Ticket Attendance and Revenue Survey 2011

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Introduction

Live Performance Australia (LPA) takes great pleasure in presenting our Ticket Attendance and Revenue Survey for 2011 (Survey).

This is the eighth annual Survey presented by LPA. In the period since 2004, our Survey has established itself as the predominant source of reliable industry statistics for the Australian Live Entertainment Industry, and represents the most comprehensive available survey of ticket sales for Australian Live Entertainment events. This year's Survey confirms that demand for Live Entertainment remained strong in 2011, despite generally difficult economic conditions.

Overall revenue for the Live Entertainment Industry declined marginally when compared to 2010, from $1.32 billion, to $1.3 billion - a drop of 1.5%. This decline occurred despite a small 0.6% increase in overall attendance. This anomaly can be partly explained by a marginal fall in average ticket price (a 0.7% drop, from $86.43 to $85.86), in addition to a slightly larger proportion of complimentary, sponsor and zero-priced tickets.

Overall, the Survey recorded that 17,345,720 tickets for Live Entertainment Industry events were issued in Australia in 2011. While this does not yet match pre-Global Financial Crisis attendance levels, it does represent a healthy improvement on the figures recorded for 2008 and 2009, and continues the upward trend recorded in 2010. This is heartening for the industry, and is indicative of strong ongoing demand.

In terms of new data partners, this year's Survey includes data from the Melbourne Recital Centre, and this has had a positive impact on the data collected for Opera and Classical Music events. In a similar vein, the addition of data from Foxtix has improved the collection rate for the genres of Contemporary Music, and Festivals (Single Category). The addition of new data partners is important to improving the reach of the Survey, and LPA will continue to seek new data partners to ensure that the Survey is as comprehensive as possible.

In terms of presentation, a major addition to this year's Survey is the provision of a State/Territory breakdown of ticket sales and revenue for each genre. We believe that this is an extremely useful addition to the Survey, and will be of particular benefit for stakeholders when engaging with State and Territory arts funding bodies. Further, we have renamed the "Non-Classical Music" category, "Contemporary Music". Contemporary Music represents by far the largest performance Survey category - by both attendance and revenue. It seemed appropriate that it be defined on its own terms.

The genres which experienced the strongest growth in 2011 were Circus and Physical Theatre, Children's/Family Events, and Comedy. While growth in the Circus and Physical Theatre and Children's/Family Events categories can be explained by the impact of single stand-out events (Cirque de Soleil's Saltimbanco tour in the Circus and Physical Theatre category, and Walking With Dinosaurs in the Children's/Family Events category), the 33.2% growth in revenue for Comedy is the result of generally strong demand for the category. This demand was reflected by healthy box office figures for a number of performers, and was also reflected by Australia's premier comedy festival - the Melbourne International Comedy Festival (MICF). The MICF had a record year in 2011, recording an 11% increase on revenue when compared with 2010. It should be noted that strong growth was also recorded in the Classical Music and Opera categories, which may in part be attributable to the addition of the Melbourne Recital Centre as a new data partner to the Survey.

The Survey is an important service to the industry, and LPA remains extremely grateful to Media Super whose generous sponsorship makes it all possible.

We also thank our Survey Consultants Ernst & Young for their professional services in compiling and analysing the Survey data, and our Design Consultant, tommygun, for their work on the layout.

Finally, we sincerely thank the Survey Participants listed on page 39 for their provision of data to the Survey. The generous cooperation and effort of all parties involved is, as always, greatly appreciated.

Evelyn Richardson
Chief Executive
Live Performance Australia

August 2012

About LPA

Live Performance Australia (LPA) is the peak body for the live performance industry, and presenter of the annual Helpmann Awards®. LPA's Vision is to ensure the growth and long term sustainability of the Australian live performance industry.

The strategic flagship areas for LPA in the three years 2011-2014 are:

- Use industry knowledge to position and influence.
- Lead industrial relations development that reflects the global nature of our industry.
- Engage members and celebrate the industry.

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.

1.1 Scope of Work

Ernst & Young has been engaged by Live Performance Australia (LPA) to undertake a survey of ticket attendances and revenues for the Live Entertainment Industry for the 2011 calendar year. The Live Entertainment Industry encompasses performances, productions, 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 participating ticketing companies and venues and the Australia Council for the Arts.
- Compiling the 2011 national survey data on an overall basis, by state and by event category.
- Performing an analysis of the 2011 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 Ernst & Young since 2006.

1.2 Approach

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

- Araluen Centre for Arts & Entertainment NT
- Darwin Entertainment Centre
- Arts Projects Australia (WOMADelaide) SA
- BASS SA
- BOCS Ticketing WA
- Canberra Ticketing
- The Arts Centre (Melbourne)
- Melbourne Recital Centre (new in 2011)
- Queensland Performing Arts Centre (QPAC)
- Sydney Opera House
- News Ticketing (includes Moshtix and Foxtix. Foxtix is a new ticketing agency in 2011)
- Ticketmaster
- Ticketek

These companies were identified by LPA and provided both gross revenue and attendance data to Ernst & Young for the 2011 calendar year. Gross revenue comprised revenue sourced from paid tickets only (i.e. it excludes sponsorships); while the attendance data provided and applied in the analysis included both paid and non-paid tickets. Average ticket price data was calculated based on paid tickets only.

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
- 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
- The 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 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.

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 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.

Category Descriptor Guide

Table 1: Category Descriptor Guide (2011)

Category	Description
Ballet and Dance	Traditional forms, Liturgical dance, Ethnic dance, Tap, Folk dance, Ballet, Latin dance, Ballroom, Breakdancing, Modern dance
Children's/Family	**Live entertainment for children** **Interactive performances for children** **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 contains 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**
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, eg 'pop' or 'jazz,' as in The Australian Jazz Orchestra):** Pop, Techno, Country, Heavy Metal, Blues, Rap, Folk, Rock, Dance parties, R&B, Soul, Jazz, Hip hop
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**

* 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 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, workshops, cinema screenings, award nights and balls were identified in some data sets. These were excluded as they are not considered part of the Live Entertainment Industry.
- Royal Melbourne Show included in Special Events was excluded as this was not considered to be part of the Live Entertainment Industry.
- 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 Entertainment 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.

Moreover, attendances at festivals are under-reported in this survey. First, some festivals maintain their own ticketing systems and are not part of this Survey. Second, the Survey only reports paid tickets and does not include the substantial unpaid and/or unticketed components of festivals. 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 Foxtix in the 2011 survey has helped to decrease the level of under-reporting as this ticketing agency, in conjunction with Moshtix, includes smaller performances at certain bars and hotels. Still, this Survey provides a conservative estimate of the total ticket revenues and attendances sourced from live entertainment events in Australia.

As part of our analysis, the 2011 data was compared against historical data sourced directly from Live Performance Australia's Live Entertainment Industry in Australia 2006, 2007, 2008, 2009 and 2010 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 data from 2008 to 2011 with data from previous years as inconsistencies may exist in the data collection methodology between the surveys performed in these four years, and for previous surveys (where more detailed event specific information was not requested).

1.4 Changes in the 2011 Ticketing Survey as compared to prior years

We have made four changes to the Ticketing Survey in 2011, being:

- The Non-Classical Music category has been renamed to "Contemporary Music". However, the scope of performances in this category remains the same as per prior years. The labelling of "Non-Classical Music" has been updated for graphs depicting prior Survey years.
- The inclusion of data from the Melbourne Recital Centre. The Melbourne Recital Centre provided ticketing information for performances during 2011, primarily in the categories of Classical Music and Opera.
- The inclusion of data from Foxtix. Foxtix is a ticketing service provider that operates nationwide, primarily in the categories of Festivals (Single-Category) and Contemporary Music. Foxtix, together with Moshtix, is managed by News Ticketing.
- A new 'State/Territory Breakdown' section in each category, which summarises the breakdown of revenue and attendance by State and Territory. However, where only one event in that category was held in a particular State/Territory, data has been combined in order to protect the privacy of individual events. A note has been made in each category where this occurs.

When comparing data from 2009 to 2011 with previous years, it should be noted that four major changes were made to the Ticketing Survey in 2009, 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 does not include comedy plays, while the Circus and Physical Theatre includes Circus and Physical Theatre events. The introduction of these categories do 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 WOMADelaide - a multi-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). Since the last two quarters of 2009, The Arts Centre (Melbourne) have 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

In 2011, the Live Entertainment Industry performed well in most categories, despite a slight overall decline in revenue from 2010. All categories, excluding Contemporary Music, Festivals (Single-Category) and Special Events, experienced modest to strong growth in revenue. Categories which had the greatest level of growth were Circus and Physical Theatre and Children's/Family. Conversely, the Contemporary Music category saw a significant decline in both revenue and attendance as compared with 2010. These falls in the Contemporary Music category help to explain the overall contraction of the Live Entertainment Industry, coupled with a decline in Festivals (Single-Category) patronage.

2.2 Analysis of Overall Trends

In 2011, approximately 17.35 million tickets were issued to live entertainment events in Australia. Whilst this represents a 0.6% increase in attendance as compared to 2010, the total number of paid tickets declined from 15.36 million to 15.23 million on a year-on-year basis. The remaining 2.12 million tickets issued in 2011 were complimentary, sponsor and zero-priced tickets.

This generated total revenues of $1.307 billion in 2011, as compared to $1.327 billion in 2010, representing a decrease of 1.5%. The decrease in revenue in 2011 is attributable to both a decline in the total number of paid tickets, and the average ticket price, which fell by 0.7% to $85.86.

Table 2 summarises the changes in revenue, tickets and ticket price between 2004 and 2011.

Table 2: Total Revenue and Attendance (2004-2011)

	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	2.1%	15,196,773	-4.0%	$80.57	5.2%
2010	$1,327,805,816	22.6%	17,241,139	13.50%	$86.43	7.3%
2011	**$1,307,300,786**	**-1.5%**	**17,345,720**	**0.61%**	**$85.86**	**-0.7%**

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

The compound annual growth rate (CAGR) for revenue from 2004 to 2011 was 9.6%, while the CAGRs for attendance and average ticket price for the same period were 3.7% and 6.5% respectively. These CAGRs should be interpreted with care, given the change in data collection and allocation methodology over the years and the increase in the number of survey participants.

Figure 1 shows a slight decline in revenue, while Figure 2 shows a marginal increase in attendance in 2011 as compared with 2011.

Figure 1: Gross Revenue (2004-2011)

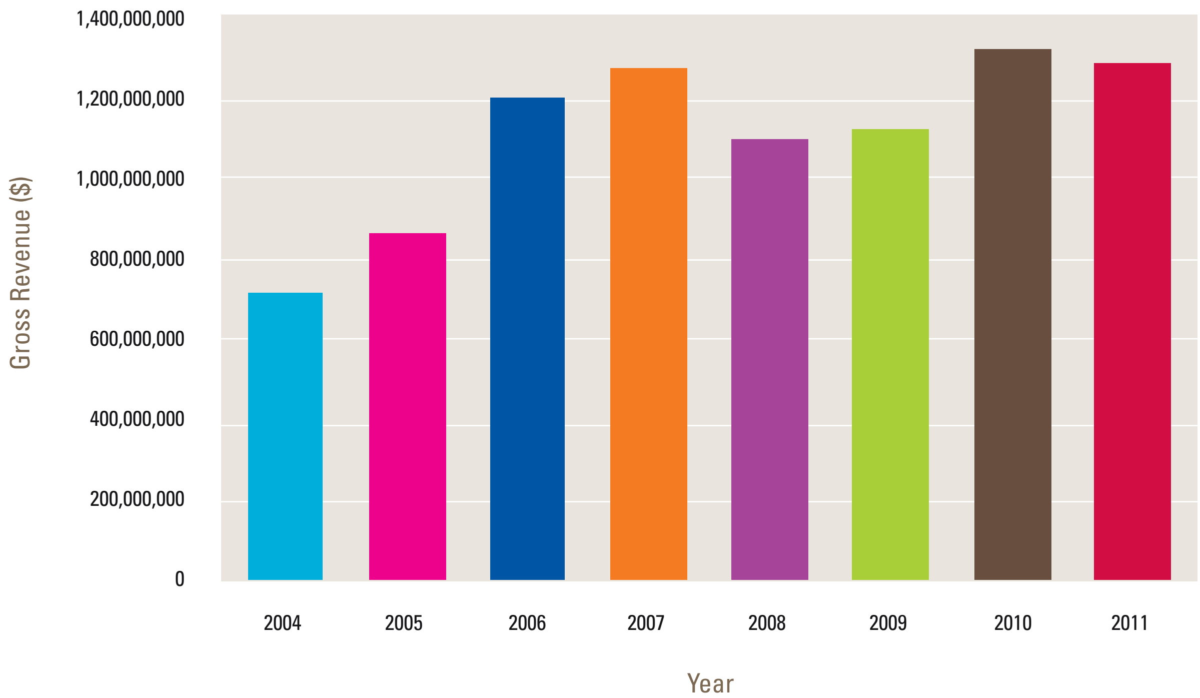
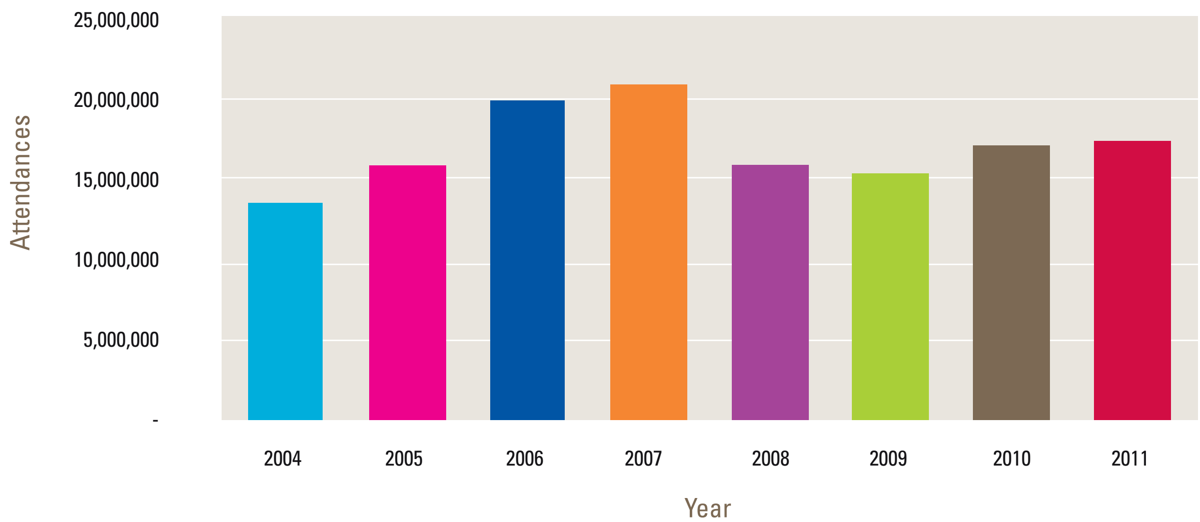


Figure 2: Total Attendances (2004-2011)



3. Revenue and Attendances by State

This section presents the revenues and attendances for all eight states and territories within Australia for 2011 as detailed in Table 3 below.

