Ticket Attendance & Revenue Survey 2009

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Live Performance Australia

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Introduction

Live Performance Australia (LPA) is pleased to present the 2009 Report of the LPA Ticket Attendance and Revenue Survey. The Survey confirms that Australians are still very engaged with the live performance sector and our industry has weathered the recent economic downturn comparatively well.

Revenue remains strong, still exceeding $1 billion. As expected, there has been some flow on from the global financial crisis in 2008 and 2009, but industry activity has stabilised and we remain optimistic that we will see an upward trend again in 2010.

There are a number of new innovations in the Survey report this year. Firstly, we have introduced separate categories for Comedy and Circus & Physical Theatre. These are both important industry sectors, and it will now be possible to measure their respective contributions over time.

Secondly, we have included revenue and attendance figures by state for the first time. This information has been sought by state arts' agencies and LPA members for some time, and it is gratifying to see this long term goal of the Survey achieved.

Lastly, Arts Projects Australia and The Arts Centre (Melbourne) have contributed data for the first time. We look forward to building on the Survey when further data partners come on board for the 2010 Survey report.

As always, our sincere thanks go to Media Super, whose generous sponsorship allows LPA to publish the Survey report. Thank you to our Survey Consultants – Ernst & Young – for their efforts in compiling and analysing the data. Lastly, we would like to acknowledge and thank the participating companies (listed on page 25) who devote time and resources to provide data to the Survey each year. The cooperation and effort of all parties involved is greatly appreciated.

Evelyn Richardson
Chief Executive
Live Performance Australia

August 2010

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 Fair Work (Registered Organisations) Act 2009.

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.

www.liveperformance.com.au
www.helpmannawards.com.au

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

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1.1 Scope of Work

Ernst & Young was engaged by Live Performance Australia (LPA) to undertake a survey of ticket attendances and revenues for the Live Entertainment Industry for 2009. The Live Entertainment Industry encompasses performances, productions, workshops, rehearsals or concerts that are performed in front of a live audience. The scope of our work included:

- Coordinating the collection of the ticket sales and revenue data for the Live Entertainment Industry in Australia from various ticketing companies and the Australia Council for the Arts.
- Compiling the 2009 national survey data on an overall basis, by state and by event category, for the purposes of inclusion in LPA's Live Entertainment Industry in Australia Attendance and Revenue Survey 2009 Report
- Performing an analysis of the 2009 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 2006, 2007 and 2008 ticketing studies published by LPA.

1.2 Approach

For this survey, Ernst & Young compiled data from ticketing companies, self-ticketing venues and the Australia Council for the Arts (collectively known as the "survey participants"). The ticketing companies that were surveyed as part of this study include:

- Araluen Centre for Arts & Entertainment NT
- Arts Projects Australia
- BASS SA
- BOCS Ticketing WA
- Canberra Ticketing
- The Arts Centre (Melbourne)
- Queensland Performing Arts Centre (QPAC)
- Sydney Opera House
- Ticketmaster
- Ticketek

These companies were identified by LPA and provided both gross revenue and attendance data to Ernst & Young for the 2009 calendar year. Gross revenue comprised revenue sourced from paid tickets only (i.e. it excludes sponsorships); while the attendance data provided and applied in the analysis included both paid and non-paid tickets[1]. Average ticket price data was calculated based on paid tickets only.

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

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

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

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

Category Descriptor Guide

Table 1: Category descriptor guide (2009)

Category	Description
Ballet and Dance	Traditional forms Folk dance Ballroom Liturgical dance Ballet Breakdancing Ethnic dance Ballet Latin dance Modern dance Tap
Children's/Family	Live entertainment for children Interactive performances for children and Workshops for children
Circus and Physical Theatre*	Physical Theatre Circus
Classical Music	Any of the following in classical/contemporary art (ie 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)
Festivals (Multi-Category)	Festivals/events which contain a number of different types of events which fall into two or more categories
Festivals (Single-Category)	Festivals/events which contain a number of events but which fall into one category only
Musical Theatre	Staged productions which include music/drama/movement in popular form, primarily (but not limited to): Musicals Cabarets in cabaret mode/style
Non-Classical 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, eg 'pop' or 'jazz,' as in The Australian Jazz Orchestra): Pop Blues Rock Soul Techno Rap Dance parties Jazz Country Folk R&B Hip hop Heavy Metal
Opera	Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style: Opera Operetta (includes Gilbert and Sullivan)
Special Events	Unique presentations which do not fall into any other category
Theatre	Script based theatre Comedy theatre Drama Mime Plays

* New categories for 2009

Ticketing companies and the Australia Council provided data to Ernst & Young directly. Confidentiality Deeds were in place between all data providers and Ernst & Young. As such, and consistent with our agreed approach, Ernst & Young did not reveal 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 event category allocations, where obvious anomalies were identified, Ernst & Young queried the data with the relevant survey participants and where appropriate amendments were made. Examples of such anomalies included for instance:

- Sporting events, fashion festivals, award nights and balls included in the Special Events/Other category were excluded as not being considered part of the Live Entertainment Industry.
- Royal Melbourne Show included in Multi-category Festivals was excluded as not considered being part of the Live Entertainment Industry.
- Comedy events included in the Festivals (Single category) were reallocated to the new Comedy category.
- Circus events included in the Theatre Category were reallocated to the new Circus and Physical Theatre category.

1.3 Limitations

As with previous studies, data on ticket revenues and attendances for the Live Entertainment Industry was limited to that provided by the companies and organisations surveyed. 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, known as the Key Organisations, are also under-represented as many of these companies either self-ticket or use ticketing service providers not currently involved in the Survey.

Moreover, attendances at festivals and non-classical music events are under-reported in this survey. Firstly, some festivals maintain their own ticketing systems and are not part of this survey. Secondly, the survey only reports paid tickets and does not include the substantial unpaid and/or unticketed components of festivals. In addition, the non-classical 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. Therefore, this study only provides a conservative estimate of the total ticket revenues and attendances sourced from live entertainment events in Australia.

As part of the study, the 2009 data was compared against historical data sourced directly from Live Performance Australia's Live Entertainment Industry in Australia 2006, 2007 & 2008 Reports. Ernst & Young 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, Ernst & Young was unable to query the accuracy of the allocation of events in these years.

We note that caution should be applied when comparing the 2009 data with data from previous years as inconsistencies may exist in the data collection methodology between this study, and for previous studies (where more detailed event specific information was not requested).

1.4 Changes in the 2009 Ticketing Survey from 2008

We have made four major changes in the 2009 Ticketing Survey, being:

- The introduction of the 'Comedy' and 'Physical Theatre' categories. As defined in Section 1.2 under our Approach, the Comedy category includes all comedy events such as stand up but not including comedy plays, while the Circus and Physical Theatre includes Circus and Physical Theatre 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 provided ticketing data for a single category festival in Adelaide previously not covered by this survey.
- The analysis and reporting of live entertainment attendances and revenue for each state/territory of Australia.
- The inclusion of data from The Arts Centre (Melbourne). For the last two quarters of 2009, The Arts Centre maintained their own ticketing system, which was previously outsourced to Ticketmaster (and therefore included in Ticketmaster's data).

2. Ticket Attendance and Revenue Results

2.1 Overview

Studies have shown that participation in the Arts, including the Live Entertainment Industry is particularly sensitive to changes in the growth of household disposable income (which is influenced by changes in employment growth and the employment rate).[2] While the Australian economy outperformed all other OECD economies in 2009, for the first three quarters of 2009, the economy only grew by 1.5%, a subdued level of economic growth as compared to prior years.[3]

In addition to the challenges posed by broader economic conditions, some arts companies have recently indicated that the Federal Government's imposed 3.25% efficiency dividend has impacted upon operating conditions for participants within the industry.[4] This may compromise the ability of participants within the industry to present as many works, especially those that are less profitable.

While overall ticketing revenues have increased in 2009 as compared to 2008 in nominal terms, this was primarily underpinned by strong performances by the Ballet and Dance, Non-Classical Music, Opera and Special Events categories. The smaller number of major productions in the Musical Theatre, and Classical Music categories were the primary reasons for declines in those categories.

2.2 Analysis of Overall Trends

In 2009, more than 15.19 million tickets were issued to live entertainment events around Australia. Of these, 13.45 million were paid tickets, while the remaining 1.75 million were complimentary, sponsor and zero priced tickets.[5] This generated total revenues of $1.083 billion in 2009, as compared to $1.061 billion in 2008, representing an increase of 3.3% year on year. Table 2 below details the changes in gross revenue and total ticketed attendances between 2004 and 2009.

