Ticket Attendance and Revenue Survey 2012

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Contents

INDEX OF FIGURES AND TABLES 2

1. INTRODUCTION 4

- 1.1 SCOPE OF WORK 6
- 1.2 APPROACH 6
- 1.3 LIMITATIONS 8
- 1.4 CHANGES IN THE 2012 TICKETING SURVEY COMPARED TO PRIOR YEARS 8

2. TICKET ATTENDANCE AND REVENUE RESULTS 10

- 2.1 OVERVIEW 10
- 2.2 ANALYSIS OF OVERALL TRENDS 10

3. REVENUE AND ATTENDANCES BY STATE 12

- 3.1 OVERALL RESULTS 12
- 3.2 PER CAPITA RESULTS 16

4. CATEGORY ANALYSIS 17

- 4.1 OVERALL HIGHLIGHTS 17
- 4.2 CATEGORY TRENDS 18
- 4.3 BALLET AND DANCE 22
- 4.4 CHILDREN'S/FAMILY EVENTS 24
- 4.5 CLASSICAL MUSIC 26
- 4.6 FESTIVALS (MULTI-CATEGORY) 28
- 4.7 FESTIVALS (SINGLE-CATEGORY) 30
- 4.8 MUSICAL THEATRE 32
- 4.9 CONTEMPORARY MUSIC 34
- 4.10 OPERA 36
- 4.11 SPECIAL EVENTS 38
- 4.12 THEATRE 40
- 4.13 CIRCUS AND PHYSICAL THEATRE 42
- 4.14 COMEDY 44

SURVEY PARTICIPANTS 46

5. SURVEY CONTACTS 47

Index of Figures and Tables

Tables

Table 1: Category Descriptor Guide (2012) 9
Table 2: Total Revenue, Attendance and Average Ticket Price (2004-2012) 10
Table 3: Total Revenue and Attendances by State/Territory (2011-2012) 12
Table 4: Revenue by Category and State/Territory in 2012 14
Table 5: Attendance by Category and State/Territory in 2012 15
Table 6: Population and per Capita Results 16
Table 7: Top 5 Categories - Revenue and Attendance 17
Table 8: Top 3 Biggest Changes in Revenue by Category 17
Table 9: Top 3 Biggest Changes in Attendance by Category 17
Table 10: Total Revenue and Attendances by Category (2012) 18
Table 11: Average Ticket Prices by Category (2008-2012) 18
Table 12: Ballet and Dance - Revenue and Attendance (2004-2012) 22
Table 13: Ballet and Dance - Revenue by State/Territory (2012) 23
Table 14: Ballet and Dance - Attendance by State/Territory (2012) 23
Table 15: Children's/Family Events - Revenue and Attendance (2004-2012) 24
Table 16: Children's/Family Events - Revenue by State/Territory (2012) 25
Table 17: Children's/Family Events - Attendance by State/Territory (2012) 25
Table 18: Classical Music - Revenue and Attendance (2004-2012) 26
Table 19: Classical Music - Revenue by State/Territory (2012) 27
Table 20: Classical Music - Attendance by State/Territory (2012) 27
Table 21: Festivals (Multi-Category) - Revenue and Attendance (2004-2012) 28
Table 22: Festivals (Multi-Category) - Revenue by State/Territory (2012) 29
Table 23: Festivals (Multi-Category) - Attendance by State/Territory (2012) 29
Table 24: Festivals (Single-Category) - Revenue and Attendance (2004-2012) 30
Table 25: Festivals (Single-Category) - Revenue by State/Territory (2012) 31
Table 26: Festivals (Single-Category) - Attendance by State/Territory (2012) 31
Table 27: Musical Theatre - Revenue and Attendance (2004-2012) 32
Table 28: Musical Theatre - Revenue by State/Territory (2012) 33
Table 29: Musical Theatre - Attendance by State/Territory (2012) 33
Table 30: Contemporary Music - Revenue and Attendance (2004-2012) 34
Table 31: Contemporary Music - Revenue by State/Territory (2012) 35
Table 32: Contemporary Music - Attendance by State/Territory (2012) 35
Table 33: Opera - Revenue and Attendance (2004-2012) 36
Table 34: Opera - Revenue by State/Territory (2012) 37
Table 35: Opera - Attendance by State/Territory (2012) 37
Table 36: Special Events -Revenue and Attendance (2004-2012) 38
Table 37: Special Events - Revenue by State/Territory (2012) 39
Table 38: Special Events - Attendance by State/Territory (2012) 39
Table 39: Theatre - Revenue and Attendance (2004-2012) 40
Table 40: Theatre - Revenue by State/Territory (2012) 41
Table 41: Theatre - Attendance by State/Territory (2012) 41
Table 42: Circus and Physical Theatre - Revenue and Attendance (2009-2012) 42
Table 43: Circus and Physical Theatre - Revenue by State/Territory (2012) 43
Table 44: Circus and Physical Theatre - Attendance by State/Territory (2012) 43
Table 45: Comedy - Revenue and Attendance (2009-2012) 44
Table 46: Comedy - Revenue by State/Territory (2012) 45
Table 47: Comedy - Attendance by State/Territory (2012) 45