In 2011, New South Wales and Victoria were the largest contributors by gross revenue, accounting for 40.1% and 29.5% respectively, towards national revenue. These two states combined accounted for $909.5 million or 69.6% of revenue for the Australian Live Entertainment Industry in 2011. However, whilst gross revenue for 2011 in New South Wales grew in both absolute and relative terms, the Victorian market saw a decline from 2010.

A similar story is seen for attendances, with New South Wales and Victoria making up 67.4% of total Australian ticket numbers in 2011.

Table 3: Total Revenue and Attendances by State/Territory (2010-2011)

State/Territory	Revenue	Share of Industry (2011)	Share of Industry (2010)	Tickets	Share of Industry (2011)	Share of Industry (2010)
New South Wales	$523,903,477	40.1%	35.1%	6,331,001	36.5%	33.7%
Victoria	$385,643,997	29.5%	34.0%	5,359,749	30.9%	33.8%
Queensland	$165,840,931	12.7%	12.1%	2,150,329	12.4%	11.9%
Western Australia	$130,050,418	9.9%	11.0%	1,788,262	10.3%	10.9%
South Australia	$77,215,957	5.9%	5.2%	1,237,386	7.1%	6.0%
Australian Capital Territory	$16,178,998	1.2%	1.1%	325,233	1.9%	1.8%
Tasmania	$6,739,343	0.5%	0.3%	99,653	0.6%	0.3%
Northern Territory	$1,727,664	0.1%	0.2%	54,107	0.3%	0.6%
Total	**$1,307,300,786**	**100.0%**	**100.0%**	**17,345,720**	**100.0%**	**100.0%**

Figure 3: Market Share (Revenue) by State/Territory (2011)

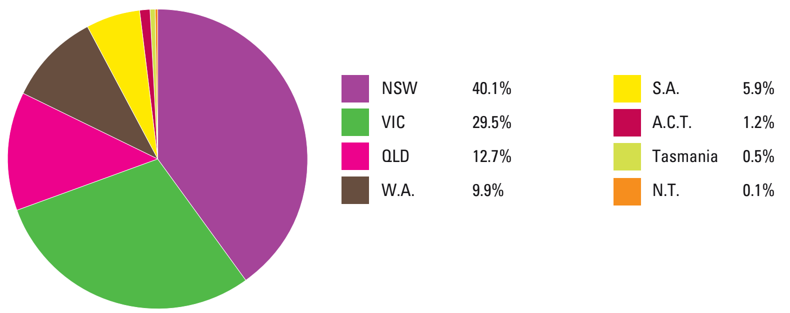
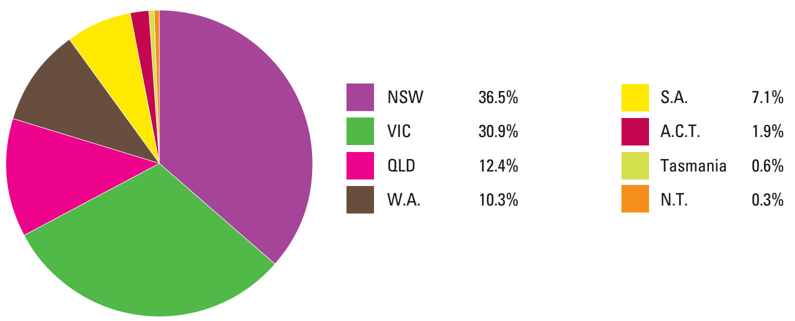


Figure 4: Market Share (Attendance) by State/Territory (2011)



4. Category Analysis

4.1 Category Trends

This section presents analysis for each of the 12 event categories, as defined in Table 1. Table 4 below and Figure 5 and Figure 6 over the page illustrate the breakdown of the Live Entertainment Industry in Australia based on share of gross industry revenue by category in 2011 and 2010, while Figure 7 and Figure 8 illustrate the industry breakdown based on share of total attendance by category in 2011 and 2010.

The Contemporary Music and Musical Theatre categories represent the two largest categories in the industry, generating 41.3% and 18.9% of revenue, respectively. Combined, these two categories represent around 60.1% of the Live Entertainment Industry by gross revenue. Notably, the Contemporary Music category experienced a decline in industry share, from 49.6% in 2010 to 41.3% in 2011. This was due to both a decline in patronage of Contemporary Music performances, coupled with large increases in other categories such as the Circus and Physical Theatre and Children's/Family categories.

Figure 9 illustrates the year on year percentage revenue movement by category. By far the most significant movement was in the Circus and Physical Theatre category, which increased by 464.3%, due in part to a number of high-profile touring acts as detailed in Section 4.12. Other significant increases occurred in the Children's/Family and Comedy category.

Figure 11 and Figure 12 present time series data of the market shares of each event category over the past eight years for ticket revenues and attendances.

Table 4: Total Revenue and Attendances by Category (2011)

Category	Revenue	% change in revenue (from 2010)	Share of industry	Tickets	% change in attendance (from 2010)	Share of industry
Ballet and Dance	$59,164,135	2.9%	4.5%	947,846	-7.4%	5.5%
Children's/Family	$58,777,398	88.1%	4.5%	1,453,012	49.1%	8.4%
Classical Music	$60,096,039	31.0%	4.6%	1,048,115	8.9%	6.0%
Festivals (Multi-Category)	$9,890,881	3.3%	0.8%	242,222	-8.1%	1.4%
Festivals (Single-Category)	$96,453,486	-4.4%	7.4%	984,946	-4.2%	5.7%
Musical Theatre	$246,792,376	1.6%	18.9%	2,799,918	7.2%	16.1%
Contemporary Music	$539,274,481	-18.2%	41.3%	5,939,618	-15.5%	34.2%
Opera	$47,305,786	17.9%	3.6%	439,041	7.2%	2.5%
Special Events	$15,799,946	-49.8%	1.2%	370,239	-29.7%	2.1%
Theatre	$65,880,712	9.5%	5.0%	1,380,622	1.9%	8.0%
Circus and Physical Theatre	$55,865,945	464.3%	4.3%	728,799	174.2%	4.2%
Comedy	$51,999,602	33.2%	4.0%	1,011,342	27.6%	5.8%
Total	**$1,307,300,786**	**-1.5%**	**100.0%**	**17,345,720**	**0.6%**	**100.0%**

Figure 5: Gross Revenue by Category (2011)

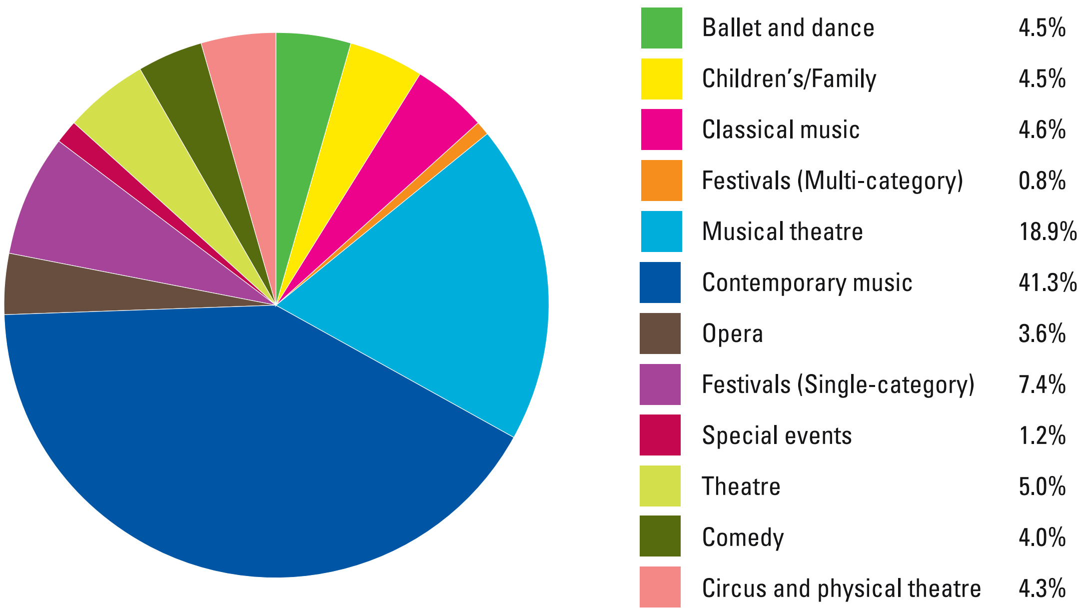


Figure 6: Gross Revenue by Category (2010)

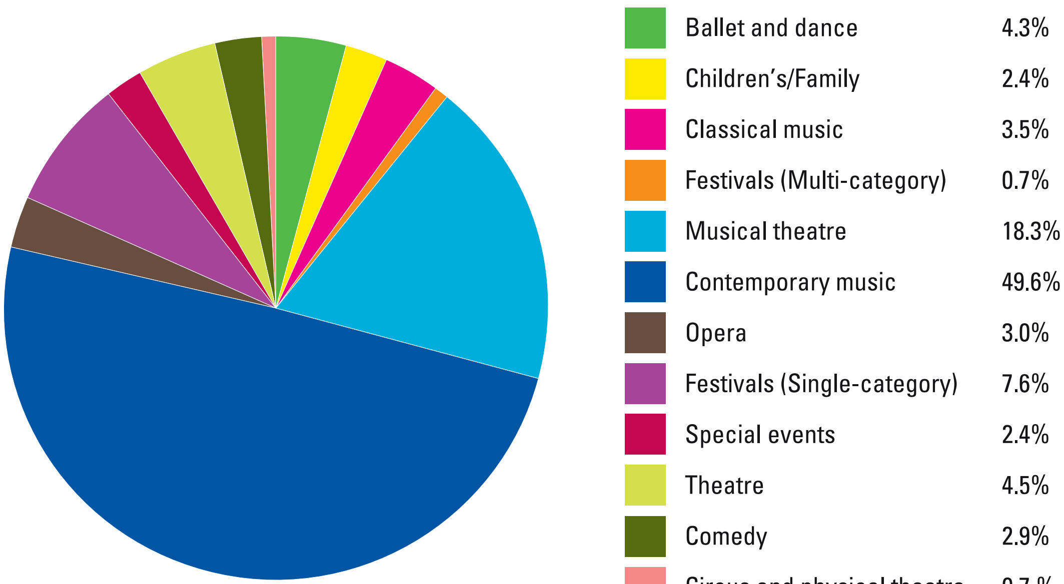
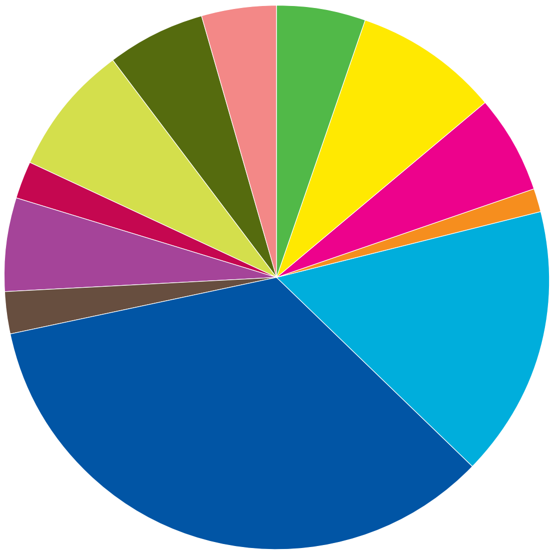
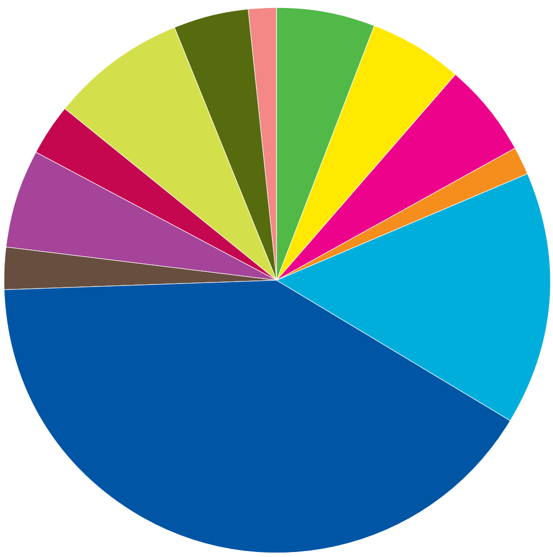


Figure 7: Total Attendance by Category (2011)



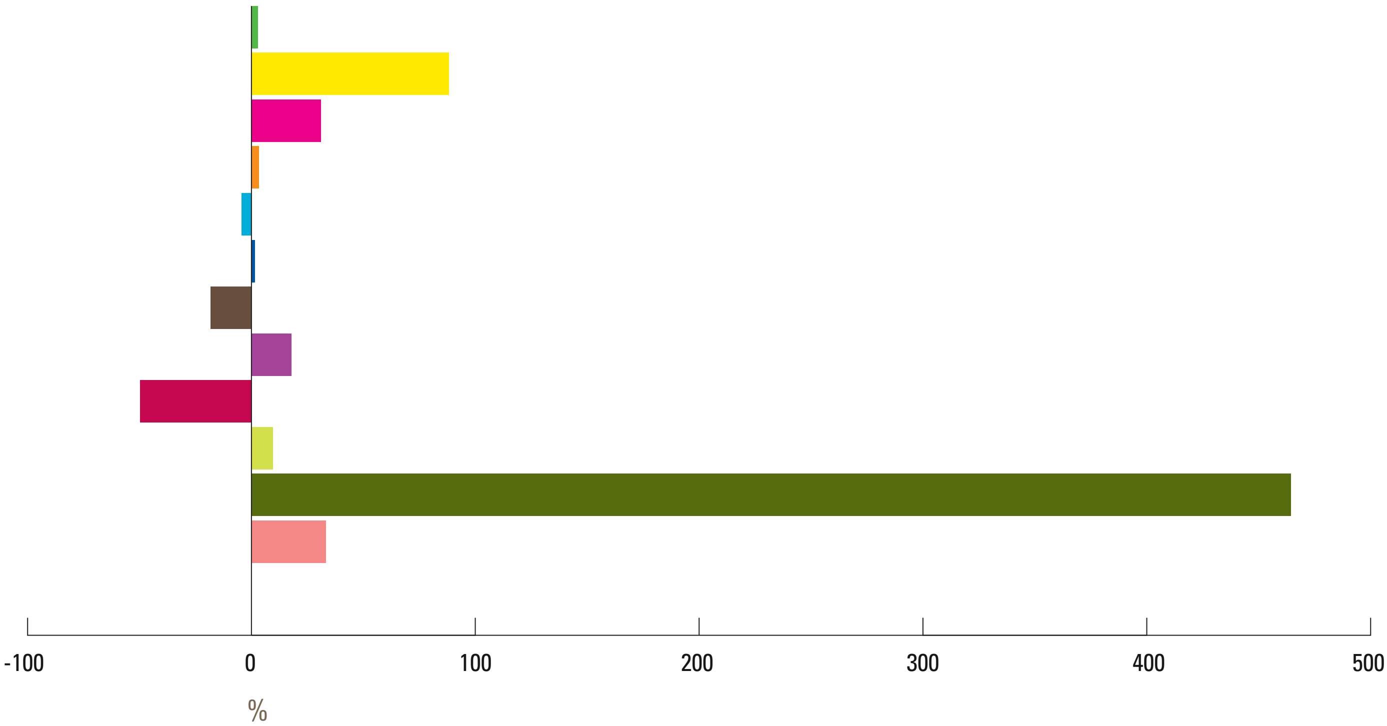
Ballet and dance	5.5%
Children's/Family	8.4%
Classical music	6.0%
Festivals (Multi-category)	1.4%
Musical theatre	16.1%
Contemporary music	34.2%
Opera	2.5%
Festivals (Single-category)	5.7%
Special events	2.1%
Theatre	8.0%
Comedy	5.8%
Circus and physical theatre	4.2%