Table 2: Total revenue and attendance (2004–2009)

	Revenue ($)	Growth (%)	Total Tickets*	Growth (%)	Average Ticket Price ($)*	Growth
2004	$689,599,070		13,477,231		$55.13	
2005	$834,337,206	21.0%	15,808,790	17.3%	$60.62	10.0%
2006	$1,158,064,526	38.8%	19,835,756	25.5%	$64.08	5.7%
2007	$1,228,658,664	6.1%	20,887,365	5.3%	$66.03	3.1%
2008	$1,061,273,304	-13.6%	15,823,705	-24.2%	$76.60	16.0%
2009	$1,083,329,949	2.08%	15,196,773	-3.96%	$80.57	5.19%

*Based on both paid and unpaid tickets ** Average Ticket Prices are calculated based only on paid tickets

2 'Music and Theatre Productions in Australia'- IBISWorld Industry Report, p 27
3 Reserve Bank of Australia website - http://www.rba.gov.au/publications/smp/2010/feb/html/dom-eco-cond.html
4 Music and Theatre Productions in Australia'- IBISWorld Industry Report, p 4
5 It is industry practice to issue sponsor tickets at zero price, but these are effectively paid tickets via the sponsorship arrangement. In this analysis, the ticketing revenue excludes any sponsorship revenue.

Figure 1 and Figure 2 below show that while overall attendances have fallen slightly, gross revenue has increased in 2009 as compared to 2008. This is in part due to an increase in average ticket prices as well as a decrease in the proportion of zero priced tickets from 2008 to 2009.

Figure 1: Gross Revenue (2004-2009)

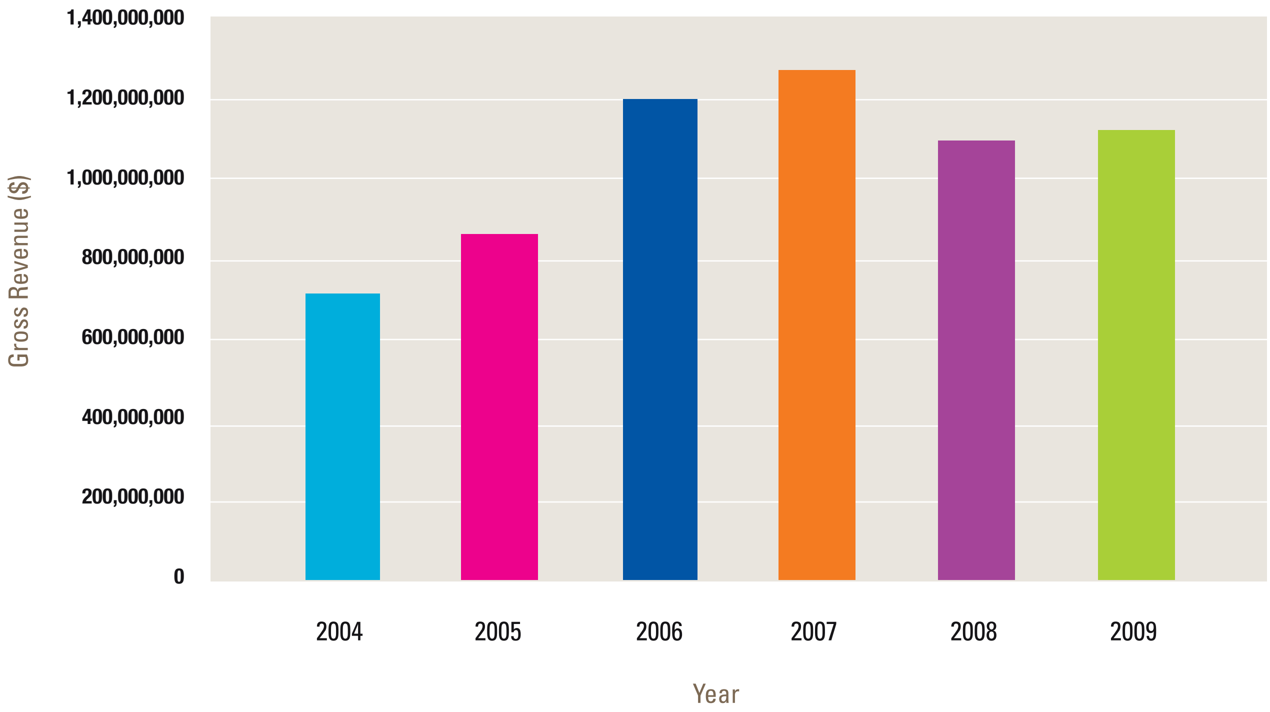
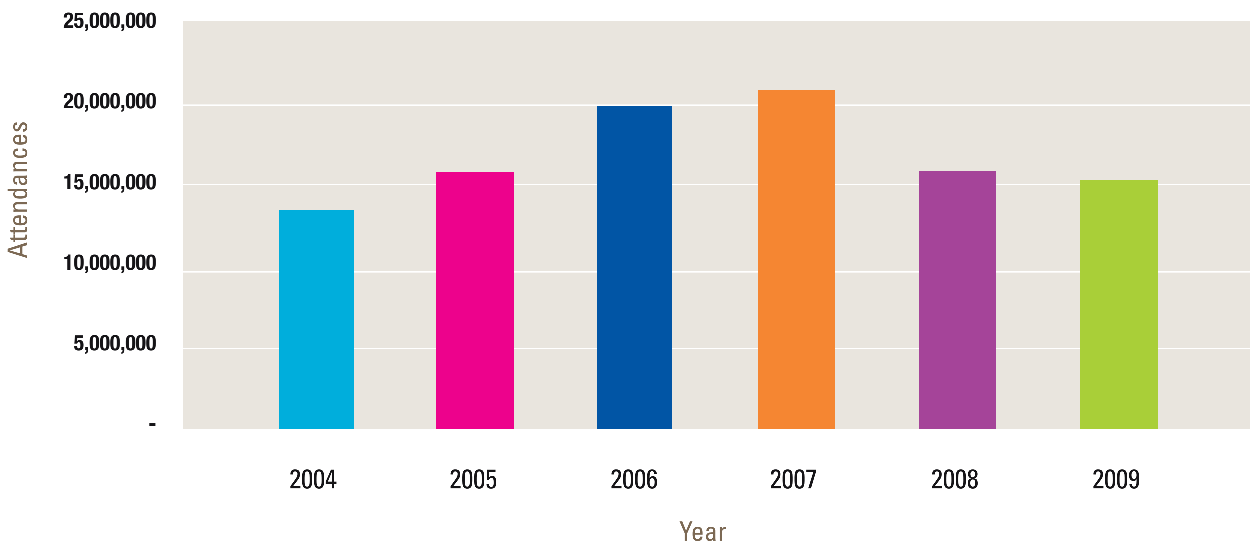


Figure 2: Total Attendances (2004-2009)



Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

3. Revenue and Attendances by State

The 2009 Live Entertainment ticketing survey is the first year in which ticketing data has been categorised by state. This section presents the revenues and attendances for all 8 states and territories within Australia as detailed in Table 3 below.

In 2009, New South Wales generated 35.4% and Victoria 32.1% of total revenues, which combined capture 67.5% of market share. In both of these states, the market share by revenue is higher than their market share by tickets which suggests live entertainment events held in these two states were higher priced than those held in other states and territories.

Figure 3 and Figure 4 illustrate the state/territory breakdowns for both revenue and attendances.

Table 3: Total revenue and attendances by state/territory (2009)

Category	Revenues	Share of Industry	Tickets	Share of Industry
New South Wales	$383,713,353	35.4%	5,176,385	34.1%
Victoria	$347,305,100	32.1%	4,744,449	31.2%
Queensland	$146,567,867	13.6%	2,006,608	13.2%
Western Australia	$105,312,778	9.7%	1,468,882	9.7%
South Australia	$82,326,982	7.6%	1,449,260	9.5%
Australian Capital Territory	$14,151,594	1.3%	264,174	1.7%
Tasmania	$3,543,859	0.3%	72,336	0.5%
Northern Territory	$408,416	0.0%	14,679	0.1%
Total	**$1,083,329,949**	**100.0%**	**15,196,773**	**100.0%**

