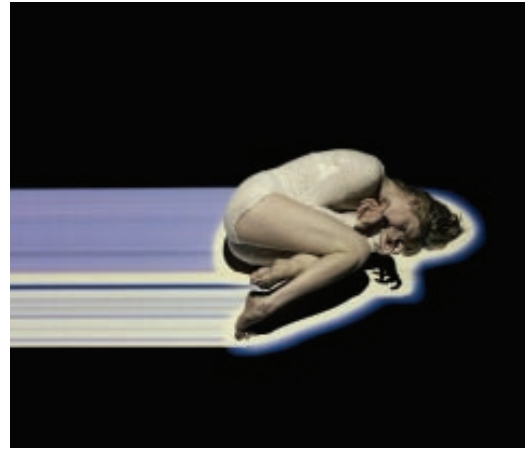
Category Descriptor Guide

Category	Description
Ballet and Dance	<p>Traditional forms</p> <p>Folk dance</p> <p>Ballroom</p> <p>Liturgical dance</p> <p>Ballet</p> <p>Breakdancing</p> <p>Ethnic dance</p> <p>Ballet</p> <p>Latin dance</p> <p>Modern dance</p> <p>Tap</p>
Children's/Family	<p>Kids workshops</p> <p>Live entertainment for kids</p> <p>Interactive performances for kids</p> <p>Circus</p>
Classical Music	<p>Any of the following in classical/contemporary art (ie current, but not 'pop') style:</p> <p>Orchestral music</p> <p>Chamber music</p> <p>Choirs and choral music</p> <p>Recitals</p> <p>Singing/playing</p> <p>All styles of the following:</p> <p>Sacred music</p> <p>Traditional music/ethnic music/world music</p>
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	<p>Staged productions which include music/drama/movement in popular form, primarily (but not limited to):</p> <p>Musicals</p> <p>Cabarets in cabaret mode/style</p>
Non-Classical Music	<p>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, eg 'pop' or 'jazz,' as in The Australian Jazz Orchestra):</p> <p>Pop</p> <p>Blues</p> <p>Rock</p> <p>Soul</p> <p>Techno</p> <p>Rap</p> <p>Dance parties</p> <p>Jazz</p> <p>Country</p> <p>Folk</p> <p>R&B</p> <p>Hip hop</p> <p>Heavy Metal</p>
Opera	<p>Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style:</p> <p>Opera</p> <p>Operetta (includes Gilbert and Sullivan)</p>
Special Events	Unique presentations which do not fall into any other category
Theatre	<p>Script based theatre</p> <p>Comedy theatre</p> <p>Physical Theatre</p> <p>Drama</p> <p>Mime</p> <p>Plays</p>

Ballet and Dance

Category Descriptor

Traditional forms
 Ethnic dance
 Folk dance
 Ballet
 Ballroom
 Latin dance
 Liturgical dance
 Modern dance
 Ballet
 Tap
 Breakdancing



Chunky Move's "Glow" – Winner of Best Ballet or Dance Work at the 2008 Helpmann Awards®. Photograph by Rom Anthoni

Ballet and Dance shows a consistent increase in both gross revenue and ticket attendance over the four year period. Revenue increased by 47.1% or \$24.8m in 2007, with ticket attendance increasing by 30.8%. In 2007, the increase can be partly attributed to tours by Matthew Bourne's Swan Lake and the Paris Opera Ballet.

In 2006, Ballet and Dance events accounted for 4.5% of gross revenue, compared with 6.3% in 2007. Ballet and Dance events accounted for 5.6% of total ticket sales in 2006, increasing to 7.0% in 2007. The average ticket price for ballet and dance events increased from \$50.07 in 2004, to its peak of \$57.39 in 2007.

Figure 7 illustrates the growth trend of gross revenue with respect to Ballet and Dance events over the four year period from 2004 to 2007.

Figure 8 illustrates the total number of tickets with respect to Ballet and Dance events over the four year period from 2004 to 2007.

Table 4: Ballet and Dance – Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth (%)	Tickets	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	\$52,563,644	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%

Figure 7: Ballet and Dance - Gross Revenue (2004-2007)

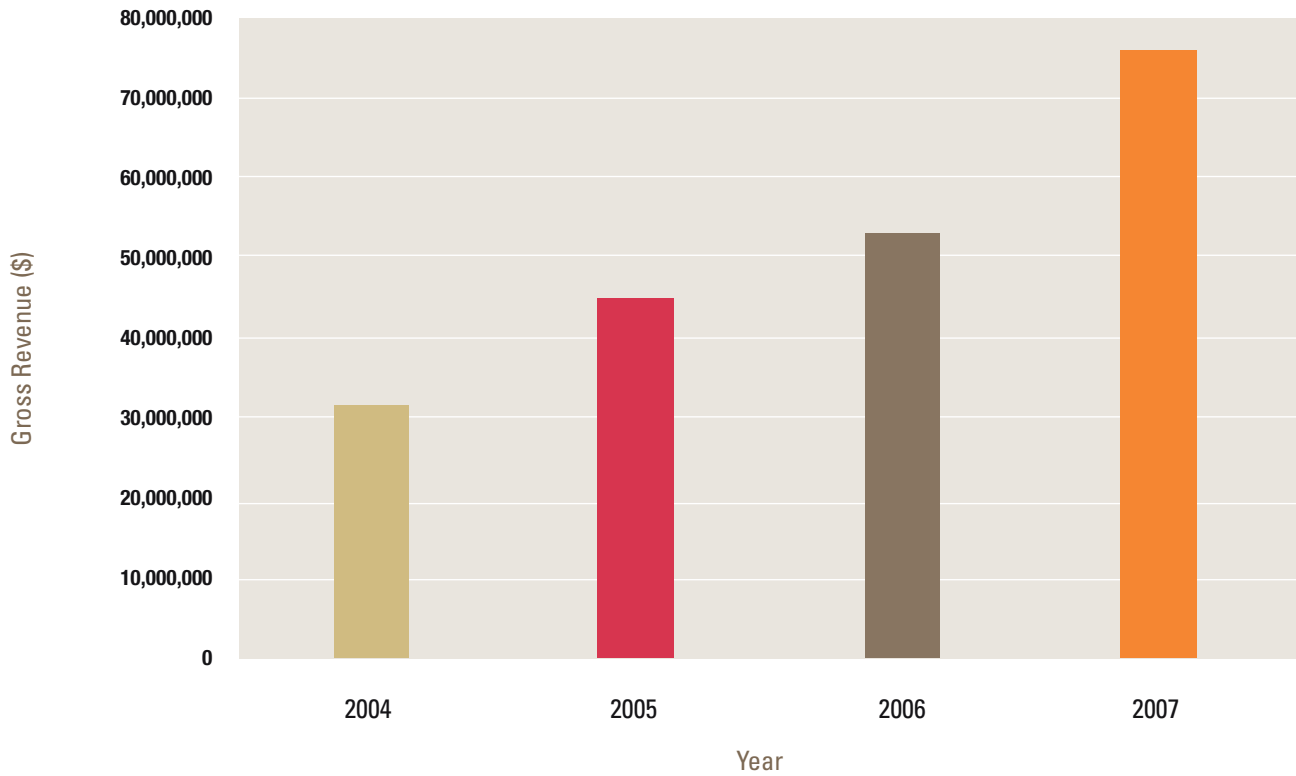
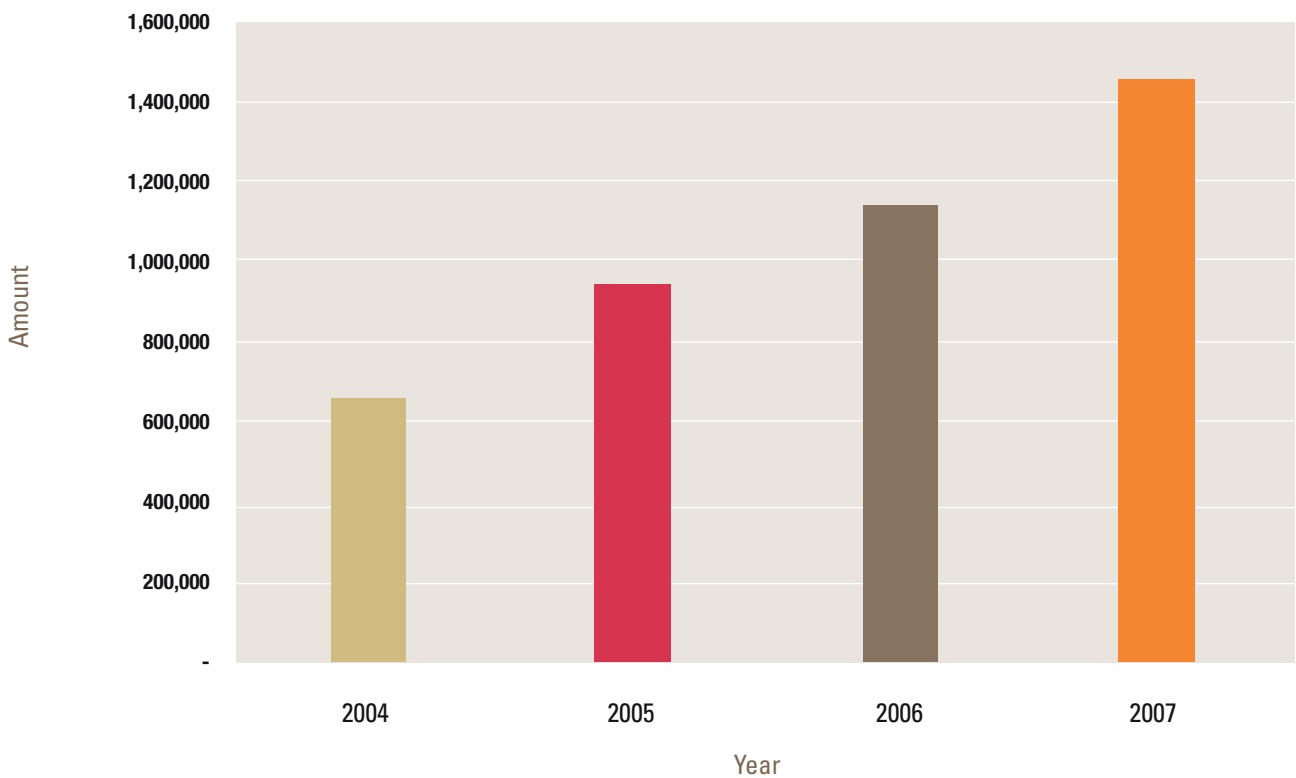


Figure 8: Ballet and Dance - Ticket Attendance (2004-2007)



Children's/Family Events

Category Descriptor

Kids workshops
 Live entertainment for kids
 Interactive performances for kids
 Circus



*Patch Theatre Company's "Mr McGee and the Biting Flea"
 Winner of the Best Presentation for Children at the 2008
 Helpmann Awards®. Photograph by Sarah Long*

Gross revenue generated by Children's/Family Events has shown an overall increasing trend from 2004 to 2007. The largest growth occurred in 2005, where gross revenue increased by \$32.4m. 2006 showed negative growth in both revenue and ticket attendance after a strong 2005, with gross revenue and ticket attendance decreasing by 28.2% and 12.3% respectively. The decrease in ticket attendance is less than the decrease in revenue, indicating that the average ticket prices were lower in 2006. This may be due to the quality of the products, as more popular performances will generally attract higher ticket prices.