Figures

Figure 1: Gross Revenue (2004-2012) 11
Figure 2: Total Attendances (2004-2012) 11
Figure 3: Market Share (Revenue) by State/Territory (2012) 12
Figure 4: Market Share (Attendance) by State/Territory (2012) 12
Figure 5: Percentage Movement in Revenue by State/Territory (2011-12) 13
Figure 6: Percentage Movement in Attendance by State/Territory (2011-12) 13
Figure 7: Gross Revenue by Category (2012) 19
Figure 8: Gross Revenue by Category (2011) 19
Figure 9: Total Attendance by Category (2012) 19
Figure 10: Total Attendance by Category (2011) 19
Figure 11: Percentage Movement in Revenue by Category (2011-2012) 20
Figure 12: Percentage Movement in Attendance by Category (2011-2012) 20
Figure 13: Market Shares (Gross Revenue) by Category (2004-2012) 21
Figure 14: Market Shares (Attendances) by Category (2004-2012) 21
Figure 15: Ballet and Dance - Gross Revenue (2004-2012) 22
Figure 16: Ballet and Dance - Total Attendance (2004-2012) 22
Figure 17: Ballet and Dance - Revenue by State/Territory (2012) 23
Figure 18: Ballet and Dance - Attendance by State/Territory (2012) 23
Figure 19: Children's/Family Events - Gross Revenue (2004-2012) 24
Figure 20: Children's/Family Events - Total Attendance (2004-2012) 24
Figure 21: Children's/Family Events - Revenue by State/Territory (2012) 25
Figure 22: Children's/Family Events - Attendance by State/Territory (2012) 25
Figure 23: Classical Music - Gross Revenue (2004-2012) 26
Figure 24: Classical Music - Total Attendance (2004-2012) 26
Figure 25: Classical Music - Revenue by State/Territory (2012) 27
Figure 26: Classical Music - Attendance by State/Territory (2012) 27
Figure 27: Festivals (Multi-Category) - Gross Revenue (2004-2012) 28
Figure 28: Festivals (Multi-Category) - Total Attendance (2004-2012) 28
Figure 29: Festivals (Multi-Category) - Revenue by State/Territory (2012) 29
Figure 30: Festivals (Multi-Category) - Attendance by State/Territory (2012) 29
Figure 31: Festivals (Single-Category) - Gross Revenue (2004-2012) 30
Figure 32: Festivals (Single-Category) - Total Attendance (2004-2012) 30
Figure 33: Festivals (Single-Category) - Revenue by State/Territory (2012) 31
Figure 34: Festivals (Single-Category) - Attendance by State/Territory (2012) 31
Figure 35: Musical Theatre - Gross Revenue (2004-2012) 32
Figure 36: Musical Theatre - Total Attendance (2004-2012) 32
Figure 37: Musical Theatre - Revenue by State/Territory (2012) 33
Figure 38: Musical Theatre - Attendance by State/Territory (2012) 33
Figure 39: Contemporary Music - Gross Revenue (2004-2012) 34
Figure 40: Contemporary Music - Total Attendance (2004-2012) 34
Figure 41: Contemporary Music - Revenue by State/Territory (2012) 35
Figure 42: Contemporary Music - Attendance by State/Territory (2012) 35
Figure 43: Opera - Gross Revenue (2004-2012) 36
Figure 44: Opera - Total Attendance (2004-2012) 36
Figure 45: Opera - Revenue by State/Territory (2012) 37
Figure 46: Opera - Attendance by State/Territory (2012) 37
Figure 47: Special Events - Gross Revenue (2004-2012) 38
Figure 48: Special Events - Total Attendance (2004-2012) 38
Figure 49: Special Events - Revenue by State/Territory (2012) 39
Figure 50: Special Events - Attendance by State/Territory (2012) 39
Figure 51: Theatre - Gross Revenue (2004-2012) 40
Figure 52: Theatre - Total Attendance (2004-2012) 40
Figure 53: Theatre - Revenue by State/Territory (2012) 41
Figure 54: Theatre - Attendance by State/Territory (2012) 41
Figure 55: Circus and Physical Theatre - Gross Revenue (2009-2012) 42
Figure 56: Circus and Physical Theatre - Total Attendance (2009-2012) 42
Figure 57: Circus and Physical Theatre - Revenue by State/Territory (2012) 43
Figure 58: Circus and Physical Theatre - Attendance by State/Territory (2012) 43
Figure 59: Comedy - Gross Revenue (2009-2012) 44
Figure 60: Comedy - Total Attendance (2009-2012) 44
Figure 61: Comedy - Revenue by State/Territory (2012) 45
Figure 62: Comedy - Attendance by State/Territory (2012) 45

Introduction

Live Performance Australia (LPA) takes great pleasure in presenting our Ticket Attendance and Revenue Survey (Survey) for 2012.

This is the ninth annual Survey presented by LPA, with the results and trends now drawn upon extensively by the industry, government and business. The Survey is the predominant source of reliable 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 results reflect a year of poorer consumer confidence across Australia.

Overall revenue for the Live Entertainment Industry declined when compared to 2011, from $1.3 billion, to $1.2 billion - a drop of 8%. This decline was largely mirrored by a 6.2% decrease in overall attendance, from 17.3 million tickets in 2011 to 16.2 million in 2012. This decline in revenue reflects decline in attendance and a marginal fall in the average ticket price.

Overall, the Survey recorded 16 273 730 tickets for Live Entertainment Industry events were issued in Australia in 2012.

In terms of new data partners, this year's Survey includes data from SeatAdvisor Box Office (SABO), which has positively impacted the Comedy category, and Cirque du Soleil, whose data was previously provided by existing data partners.

LPA is mindful that performances by the small to medium sector, and at regional venues, continue to be significantly underreported in this Survey. We are working with the Australia Council for the Arts, and the Australian Performing Arts Centre Australia (APACA) to redress this issue in a new supplementary report to be released later in 2013. The addition of new data partners is important to improving the reach of the Survey, and we encourage event owners not presently included in the Survey to become data partners.

In terms of presentation, one addition to this year's Survey is the inclusion of analysis of revenue and attendance on a per capita basis. The results show that Victoria and New South Wales command a larger share of both revenue and attendances compared to their share of the population.

Following the introduction of breakdowns of State ticket sales and revenue by genre in the 2011 Survey, we have been able to include the percentage movements in revenue and attendance in each genre by State/Territory from 2011 to 2012. At the top level, Queensland performed particularly well, increasing its revenue by 10.8% and attendances by 7.1%. There is significant variance in State movements between each genre category however. We hope that as State trends by genre continue to emerge over the coming years, these will prove particularly useful to State and Territory arts and events agencies.

As with previous years, Contemporary Music and Musical Theatre represent the two largest sectors in the Industry, generating 40% and 16.9% of revenue, respectively. While both categories experienced declines in both revenue and attendance, combined they still account for 56.9% of gross revenue and 47.4% of total attendance.

In terms of Contemporary Music, which commands more than one third of Live Entertainment Industry market share, annual variance in this category strongly reflects the number of big-name international artists which tour in any given year and the number of stadium tours.

In Musical Theatre, the decline in both revenue and attendance reflects overall fewer performances and shorter seasons for productions in this category. It should also be noted that the State based figures reflect the impact of touring musicals outside Sydney and Melbourne with Queensland and Western Australia reporting higher revenue and attendance.

The genres which experienced the strongest growth in 2012 were both Festivals categories, Theatre and Classical Music. In the (Multi-Category) Festival category, the increase in revenue is largely explained by the growth in average ticket price (24.4% increase in 2012).The (Single-Category) Festival category saw a slight 2% increase in revenue, a significant 18.7% increase in attendance reflecting a strong year for music festivals, and a 7.4% decline in average ticket price. Theatre reported a 25.9% growth in revenue and 16% growth in attendance, while the average ticket price increased by 6.6%. These increases were largely driven by Dame Edna Everage's national Farewell Tour. However, productions presented by AMPAG companies generated the majority of ticket sales and revenue. While the Classical Music category experienced modest revenue growth of 1.3%, it experienced a significant 19.7% increase in attendance. However, the average ticket price fell by 12.3% which explains why revenue growth did not match attendance growth. Growth in this sector was largely driven by the reopening of Hamer Hall at the Arts Centre Melbourne.

The Survey is an important data source for 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 44 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

July 2013

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

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1.1 Scope of Work

Ernst & Young (EY) has been engaged by Live Performance Australia (LPA) to undertake a Survey of ticket attendances and revenues for the Live Entertainment Industry for the 2012 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 ("National Survey Data") for the Live Entertainment Industry in Australia from participating ticketing companies, venues, entertainment companies and the Australia Council for the Arts
- Compiling the 2012 National Survey Data on an overall basis, by State and by event category
- Performing an analysis of the 2012 National Survey Data on an overall basis (and in comparison to previous years), by State and by event category

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

1.2 Approach

For this Survey, EY compiled data from ticketing companies, self-ticketing venues 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
- Arts Projects Australia (WOMADelaide) SA
- BASS SA
- BOCS Ticketing WA
- Canberra Ticketing
- Cirque du Soleil (new in 2012)
- Darwin Entertainment Centre
- Arts Centre Melbourne
- Melbourne Recital Centre
- News Ticketing (includes Moshtix and Foxtix)
- Queensland Performing Arts Centre (Qtix)
- SeatAdvisor Box Office (SABO - new in 2012)
- Sydney Opera House
- Ticketmaster
- Ticketek

These companies were identified by LPA and provided both gross revenue and attendance data to EY for the 2012 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) companies, following these were:

- The Australian Ballet
- Australian Brandenburg Orchestra
- Adelaide Symphony Orchestra
- Australian Chamber Orchestra
- Bangarra Dance Theatre

[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.