Figure 3: Market shares (revenue) by state/territory

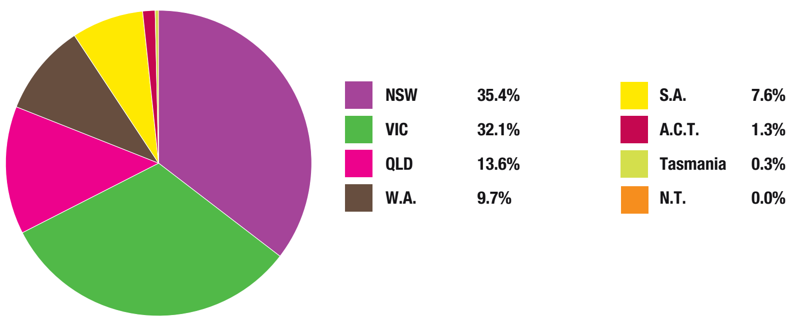
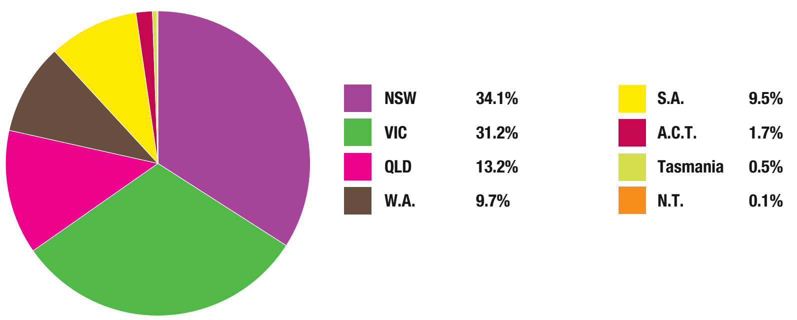


Figure 4: Market share (attendances) by state/territory



4. Category Analysis

4.1 Category Trends

This section presents analysis for each of the twelve categories, as defined in Table 1. Table 4 below and Figure 5 & Figure 6 over the page illustrates the category breakdown of the Live Entertainment Industry in Australia based on revenue while Figure 7 & Figure 8 measures the change in total attendance and revenue from 2008 to 2009.

In 2009, the Non-Classical Music and Musical Theatre categories were by far the two largest categories in the industry. The Non-Classical Music category generated 42.5% of the total revenues for the industry, while the Musical Theatre category generated 19.8% of total industry revenues. Combined these two categories represent around 62.1% of the Live Entertainment Industry by gross revenue.

As compared to 2008 (Figure 6), the most notable shift was in the Non-Classical Music category, where gross revenue as a share of the industry total has grown from 36.7% in 2008 to 42.5% in 2009, its highest level since the commencement of the Survey. The only other categories which have grown in industry share were Ballet and Dance, Opera and Special Events. Gross revenues from all other categories declined as a proportion of the industry total as compared to 2008, with the most significant declines in the Musical Theatre and Classical Music categories of $37.2 million and $35.8 million respectively.

The introduction of the two new Circus and Physical Theatre and Comedy categories has also had an impact on the decline in market shares in some categories. The majority of Comedy events were included in Single festival in 2008 while Circus and Physical Theatre events were included in Theatre categories for 2008.

Figure 9 and Figure 10 present time series data of the market shares of each event category over the past 6 years for ticket revenues and attendances. During this period, both Non-classical and Musical Theatre categories have maintained their dominance of the industry with a combined market share of approximately 50%. The overall market share for each of the categories have fluctuated over the past 6 years without exhibiting any significant upward or downward trend over this timeframe.

Table 4: Total revenue and attendances by category (2009)

Category	Revenue	% change in revenue (from 2008)	Share of industry	Tickets	% change in attendance (from 2008)	Share of Industry
Ballet and Dance	$58,570,704	+24.5%	5.40%	1,050,763	+12.4%	6.90%
Children's/Family	$31,904,974	-30.1%	2.90%	1,076,332	-26.0%	7.10%
Circus and Physical Theatre	$8,601,990	N/A	0.80%	198,274	N/A	1.30%
Comedy	$27,817,875	N/A	2.60%	661,445	N/A	4.40%
Classical Music	$71,273,338	-33.4%	6.60%	1,120,002	-24.2%	7.40%
Multi Festival	$10,642,917	-50.8%	1.00%	431,061	-21.9%	2.80%
Musical Theatre	$214,959,848	-14.8%	19.80%	2,458,212	-21.5%	16.20%
Non Classical Music	$460,443,027	+18.3%	42.50%	4,682,805	+8.1%	30.80%
Opera	$44,044,808	+6.6%	4.10%	448,096	+11.3%	2.90%
Single Festival	$55,275,589	-16.8%	5.10%	800,145	-34.5%	5.30%
Special Events	$23,602,096	+128.6%	2.20%	559,434	+49.3%	3.70%
Theatre	$76,192,784	-5.3%	7.00%	1,710,204	-12.0%	11.30%
Total	**$1,083,329,949**		**100%**	**15,196,773**		**100%**

Figure 5: Gross revenue by category (2009)

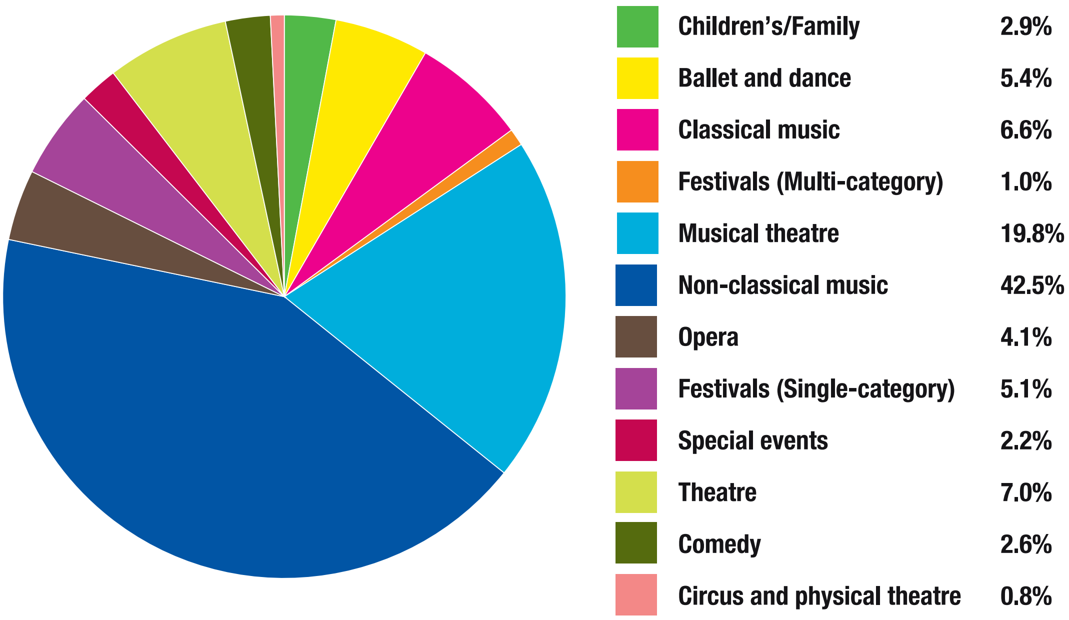
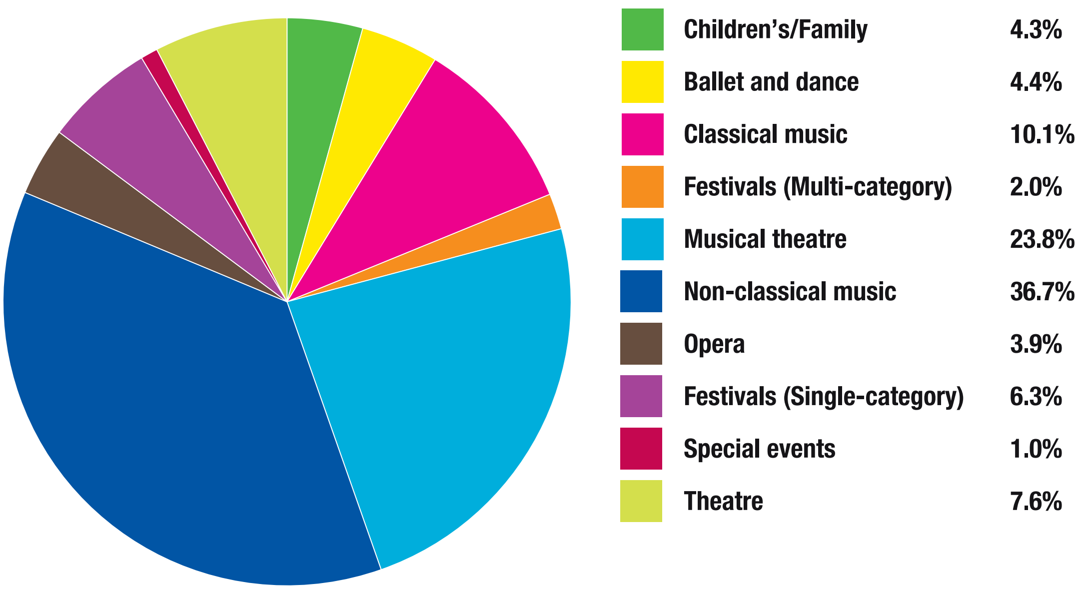


Figure 6: Gross revenue by category (2008)



Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 7: Percentage movement in revenue by category (2008-2009)

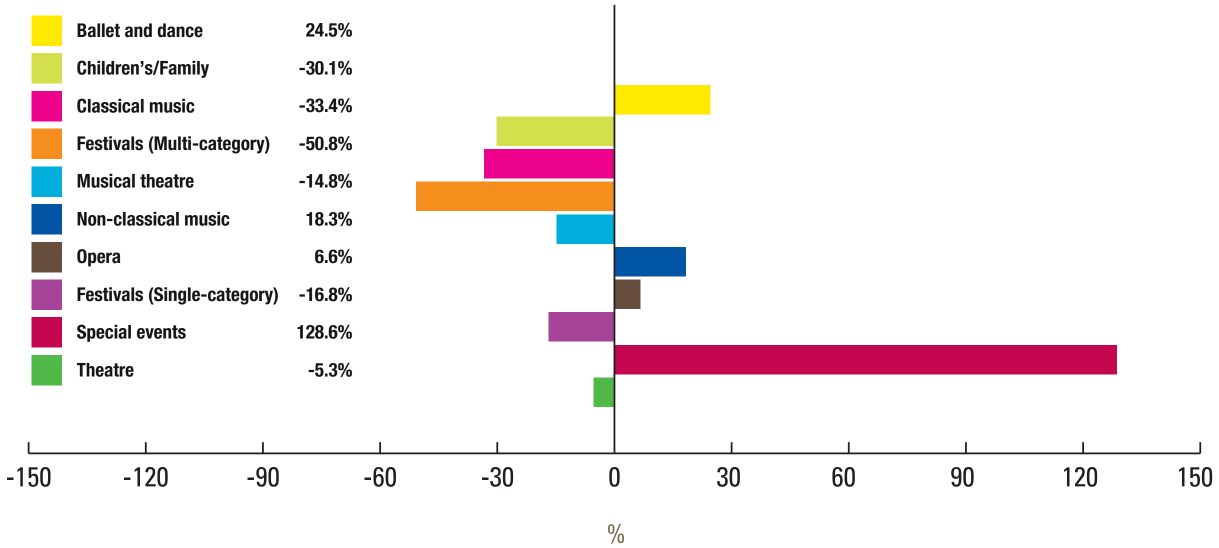
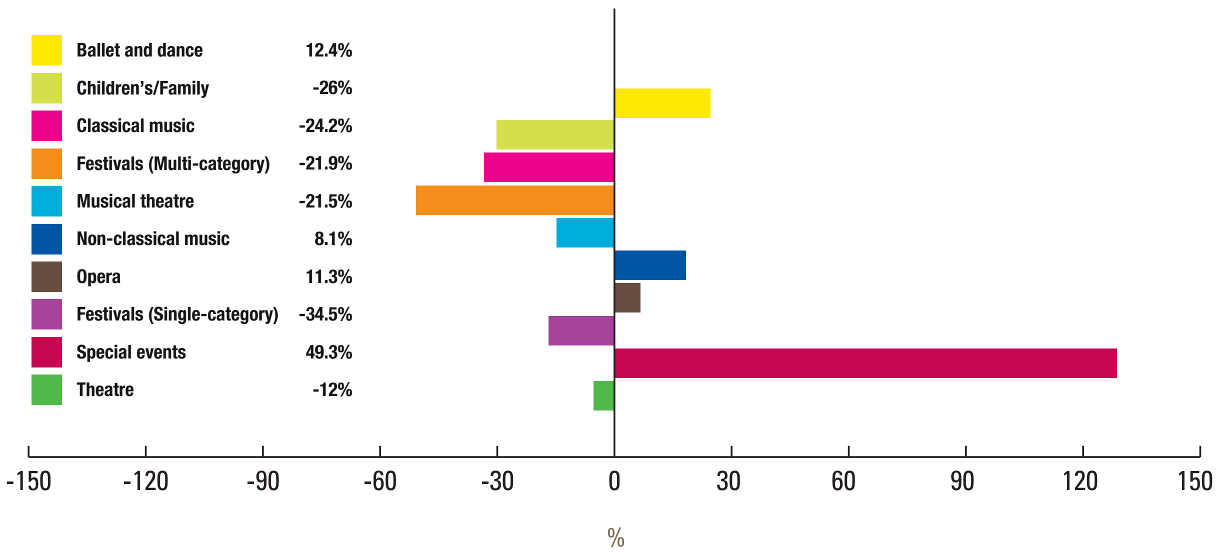


Figure 8: Percentage movement in attendance by category (2008-2009)



Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 9: Market shares (gross revenue) by category (2004-2009)

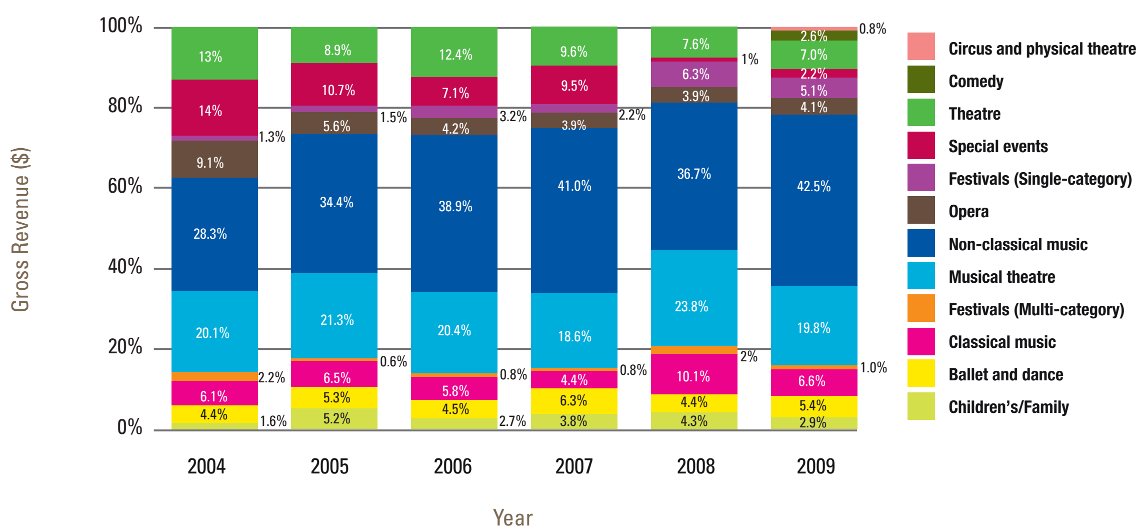
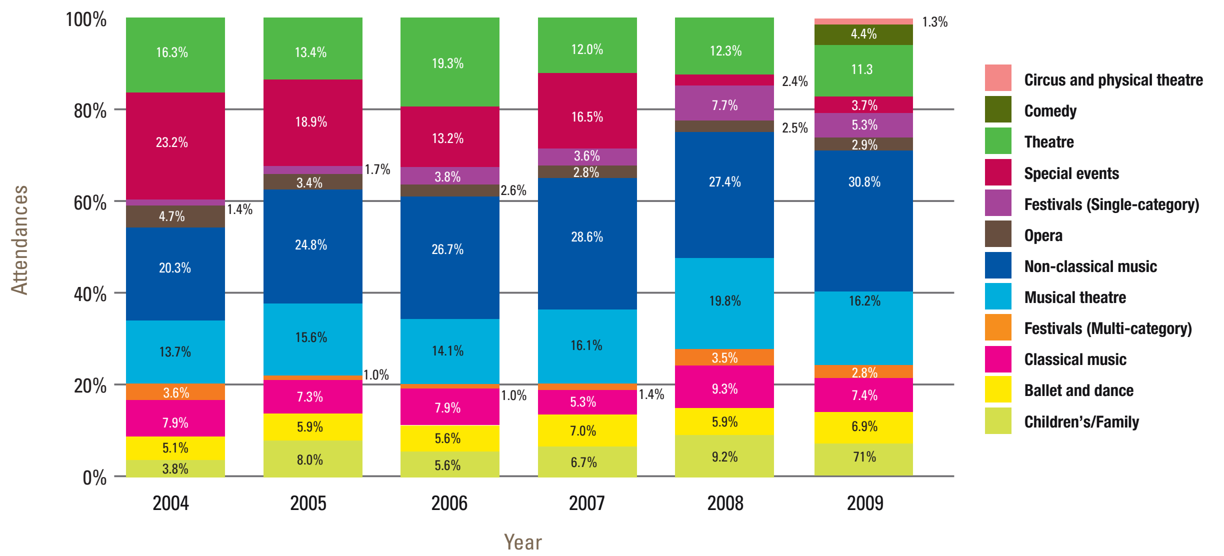


Figure 10: Market shares (attendances) by category (2004-2009)



Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

4.2 Ballet and Dance

The Ballet and Dance category has experienced an increase in both gross revenue and ticket attendances in 2009. Gross revenue grew by 24.5% from $47.05 million to $58.57 million, while total attendances increased by 12.4%. Further, the average ticket price rose from $60.67 to $63.33.