Figure 8: Total Attendance by Category (2010)



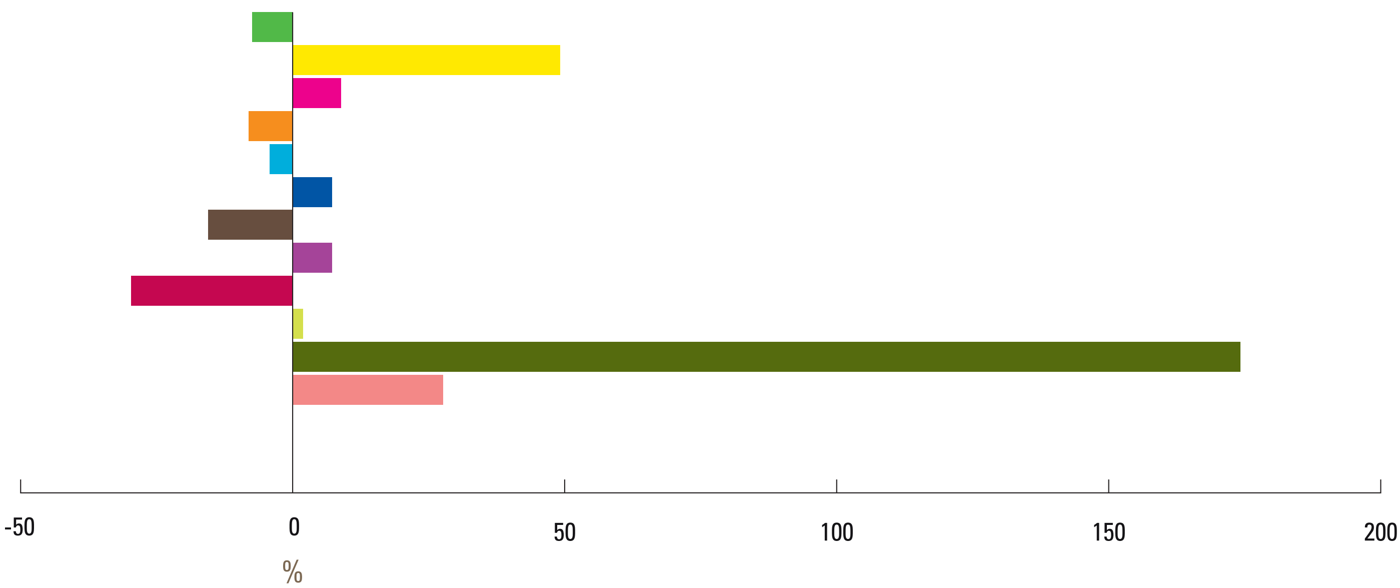
Ballet and dance	5.9%
Children's/Family	5.7%
Classical music	5.6%
Festivals (Multi-category)	1.5%
Musical theatre	15.2%
Contemporary music	40.8%
Opera	2.4%
Festivals (Single-category)	6.0%
Special events	3.1%
Theatre	7.9%
Comedy	4.6%
Circus and physical theatre	1.5%

Figure 9: Percentage Movement in Revenue by Category (2010-2011)



Ballet and dance	2.9%	Festivals (Single-category)	-4.4%	Special events	-49.8%
Children's/Family	88.1%	Musical theatre	1.6%	Theatre	9.5%
Classical music	31.0%	Contemporary music	-18.2%	Circus and physical theatre	464.3%
Festivals (Multi-category)	3.3%	Opera	17.9%	Comedy	33.2%

Figure 10: Percentage Movement in Attendance by Category (2010-2011)



Ballet and dance	-7.4%	Festivals (Single-category)	-4.2%	Special events	-29.7%
Children's/Family	49.1%	Musical theatre	7.2%	Theatre	1.9%
Classical music	8.9%	Contemporary music	-15.5%	Circus and physical theatre	174.2%
Festivals (Multi-category)	-8.1%	Opera	7.2%	Comedy	27.6%

Figure 11: Market Shares (Gross Revenue) by Category (2004-2011)

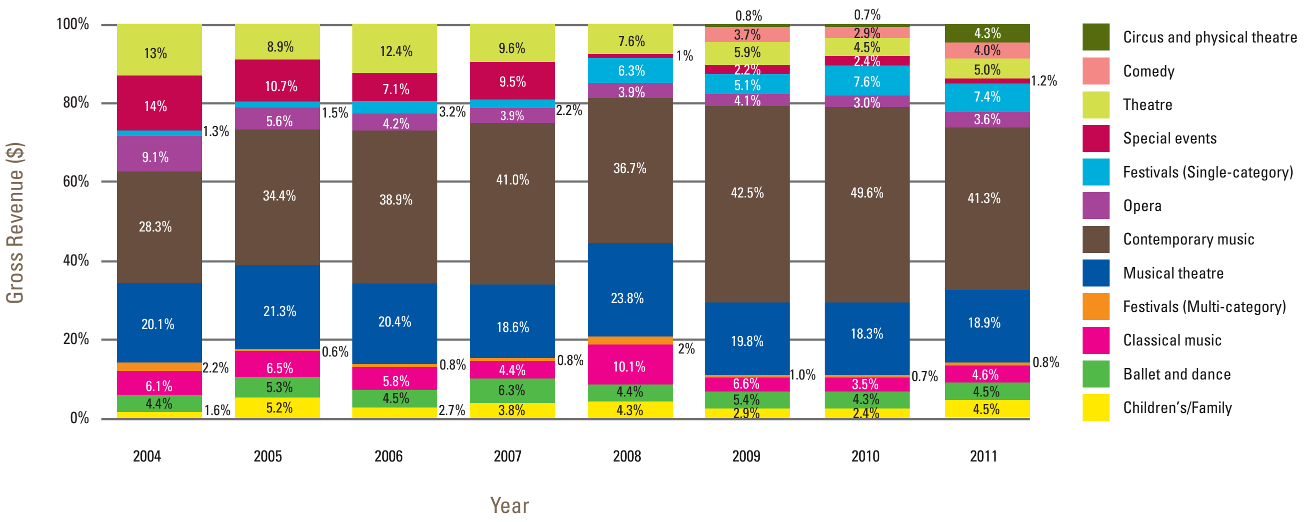
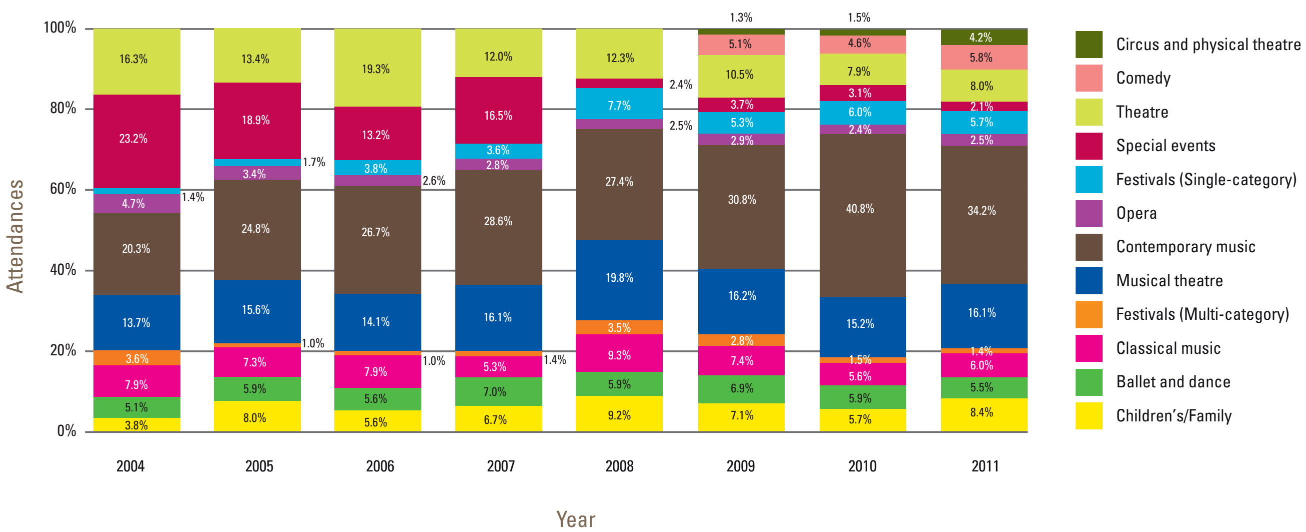


Figure 12: Market Shares (Attendances) by Category (2004-2011)



Note: Caution should be applied when comparing the 2008, 2009 and 2010 data with data from 2004 to 2007, as inconsistencies may exist in the data collection and allocation methodology.

4.2 Ballet and Dance

4.2.1 Category Trends

West Australian Ballet, Seventh Symphony
Photo - Jon Green

The Ballet and Dance category experienced a slight increase in gross revenue, but a decrease in ticket attendances in 2011. Gross revenue increased by 2.9% from $57.51 million in 2010 to $59.16 million in 2011, while total attendances decreased by 7.4% over the same period. Further, the average ticket price increased 10.9%, from $64.86 to $71.93.

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 companies versus local productions). In 2011, the biggest dance productions included Riverdance, Tap Dogs and Stomp. Other major productions included Ballet Revolución and the Imperial Russian Ballet.

As with previous years, local productions from the AMPAG companies form a large portion of the revenues and ticket sales in this category. Major AMPAG contributors in this category included The Australian Ballet, The Queensland Ballet, Bangarra Dance Theatre and the West Australian Ballet.

Table 5: Ballet and Dance – Revenue and Attendance (2004-2011)

	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	36.30%	$52.76	5.4%
2006	$52,523,644	17.9%	1,113,849	19.70%	$50.52	-4.2%
2007	$77,287,071	47.1%	1,457,306	30.80%	$57.39	13.6%
2008	$47,051,946	-39.1%	934,533	-35.90%	$60.67	5.7%
2009	$58,570,704	24.5%	1,050,763	12.40%	$63.33	4.4%
2010	$57,509,401	-1.8%	1,023,077	-2.60%	$64.86	2.4%
2011	**$59,164,135**	**2.9%**	**947,846**	**-7.4%**	**$71.93**	**10.9%**

Figure 13: Ballet and Dance – Gross Revenue (2004-2011)

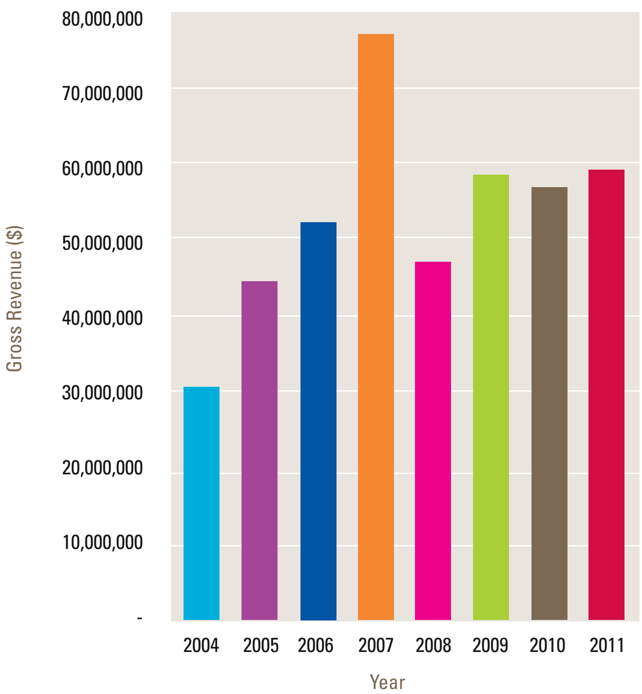
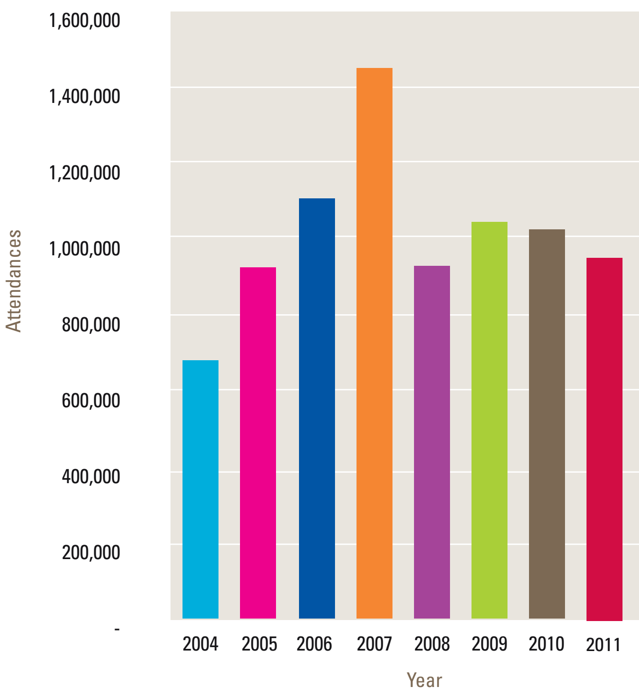


Figure 14: Ballet and Dance – Total Attendance (2004-2011)



4.2.2 State/Territory Breakdown

Figure 15: Ballet and Dance

Revenue by State/Territory (2004-2011)