- Bell Shakespeare
- Belvoir
- Black Swan Theatre Company
- Circus Oz
- Malthouse Theatre
- Melbourne Symphony Orchestra
- Melbourne Theatre Company
- Musica Viva
- Opera Australia
- Opera Queensland
- Orchestra Victoria
- Queensland Ballet
- Queensland Symphony Orchestra
- Queensland Theatre Company
- State Opera of South Australia
- State Theatre Company of South Australia
- Sydney Dance Company
- Sydney Symphony Orchestra
- Sydney Theatre Company
- Tasmanian Symphony Orchestra
- West Australian 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 and venues are requested to exclude from their data all events produced or presented by the AMPAG companies. This is to avoid double counting of revenue and attendance data.

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

While our scope of work did not include a detailed review of all data to determine the appropriateness of event category allocations, where obvious anomalies were identified, EY 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. LPA and EY are working with regional venues and small to medium companies to produce a supplementary report of their revenue and attendance in the second half of 2013.

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 was incorporated for the first time in the 2011 Survey, helping 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 2012 data was compared against historical data sourced directly from Live Performance Australia's Live Entertainment Industry in Australia 2006 - 2011 Reports. EY note that we did not revisit the data collection and allocation methodology used in 2006 and 2007 as the historical data used to prepare the reports in these years was not provided in a disaggregated format. As such, EY was unable to query the accuracy of the allocation of events in these years.

Therefore caution should be applied when comparing data from 2008 to 2012 with data from previous years as inconsistencies may exist in the data collection methodology between the Surveys performed in these five years, and for previous Surveys (where more detailed event specific information was not requested).

1.4 Changes in the 2012 Ticketing Survey Compared to Prior Years

We have made two changes to the Survey in 2012, namely:

- The inclusion of data from SeatAdvisor Box Office (SABO). SABO is a national ticketing service provider, however only Comedy performances, mainly from the Sydney Comedy Festival, Comedy Store and Factory Theatre in Sydney, are relevant for this Survey
- Having previously been ticketed by Ticketmaster and Ticketek, Cirque du Soleil's performances, namely the 'Ovo' 2012-13 tour, are now self-ticketed. Cirque du Soleil is a Canadian entertainment company that stages Circus and Physical Theatre performances

When comparing 2012 data with that from previous years, the following should be noted:

- The Non-Classical Music category was renamed to 'Contemporary Music' in 2011. However, the scope of performances in this category remains the same as prior years
- The Melbourne Recital Centre and Foxtix (together with Moshtix) were new data providers in 2011. Melbourne Recital Centre provides ticketing services primarily in the categories of Classical Music and Opera while Foxtix Operate primarily in the categories of Festivals (Single-Category) and Contemporary Music
- In 2009, the 'Comedy' and 'Circus and Physical Theatre' categories were introduced. As defined in Section 1.2 under our Approach, the Comedy category includes all Comedy events such as stand up but does not include Comedy plays, while the Circus and Physical Theatre category includes Circus and Physical Theatre events. The introduction of these categories do not represent an extension of the scope of the Survey, rather events which fall within these new categories would have been included in other categories in prior years
- The inclusion of data from Arts Projects Australia. Arts Projects Australia from 2009 onwards provided ticketing data for WOMADelaide - a multi-category Festival in Adelaide previously not covered by this Survey. Also in 2009, data from Arts Centre Melbourne was included for the first time, having previously been outsourced to Ticketmaster (and therefore included in Ticketmaster's data)

Category Descriptor Guide

Table 1: Category Descriptor Guide (2012)

Category	Description
Ballet and Dance	Traditional forms, Folk dance, Ballroom, Liturgical dance, Ballet, Breakdancing, Ethnic dance, Latin dance, Modern dance, Tap
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 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
Contemporary Music**	All forms of the following, performed by any type of ensemble or soloist (including any ensemble/chorus/solo musicians advertising a program which is exclusively one of the following categories, e.g. 'pop' or 'jazz,' as in The Australian Jazz Orchestra): Pop, 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

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

2. Ticket Attendance and Revenue Results

2.1 Overview

While some categories experienced gains in 2012, the majority of categories declined in what was overall a weaker year for the Australian Live Entertainment Industry. The decline was largely driven by significantly lower revenue and patronage in the Contemporary Music and Musical Theatre categories, which collectively comprise almost 60% of the Industry. On the other hand, both Festivals categories experienced revenue and attendance gains, and there were significant gains in the Theatre category due in part to a strong commercial Theatre season.

Declines in the Live Entertainment Industry in 2012 mirror a year of poorer consumer confidence across Australia. Consumer confidence measures the level of economic optimism that consumers have and as such, is an indicator of their willingness to spend. Consumer confidence in 2012 was particularly low despite several interest rate cuts. For example, the Westpac Melbourne Institute Index of Consumer Sentiment fell to its lowest levels since the global financial crisis[2]. As identified in previous Ticket Attendance and Revenue Survey Reports, research suggests that participation in the Arts, including the Live Entertainment Industry, is particularly sensitive to changes in the growth of real household disposable income[3].

While the Industry has experienced fluctuations in the level of attendances and revenue over the last five years, primarily driven by weaker economic conditions in Australia and overseas, attendance and revenue for 2012 is still above the lows of 2008. However, due to the limitations outlined in Section 1.3, some degree of caution should be taken when comparing 2012 with 2008.

2.2 Analysis of Overall Trends

In 2012, approximately 16.27 million tickets were issued to live entertainment events in Australia. This represents a decline of 6.2% on 2011. Of the 16.27 million total tickets, the number of paid tickets was 14.10 million, a decline from 15.23 million in 2011. The remaining 2.17 million issued in 2012 were complimentary, sponsor and zero-priced tickets[4], an increase from 2.15 million in 2011.

Ticket sales in 2012 generated total revenue of $1.205 billion, down 8.0% on 2011, when ticket sales totalled $1.309 billion. This decrease in revenue is a result of decline in both the total number of tickets[5] and a marginal fall in the average ticket price.

An analysis of longer term trends provides an indication of how the Industry has performed in recent times. However, given the limitations outlined in Section 1.3, our trend analysis has only been performed on data from 2008 to 2012. The compound annual growth rates (CAGRs) for revenue and average ticket price between 2008 and 2012 were 3.2% and 2.8% respectively, while the CAGR for attendance for the same period was 0.7%. In particular, average ticket price changes over the last five years have mostly kept pace with the consumer price index (CPI) of 2-3%.

Table 2 below summarises the changes in revenue, tickets and ticket price between 2004 and 2012.