Ticket sales and revenue increased in 2007, showing another strong period in the Children's/Family category, with an increase on both 2005 and 2006 figures. This can be attributed to Disney on Ice (Finding Nemo) and Walking with Dinosaurs which not only increased attendance, but also had higher ticket prices.

In 2006, Children's/Family Events accounted for 2.7% of the total gross revenue, compared to 3.8% in 2007. In 2006, Children's/Family Events accounted for 5.6% of total attendance, which then increased to 6.7% in 2007. The average ticket price for Children's/Family Events increased from \$21.25 in 2004 to \$36.49 in 2007.

Figure 9 illustrates the growth trend of gross revenue with respect to Children's/Family Events over the four year period from 2004 to 2007.

Figure 10 illustrates the total number of tickets with respect to Children's/Family Events over the four year period from 2004 to 2007.

Table 5: Children's/Family Events – Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth (%)	Tickets	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%

Figure 9: Children's/Family Events - Gross Revenue (2004-2007)

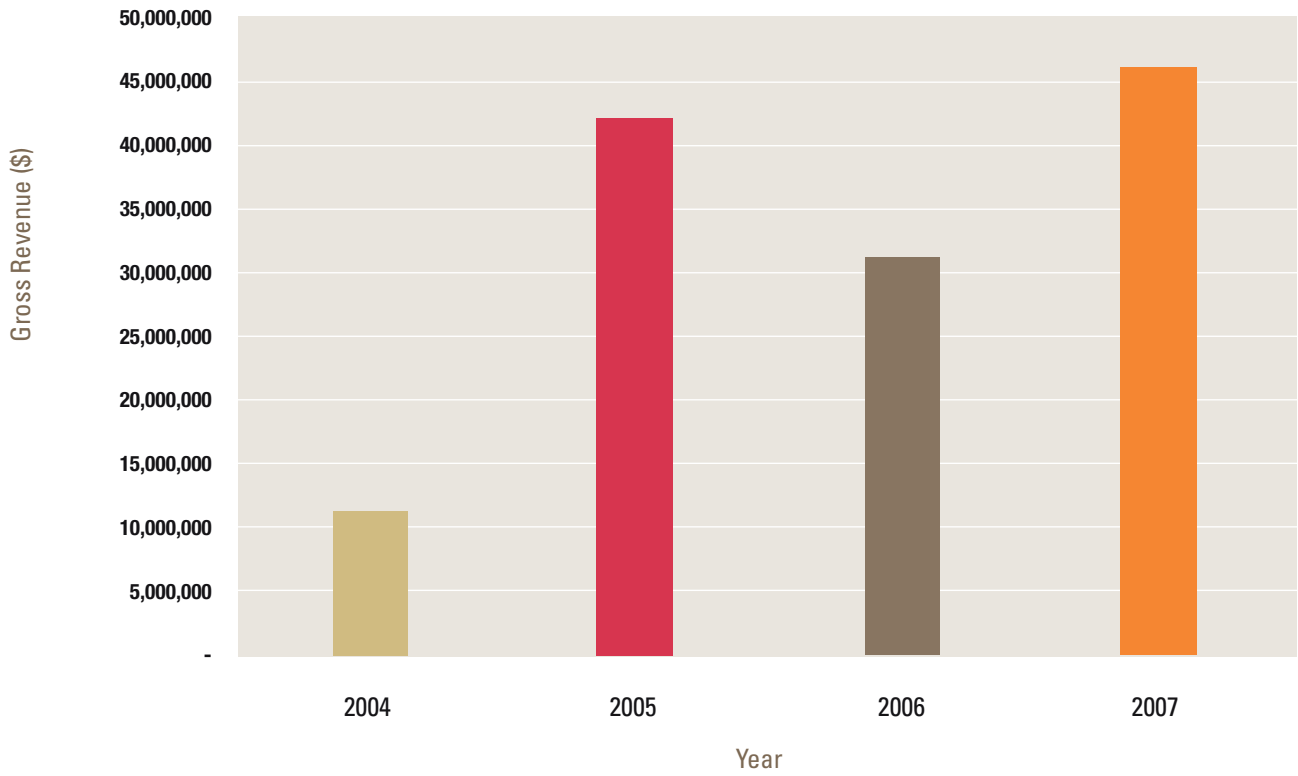
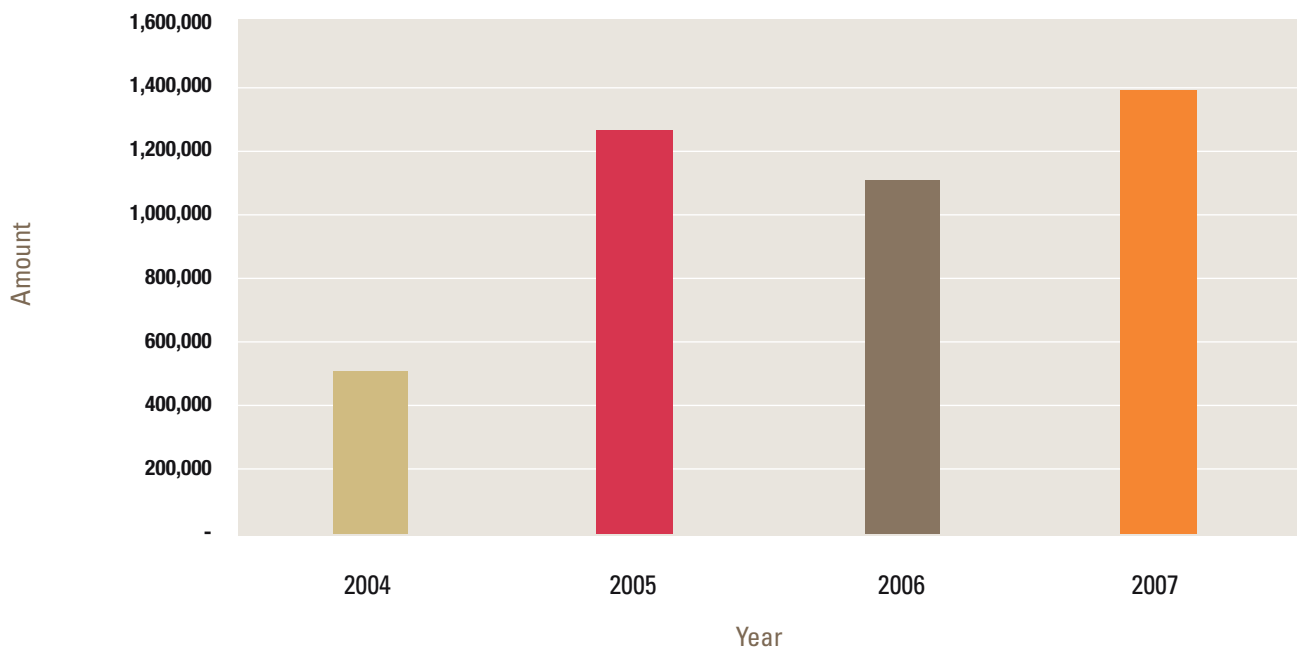


Figure 10: Children's/Family Events - Ticket Attendance (2004-2007)



Classical Music

Category Descriptor

Any of the following in classical/contemporary art (ie current, but not 'pop') style:

Orchestral music
 Chamber music
 Choirs and choral music
 Recitals
 Singing/playing

All styles of the following:

Sacred music
 Traditional music/ethnic music/world music



West Australian Opera's "Madama Butterfly" – Winner of Best Classical Concert Presentation at the 2008 Helpmann Awards®. Performers are Andrew Foote, Angus Wood and Aivale Cole on the large screen. Photograph by James Rogers

Gross revenue shows an increasing trend from 2004 to 2006, and subsequent decrease in 2007. 2006 shows the largest growth, with an increase of \$13.2m in gross revenue. 2007 shows negative growth in gross revenue after a strong 2006, decreasing by 19.2%. The relative decrease in ticket sales is greater than the decrease in gross revenue, indicating that tickets were being sold at a higher price in 2007.

In the 2006 period, Classical Music events accounted for 5.8% of total gross revenue, decreasing to 4.4% in 2007. In 2006, Classical Music events accounted for 7.9% of total ticket sales, decreasing to 5.3% in 2007. The average ticket price for classical music events increased from \$43.21 in 2004 to \$55.85 in 2007.

Figure 11 illustrates the growth trend of gross revenue with respect to Classical Music events over the four year period from 2004 to 2007.

Figure 12 illustrates the total number of tickets with respect to Classical Music events over the four year period from 2004 to 2007.