The increase in revenues is in part due to the variation in the type and size of productions staged from year to year (i.e. international troupes versus local productions). In 2009, large productions in this category included tours by the Complexions Contemporary Ballet and the Paris Opera Ballet, and the Cuban dance show 'Lady Salsa'.

Aurélie Dupont and Hervé Moreau in *La Bayadère,*The Paris Opera Ballet, Queensland Performing Arts Centre June/July 2009. *Photo copyright Anne Deniau.*

Table 5: Ballet and Dance – revenue and attendance (2004-2009)

	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%

Figure 11: Ballet and Dance – gross revenue (2004-2009)

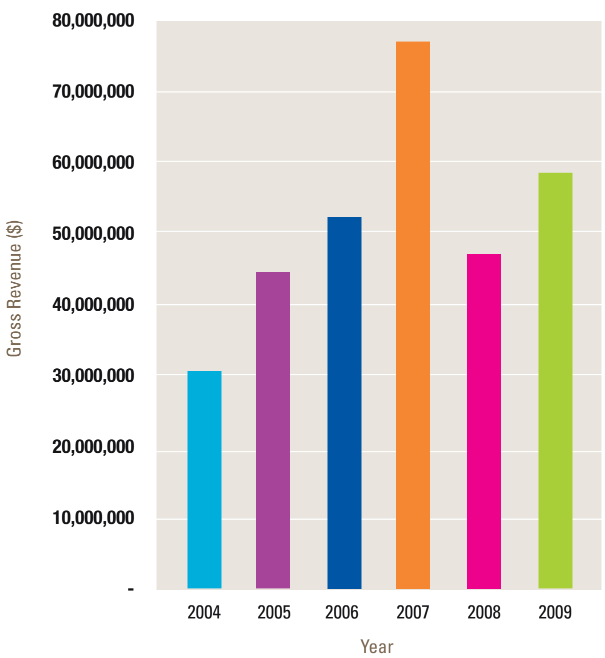
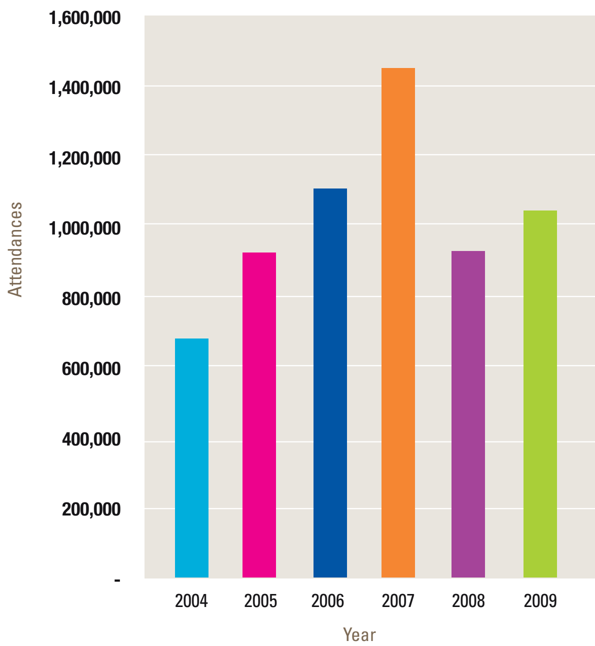


Figure 12: Ballet and Dance – total attendance (2004-2009)



Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

4.3 Children's/Family Events

Thursday's Child. Monkey Baa Theatre for Young People. *Photo - Heidrun Loh.*

Gross revenue and attendances fell in 2009 in the Children's/Family Events category. Gross revenue for the category fell by 30.1%, from $45.65 million to $31.90 million between 2008 and 2009. Similarly attendances fell by 26.0% from 1.46 million to 1.08 million. The fall in both revenues and attendances in 2009 was partly attributable to the fewer number of international productions such as 'High School Musical on Ice' which were held in 2008.

In addition, Circus events which were previously in the Children's/Family Events category have now been reallocated to the new category Circus and Physical Theatre.

Nonetheless, children's favourites such as 'Disney on Ice – Princess Wishes' and 'The Wiggles' helped support attendances in 2009 and significantly contributed to gross revenues for the category.

Table 6: Children's/Family Events – revenue and attendance (2004-2009)

	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%

Figure 13: Children's/Family Events – gross revenue (2004- 2009)

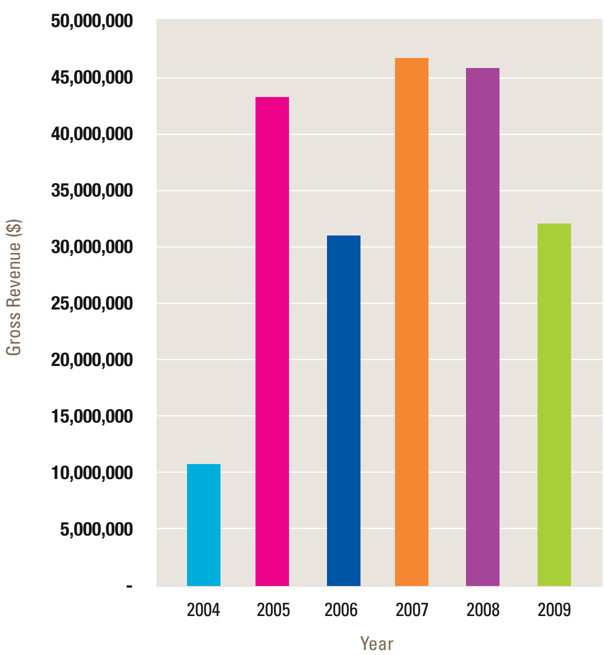
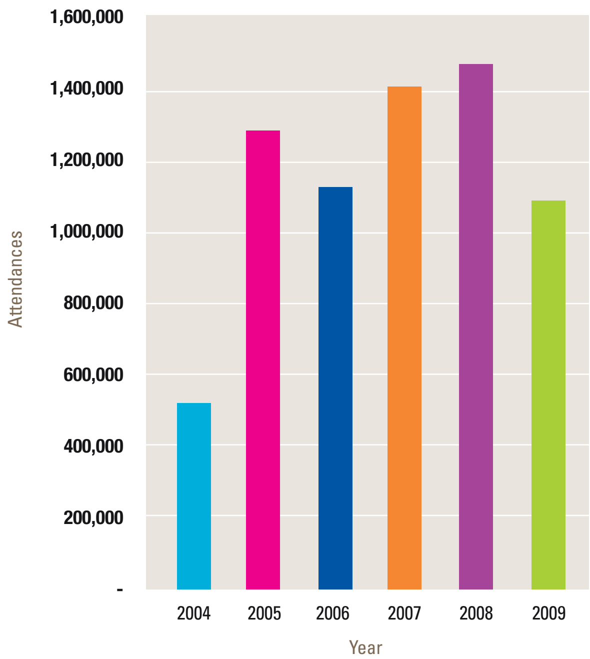


Figure 14: Children's/Family Events – total attendance (2004-2009)



Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

4.4 Classical Music

The Australian Brandenburg Orchestra. *Photo - Steven Godbee.*

Gross revenues and attendances for the Classical Music category trended down towards historical averages in 2009, from a bumper year in 2008. Gross revenues fell by 33.4% from $107.05 million to $71.27 million. In line with revenues, attendances in 2009 fell to 1.12 million from 1.48 million, a 24.2% drop. However as compared to other prior years (with the exclusion of 2008), gross revenues remain in line with historical trends.

The significant spike in gross revenue, attendances and ticket prices in 2008 could largely be attributed to two international artists (Andre Rieu and Andrea Bocelli) performing a large number of events in Australia, with both shows charging on average upwards of $200 per ticket.

In 2009, large events in the category include various performances by the Australian Chamber Orchestra,the Melbourne Symphony Orchestra, the Queensland Symphony Orchestra, the Sydney Symphony Orchestra and the Australian Brandenburg Orchestra, which form the backbone of events held within this category.