Table 2: Total Revenue, Attendance and Average Ticket Price (2004-2012)

	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	13.5%	$86.43	7.3%
2011^	$1,309,187,150	-1.5%	17,345,720	0.6%	$85.99	-0.7%
2012	**$1,204,883,551**	**-8.0%**	**16,273,730**	**-6.2%**	**$85.46**	**-0.6%**

* Based on both paid and unpaid tickets

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

^ Due to an under-reporting of revenue in 2011 in the Festivals (Multi-Category) Category, revenue for 2011 has been adjusted from $1,307,300,786 to $1,309,187,150; a difference of approximately $1.89 million. The average ticket price has also been adjusted from $85.86 to $85.99. Attendance figures were not affected.

[2] Westpac Consumer Sentiment Bulletin

[3] 'Music and Theatre Productions in Australia'- IBISWorld Industry Report (August 2010), p 4

[4] It is Industry practice to issue sponsor tickets at zero price, but they are effectively paid tickets via the sponsorship agreements. In this analysis, the ticketing revenue excludes any sponsorship revenue.

[5] Revenue for 2011 has been adjusted from $1.307b to $1.309b. See explanatory note to Table 2.

Figure 1: Gross Revenue (2004-2012)

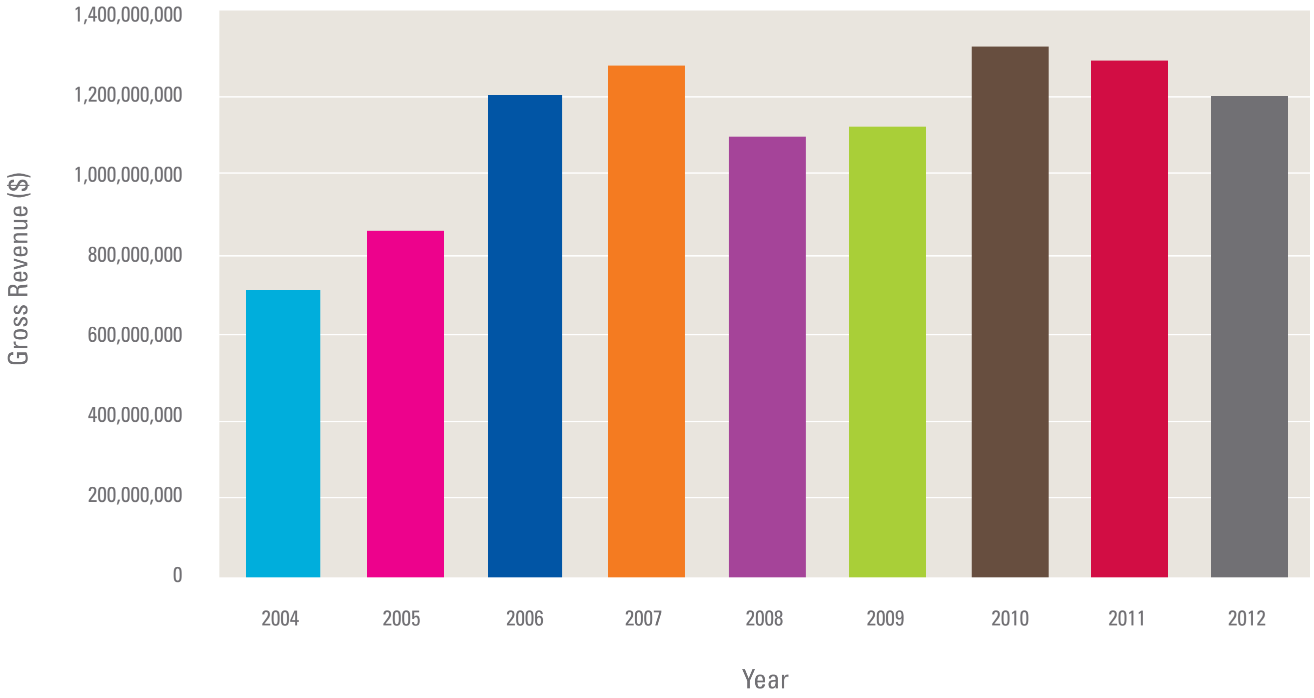
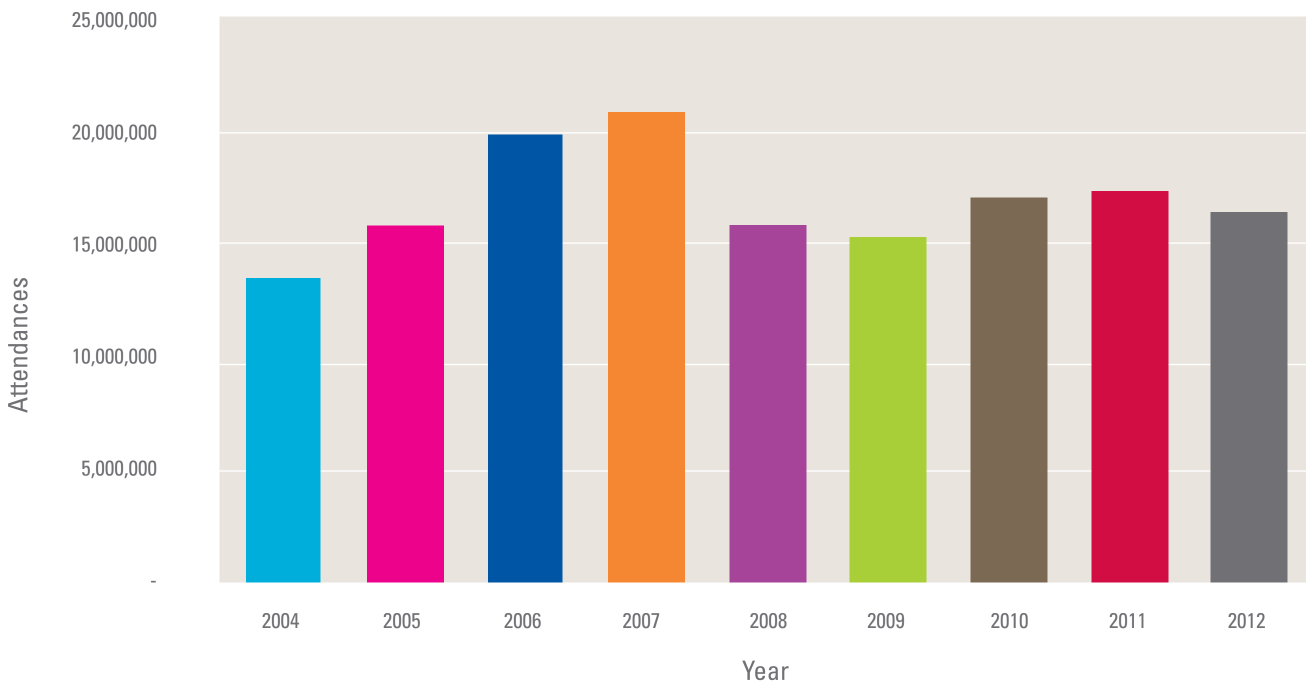


Figure 2: Total Attendances (2004-2012)



3. Revenue and Attendances by State

3.1 Overall Results

This section presents the revenues and attendances for all eight States and Territories within Australia for 2012 as detailed in Table 3 below.