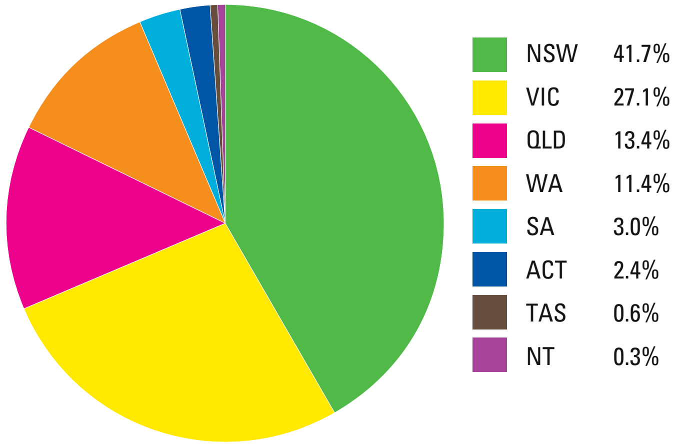


Table 6: Ballet and Dance

Revenue by State/Territory (2004-2011)

State/Territory	Revenue	Proportion
NSW	$24,689,155	41.7%
VIC	$16,045,127	27.1%
QLD	$7,936,116	13.4%
WA	$6,739,142	11.4%
SA	$1,795,395	3.0%
ACT	$1,446,708	2.4%
TAS	$359,800	0.6%
NT	$152,692	0.3%
Total	**$59,164,135**	**100.0%**

Figure 16: Ballet and Dance

Attendance by State/Territory (2004-2011)

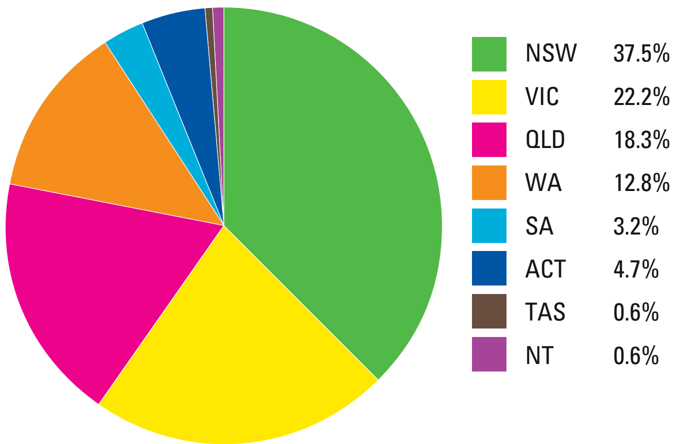


Table 7: Ballet and Dance

Attendance by State/Territory (2004-2011)

State/Territory	Attendance	Proportion
NSW	355,684	37.5%
VIC	210,855	22.2%
QLD	173,560	18.3%
WA	121,521	12.8%
SA	30,137	3.2%
ACT	44,334	4.7%
TAS	5,776	0.6%
NT	5,979	0.6%
Total	**947,846**	**100.0%**

4.3 Children's/Family Events

4.3.1 National Overview

Walking With Dinosaurs
Photo - Joan Marcus

In 2011, the Children's/Family Events category experienced a significant increase in both gross revenue and total attendance. Gross revenue increased by 88.1%, from $31.25 million in 2010 to $58.78 million in 2011. Total attendance grew by 49.1% whilst the average ticket price grew by 28.2% from $34.23 in 2011 to $43.87 in 2011.

These increases were driven by a national tour of the Walking with Dinosaurs Arena Spectacular, which was the largest production in this category in 2011. Ticket prices for this event ranged from $50 to $100, helping to explain the growth in average ticket prices. Other major events included productions such as Alice's Adventures in Wonderland, Disney on Ice, the Sydney Children's Festival and various concerts by The Wiggles. Other children's favourites such as Dora the Explorer, Hi-5 and The Gruffalo also returned in 2011.

Table 8: Children's/Family Events – Revenue and Attendance (2004-2011)

	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	146.70%	$35.52	67.1%
2006	$30,944,086	-28.2%	1,114,427	-12.30%	$28.96	-18.5%
2007	$46,535,403	50.4%	1,393,942	25.10%	$36.49	26.0%
2008	$45,647,441	-1.9%	1,455,400	4.40%	$34.24	-6.2%
2009	$31,904,974	-30.1%	1,076,332	-26.00%	$32.38	-5.4%
2010	$31,247,780	-2.1%	974,624	-9.40%	$34.23	5.7%
2011	**$58,777,398**	**88.1%**	**1,453,012**	**49.1%**	**$43.87**	**28.2%**

Figure 17: Children's/Family Events
Gross Revenue (2004-2011)

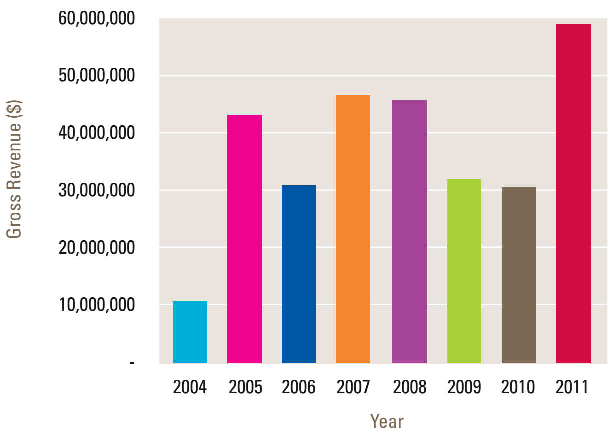
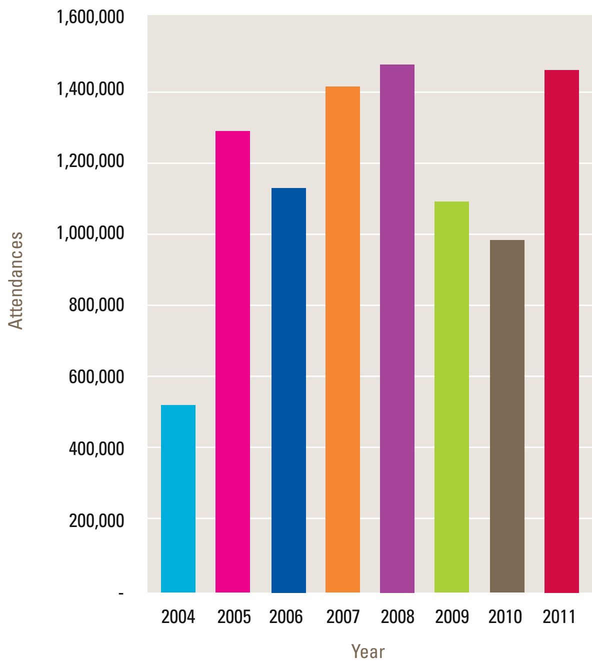


Figure 18: Children's/Family Events
Total Attendance (2004-2011)



Note: Caution should be applied when comparing the data from 2008 to 2011 with data from 2004 to 2007, as inconsistencies may exist in the data collection and allocation methodology.

4.3.2 State/Territory Breakdown

Figure 19: Children's/Family Events Revenue by State/Territory (2011)

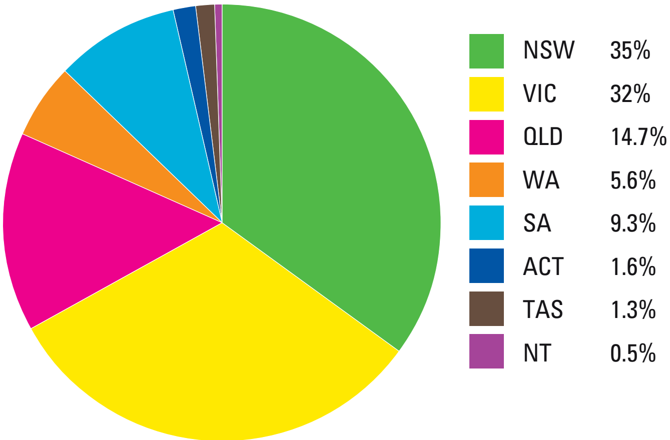


Table 9: Children's/Family Events Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$20,597,974	35.0%
VIC	$18,782,983	32.0%
QLD	$8,641,004	14.7%
WA	$3,306,144	5.6%
SA	$5,466,074	9.3%
ACT	$939,450	1.6%
TAS	$778,493	1.3%
NT	$265,277	0.5%
Total	**$58,777,398**	**100.0%**

Figure 20: Children's/Family Events Attendance by State/Territory (2011)

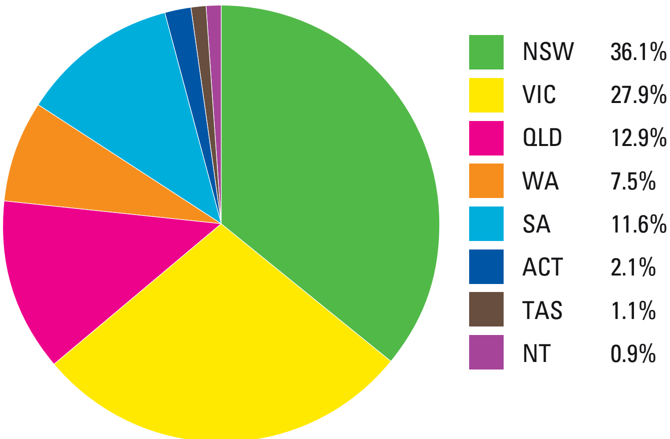


Table 10: Children's/Family Events Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	523,876	36.1%
VIC	404,876	27.9%
QLD	186,934	12.9%
WA	109,694	7.5%
SA	168,176	11.6%
ACT	30,728	2.1%
TAS	16,323	1.1%
NT	12,405	0.9%
Total	**1,453,012**	**100.0%**

4.4 Classical Music

4.4.1 National Overview

Melbourne Symphony Orchestra
Photo - Lucas Dawson Photography

The Classical Music category experienced a rise in gross revenue in 2011 when compared to 2010 figures. Revenue increased by 29.3%, from $45.88 million to $59.31 million. Total attendance also increased, but at a more modest 8.4%. The increase in revenue was driven by the increase in average ticket price, which rose from $60.43 in 2010 to $68.82 in 2011, or 13.9%.

The largest performances in Classical Music were a tour by André Rieu as well as the Vienna Philharmonic Orchestra. However, as with previous years, the Classical Music category was dominated by the AMPAG companies, in particular the Australian Chamber Orchestra, the Melbourne Symphony Orchestra, the Sydney Symphony Orchestra, the Queensland Symphony Orchestra, the Western Australian Symphony Orchestra, the Australian Brandenburg Orchestra, and Musica Viva Australia.

Table 11: Classical Music – Revenue and Attendance (2004-2011)

	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**	**8.94%**	**$68.82**	**13.9%**

Note: The Melbourne Recital Centre is a new Survey Participant in 2011, with performances there contributing towards the revenue and attendance figures for the Classical Music Category.

Figure 21: Classical Music – Gross Revenue (2004-2011)

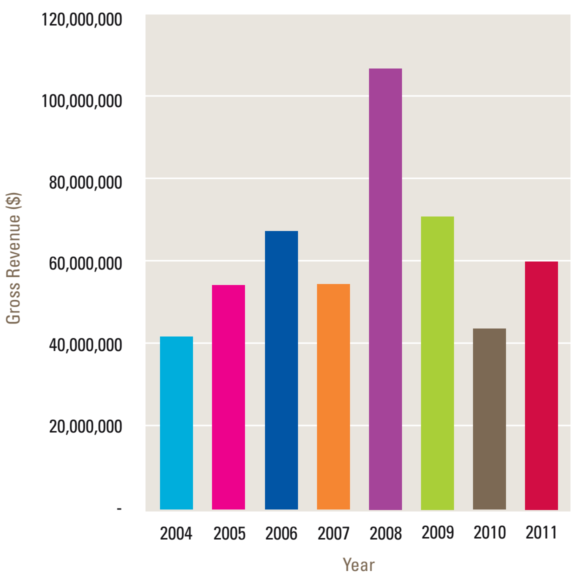
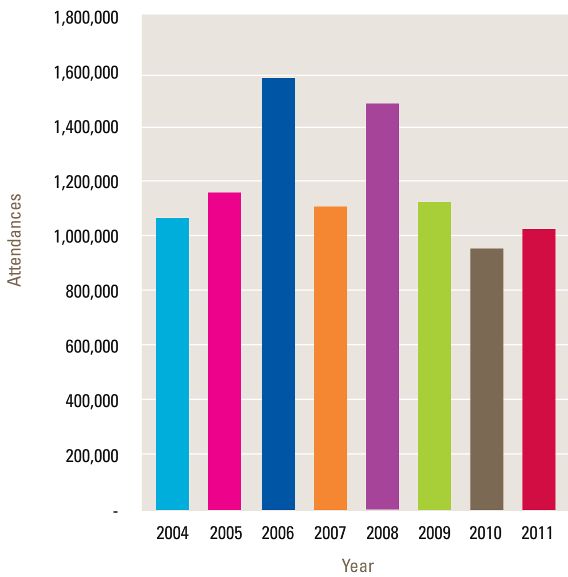


Figure 22: Classical Music – Total Attendance (2004-2011)



4.4.2 State/Territory Breakdown

Figure 23: Classical Music Revenue by State/Territory (2011)

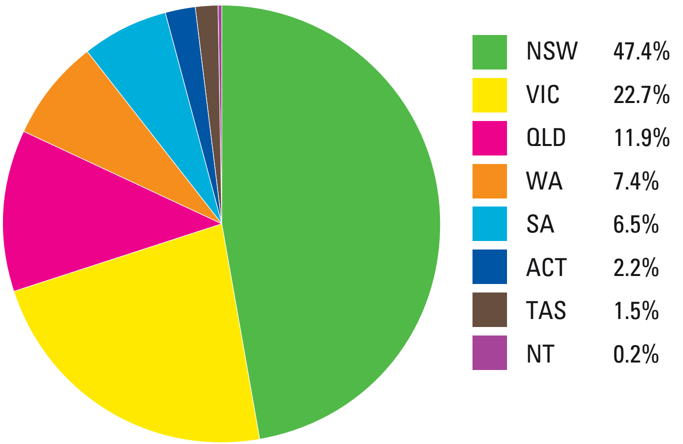


Table 12: Classical Music Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$28,512,700	47.4%
VIC	$13,662,066	22.7%
QLD	$7,167,492	11.9%
WA	$4,445,358	7.4%
SA	$3,906,990	6.5%
ACT	$1,346,702	2.2%
TAS	$920,639	1.5%
NT	$134,091	0.2%
Total	**$60,096,039**	**100.0%**

Figure 24: Classical Music Attendance by State/Territory (2011)

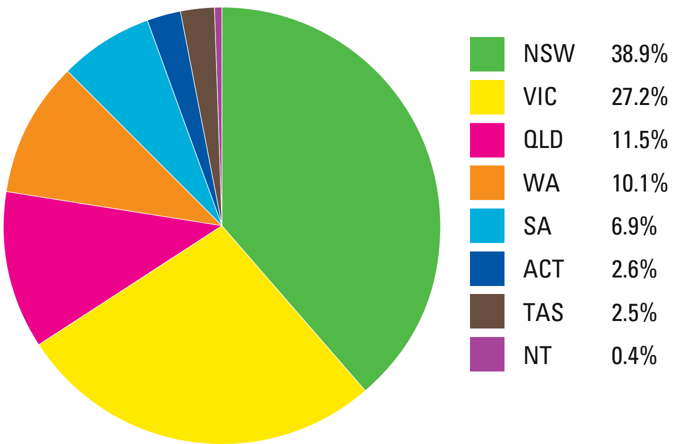


Table 13: Classical Music Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	407,432	38.9%
VIC	284,958	27.2%
QLD	120,219	11.5%
WA	105,460	10.1%
SA	72,423	6.9%
ACT	27,409	2.6%
TAS	26,254	2.5%
NT	3,960	0.4%
Total	**1,048,115**	**100.0%**

4.5 Festivals (Multi Category)

4.5.1 National Overview

WOMADelaide
Photo - Tony Lewis

Gross revenue for Festivals (Multi-Category) increased by 3.3% compared to 2010 figures, from $9.57 million to $9.89 million while total attendance decreased by 8.1% over the same period. The average ticket price rose from $43.12 in 2010 to $47.88 in 2011, an increase of 11.1%.