Table 7: Classical Music – revenue and attendance (2004-2009)

	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%

Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 15: Classical Music – gross revenue (2004-2009)

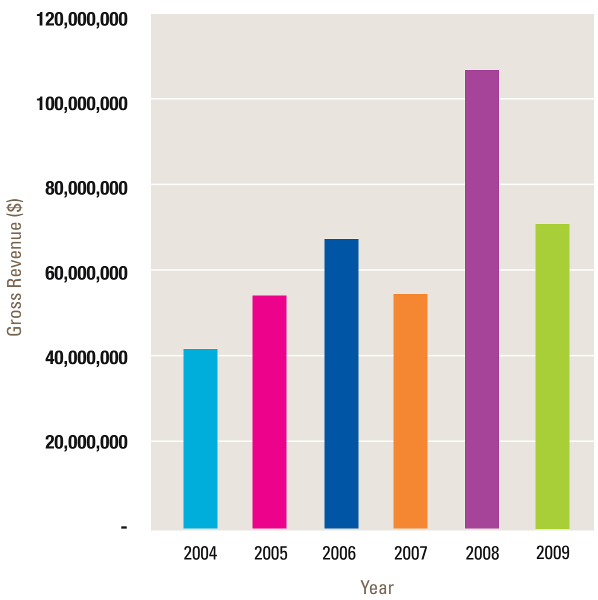
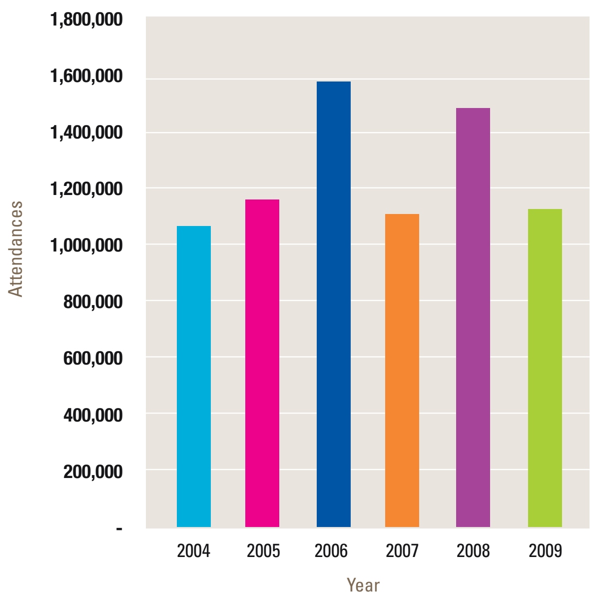


Figure 16: Classical Music – total attendance (2004-2009)



4.5 Festivals (Multi Category)

Roo'd at Ten Days on the Island Festival, Tasmania.

Gross revenue generated by Multi Category Festival events fell from $21.62 million to $10.64 million, a reduction of 50.8%. Similarly, attendances also fell, from 551,810 in 2008 to 431,061 in 2009, representing an decrease of 21.9%. The disproportionate decrease in revenue as compared to attendances can partially be attributed to the 35.5% decrease in average ticket prices from $52.11 to $33.60 between 2008 and 2009.

The significant decrease in revenue and attendance in 2009 was primarily attributable to the Adelaide Festival, a bi-annual event which was held in 2008 and not in 2009.

Table 8: Festivals (Multi-Category) – revenue and attendance (2004-2009)

	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%

Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 17: Festivals (Multi-Category) – gross revenue (2004-2009)

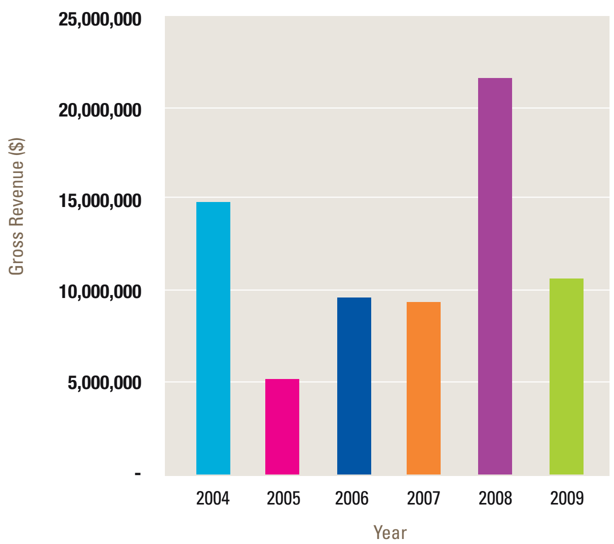
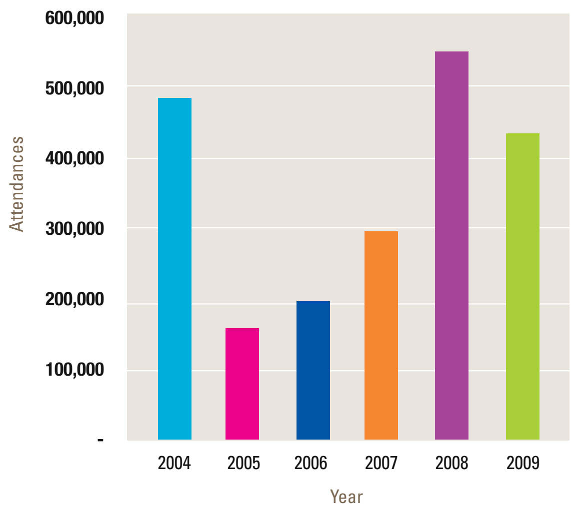


Figure 18: Festivals (Multi-Category) – total attendance (2004-2009)



4.6 Festivals (Single Category)

Summadayze.
Photo - Julian Smith.

Attendances at Single-Category Festival events fell from 1.22 million in 2008 to 0.80 million in 2009, a year on year decrease of 34.5%. Gross revenue generated in this category also fell from $66.43 million to $55.28 million, representing a decrease of 16.8%. Average ticket prices however increased, from $60.91 in 2008 to $81.19 in 2009.

The fall in this category has primarily been caused by the introduction of the new Comedy category. Prior to 2009, a large number of comedy events such as those of the Melbourne Comedy Festival were classified in Festivals (Single category). Under the guidelines of the 2009 ticketing survey, these events have been recategorised into the Comedy category.

Major festivals in this category in 2009 include V Festival, Big Day Out, Summadayze and the Future Music Festival.

Table 9: Festivals (Single-Category) – revenue and attendance (2004-2009)

	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%

Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 19: Festivals (Single-Category) – gross revenue (2004-2009)

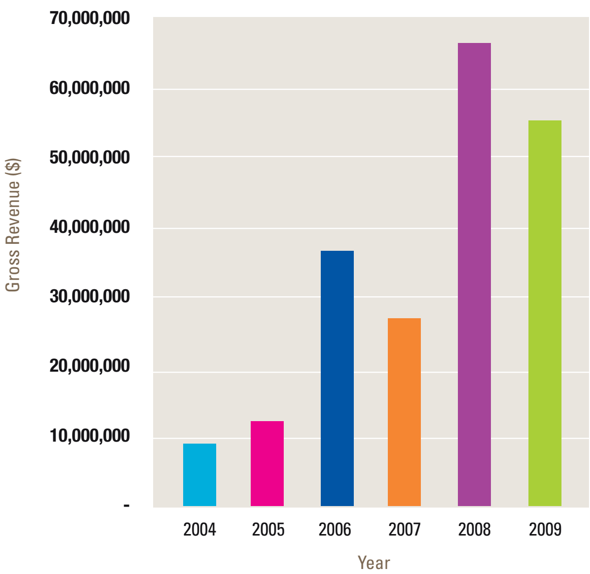
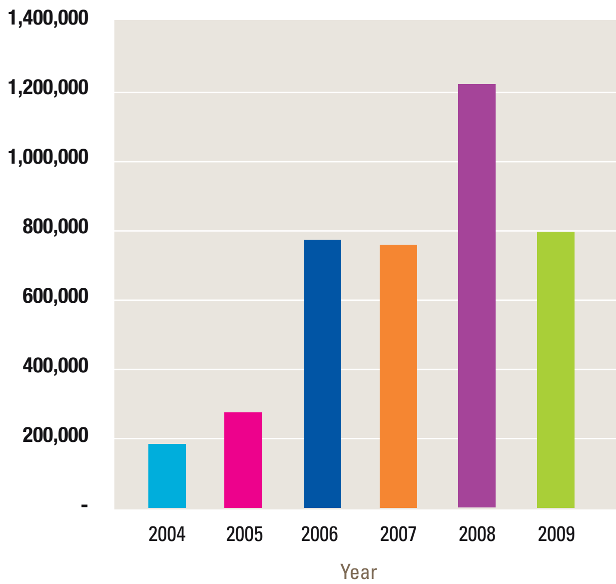


Figure 20: Festivals (Single-Category) – total attendance (2004-2009)



4.7 Musical Theatre

Michaela Banas and Mitchell Butel in *Avenue Q* . Arts Asia Pacific and Power Arts. *Photo - Jeff Busby.*

The Musical Theatre category generated $214.96 million of revenue in 2009 as compared to $252.20 million in 2008, a decrease of 14.8%. Total attendance also decreased, falling by 21.5% from 3.13 million in 2008 to 2.46 million in 2009.