Table 6: Classical Music– Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth (%)	Tickets	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%

Figure 11: Classical Music - Gross Revenue (2004-2007)

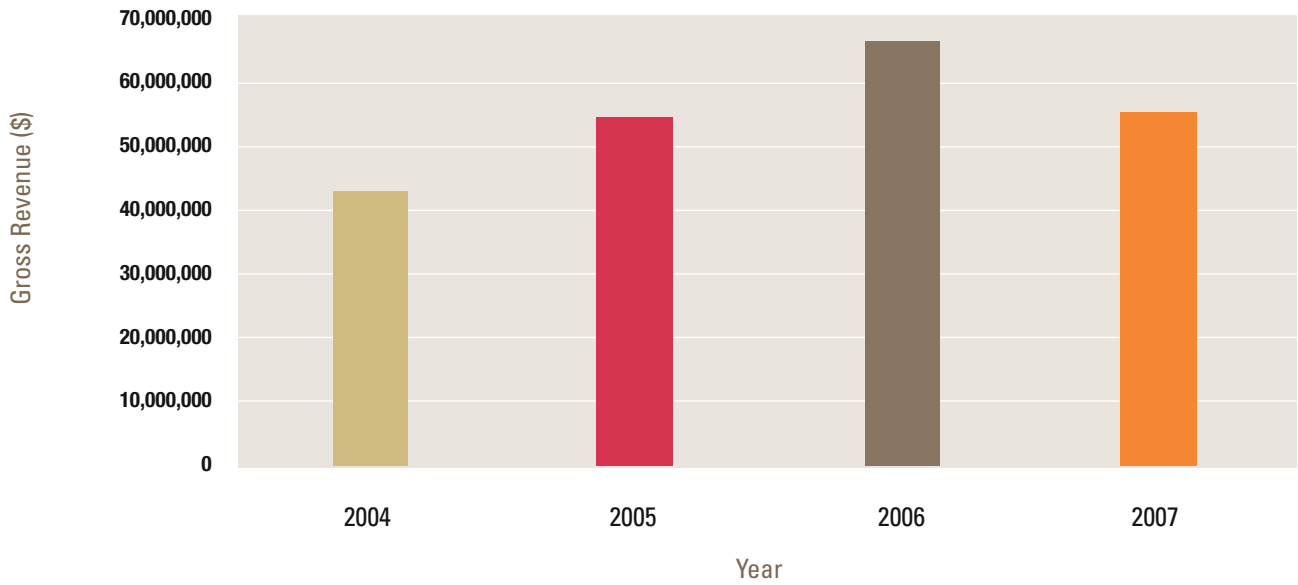
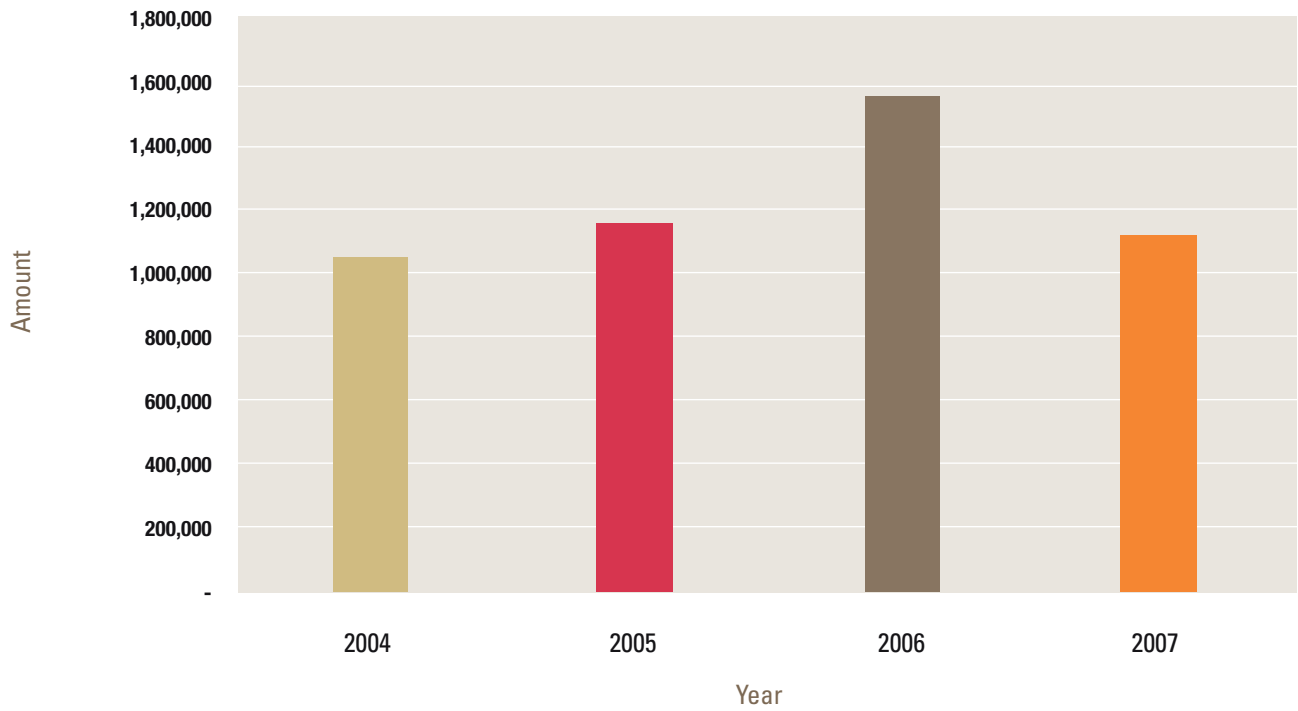


Figure 12: Classical Music - Ticket Attendance (2004-2007)



Festivals (Multi-Category)

Category Descriptor

Festivals/events which contain a number of different types of events which fall into two or more categories.



Cast members from National Theatre of Scotland's 2007 production "Black Watch." Presented by Sydney Festival - Winner of Best Sound Design in the 2008 Helpmann Awards®. Photograph by Manuel Harlan

Multi-category Festivals, which includes International Arts Festivals, have shown a variable trend in gross revenue and ticket attendance over the four year period. The largest growth was experienced in 2006 with gross revenue increasing by \$4.5m. 2007 showed negative growth with gross revenue declining by 3.3%. However, during the same year, ticket sales increased by 45.9%. The number of paid tickets also increased, resulting in the average ticket price being lower in 2007.

Multi-category Festivals accounted for 0.8% of gross revenue in both 2006 and 2007. Multi-category Festivals accounted for 1.0% of ticket attendance in 2006 and 1.4% in 2007. The average ticket price for Multi-category Festivals increased from \$32.26 in 2004, to \$44.09 in 2007, after peaking in 2006 at \$56.72.

Figure 13 illustrates the growth trend of gross revenue with respect to Multi-category Festivals over the four year period from 2004 to 2007.

Figure 14 illustrates the total number of tickets with respect to Multi-category Festivals over the four year period from 2004 to 2007.

Table 7: Festival (Multi-Category) – Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth	Tickets	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%

Figure 13: Festivals (Multi-Category) - Gross Revenue (2004-2007)

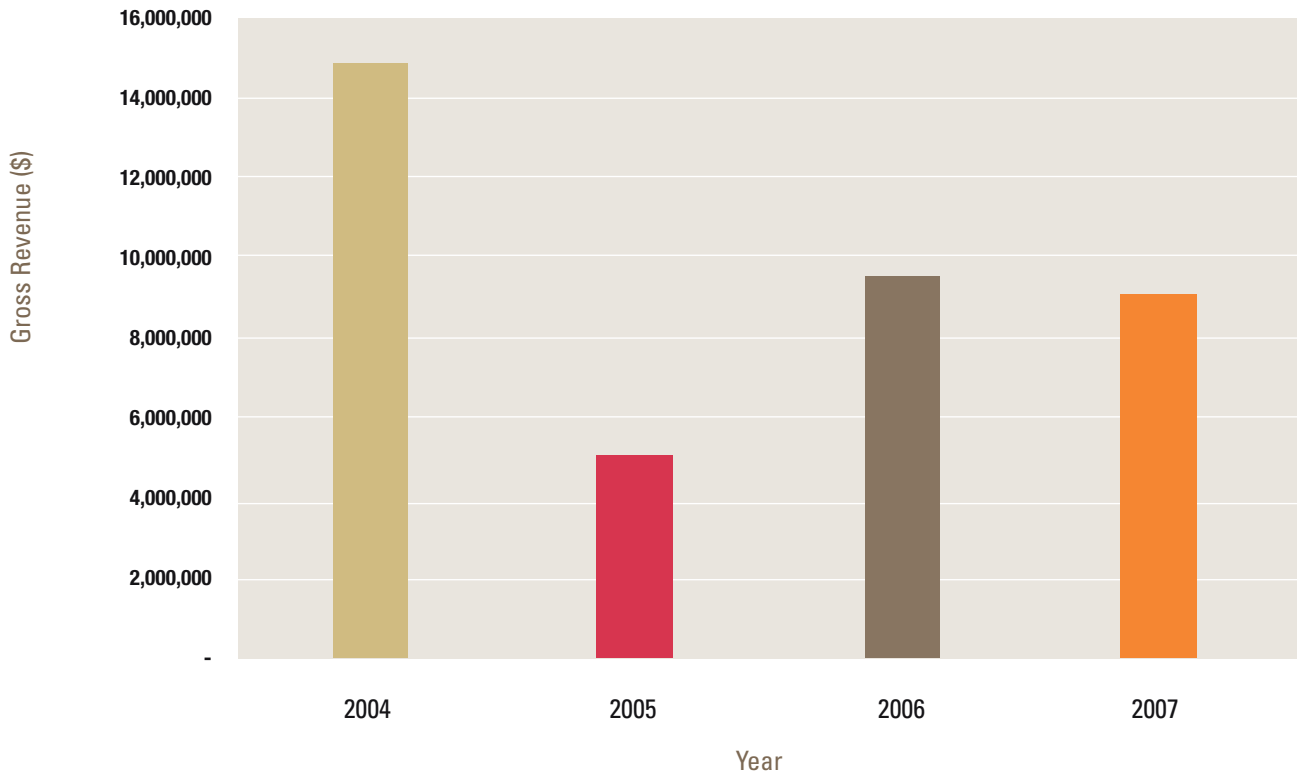
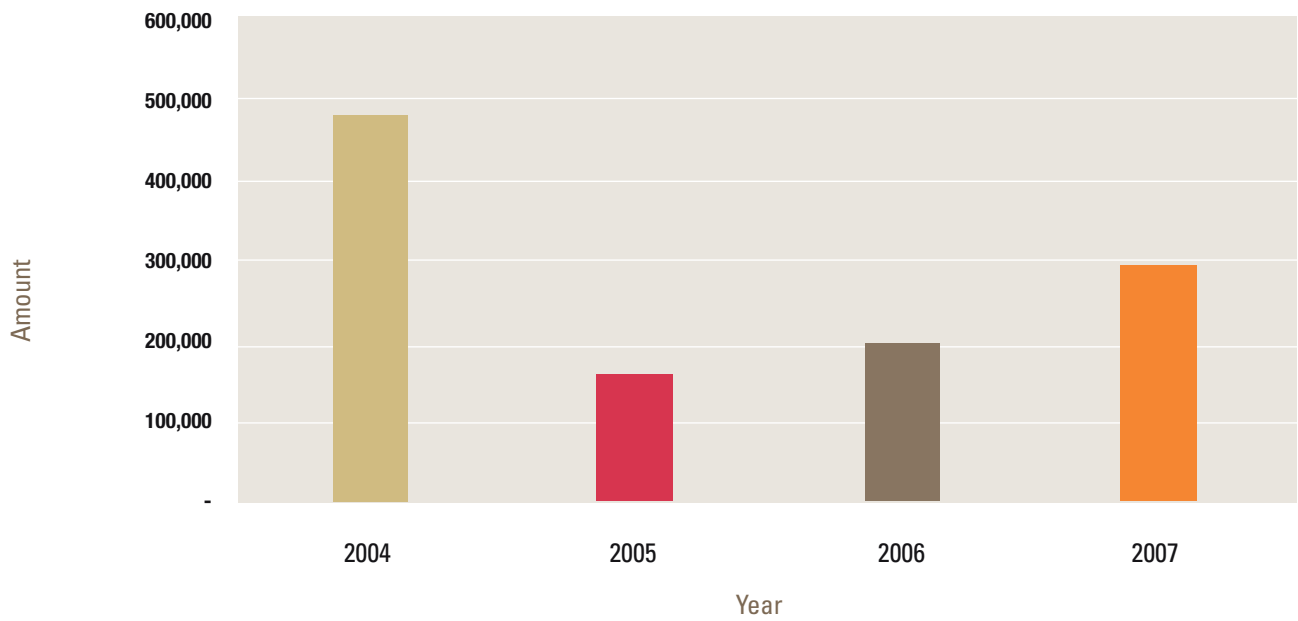