Between 2011 and 2012, New South Wales and Victoria experienced declines in terms of revenue, attendance and Industry share. The two States had combined revenue of $790.45 million, or approximately two-thirds of the entire Australian Live Entertainment Industry. On the other hand, Queensland experienced gains in all of revenue, attendance and Industry share. Across the other States and Territories, results were mixed, however it was a generally weaker year overall. Figure 5 and Figure 6 on the following page illustrate the year on year changes in revenue and attendance while Table 4 and Table 5 provide a breakdown of total revenue and attendance by Category and State/Territory.

Table 3: Total Revenue and Attendances by State/Territory (2011-2012)

State/Territory	Revenue	Share of Industry (2012)	Share of Industry (2011)	Change in Revenue from 2011	Tickets	Share of Industry (2012)	Share of Industry (2011)	Change in Attendance from 2011
New South Wales	$446,063,403	37.0%	40.1%	-14.9%	5,795,757	35.6%	36.5%	-8.5%
Victoria	$344,389,414	28.6%	29.5%	-10.7%	4,916,559	30.2%	30.9%	-8.3%
Queensland	$183,775,420	15.3%	12.7%	10.8%	2,302,462	14.1%	12.4%	7.1%
Western Australia	$134,131,622	11.1%	9.9%	1.7%	1,791,795	11.0%	10.3%	0.2%
South Australia	$73,536,693	6.1%	5.9%	-4.8%	1,053,997	6.5%	7.1%	-14.8%
Australian Capital Territory	$17,293,297	1.4%	1.2%	6.9%	271,525	1.7%	1.9%	-16.5%
Tasmania	$4,221,182	0.4%	0.5%	-37.4%	97,972	0.6%	0.6%	-1.7%
Northern Territory	$1,472,520	0.1%	0.1%	-14.8%	43,663	0.3%	0.3%	-19.3%
Total	**$1,204,883,551**	**100.0%**	**100.0%**	**-8.0%**	**16,273,730**	**100.0%**	**100.0%**	**-6.2%**

Figure 3: Market Share (Revenue) by State/Territory (2012)

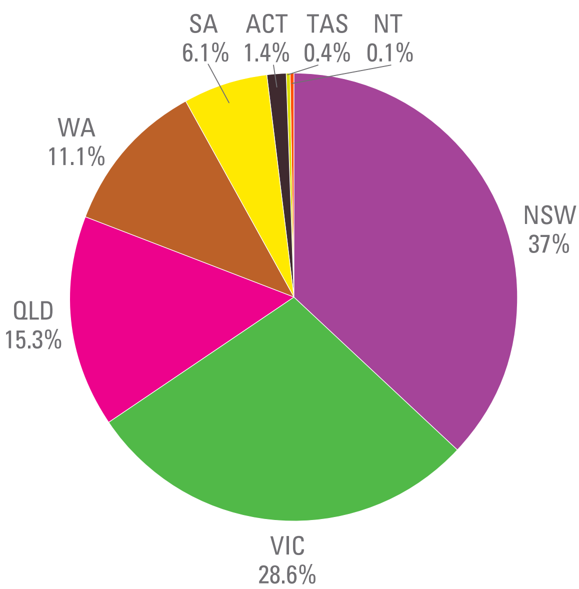


Figure 4: Market Share (Attendance) by State/Territory (2012)

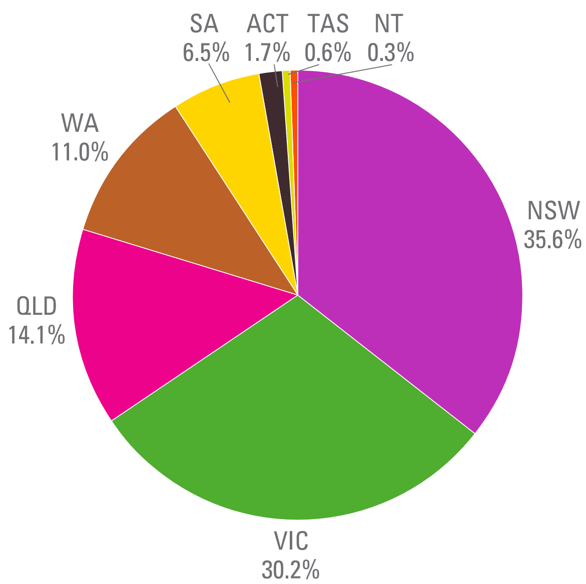


Figure 5: Percentage Movement in Revenue by State/Territory (2011-12)

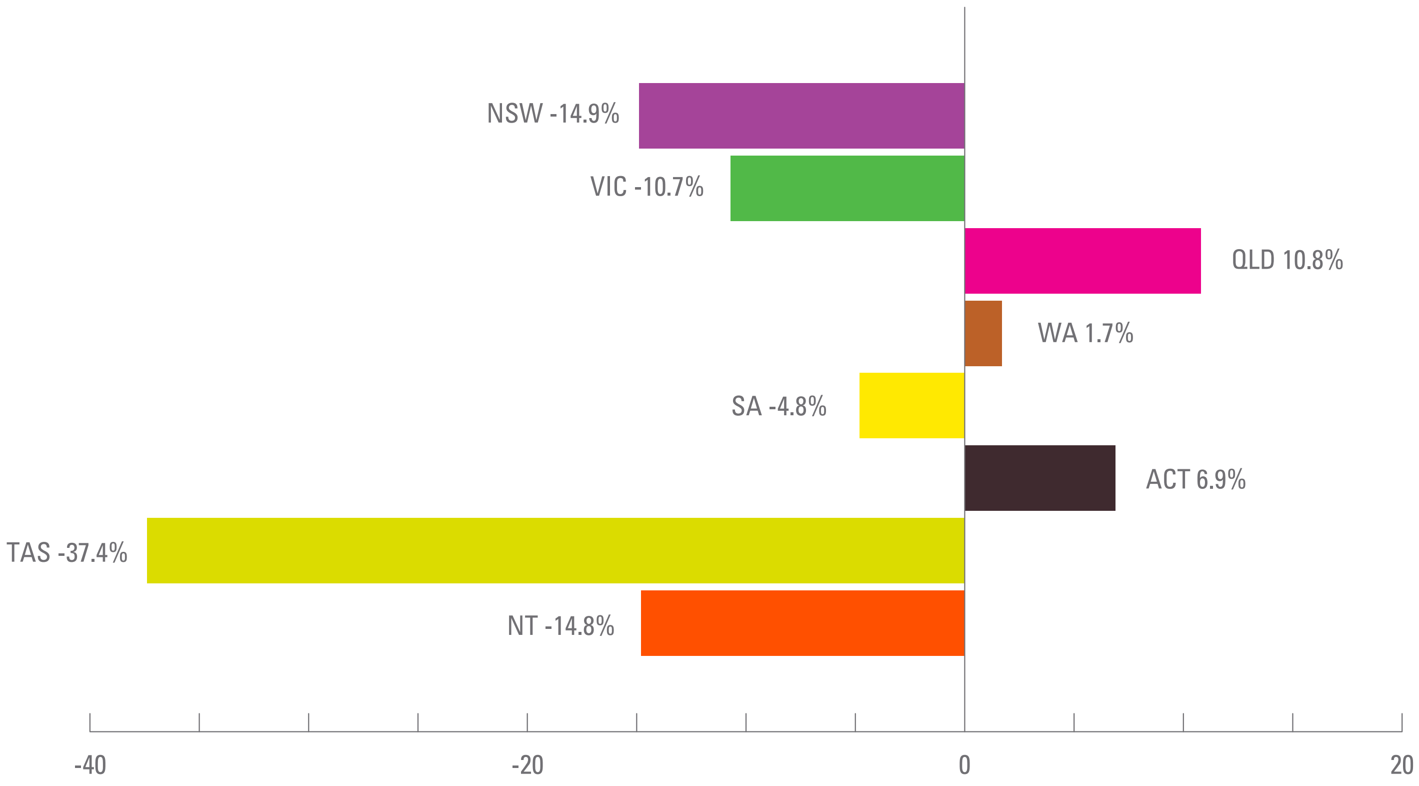


Figure 6: Percentage Movement in Attendance by State/Territory (2011-12)