The fall in revenues and attendances in the Musical Theatre category is largely attributable to the fewer number of large national touring productions staged in 2009 as compared to 2008. For instance, productions such as The Phantom of the Opera, Billy Elliot and My Fair Lady toured more extensively and added to the number of performances presented in this category in 2008, compared to the major musicals presented in 2009 (such as Jersey Boys and Wicked), which played in fewer cities.

Table 10: Musical Theatre – revenue and attendance (2004-2009)

	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%

Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 21: Musical Theatre – gross revenue (2004-2009)

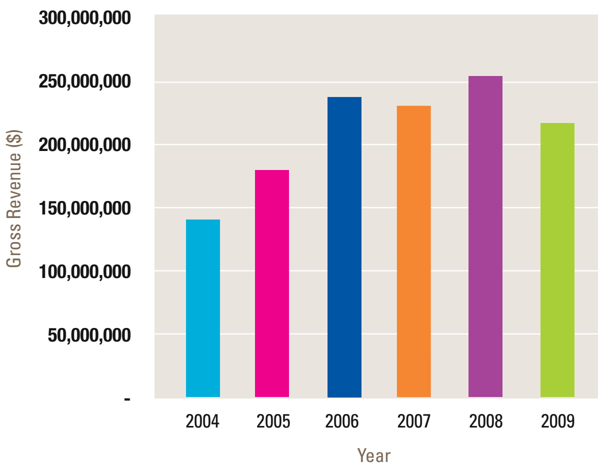
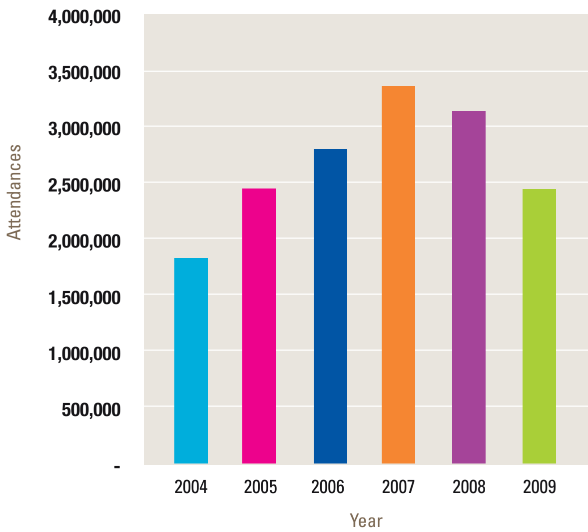


Figure 22: Musical Theatre – total attendance (2004-2009)



4.8 Non-Classical Music

The Non-Classical Music category bucked the trend of most other categories within the Live Entertainment Industry in 2009 by experiencing an increase in both ticketing revenue and attendances. Ticketing revenue increased from $389.16 million in 2008 to $460.44 million in 2009. Similarly, total attendance also grew from 4.33 million to 4.68 million, an increase 8.1%.

The increase in this category in 2009 is largely due to three large tours (Pink, Britney Spears and Coldplay) being staged in 2009; which combined, accounted for the majority of the increase.

Michael Coppel Presents *Pink Funhouse Tour. Photo - Dave Hogan.*

Table 11: Non-Classical Music – revenue and attendance (2004-2009)

	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%

Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 23: Non-Classical Music – gross revenue (2004-2009)

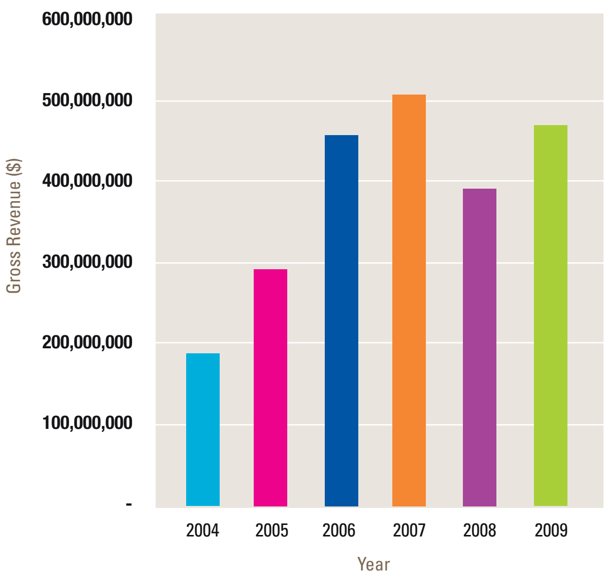
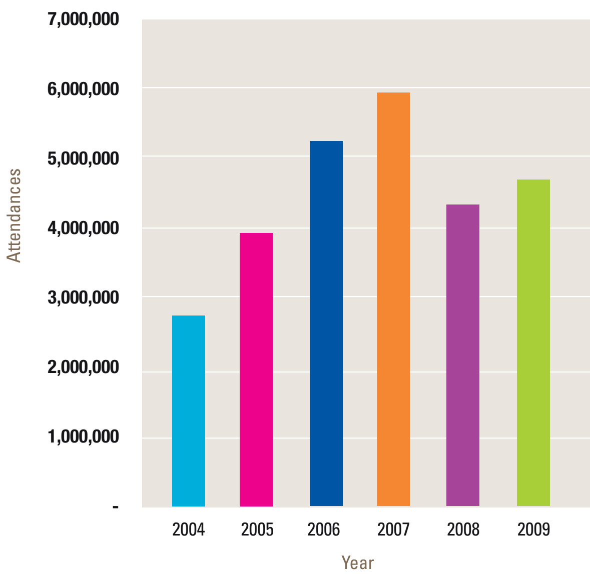


Figure 24: Non-Classical Music – total attendance (2004-2009)



4.9 Opera

Between 2008 and 2009, gross revenue generated by performances within the Opera category increased 6.6% from $41.32 million to $44.04 million. Total attendance also increased from 402,549 to 448,096 over the same period, representing an increase of 11.3%. Average ticket prices remained largely unchanged, declining by 2.5% from $114.46 in 2008 to $111.62 in 2009.

David Wenham (Jerry) and Chorus. *Jerry Springer the Opera.* Sydney Opera House.
Photo - James Morgan.

Table 12: Opera – revenue and attendance (2004-2009)

	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%

Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 25: Opera – gross revenue (2004-2009)

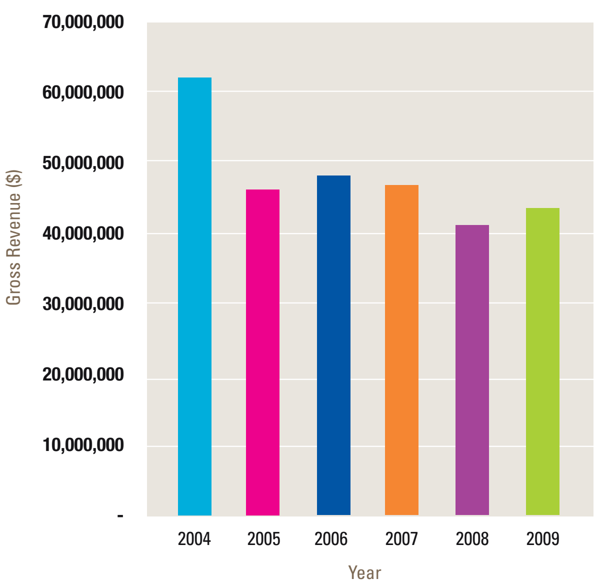
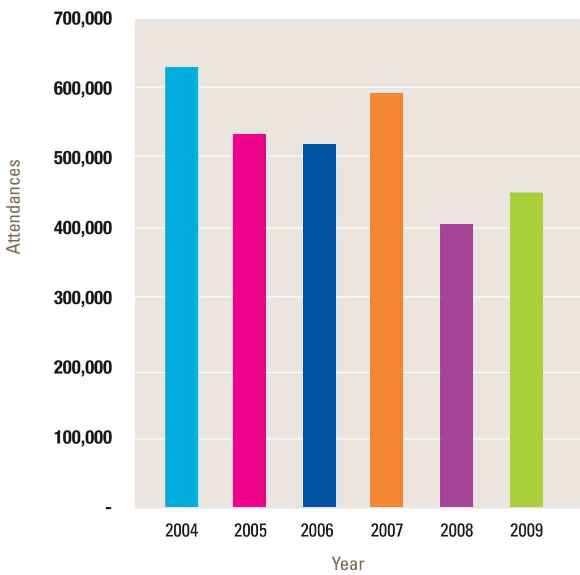
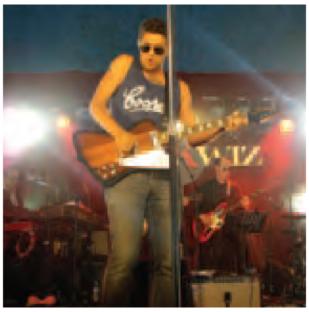


Figure 26: Opera – total attendance (2004-2009)



4.10 Special Events/Other



Dan Sultan performing as part of *The RocKwiz National Tour.* *Photo - Renegade Films.*

In 2009, revenue generated by events in the Special Events/Other category rose from $10.32 million to $23.6 million. Similarly, total attendance also increased from 374,623 to 559,434. Performances by David Copperfield were a major reason for the increase in ticketing revenues and attendances between 2008 and 2009.