Figure 14: Festivals (Multi-Category) - Ticket Attendance (2004-2007)



Festivals (Single-Category)

Category Descriptor

Festivals/events which contain a number of events but which fall into one category only.



*Arts Projects Australia's "Womadelaide" – Winner of Best Contemporary Music Festival at the 2008 Helpmann Awards®.
Photograph by Alec Kingham*

Single-category Festivals showed an increasing trend in gross revenue from 2004 to 2006 with a decline experienced in 2007. The largest growth occurred in 2006 with gross revenue increasing by \$24.4m or 201.6%. In 2006 Summadayze (Australia's largest dance party festival) sold out and it was the first year of the V Festival. 2007 showed negative growth with gross revenue decreasing by \$9.6m or 26.3%. However, the relative decrease in ticket sales of 1.1% was lower, this can be explained by the increase in the number of zero priced tickets.

In 2006, Single-category Festivals accounted for 3.2% of gross revenue, compared to 2.2% in 2007. Single-category Festivals accounted for 3.8% of total ticket sales in 2006, decreasing to 3.6% in 2007. The average ticket price for Single-category Festivals decreased from \$54.69 in 2004, to \$39.00 in 2007, after peaking at \$63.05 in 2005.

Figure 15 illustrates the growth trend of gross revenue with respect to Single-category Festivals over the four year period from 2004 to 2007.

Figure 16 illustrates the total number of tickets with respect to Single-category Festivals (primarily music festivals) over the four year period from 2004 to 2007. We note that music festivals often manage their own ticketing which means their data is not captured in this survey.

Table 8: Festivals (Single-Category) – Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth	Tickets	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%

Figure 15: Festivals (Single-Category) - Gross Revenue (2004-2007)

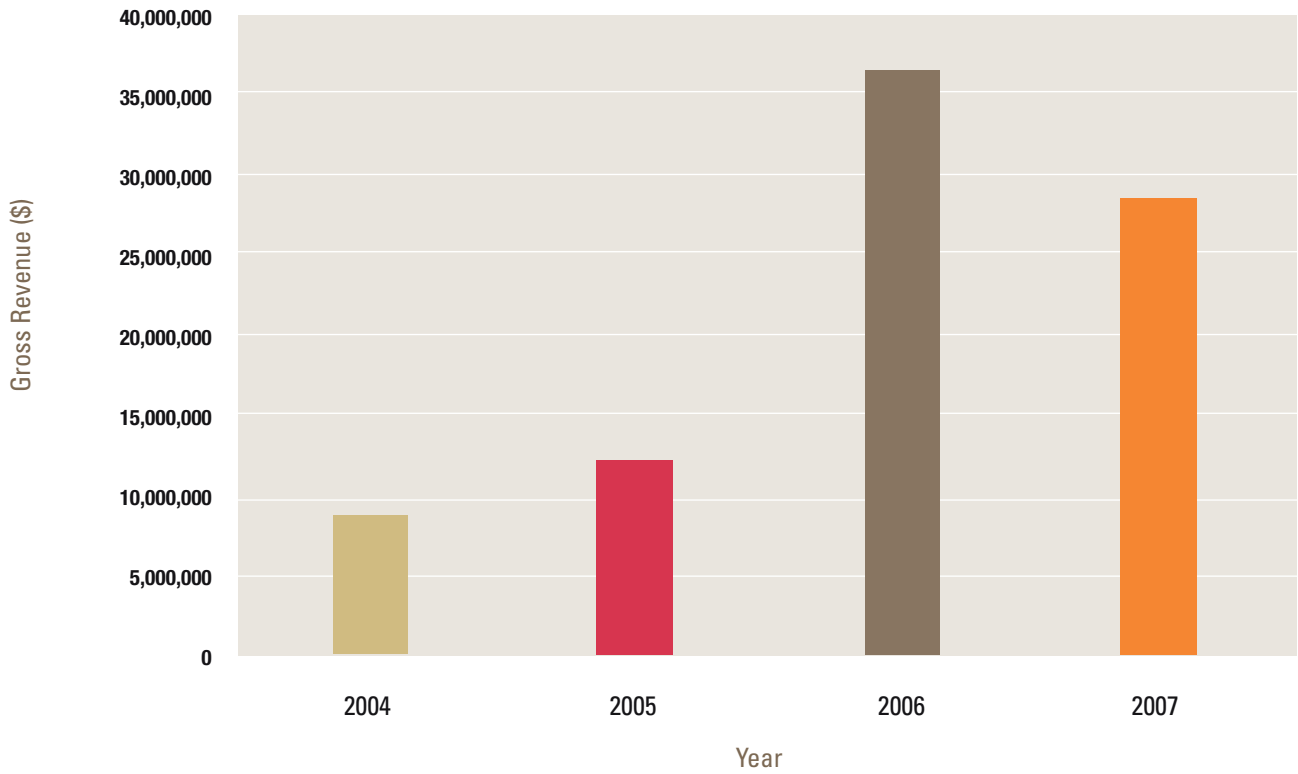
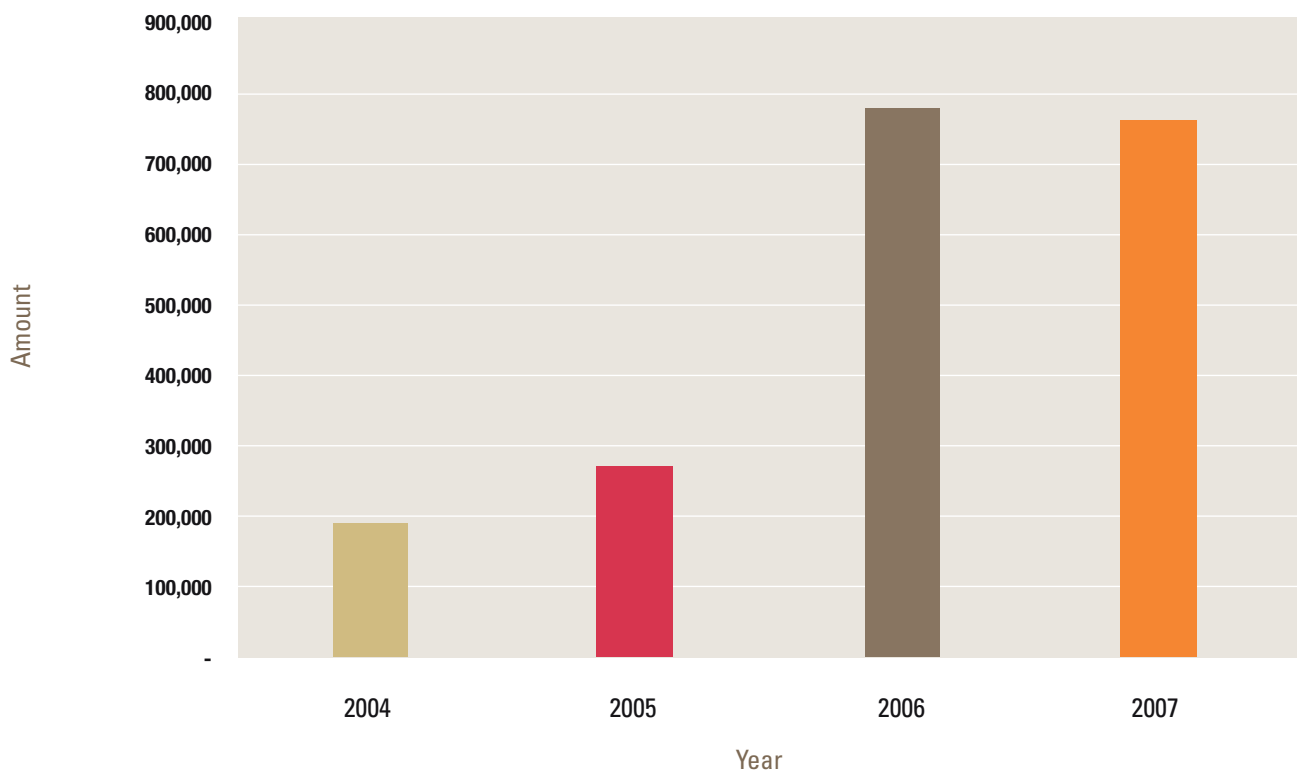