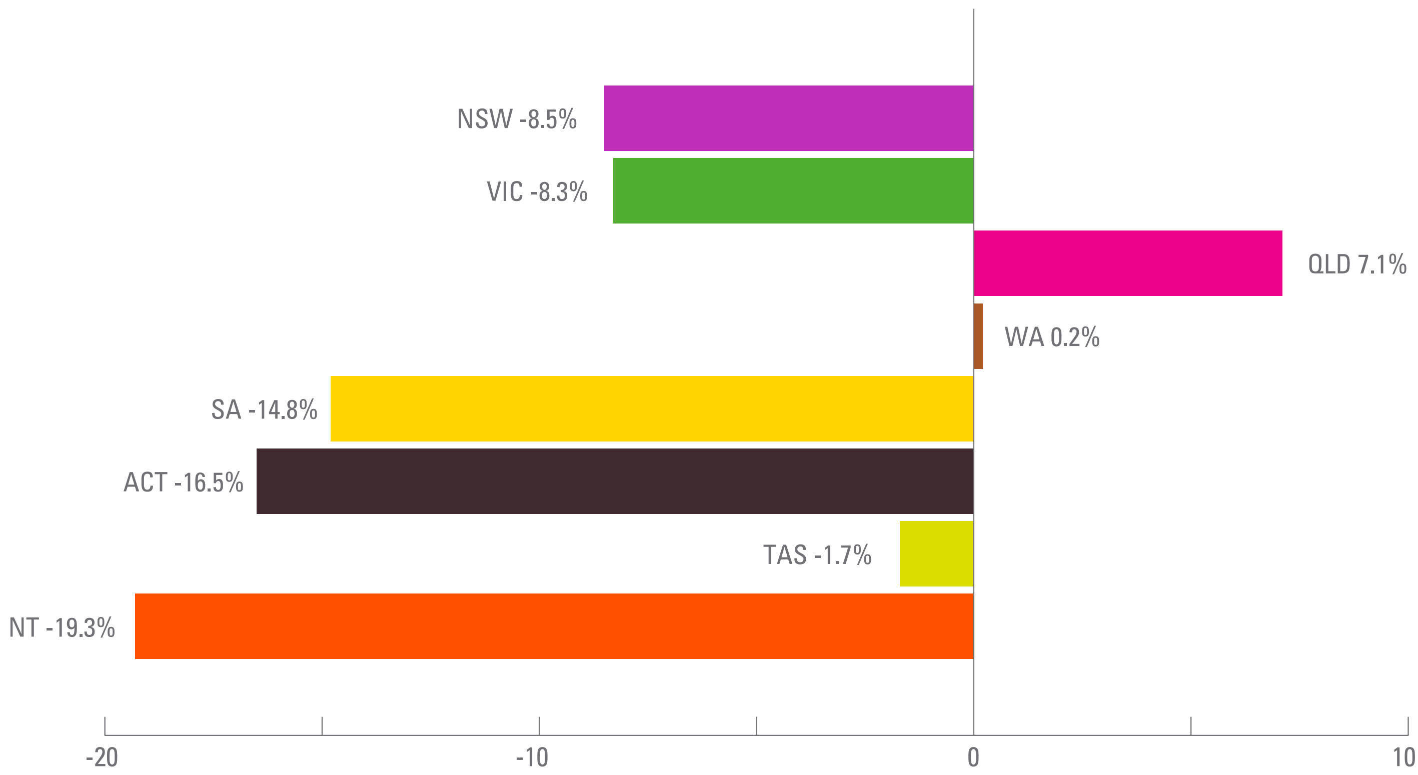


Table 4: Revenue by Category and State/Territory in 2012

	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$19,455,855	$16,412,119	$10,528,468	$5,896,799	$2,956,596	$1,581,833	$863,181	$171,046	**$57,865,897**
Children's/ Family	$21,557,868	$14,640,484	$6,677,540	$3,533,623	$3,581,632	$903,233	$387,505	$305,431	**$51,587,317**
Classical Music	$24,736,102	$19,142,310	$5,237,521	$5,935,995	$3,327,287	$1,386,680	$1,070,777	$47,547	**$60,884,219**
Festival (Multi Category)	$2,664,092	$2,255,262	$1,093,782	$1,786,563	$5,117,088	$0	$0	$0	**$12,916,787**
Festival (Single Category)	$46,885,791	$14,168,915	$10,910,587	$17,170,341	$7,931,980	$1,297,878	$0	$0	**$98,365,490**
Musical Theatre	$60,502,328	$56,983,253	$47,084,207	$25,805,255	$12,670,798	$193,406	$0	$39,360	**$203,278,606**
Contemporary Music	$166,537,474	$157,548,428	$70,992,764	$55,408,813	$23,328,290	$6,626,352	$1,536,314	$202,115	**$482,180,550**
Opera	$30,569,497	$9,301,614	$4,307,911	$1,759,636	$1,552,298	$353,016	$0	$0	**$47,843,971**
Special Events	$2,138,338	$185,419	$476,329	$959,782	$138,718	$154,105	$0	$197,311	**$4,250,001**
Theatre	$27,466,312	$32,440,355	$7,192,975	$9,867,396	$3,307,037	$2,646,499	$0	$52,686	**$82,973,259**
Circus & Physical Theatre	$27,748,585	$3,151,615	$14,867,599	$619,546	$7,444,604	$0	$195,517	$15,322	**$54,042,789**
Comedy	$15,801,162	$18,159,639	$4,405,735	$5,387,874	$2,180,367	$2,150,297	$167,889	$441,701	**$48,694,665**
Total	**$446,063,403**	**$344,389,414**	**$183,775,420**	**$134,131,622**	**$73,536,693**	**$17,293,297**	**$4,221,182**	**$1,472,520**	**$1,204,883,551**

Table 5: Attendance by Category and State/Territory in 2012

	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	259,221	208,941	248,458	106,736	44,133	36,880	11,191	4,633	**920,193**
Children's/ Family	520,588	359,358	143,792	110,533	112,761	30,630	11,700	10,972	**1,300,334**
Classical Music	382,223	502,421	115,197	128,361	60,168	21,933	42,870	1,790	**1,254,963**
Festival (Multi Category)	59,649	47,195	35,346	42,638	75,795	-	-	-	**260,623**
Festival (Single Category)	501,130	178,523	163,537	176,641	132,253	17,149	-	-	**1,169,233**
Musical Theatre	1,965,258	1,803,765	683,211	606,175	318,497	79,376	23,653	4,322	**5,484,257**
Contemporary Music	688,685	616,757	496,616	285,089	131,905	3,222	-	1,794	**2,224,068**
Opera	45,656	11,798	10,784	9,543	1,875	5,111	-	6,422	91,189
Special Events	219,712	106,831	54,751	26,316	17,485	5,809	-	-	**430,904**
Theatre	621,971	523,515	164,294	182,950	65,870	40,829	-	1,996	**1,601,425**
Circus & Physical Theatre	265,055	73,278	129,740	12,095	69,349	-	5,530	459	**555,506**
Comedy	266,609	484,177	56,736	104,718	23,906	30,586	3,028	11,275	**981,035**
Total	**5,795,757**	**4,916,559**	**2,302,462**	**1,791,795**	**1,053,997**	**271,525**	**97,972**	**43,663**	**16,273,730**