The increase in revenue but decrease in attendance can be attributed to the rise in the average ticket price, which acted to more than offset the decline in patronage. In 2011, major events in this category included the WOMADelaide Music, Arts and Dance Festival, the annual Brisbane Festival, Sydney Festival and Melbourne Festival.

Table 14: Festivals (Multi-Category) – Revenue and Attendance (2004-2011)

	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	**$9,890,881**	**3.3%**	**242,222**	**-8.1%**	**$47.88**	**11.1%**

Figure 25: Festivals (Multi-Category)
Gross Revenue (2004-2011)

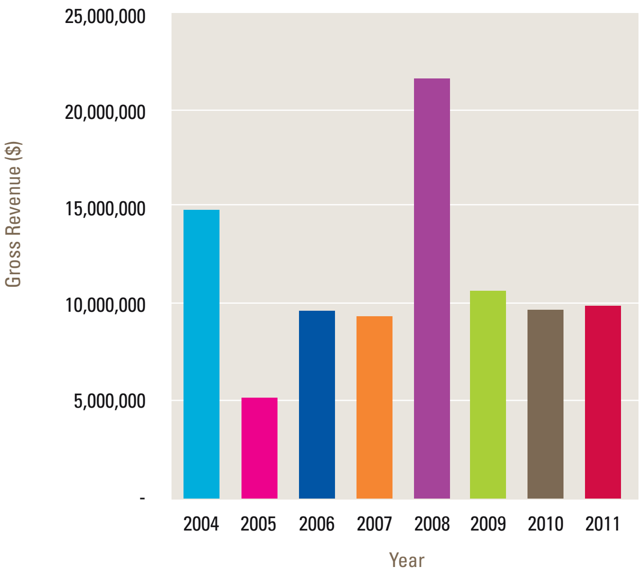
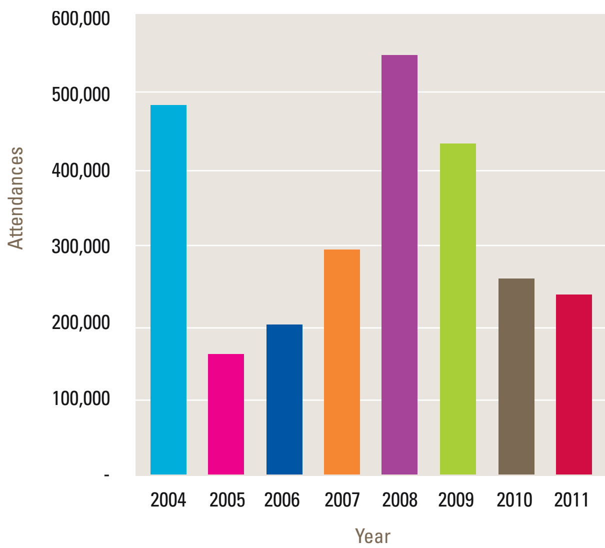


Figure 26: Festivals (Multi-Category)
Total Attendance (2004-2011)



4.5.2 State/Territory Breakdown

Figure 27: Festivals (Multi-Category)
Revenue by State/Territory (2011)

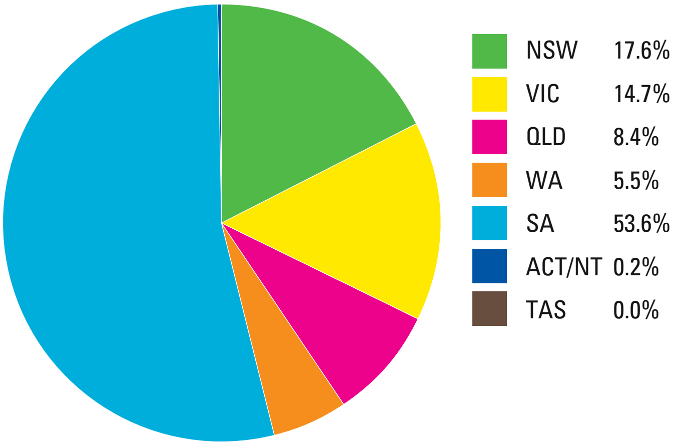


Table 15: Festivals (Multi-Category)
Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$1,738,894	17.6%
VIC	$1,450,864	14.7%
QLD	$832,832	8.4%
WA	$548,003	5.5%*
SA	$5,296,755	53.6%+
ACT/NT^	$23,534	0.2%
TAS	-	0.0%
Total	**$9,890,881**	**100.0%**

Figure 28: Festivals (Multi-Category)
Attendance by State/Territory (2011)

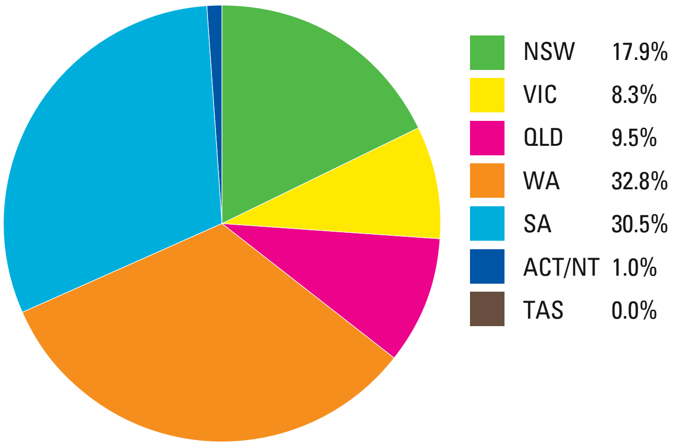


Table 16: Festivals (Multi-Category)
Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	43,445	17.9%
VIC	20,107	8.3%
QLD	22,936	9.5%
WA	79,419	32.8%*
SA	73,805	30.5%
ACT/NT^	2,510	1.0%
TAS	-	0.0%
Total	**242,222**	**100.0%**

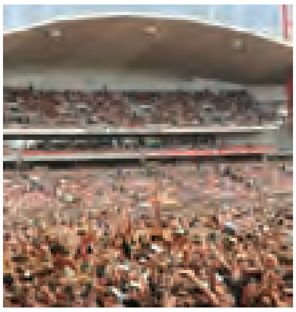
* This disproportionate share in revenue versus attendance is due to the Perth International Arts Festival. This Festival had large attendance figures and low average ticket prices.

\+ The dominance of SA in terms of revenue is due to the large Multi-Category Festival, WOMADelaide.

^ ACT and NT have been combined due to single events occurring in each territory.

4.6 Festivals (Single Category)

4.6.1 National Overview



Big Day Out 2011

Photo - by Tony Mott

Festivals (Single-Category) saw a decline in both gross revenue and total attendance in 2011 compared to 2010. Gross revenue fell from $100.92 million in 2010 to $96.45 million in 2011, a decrease of 4.4%, whilst attendance fell by a similar proportion, at 4.2% from the preceding year.

However, the average ticket price continued its upward trend over recent years, increasing from $119.39 in 2010 to $138.97 in 2011, or 16.4%. This can be explained by the general increase in prices for various festivals, most significantly Splendour in the Grass, where multi-day ticket prices increased from $350 to $390.

Similar to 2010, the biggest festivals in this category for 2011 were the Future Music Festival, Splendour in the Grass and Big Day Out. Other festivals included Soundwave, Good Vibrations and Summadayze.

The Homebake Festival, which did not run in 2010, returned in 2011.

Table 17: Festivals (Single-Category) – Revenue and Attendance (2004-2011)

	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%**

Figure 29: Festivals (Single-Category)

Gross Revenue (2004-2011)

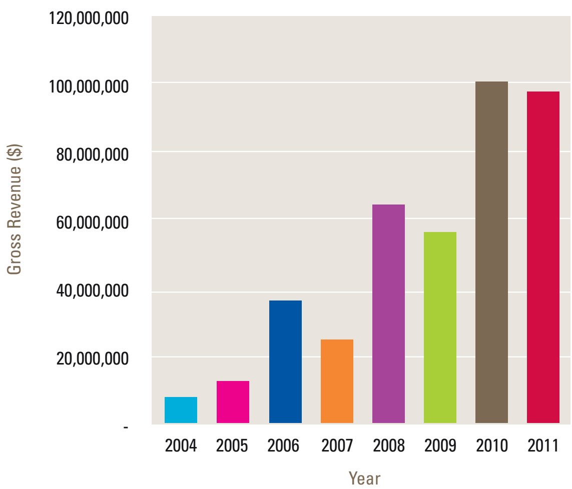
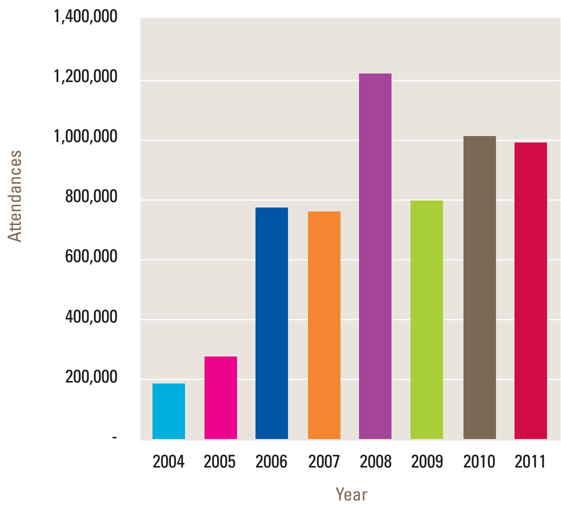


Figure 30: Festivals (Single-Category)

Total Attendance (2004-2011)



Note: The declines in revenue and attendance in this category from 2008 to 2009 were primarily caused by the introduction of the Comedy category in 2009. Prior to this, a large number of comedy events such as those of the Melbourne Comedy Festival were classified in Festivals (Single-Category). Since 2010, Moshtix/Foxtix have been contributing data to the Survey, which has increased the revenue and attendance recorded in this category.

4.6.2 State/Territory Breakdown

Figure 31: Festivals (Single-Category)
Revenue by State/Territory (2011

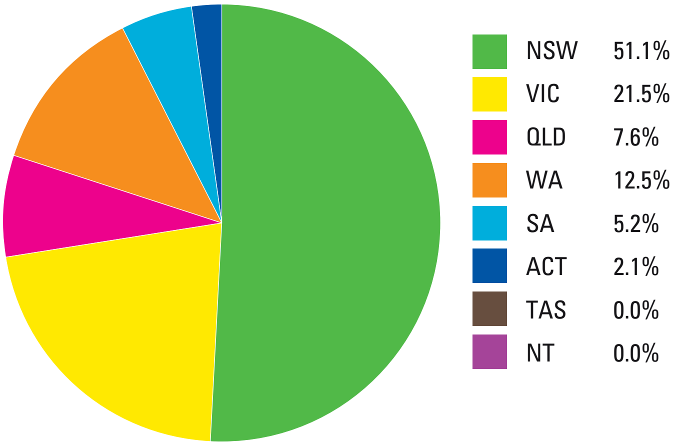


Table 18: Festivals (Single-Category)
Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$49,233,224	51.1%
VIC	$20,727,909	21.5%
QLD	$7,349,893	7.6%
WA	$12,027,799	12.5%
SA	$5,047,267	5.2%
ACT	$2,067,394	2.1%
TAS	-	0.0%
NT	$47,573	0.0%
Total	**$96,453,486**	**100.0%**

Figure 32: Festivals (Single-Category)
Attendance by State/Territory (2011)

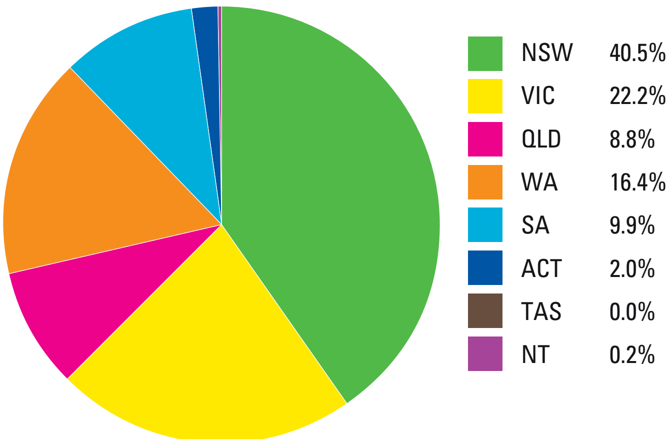


Table 19: Festivals (Single-Category)
Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	398,637	40.5%
VIC	218,946	22.2%
QLD	87,094	8.8%
WA	161,430	16.4%
SA	97,411	9.9%
ACT	19,435	2.0%
TAS	-	0.0%
NT	1,993	0.2%
Total	**984,946**	**100.0%**

4.7 Musical Theatre

4.7.1 National Overview

Andrew Lloyd Webber's Love Never Dies, Melbourne 2011
Photo - Jeff Busby

The Musical Theatre category experienced a slight increase in both gross revenue and total attendance between 2010 and 2011. During that period, gross revenue grew by 1.6%, from $242.90 million to $246.79 million, whilst total attendance grew by 7.2%. Conversely, the average ticket price declined, by 6.1% from $98.84 in 2010 to $92.79 in 2011.