Figure 16: Festivals (Single-Category) - Ticket Attendance (2004-2007)



Musical Theatre

Category Descriptor

Staged productions which include music/drama/movement in popular form, primarily (but not limited to):

Musicals

Cabarets in cabaret mode/style



Universal Pictures Stage Entertainment, Working Title Films and Old Vic Production's "Billy Elliot The Musical" – Winner of Best Musical at the 2008 Helpmann Awards®. © 2007 Billy Australia Limited. Photograph by David Scheinmann

Gross revenue generated by Musical Theatre events increased from 2004 to 2006. The largest growth occurred in 2006 partly due to *The Boy from Oz*, with gross revenue increasing by \$57.9m, or 32.5%. 2007 showed negative growth in revenue, following on from steady increases in 2005 and 2006.

The decrease in gross revenue was minimal, falling by 3.0% and was due to lower average ticket prices for shows like *Menopause the Musical* and *Keating*.

In 2006, Musical Theatre events accounted for 20.4% of total gross revenue, decreasing to 18.6% in 2007. In addition to this, Musical Theatre events accounted for 14.2% of total ticket sales in 2006, compared with 16.1% in 2007. The average ticket price was \$76.34 in 2004, increasing to its peak of \$86.18 in 2006. In 2007, the average price decreased to \$70.50, representing an 18.2% decrease from 2006.

Figure 17 illustrates the growth trend of gross revenue with respect to Musical Theatre events over the four year period from 2004 to 2007.

Figure 18 illustrates the total number of tickets with respect to Musical Theatre events over the four year period from 2004 to 2007.

Table 9: Musical Theatre – Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth	Tickets	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%

Figure 17: Musical Theatre - Gross Revenue (2004-2007)

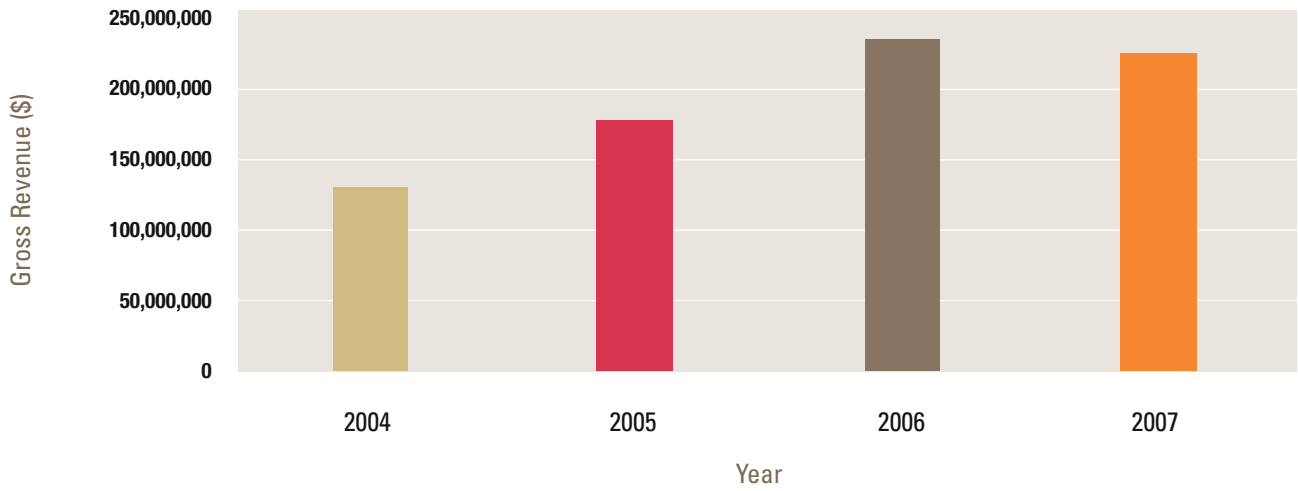
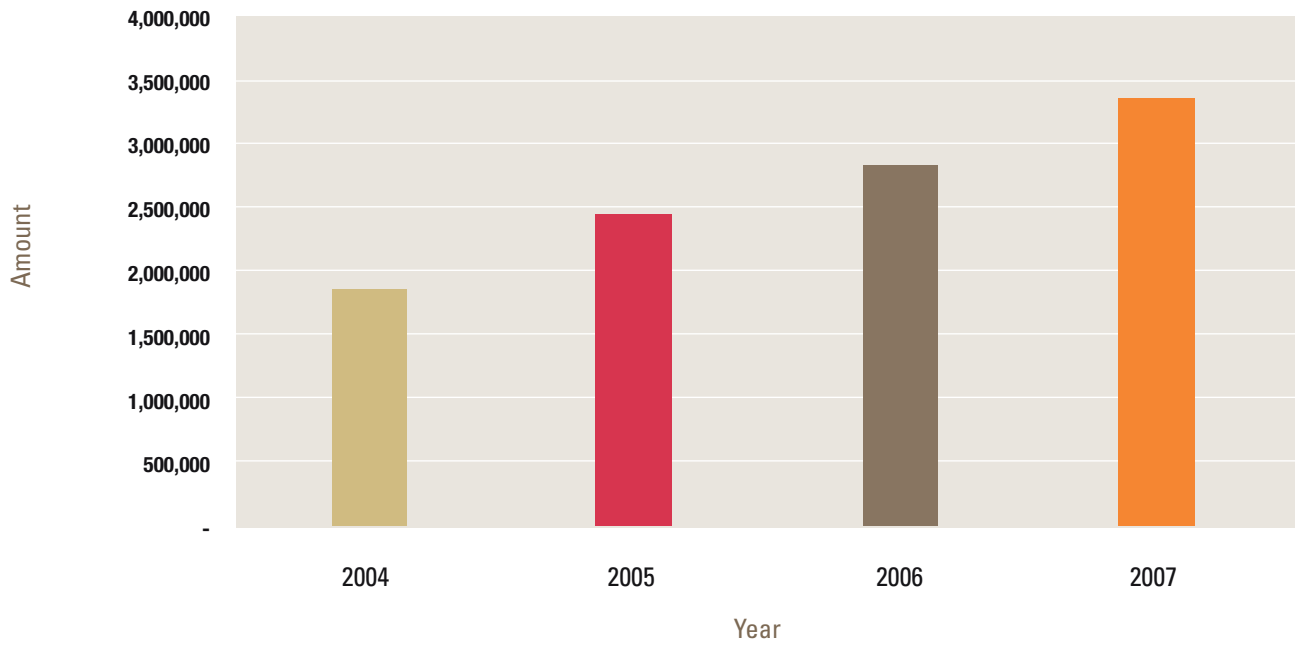


Figure 18: Musical Theatre - Ticket Attendance (2004-2007)



Non-Classical Music

Category Descriptor

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, eg 'pop' or 'jazz,' as in The Australian Jazz Orchestra):

Pop	Folk	Rap
Jazz	Soul	Heavy Metal
Blues	R&B	Dance
Country	Techno	parties
Rock	Hip hop	



Frontier Touring Company's "Crowded House Tour" – Winner of Best Australian Contemporary Concert at the 2008 Helpmann Awards®. Photograph courtesy Frontier Touring Company

Gross revenue generated by Non-Classical Music events has shown an overall increasing trend from 2004 to 2007. The largest period of growth occurred in 2006, with gross revenue increasing by \$163.7m, or 57%. Approximately 53% of revenue was generated in the last quarter of 2006 as a result of sell out shows performed by artists such as Robbie Williams, Kylie, U2, Billy Joel and Elton John.

Non-Classical Music events sold the largest number of tickets in both 2006 and 2007 when compared to the other ticketing categories; accounting for 38.9% of total gross revenues in 2006, increasing to 41.0% in 2007. In 2006, Non Classical Music events were responsible for 26.7% of total ticket sales, increasing marginally to 28.6% in 2007. The average ticket price for Non Classical Music events increased from \$77.09 in 2004 to \$90.49 in 2007. The peak in average ticket price of \$92.78 occurred in 2006.

Figure 19 illustrates the growth trend of gross revenue with respect to Non-Classical Music events over the four year period from 2004 to 2007.

Figure 20 illustrates the total number of tickets with respect to Non-Classical Music events over the four year period from 2004 to 2007.