The significant fall in revenue and attendances between 2007 and 2008 could be explained by the fact that 2008 was the first year in which Ernst & Young were able to review data provided at the event level. A large number of events originally included in the Special Events/Other category were subsequently excluded, as they did not fall within the industry and category definitions. As such, caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Table 11: Special Events/Other– Revenue and Attendance (2004-2008)

	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%

Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 27: Special Events/Other – gross revenue (2004-2009)

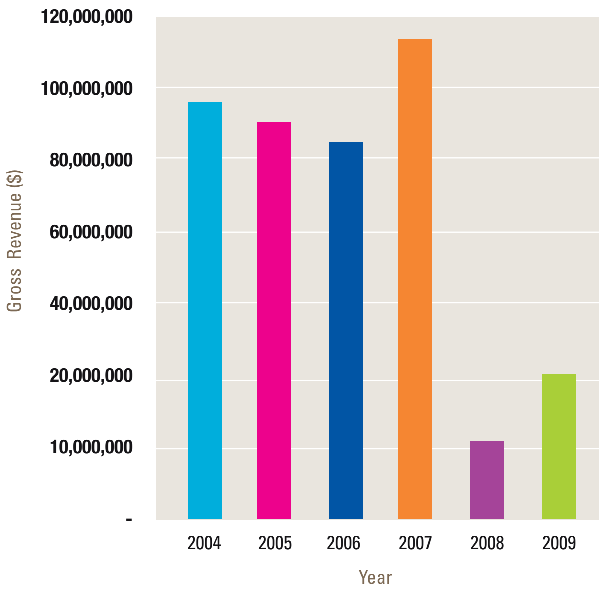
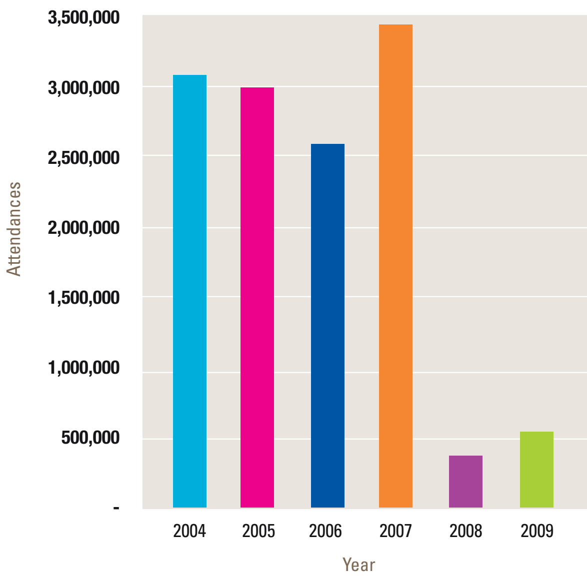
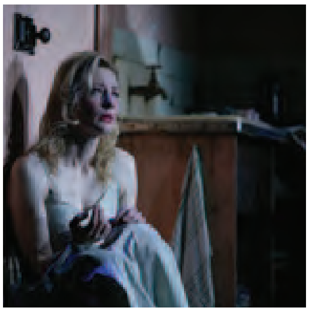


Figure 28: Special Events/Other – total attendance (2004-2009)



4.11 Theatre



In 2009, total revenue generated from the Theatre category fell by 5.3% from $80.48 million to $76.19 million. Total attendance also fell from 1.94 million to 1.71 million, representing a decrease of 12.0%, while average ticket prices increased from $46.92 to $51.34.

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

Cate Blanchett (Blanche) in *A Streetcar Named Desire*. © Lisa Tomasetti. Sydney Theatre Company.

Table 14: Theatre – revenue and attendance (2004-2009)

	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%

Note: Caution should be applied when comparing the 2008 and 2009 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

Figure 29: Theatre – gross revenue (2004-2009)

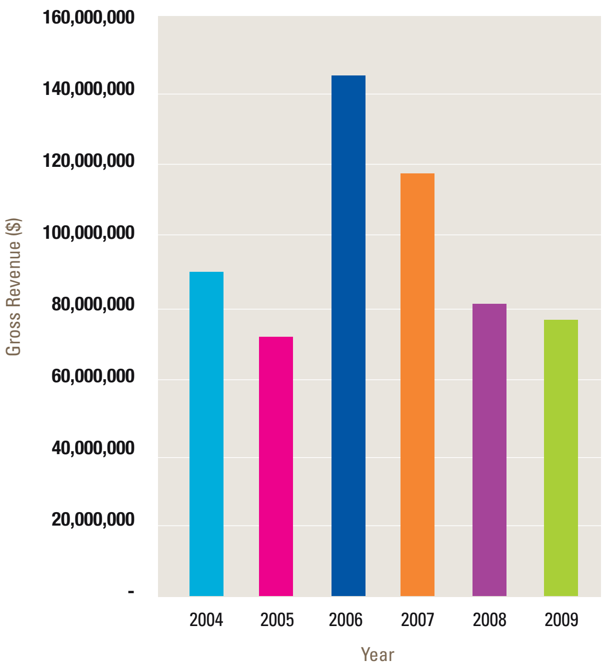
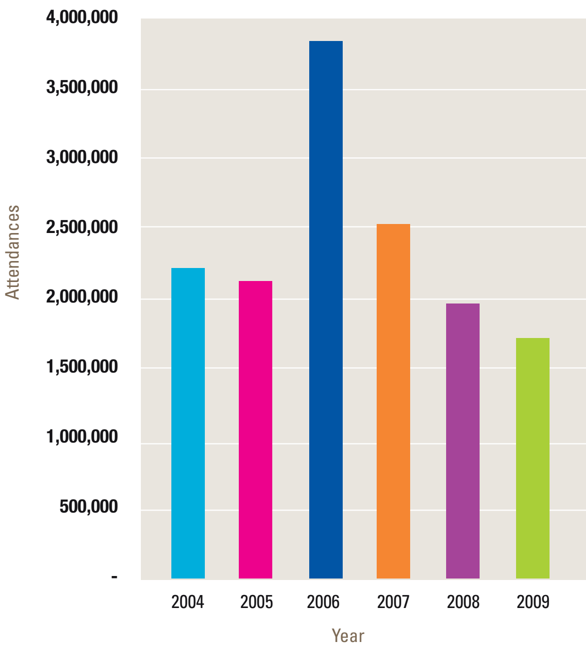


Figure 30: Theatre – total attendance (2004-2009)



4.12 Comedy

Tim Minchin. *Photo - Joanne Saad.*

The 2009 Live Entertainment ticketing survey is the first year in which live entertainment events have been classified into the Comedy category. This category covers events such as stand up, and other comedy performances (but not comedy plays). In previous years, most comedy events were likely to have been classified into either the Theatre category or Festivals (Single-Category).

Based on information obtained for Comedy events performed in 2009, the category generated $27.82 million in ticketing revenue, with attendances totalling 706,702. Average ticket prices for performances in the category were around $44.07.

Table 15: Comedy – revenue and attendance (2009)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$27,817,875	N/A	661,445	N/A	$44.07	N/A

4.13 Circus and Physical Theatre

Flip Kammerer in *Barely Contained,* Circus Oz 2009.
Photo - Jess Bialek.

Circus and Physical Theatre is also a new category which has been introduced in the 2009 Live Entertainment ticketing and revenue survey. Events which fall within this category include Circus and other Physical Theatre type events. In previous years, most Circus and Physical Theatre events were likely to have been included in the Theatre category.

In 2009, some of the larger events in this category include performances by the Great Moscow Circus and Le Grand Cirque. Events in this category generated $8.60 million in ticketing revenues and attracted 198,274 attendances.

Table 16: Circus and Physical Theatre – revenue and attendance (2009)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$8,601,990	N/A	198,274	N/A	$47.98	N/A

Survey Participants

Participating Ticketing Companies

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Arts Projects Australia
BASS SA
BOCS Ticketing WA
Canberra Ticketing
The Arts Centre (Melbourne)
Queensland Performing Arts Centre (QPAC)
Sydney Opera House
Ticketmaster
Ticketek

Australian Major Performing Arts Group (AMPAG Companies)

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

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