Productions of Mary Poppins and Jersey Boys were the largest events in the Musical Theatre category, with other major musicals including Love Never Dies, Wicked and Hairspray.

Table 20: Musical Theatre – Revenue and Attendance (2004-2011)

	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%**

Figure 33: Musical Theatre
Gross Revenue (2004-2011)

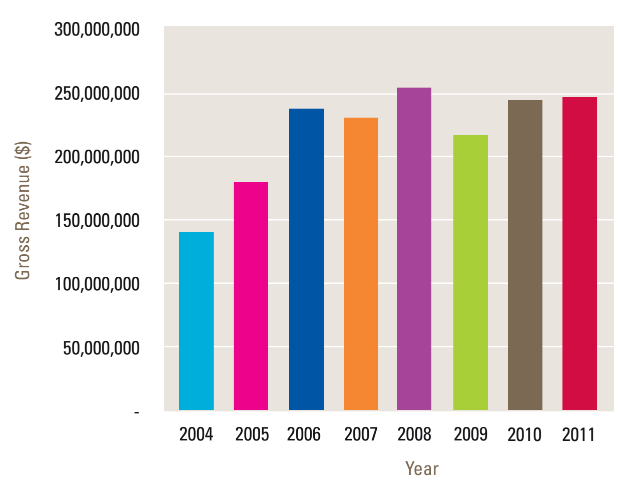
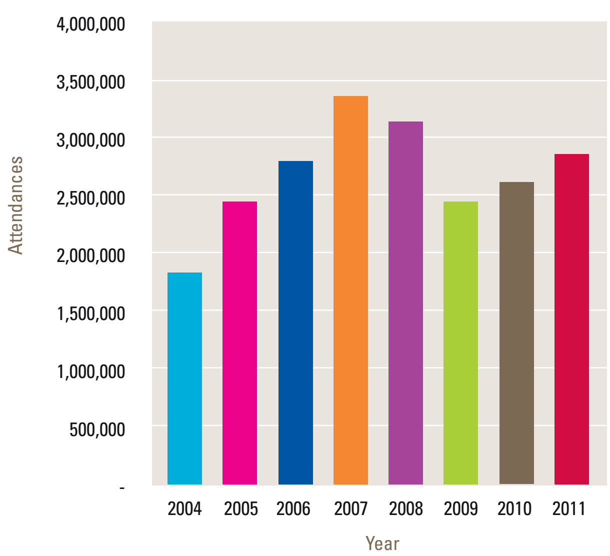


Figure 34: Musical Theatre
Total Attendance (2004-2011)



4.7.2 State/Territory Breakdown

Figure 35: Musical Theatre
Revenue by State/Territory (2011)

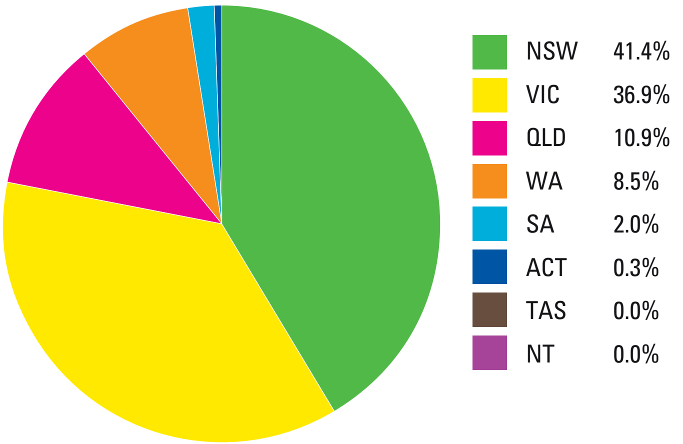


Table 21: Musical Theatre
Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$102,058,598	41.4%
VIC	$91,147,602	36.9%
QLD	$26,936,877	10.9%
WA	$20,884,533	8.5%
SA	$4,890,122	2.0%
ACT	$791,497	0.3%
TAS	-	0.0%
NT	$83,146	0.03%
Total	**$246,792,376**	**100.0%**

Figure 36: Musical Theatre
Attendance by State/Territory (2011)

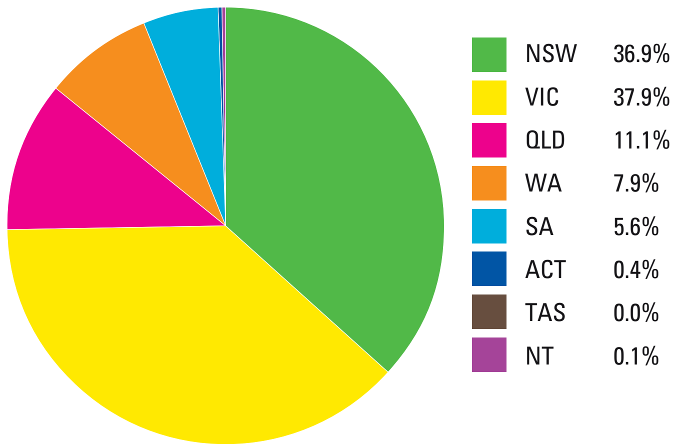


Table 22: Musical Theatre
Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	1,033,145	36.9%
VIC	1,062,386	37.9%
QLD	310,828	11.1%
WA	221,305	7.9%
SA	158,122	5.6%
ACT	11,938	0.4%
TAS	-	0.0%
NT	2,194	0.1%
Total	**2,799,918**	**100.0%**

4.8 Contemporary Music

4.8.1 National Overview

Eminem

Photo - Karin Catt

Between 2010 and 2011, gross revenue and total attendance both fell on a year by year basis in the Contemporary Music category. Gross revenue declined by 18.2%, from $659.10 million to $539.27 million, whilst total attendance declined by 15.5%. However, the Contemporary Music category continues to be the biggest in the Live Entertainment Industry, with total revenue and total attendance being more than double that of the second-largest category, Musical Theatre. Average ticket prices experienced a modest increase of 0.6%, from $102.78 in 2010 to $103.45 in 2011.

The decrease in both revenue and ticket numbers can be explained by the general decrease in the number of big-name performers touring in 2011. For instance, AC/DC, U2, Bon Jovi, Metallica and Lady Gaga toured in 2010 but not in 2011.

However, numerous big-name international and local artists still toured Australia in 2011. The highest grossing tours were from Michael Buble, Cold Chisel, Usher, Elton John, Eminem, Rihanna, Justin Bieber and the Kings of Leon.

Table 23: Contemporary Music – Revenue and Attendance (2004-2011)

	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%**

Figure 37: Contemporary Music

Gross Revenue (2004-2011)

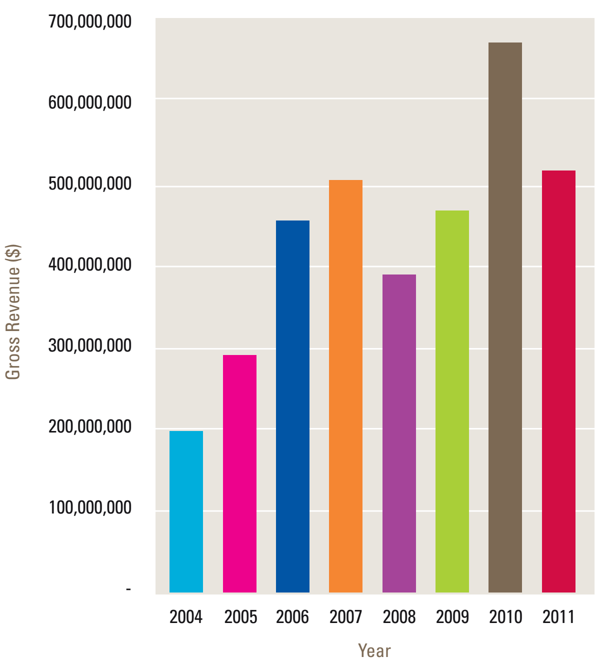
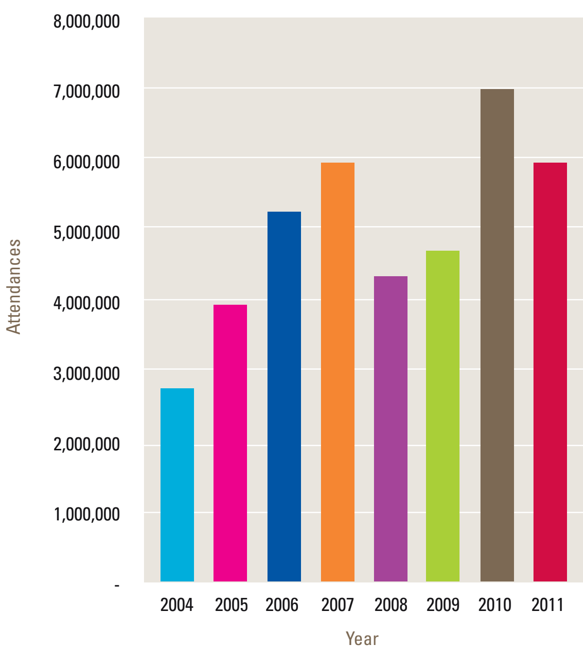


Figure 38: Contemporary Music

Total Attendance (2004-2011)



Note: Since 2010, Moshtix/Foxtix have been contributing data to the Survey, which has increased the revenue and attendance recorded in this category.

4.8.2 State/Territory Breakdown

Figure 39: Contemporary Music Revenue by State/Territory (2011)

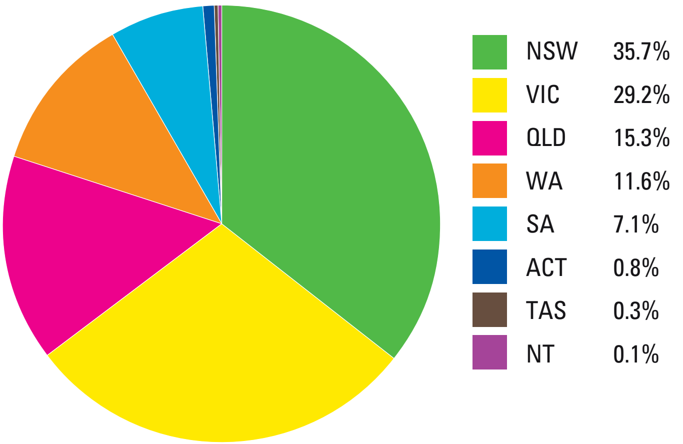


Table 24: Contemporary Music Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$192,341,744	35.7%
VIC	$157,414,440	29.2%
QLD	$82,340,080	15.3%
WA	$62,399,220	11.6%
SA	$38,320,778	7.1%
ACT	$4,400,641	0.8%
TAS	$1,611,648	0.3%
NT	$445,930	0.1%
Total	**$539,274,481**	**100.0%**

Figure 40: Contemporary Music Attendance by State/Territory (2011)

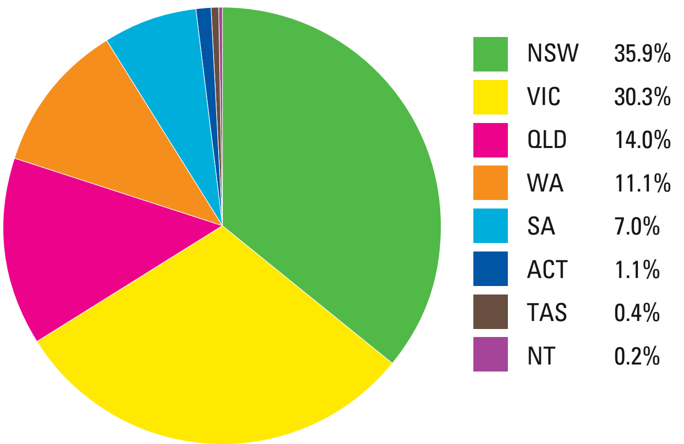
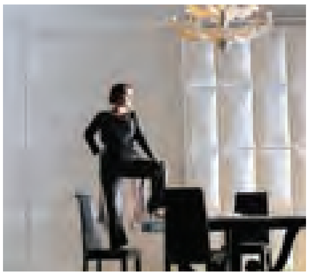


Table 25: Contemporary Music Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	2,132,243	35.9%
VIC	1,801,394	30.3%
QLD	831,690	14.0%
WA	657,948	11.1%
SA	418,201	7.0%
ACT	65,658	1.1%
TAS	22,446	0.4%
NT	10,038	0.2%
Total	**5,939,618**	**100.0%**

4.9 Opera

4.9.1 National Overview



Emma Matthews in Opera Australia's Partenope
Photo - Branco Gaica

The Opera category showed overall gains in the 2010 to 2011 period. Gross revenue increased by 19.8% from $40.13 million to $48.09 million. This growth can be attributed to both an increase in total attendance, which grew by 8.4%, whilst the average ticket price grew by 11.3% from $112.86 to $125.61.

In 2011, as with previous years, most revenue and ticket sales came from productions which were staged by AMPAG companies. Within AMPAG, Opera Australia was the largest company in 2011, followed by Opera Queensland, The State Opera of South Australia, and the West Australian Opera.

Notable productions in 2011 included Carmen, The Barber of Sevillle, Don Giovanni and La Boheme.

Table 26: Opera – Revenue and Attendance (2004-2011)

	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**	**7.20%**	**$124.66**	**10.5%**

Note: The Melbourne Recital Centre is a new Survey Participant in 2011, with performances there contributing towards the revenue and attendance figures for the Opera Category.