Table 10: Non-Classical Music – Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth	Tickets	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	\$450,885,531	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%

Figure 19: Non-Classical Music - Gross Revenue (2004-2007)

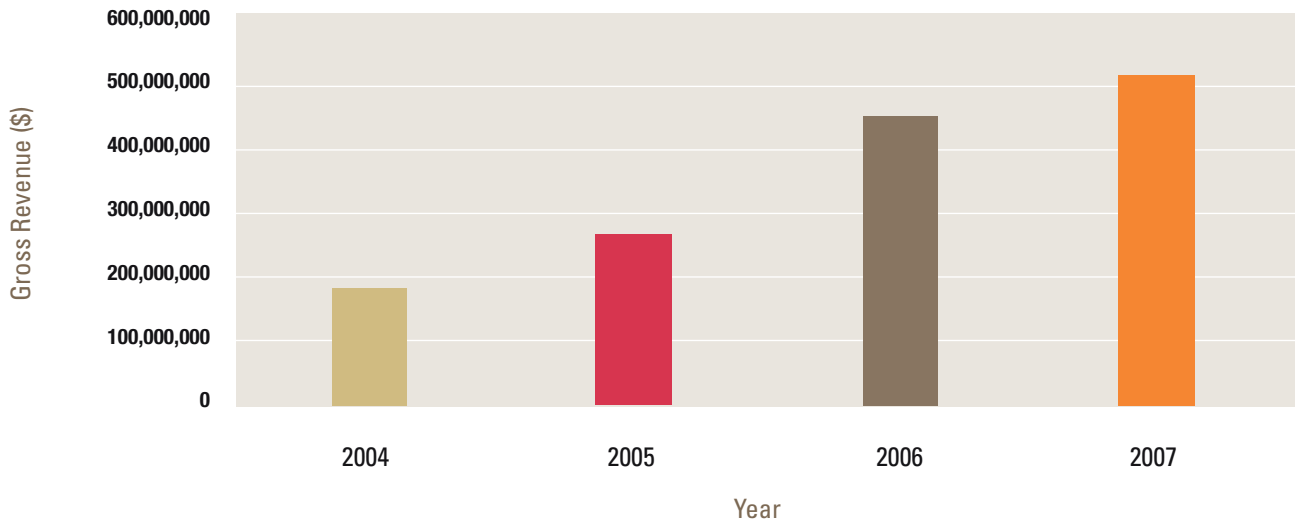
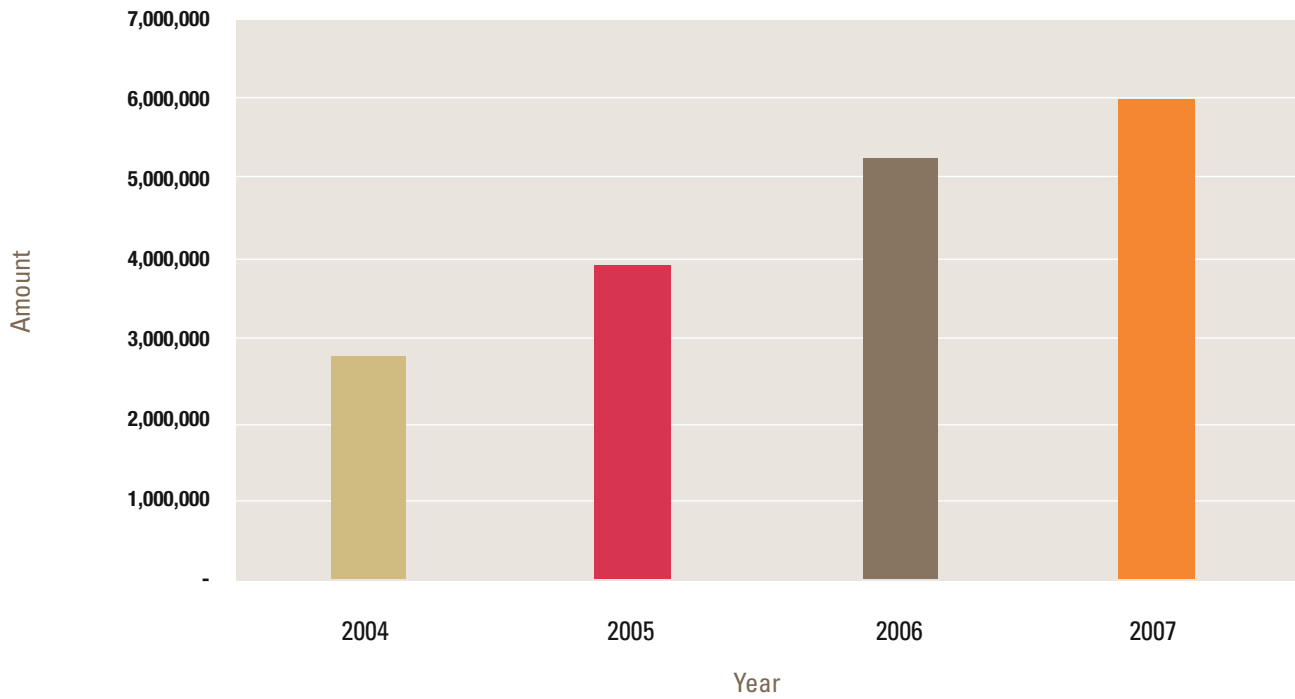


Figure 20: Non-Classical Music - Ticket Attendance (2004-2007)



Opera

Category Descriptor

Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style:

Opera
Operetta (includes Gilbert and Sullivan)



Opera Australia's "Arabella" Winner of Best Opera at the 2008 Helpmann Awards®. Photograph by Branco Gaica

Opera has shown a variable trend in gross revenue and ticket attendance over the four year period. Gross revenue increased in 2006 by \$1.9m, or 4.2%, this was followed by a \$1.1m or 2.2% decrease in 2007.

In 2006, Opera events accounted for 4.2% of gross revenue, compared with 3.8% in 2007. Opera events accounted for 2.6% of total ticket sales in 2006, increasing to 2.8% in 2007. The average ticket price for opera reached its lowest point of \$85.28 in 2007.

Figure 21 illustrates the growth trend of gross revenue with respect to Opera events over the four year period from 2004 to 2007.

Figure 22 illustrates the total number of tickets with respect to Opera events over the four year period from 2004 to 2007.

Table 11: Opera – Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth	Tickets	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%

Figure 21: Opera - Gross Revenue (2004-2007)

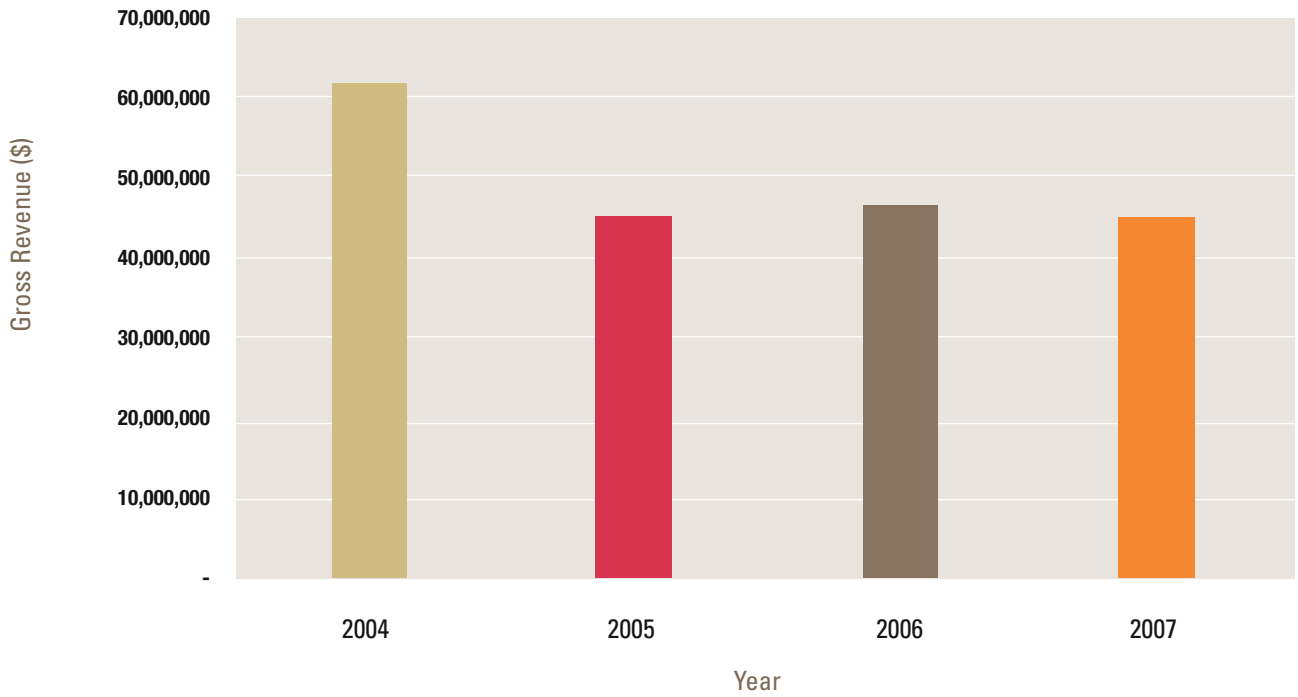
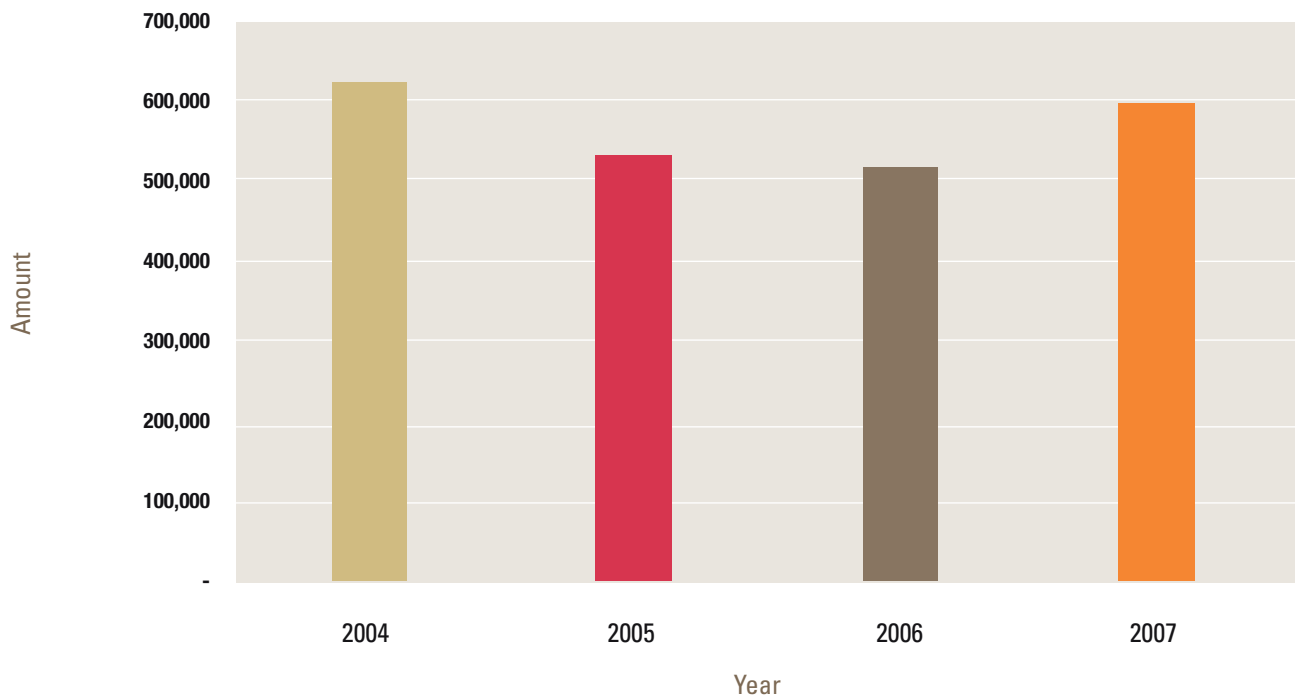


Figure 22: Opera - Ticket Attendance (2004-2007)



Special Events/Other

Category Descriptor

Unique presentations which do not fall into any other category.