3.2 Per Capita Results

A comparison of each State and Territory's share of the Live Entertainment Industry against their population provides insight into spend per capita as well as the concentration of the Industry relative to where people live. Table 6 illustrates that New South Wales and Victoria command a larger share of both Live Entertainment revenue and attendance compared to their share of Australia's population. On the other hand, all other States and Territories (except for Western Australia's share of Industry revenue) comprise a smaller share of national revenue and attendance compared to their population.

There are several possible explanations for these disproportional results, including the following:

- Many performances take place exclusively in major cities along the more densely populated eastern seaboard. For example, Coldplay only brought its large stadium tour to Sydney, Melbourne and Brisbane. At a high level, this reflects the economic and logistical advantages that big cities hold in their capability to stage major events
- Some of Australia's largest performing arts companies including Opera Australia (Sydney), Melbourne Symphony Orchestra, Sydney Symphony and The Australian Ballet (Melbourne), are based in New South Wales and Victoria and as such stage the bulk of their performances in Sydney and Melbourne
- The Victorian Major Events Company and Destination NSW are particularly active in the major events market and as such have been successful in attracting major events to these States
- The majority of regional performances are not included in this Survey and as such, performances in larger States with significant regional markets, such as Queensland and Western Australia are under-reported. Further, cities such as Brisbane and Perth are constrained in their ability to host performances due to a smaller number of venues and hence capacity, compared to Melbourne, for example

It should be noted that these State and Territory breakdowns do not take into account people who travel from interState or overseas to watch a live performance. Industry share only accounts for the State or Territory in which the performance took place and hence where the revenue and attendance are recognised.

Table 6: Population and Per Capita Results

State/ Territory	Population* (2012) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
NSW	7.35	32.1%	37.0%	40.1%	$60.69
VIC	5.68	24.8%	28.6%	29.5%	$60.63
QLD	4.61	20.1%	15.3%	12.7%	$39.86
WA	2.47	10.8%	11.1%	9.9%	$54.30
SA	1.66	7.3%	6.1%	5.9%	$44.30
ACT	0.38	1.7%	1.4%	1.2%	$45.51
TAS	0.51	2.2%	0.4%	0.5%	$8.28
NT	0.23	1.0%	0.1%	0.1%	$6.40
Total	**22.89**	**100.0%**	**100.0%**	**100.0%**	**$52.64**

Note: *Population is as of December 2012 based on estimates by the Australian Bureau of Statistics (ABS)

4. Category Analysis

4.1 Overall Highlights

This section presents the largest categories by revenue and attendance (Table 7) as well as the categories which experienced the greatest movements in revenue and attendance (Table 8 and Table 9). As with previous years, the Contemporary Music and Musical Theatre categories represent the two largest categories in the Industry, generating 40.0% and 16.9% of revenue, respectively. Combined, these two categories account for 56.9% of the Live Entertainment Industry of gross revenue and 47.4% of total attendance.

The most significant gains were experienced by both of the Festivals categories as well as the Theatre and Classical Music Categories. On the other hand, the Special Events category, which is by its nature volatile, experienced the largest declines. Reasons for these shifts are detailed within the event category analysis section of the report.

Table 7: Top 5 Categories - Revenue and Attendance

	Revenue			Attendance		
	Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
1	Contemporary Music	$482,180,550	40.0%	Contemporary Music	5,484,257	33.7%
2	Musical Theatre	$203,278,606	16.9%	Musical Theatre	2,224,068	13.7%
3	Festivals (Single-Category)	$98,365,490	8.2%	Theatre	1,601,425	9.8%
4	Theatre	$82,973,259	6.9%	Children's/Family	1,300,334	8.0%
5	Classical Music	$60,884,219	5.1%	Classical Music	1,254,963	7.7%

Table 8: Top 3 Biggest Changes in Revenue by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2011	Category	Decrease from 2011
1	Theatre	25.9%	Special Events	-73.1%
2	Festivals (Multi-Category)	9.7%	Musical Theatre	-17.6%
3	Festivals (Single-Category)	2.0%	Children's/ Family	-12.2%

Table 9: Top 3 Biggest Changes in Attendance by Category

	Biggest Increase		Biggest Decline	
	Category	Increase from 2011	Category	Decrease from 2011
1	Classical Music	19.7%	Special Events	-75.4%
2	Festivals (Single-Category)	18.7%	Circus and Physical Theatre	-23.8%
3	Theatre	16.0%	Musical Theatre	-20.6%

4.2 Category Trends

This section presents an analysis for each of the 12 event categories, as defined in Table 1. Table 10 below and Figures 7 and 8 on the following page illustrate the breakdown of the Live Entertainment Industry in Australia based on share of gross revenue by category in 2012 and 2011. Figure 9 and Figure 10 illustrate the Industry breakdown based on share of total attendance by category in 2012 and 2011.

Figure 11 and Figure 12 illustrate the year on year revenue and attendance movements by category while Figure 13 and Figure 14 present time series data of the market shares of each event category over the past nine years of the Survey in terms of ticket revenues and attendances.

Additionally, Table 10 below shows the average ticket price by category for the past 5 years.

Table 10: Total Revenue and Attendances by Category (2012)

Category	Revenue	% Change in Revenue (from 2011)	Share of Industry	Tickets	% Change in Attendance (from 2011)	Share of Industry
Ballet and Dance	$57,865,897	-2.2%	4.8%	920,193	-2.9%	5.7%
Children's/Family	$51,587,317	-12.2%	4.3%	1,300,334	-10.5%	8.0%
Classical Music	$60,884,219	1.3%	5.1%	1,254,963	19.7%	7.7%
Festivals (Multi-Category)	$12,916,787	9.7%	1.1%	260,623	7.6%	1.6%
Festivals (Single-Category)	$98,365,490	2.0%	8.2%	1,169,233	18.7%	7.2%
Musical Theatre	$203,278,606	-17.6%	16.9%	2,224,068	-20.6%	13.7%
Contemporary Music	$482,180,550	-10.6%	40.0%	5,484,257	-7.7%	33.7%
Opera	$47,843,971	1.1%	4.0%	430,904	-1.9%	2.6%
Special Events	$4,250,001	-73.1%	0.4%	91,189	-75.4%	0.6%
Theatre	$82,973,259	25.9%	6.9%	1,601,425	16.0%	9.8%
Circus and Physical Theatre	$54,042,789	-3.3%	4.5%	555,506	-23.8%	3.4%
Comedy	$48,694,665	-6.4%	4.0%	981,035	-3.0%	6.0%
Total	**$1,204,883,551**	**-8.0%**	**100.0%**	**16,273,730**	**-6.2%**	**100.0%**