Figure 41: Opera
Gross Revenue (2004-2011)

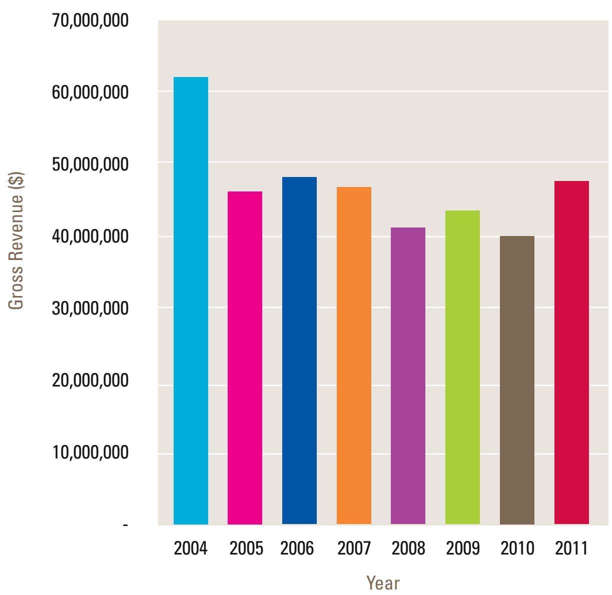
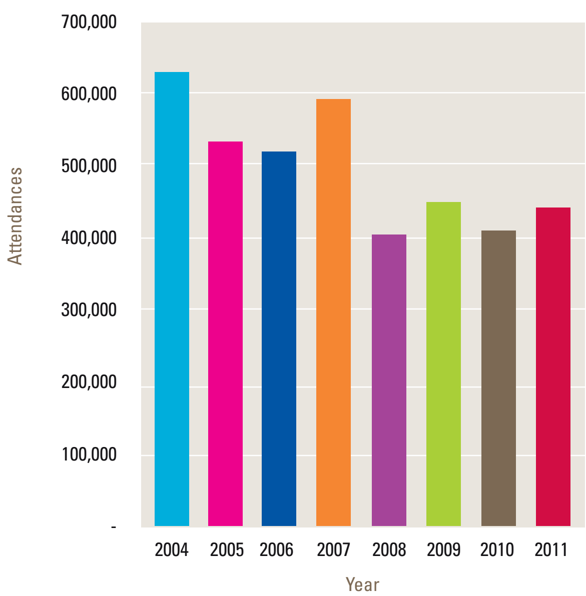


Figure 42: Opera
Total Attendance (2004-2011)



4.9.2 State/Territory Breakdown

Figure 43: Opera

Revenue by State/Territory (2011)

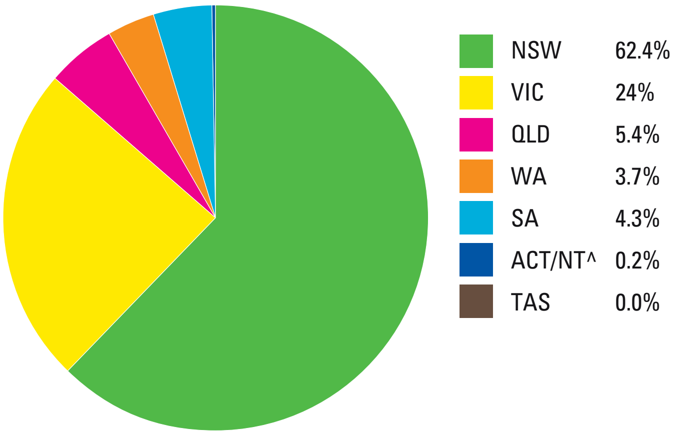


Table 27: Opera

Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$29,501,954	62.4%
VIC	$11,352,933	24.0%
QLD	$2,567,335	5.4%
WA	$1,732,457	3.7%
SA	$2,034,963	4.3%
ACT/NT^	$116,143	0.2%
TAS	$0	0.0%
Total	**$47,305,786**	**100.0%**

Figure 44: Opera

Attendance by State/Territory (2011)

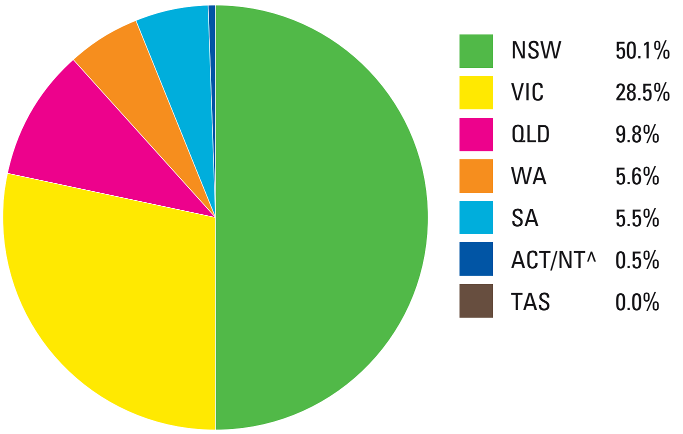


Table 28: Opera

Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	219,899	50.1%
VIC	125,279	28.5%
QLD	43,156	9.8%
WA	24,531	5.6%
SA	23,995	5.5%
ACT/NT^	2,181	0.5%
TAS	-	0.0%
Total	**439,041**	**100.0%**

^ACT and NT have been combined due to single events occurring in each territory.

4.10 Special Events/Other

4.10.1 National Overview

QI - Live

Between 2010 and 2011, revenue generated by the Special Events category decreased by 49.8%, from $31.45 million to $15.80 million. Total tickets issued fell by 29.8%, whilst the average ticket price also decreased from $88.67 to $57.28.

These falls were due to the international performance, Edinburgh Military Tattoo, which generated the majority of revenue and ticket sales in 2010 but did not perform again in 2011. Ticket prices for this event ranged from $79 to $229. However, 2011 saw the return of The Horseman from Snowy River as well as psychic medium John Edwards. Other notable events included a stage performance of the television show QI Live and the inaugural Enlighten Canberra city-wide event which spanned two weekends.

Table 29: Special Events – Revenue and Attendance (2004-2011)

	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**	**-29.8%**	**$57.28**	**-35.4%**

Figure 45: Special Events Gross Revenue (2004-2011)

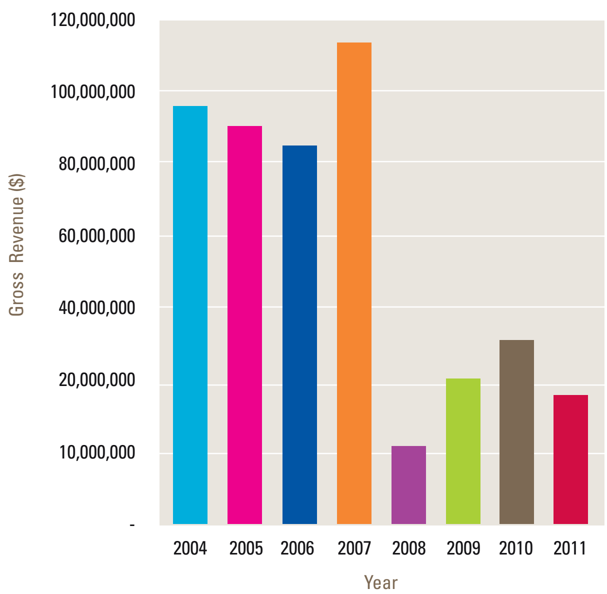
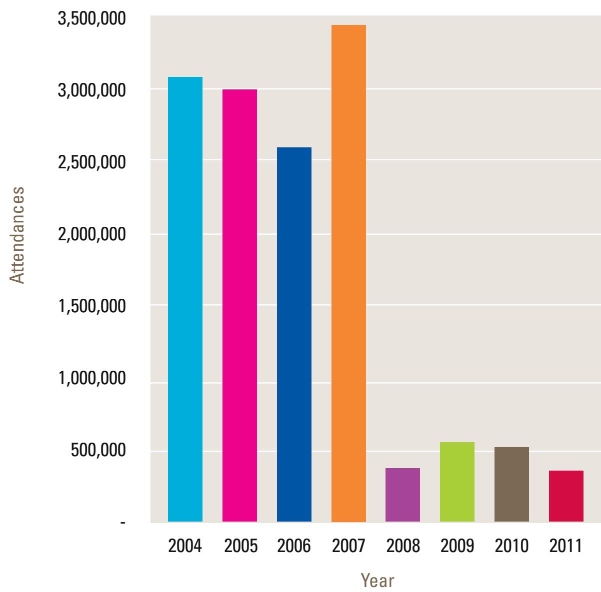


Figure 46: Special Events Total Attendance (2004-2011)



Note: The significant fall in revenue and attendances between 2007 and 2008 can 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 2008-2011 data with data from previous years as inconsistencies may exist in the data collection and allocation methodology.

4.10.2 State/Territory Breakdown

Figure 47: Special Events
Revenue by State/Territory (2011)

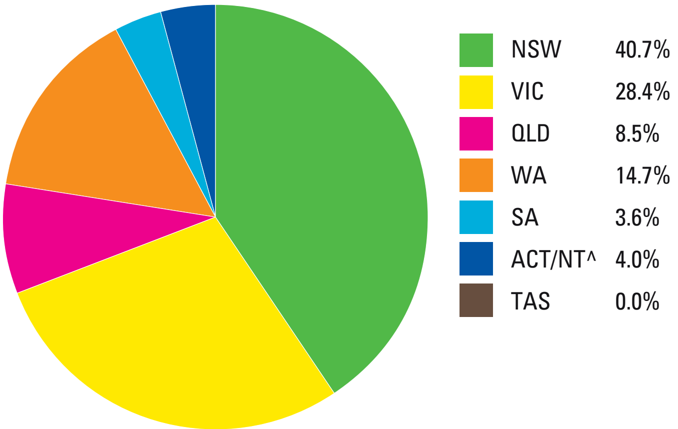


Table 30: Special Events
Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$6,435,191	40.7%
VIC	$4,482,262	28.4%
QLD	$1,347,784	8.5%
WA	$2,320,961	14.7%
SA	$574,903	3.6%
ACT/NT^	$638,845	4.0%
TAS	-	0.0%
Total	**$15,799,946**	**100.0%**

Figure 48: Special Events
Attendance by State/Territory (2011)

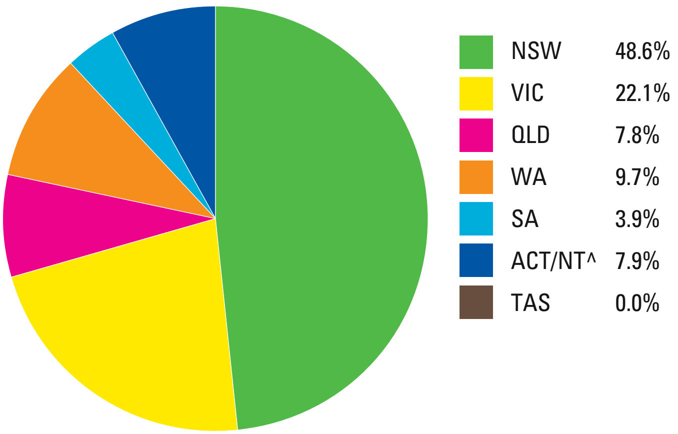


Table 31: Special Events
Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	179,863	48.6%
VIC	81,882	22.1%
QLD	29,012	7.8%
WA	35,747	9.7%
SA	14,315	3.9%
ACT/NT^	29,420	7.9%
TAS	-	0.0%
Total	**370,239**	**100.0%**

^ACT and NT have been combined due to single events occurring in each territory.

4.11 Theatre

4.11.1 National Overview

Kevin Spacey in Richard III
Photo - Tristram Kenton

In the Theatre category, gross revenue, attendance and average ticket price increased from 2010 to 2011. Gross revenue grew from $60.15 million in 2010 to $65.88 million in 2011, an increase of 9.5%. Growth in attendance was smaller at 1.9%, whilst the average ticket price rose from $51.47 to $56.14; an increase of 9.1%.

As with previous years, the AMPAG companies, in particular the Sydney Theatre Company and the Melbourne Theatre Company, contributed towards the majority of both revenue and ticket sales in 2011.

In 2011, the largest events included The White Guard from the Sydney Theatre Company and the international touring production of Richard III. Other major performances were Gross und Klein (STC) and The Importance of Being Earnest (MTC).

Table 32: Theatre – Revenue and Attendance (2004-2011)

	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%**

Figure 49: Theatre
Gross Revenue (2004-2011)

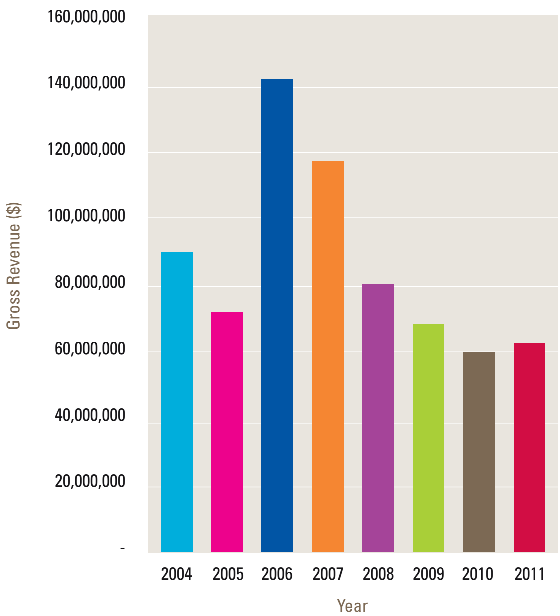
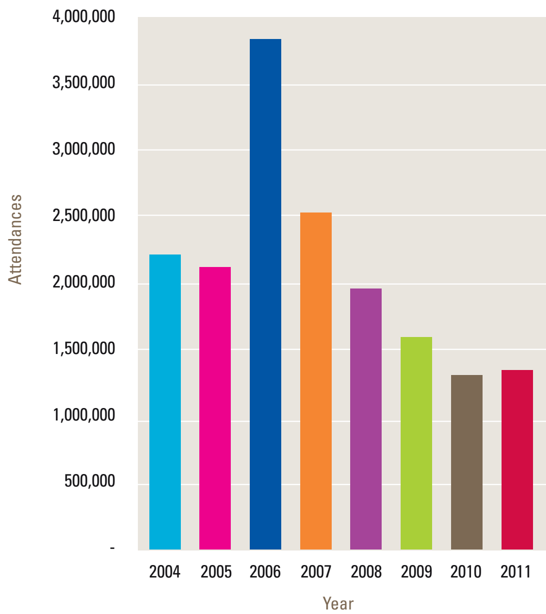


Figure 50: Theatre
Total Attendance (2004-2011)



Note: We note that 2008 revenue and ticketing data for the Theatre category is not directly comparable to the 2009-2011 ticketing data 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 are now reallocated into these new categories. As a result this has contributed to the decrease in reported revenue and attendances in this category since 2009.