Choir of Hard Knocks with Founding Music Director Dr Jonathon Welch, Australian of the Year - Local Hero 2008. Winner of Best Special Event at the 2008 Helpmann Awards®. Photograph courtesy Jonathon Welch

Special Events as the name suggests are unique and usually once-off resulting in inconsistency from year to year.

Special Events/Other shows a decreasing trend in gross revenue and ticket attendance from 2004 to 2006, followed by an increase in 2007. In 2007, gross revenue increased by \$35.1m or 42.7% and ticket attendance increased by 31.5%.

In 2006, Special Events/Other accounted for 7.1% of total gross revenue, compared with 9.5% in 2007. Special Events/Other accounted for 13.3% of total ticket sales in 2006, increasing to 16.5% in 2007. The average ticket price for Special Events/Other decreased from \$45.43 in 2004, to \$42.64 in 2006, before peaking at \$48.56 in 2007.

Figure 23 illustrates the growth trend of gross revenue with respect to Special Events over the four year period from 2004 to 2007.

Figure 24 illustrates the total number of tickets with respect to Special Events/Other over the four year period from 2004 to 2007.

Table 12: Special Events/Other– Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth	Tickets	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%

Figure 23: Special Events/Other - Gross Revenue (2004-2007)

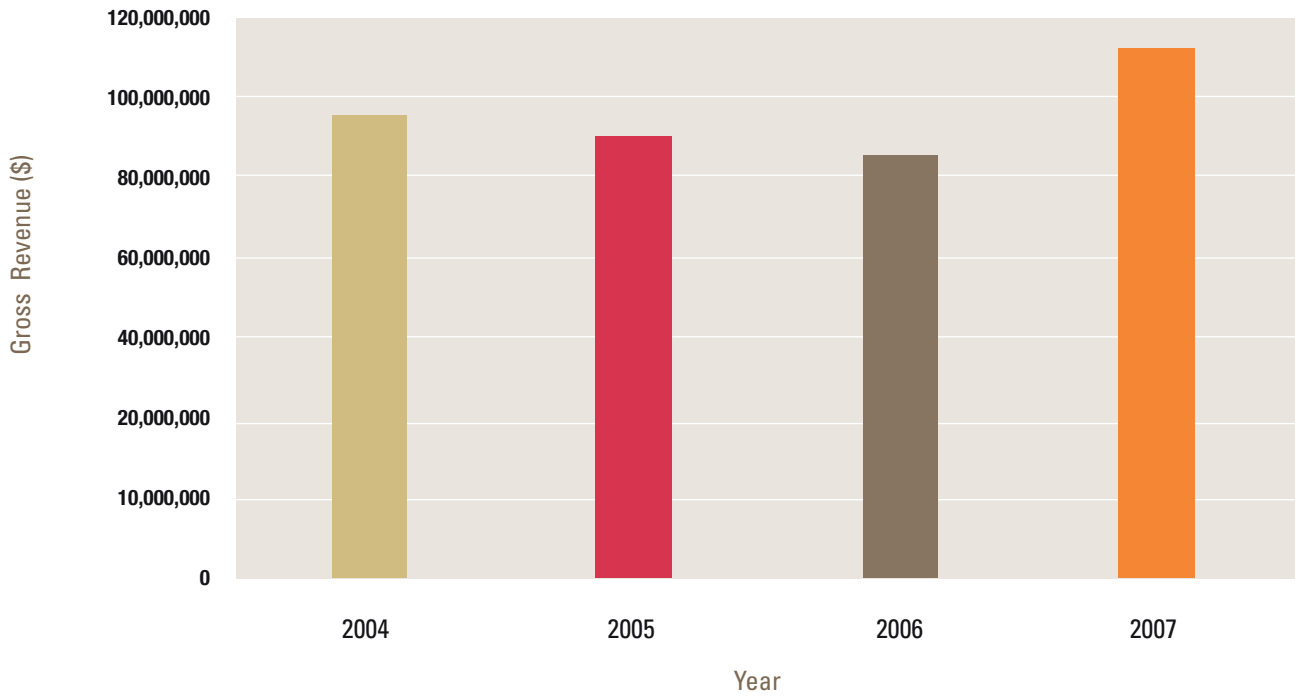
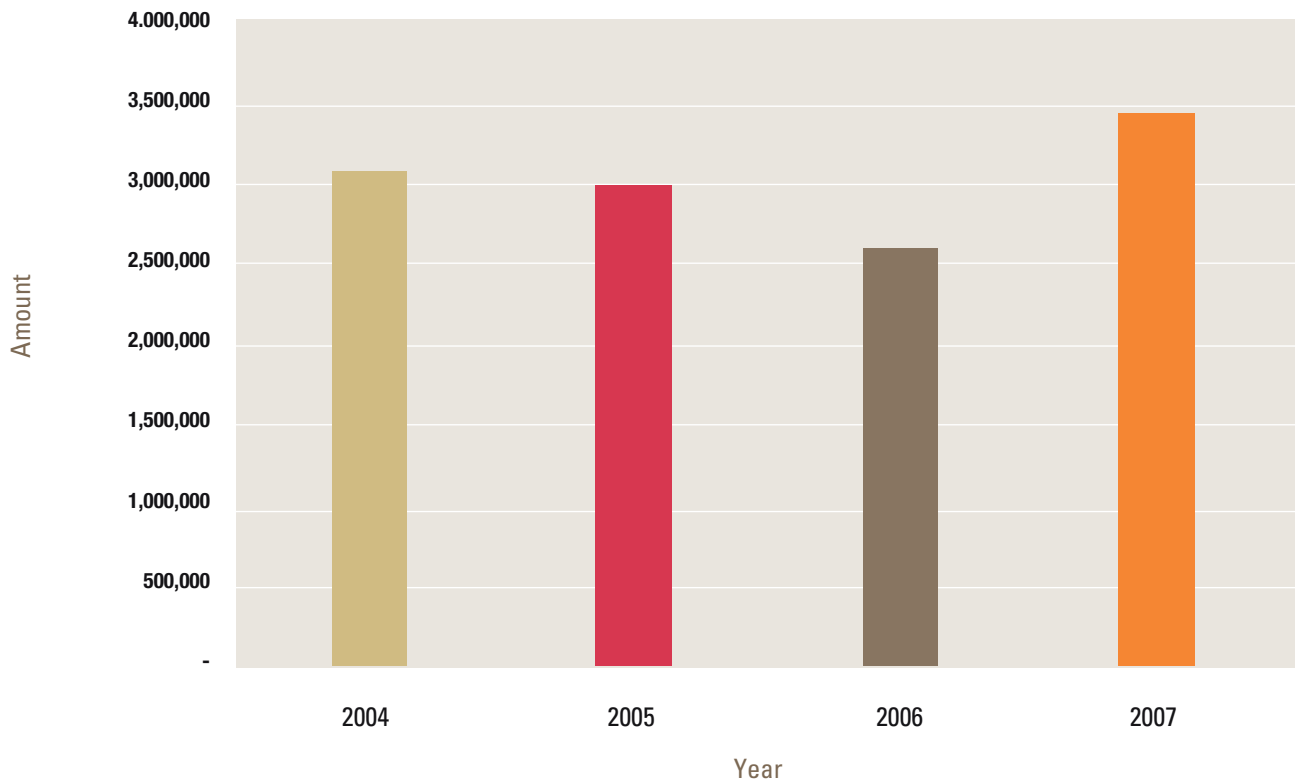


Figure 24: Special Events/Other - Ticket Attendance (2004-2007)



Theatre

Category Descriptor

Script based theatre
 Drama
 Comedy theatre
 Mime
 Physical Theatre
 Plays



Company B's "Who's Afraid of Virginia Woolf" – Winner of Best Play at the 2008 Helpmann Awards®. Performers Marton Csokas and Catherine McClements. Photograph by Heidrun Lohr

Theatre has shown a variable trend in gross revenue and ticket attendance over the four year period. The largest growth occurred in 2006 with gross revenue increasing by \$69.6m, strong sales by comedy events such as Little Britain and Lano and Woodley contributed to this growth. 2007 showed negative growth with gross revenue decreasing by 18.2%. The fact that the relative decrease in ticket sales, 34.6%, was larger indicates that tickets were being sold at a higher price in 2007.

In 2006, theatre events accounted for 12.4% of gross revenue, compared with 9.6% in 2007. Theatre events accounted for 19.3% of total ticket sales in 2006, decreasing to 12.0% in 2007. The average ticket price for theatre events increased from \$43.87 in 2004, to \$50.42 in 2007, however, average price decreased in both 2005 and 2006.

Figure 25 illustrates the growth trend of gross revenue with respect to Theatre events over the four year period from 2004 to 2007.

Figure 26 illustrates the total number of tickets with respect to Theatre events over the four year period from 2004 to 2007.