4.11.2 State/Territory Breakdown

Figure 51: Theatre

Revenue by State/Territory (2011)

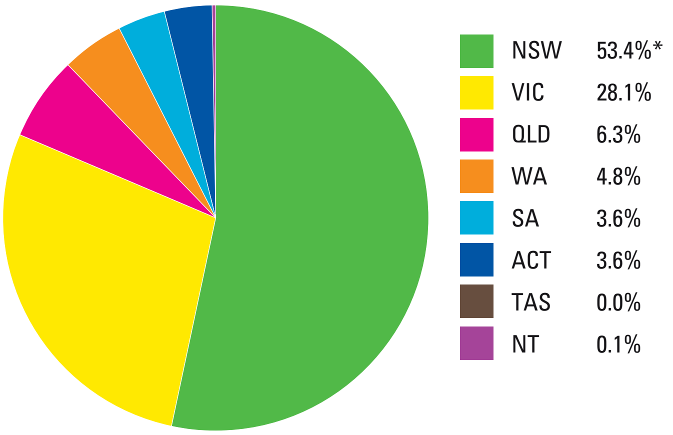


Table 33: Theatre

Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$35,207,661	53.4%*
VIC	$18,501,207	28.1%
QLD	$4,123,535	6.3%
WA	$3,191,001	4.8%
SA	$2,397,004	3.6%
ACT	$2,383,245	3.6%
TAS	-	0.0%
NT	$77,060	0.1%
Total	**$65,880,712**	**100.0%**

Figure 52: Theatre

Attendance by State/Territory (2011)

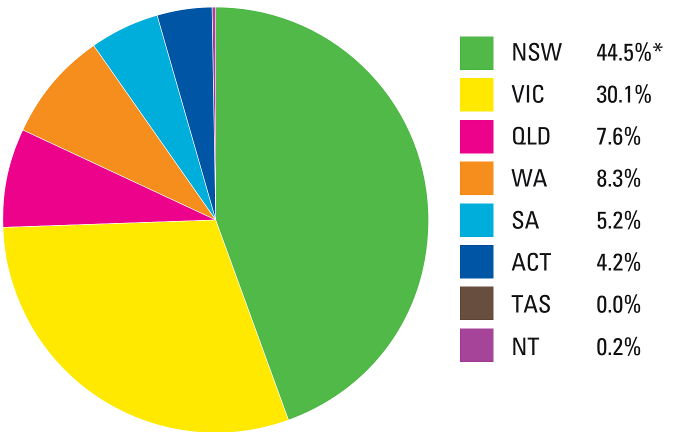


Table 34: Theatre

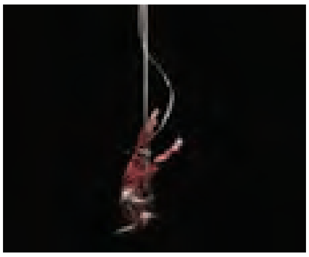
Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	613,948	44.5%*
VIC	415,248	30.1%
QLD	104,974	7.6%
WA	114,038	8.3%
SA	71,249	5.2%
ACT	58,157	4.2%
TAS	-	0.0%
NT	3,008	0.2%
Total	**1,380,622**	**100.0%**

*The dominance of NSW in both revenue and attendance figures can be partially explained by the production Richard III, which experienced strong patronage and only played in Sydney.

4.12 Circus and Physical Theatre

4.12.1 National Overview



Lewis West in Circa
Photo - Justin Nicholas

In 2011, the Circus and Physical Theatre category experienced very large gains in gross revenue, total attendance and average ticket price, recording the largest growth out of all categories for each of these indicators. Gross revenue increased by 464.3% from $9.90 million to $55.87 million, whilst total attendance rose by 174.2%. The average ticket price more than doubled from $43.03 to $86.81.

All of these gains can be attributed to the Australian leg of Cirque du Soleil's Saltimbanco tour, which toured the country for five months during 2011. With performances in all major Australian cities and ticket prices of up to $159, Saltimbanco made up the majority of revenue and ticket sales in this category. Cirque du Soleil only conducts tours of Australia every few years (it did not stage any performances in 2010, and only had limited shows in 2009), which is reflected in the results over the last three years. Hence, 2011 can be viewed as a somewhat anomalous year in the Circus and Physical Theatre category. Nonetheless, Cirque du Soleil is scheduled to tour Australia again over the 2012-13 season with a different production.

Other major events in the Circus and Physical Theatre category for 2011 include the Great Moscow Circus, Le Grande Cirque, El Cabello Blanco and Shaolin Warriors.

Circus and Physical Theatre is a relatively new category that was introduced in the 2009 survey, prior to which such events were included in the Theatre or Children's/Family categories.

Table 35: Circus and Physical Theatre – Revenue and Attendance (2009-2011)

	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%**

Figure 53: Circus and Physical Theatre Gross Revenue (2009-2011)

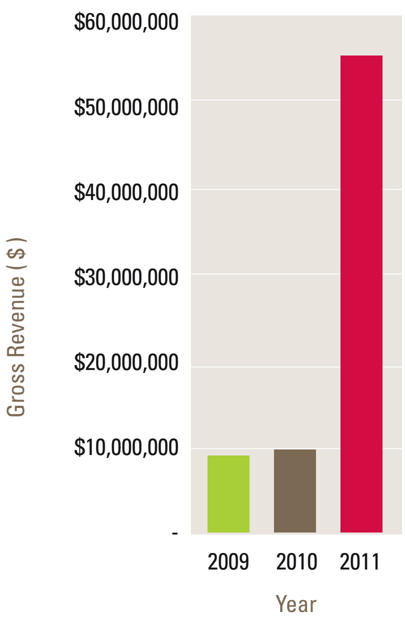
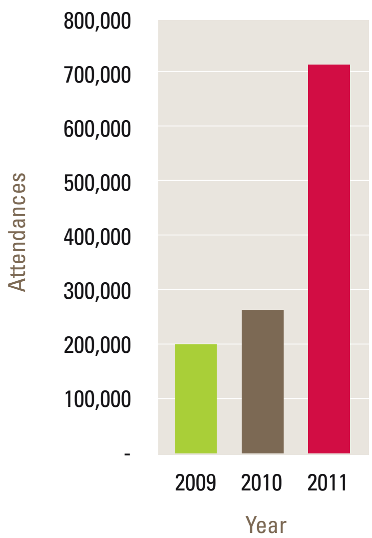


Figure 54: Circus and Physical Theatre Total Attendance (2009-2011)



4.12.2 State/Territory Breakdown

Figure 55: Circus and Physical Theatre Revenue by State/Territory (2011)

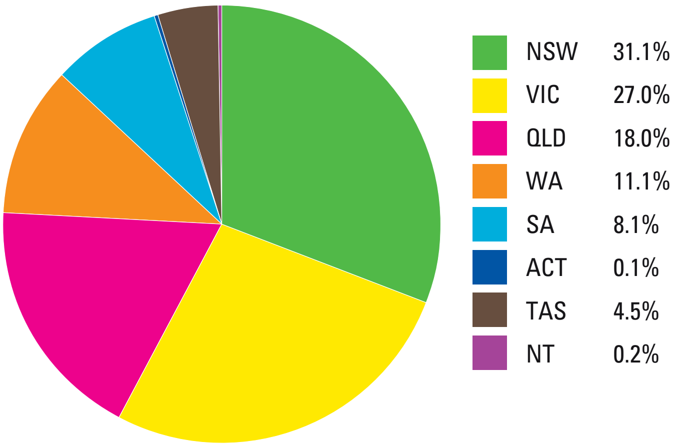


Table 36: Circus and Physical Theatre Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$17,377,340	31.1%
VIC	$15,084,661	27.0%
QLD	$10,034,506	18.0%
WA	$6,189,504	11.1%
SA	$4,499,462	8.1%
ACT	$55,523	0.1%
TAS	$2,538,561	4.5%
NT	$86,388	0.2%
Total	**$55,865,945**	**100.0%**

Figure 56: Circus and Physical Theatre Attendance by State/Territory (2011)

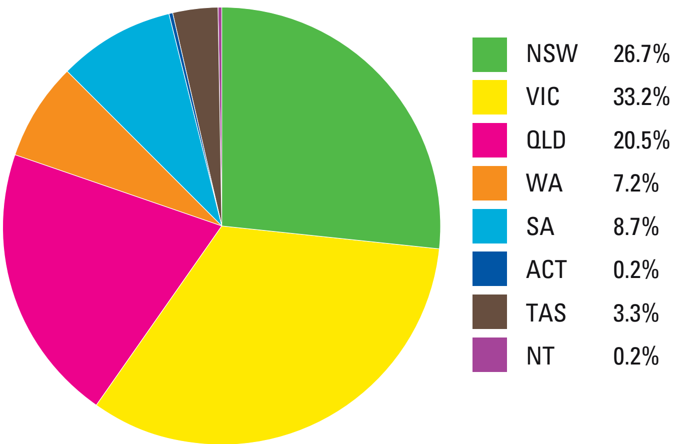


Table 37: Circus and Physical Theatre Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	194,490	26.7%
VIC	241,944	33.2%
QLD	149,212	20.5%
WA	52,567	7.2%
SA	63,694	8.7%
ACT	1,167	0.2%
TAS	24,222	3.3%
NT	1,503	0.2%
Total	**728,799**	**100.0%**

4.13 Comedy

4.13.1 National Overview

Stephen K. Amos
Photo - James Penlidis

The Comedy category experienced growth with regards to gross revenue, attendance and average ticket price in 2011. Gross revenue increased by 33.2% from $39.05 million in 2010 to $52.00 million in 2011, whilst total attendance grew by 27.6%. The average ticket price increased from $51.53 to $55.07, or 6.9%.

As with previous years, the Melbourne International Comedy Festival and Sydney Comedy Festival were the major contributors to this category, with touring acts including Arj Barker, Carl Barron and Stephen K. Amos. Other major touring comedians helped to drive the year-on-year increase including Billy Connolly, Eddie Izzard, Dylan Moran, William Shatner and the popular multi-comedian Just For Laughs line-up at the Sydney Opera House. The growth in comedy was produced by strong demand for a number of acts, and was reflected in record sales figures for the Melbourne International Comedy Festival, which experienced an 11% increase in box office takings when compared to 2010.

Comedy is also a relatively new category that was introduced in the 2009 survey. In years prior to 2009, most comedy events were likely to have been classified into either the Theatre category or Festivals (Single-Category).

Table 38: Comedy – Revenue and Attendance (2009-2011)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$27,817,875	N/A	661,445	N/A	$44.07	N/A
2010	$39,048,164	40.4%	792,713	19.8%	$51.53	16.9%
2011	**$51,999,602**	**33.2%**	**1,011,342**	**27.6%**	**$55.07**	**6.9%**

Figure 57: Comedy
Gross Revenue (2009-2011)

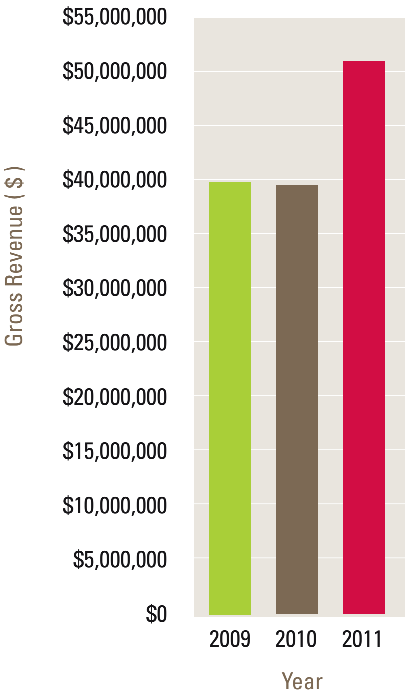
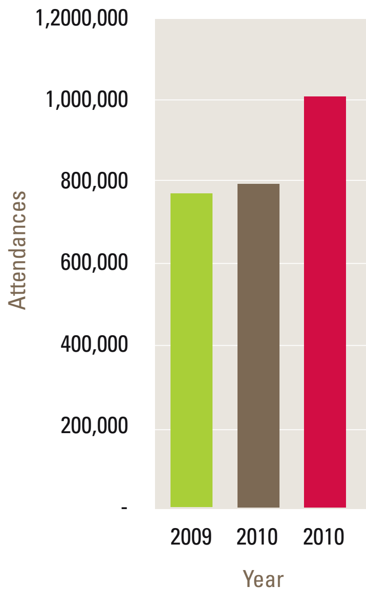


Figure 58: Comedy
Total Attendance (2009-2011)



4.13.2 State/Territory Breakdown

Figure 59: Comedy

Revenue by State/Territory (2011)

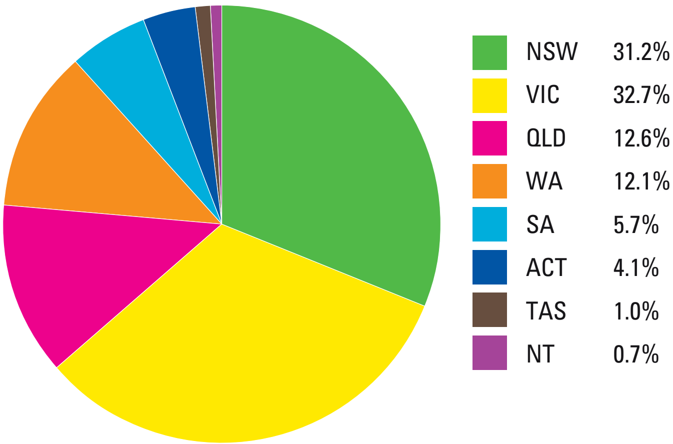


Table 39: Comedy

Revenue by State/Territory (2011)

State/Territory	Revenue	Proportion
NSW	$16,209,043	31.2%
VIC	$16,991,943	32.7%
QLD	$6,563,475	12.6%
WA	$6,266,297	12.1%
SA	$2,986,243	5.7%
ACT	$2,114,243	4.1%
TAS	$530,202	1.0%
NT	$338,155	0.7%
Total	**$51,999,602**	**100.0%**

Figure 60: Comedy

Attendance by State/Territory (2011)

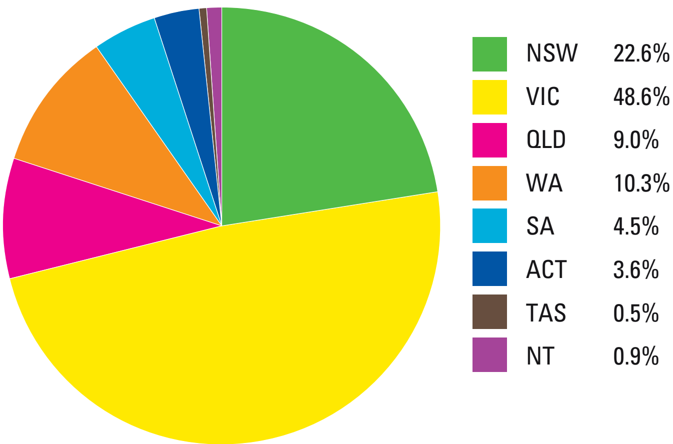


Table 40: Comedy

Attendance by State/Territory (2011)

State/Territory	Attendance	Proportion
NSW	228,339	22.6%
VIC	491,874	48.6%
QLD	90,714	9.0%
WA	104,602	10.3%
SA	45,858	4.5%
ACT	36,539	3.6%
TAS	4,632	0.5%
NT	8,784	0.9%
Total	**1,011,342**	**100.0%**

Survey Participants

Araluen Centre for Arts & Entertainment NT

Arts Projects Australia (WOMADelaide)

BASS SA

BOCS Ticketing WA

Canberra Ticketing

Darwin Entertainment Centre

Arts Centre Melbourne

Melbourne Recital Centre

News Ticketing (Moshtix and Foxtix)

Queensland Performing Arts Centre (Qtix)

Sydney Opera House

Ticketmaster

Ticketek

The Australian Ballet

Australian Brandenburg Orchestra

Adelaide Symphony 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

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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