Table 13: Theatre – Revenue and Attendance (2004-2007)

	Revenue (\$)	Growth	Tickets	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%

Figure 25: Theatre - Gross Revenue (2004-2007)

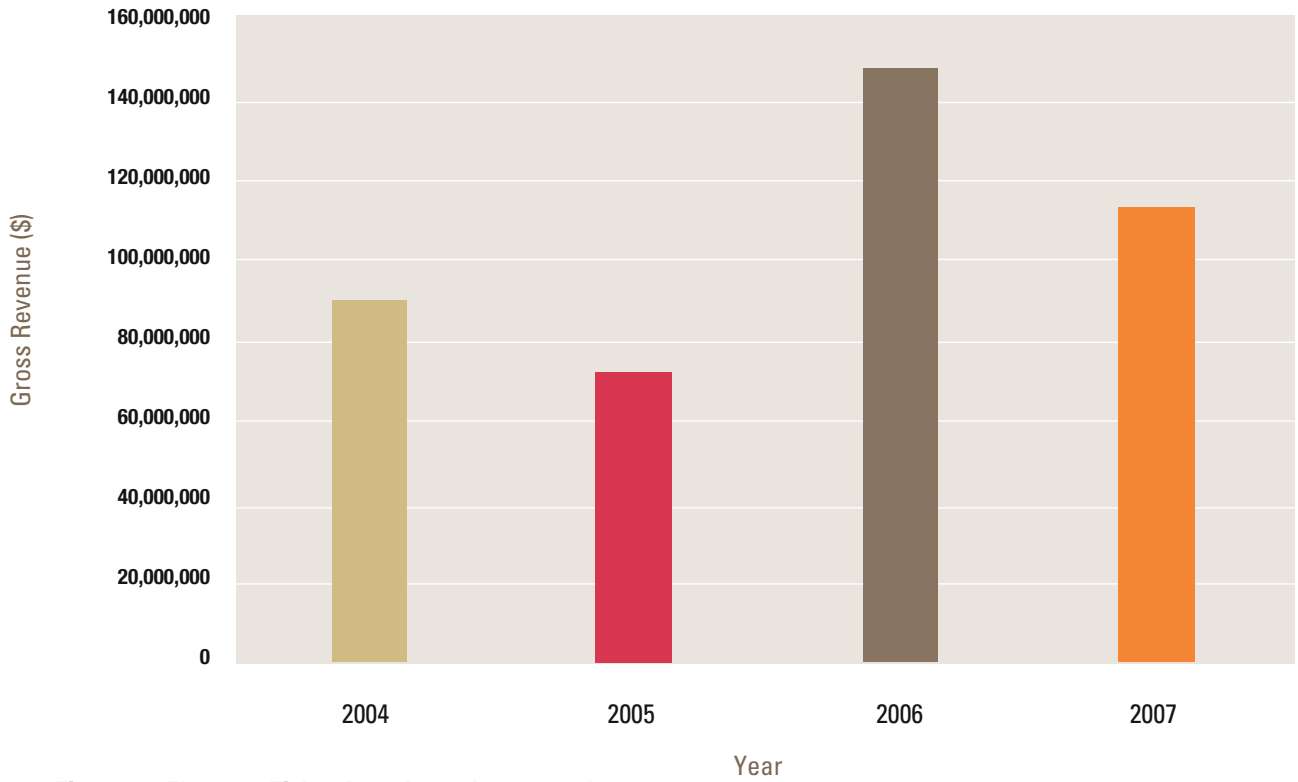
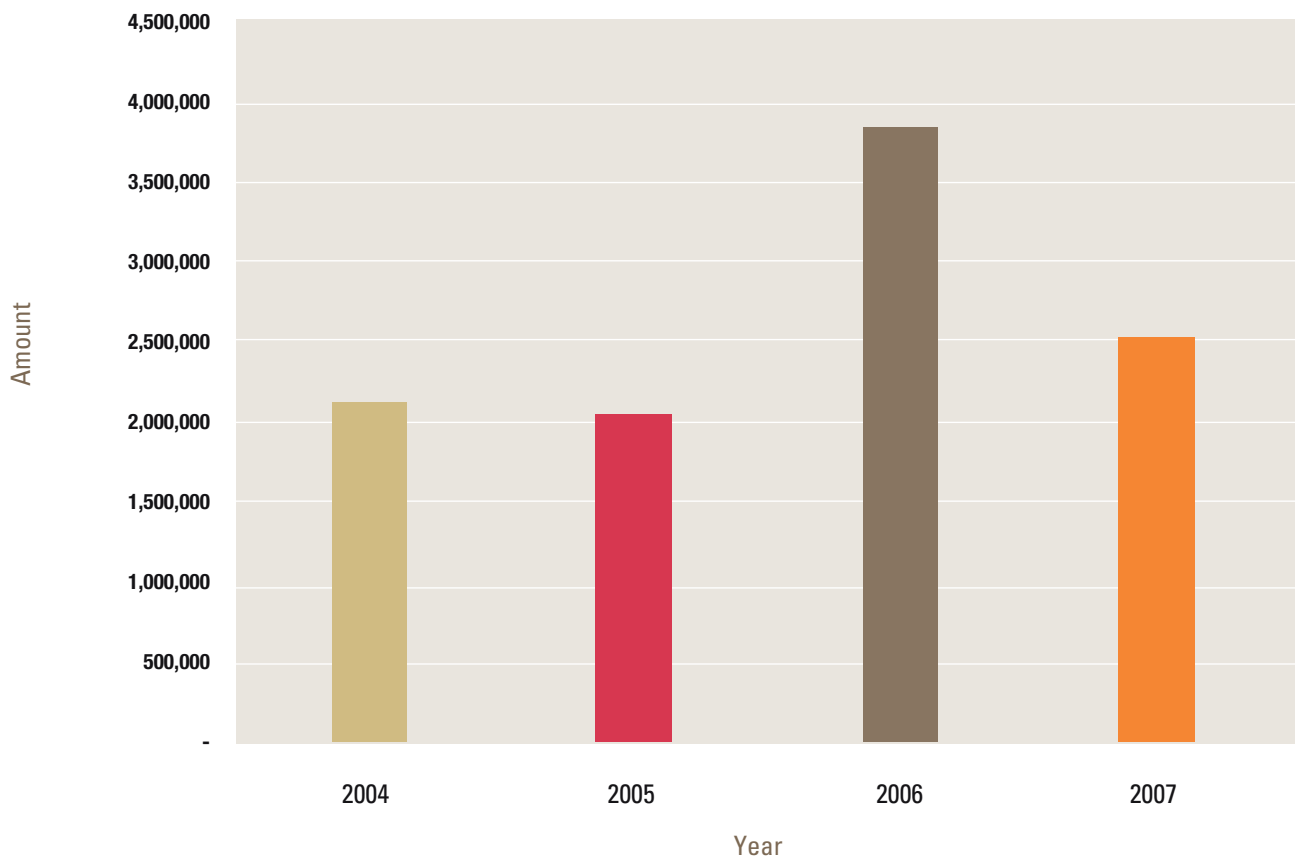


Figure 26: Theatre - Ticket Attendance (2004-2007)



Explanatory Notes

1. Revenue and attendance is the aggregate of figures supplied by participating ticketing companies and the Australian Major Performing Arts Group (AMPAG) through the Australia Council for the Arts.
2. Australia Council for the Arts data is limited to that provided to it by the Australian Major Performing Arts Group (AMPAG) of companies listed in this report. Ticketing company data is limited to that provided by those companies listed in this report.
3. Revenue data refers to the revenue from events that occur in the quarter. Revenue will be reported for the quarter in which the event occurs. This is not necessarily the quarter in which the sale is made. Subscription data are allocated to the quarter in which the event occurs.
4. Total 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 pulled with a zero price.
5. Event Categorisation. Ticketing companies and the Australia Council for the Arts assign events to the respective event categories on the basis of definitions developed by the partners.
6. Data collection. On a quarterly basis, ticketing companies and the Australia Council for the Arts send their data to Ernst & Young. This data consists of total attendance and revenue data aggregated across the events within each of the ten live entertainment categories. No data is provided to Ernst & Young about individual events. This data is then compiled to produce national figures for each category of event.
7. Festivals. Attendance at festivals is under-reported in this survey. Firstly, some festivals maintain their own ticketing systems and are not yet part of this survey. Secondly, the survey only reports paid tickets and does not include the substantial unpaid and/or unticketed components of festivals. As each of the ten event categories is mutually exclusive, single events which are a component of a festival are reported only in the festival category. Attendance and revenues for other event categories will not, therefore, include events held as part of festivals. This ensures that attendance and revenues for the other eight categories of event are necessarily also under-reported.
8. Coverage. While national in reach the coverage of this survey collects data on that part of the market covered by the major ticketing companies, the major performing arts companies and the leading festivals included in this survey. The survey is therefore an under-estimation of the total live entertainment industry in Australia. For instance the survey does not collect revenue and detailed attendance data from most regional venues; for free performances, and also for schools performances of the AMPAG companies. Audited annual returns for subsidised performing arts companies indicate up to 1 million paid attendance of school-aged children and teachers in education venues across Australia. Free performances, including outdoor concerts, which are a core part of the work of many companies in dance, music, opera and circus are not included here.

Survey Participants

Participating Ticketing Companies

Araluen Centre for Arts & Entertainment (Alice Springs, NT)
BASS South Australia (SA)
BOCS Ticketing (WA)
Canberra Ticketing, Canberra Theatre Centre (ACT)
Qtix, Queensland Performing Arts Centre (QLD)
Sydney Opera House (NSW)
Ticketek (National)
Ticketmaster (National)

Australian Major Performing Arts Group (AMPAG Companies)

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

Survey Contacts

Live Performance Australia

Project Manager, Coordinator, and copyright ownership.
Contact for media and general queries:

Evelyn Richardson
Chief Executive

Level 1, 15-17 Queen Street
Melbourne VIC 3000

Tel (03) 9614 1111
Fax (03) 9614 1166
Email erichardson@liveperformance.com.au

The Live Performance Australia website provides
the PDF version of the Survey report.

www.liveperformance.com.au

Ernst & Young

Survey consultants in charge of aggregating and preparing
quarterly and annual results.

8 Exhibition Street
Melbourne Vic 3000

Tel (03) 8650 7622
Fax (03) 8650 7711
Web www.ey.com.au

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