Table 11: Average Ticket Prices by Category (2008-2012)

Year	2008	2009	2010	2011	2012	Compound Annual Growth Rate
Ballet and Dance	$60.67	$63.33	$64.86	$71.93	$77.93	6.5%
Childrens/Family	$34.24	$32.38	$34.23	$43.87	$43.17	6.0%
Classical Music	$84.81	$74.01	$60.43	$68.82	$60.34	-8.2%
Festival (Multi Category)	$52.11	$33.60	$43.12	$57.02	$59.58	3.4%
Festival (Single Category)	$60.91	$81.19	$119.39	$138.97	$128.71	20.6%
Musical Theatre	$89.23	$93.54	$98.84	$92.79	$97.08	2.1%
Contemporary Music	$101.35	$108.61	$102.78	$103.45	$100.27	-0.3%
Opera	$114.46	$111.62	$112.86	$124.66	$126.84	2.6%
Special Events	$43.60	$67.79	$88.67	$57.28	$57.58	7.2%
Theatre	$46.92	$46.58	$51.47	$56.14	$59.86	6.3%
Circus and Physical Theatre*	N/A	$47.98	$43.03	$86.81	$103.67	29.3%
Comedy*	N/A	$54.06	$51.53	$55.07	$53.55	-0.3%
All Categories	**$76.60**	**$80.57**	**$86.43**	**$85.99**	**$85.46**	**2.8%**

Figure 7: Gross Revenue by Category (2012)

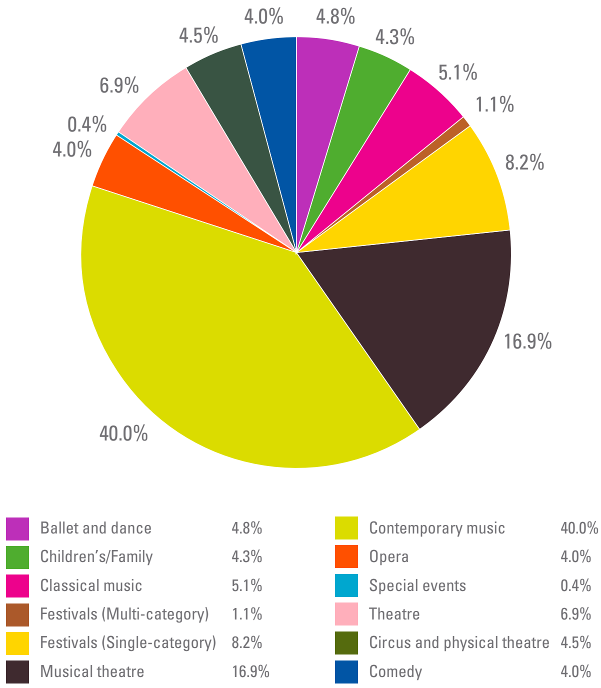


Figure 8: Gross Revenue by Category (2011)

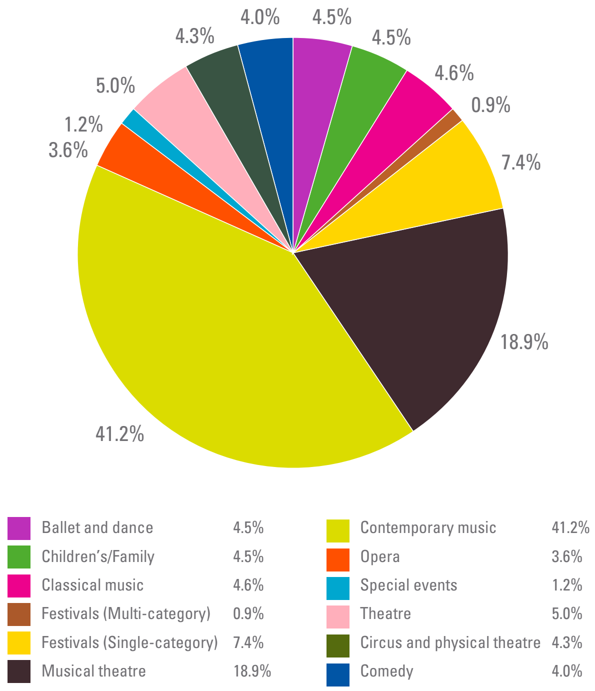


Figure 9: Total Attendance by Category (2012)

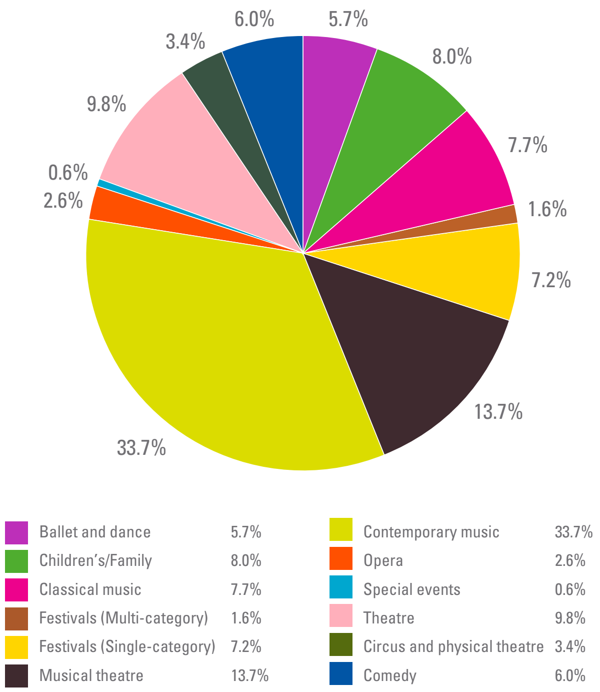


Figure 10: Total Attendance by Category (2011)

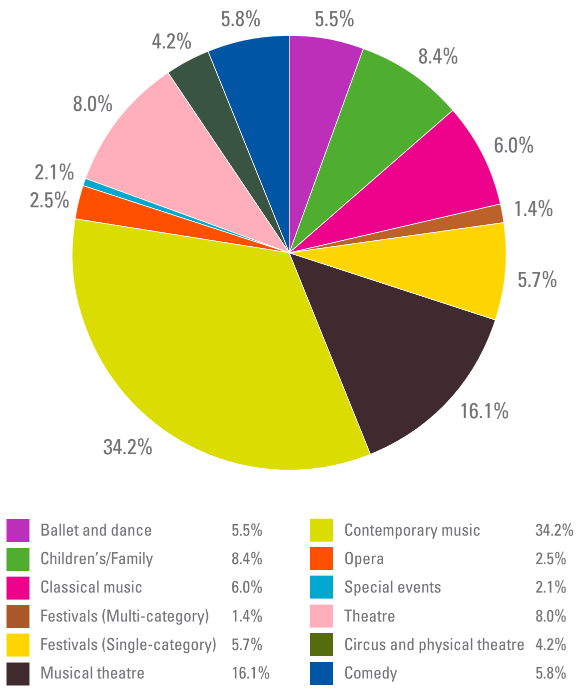


Figure 11: Percentage Movement in Revenue by Category (2011-2012)

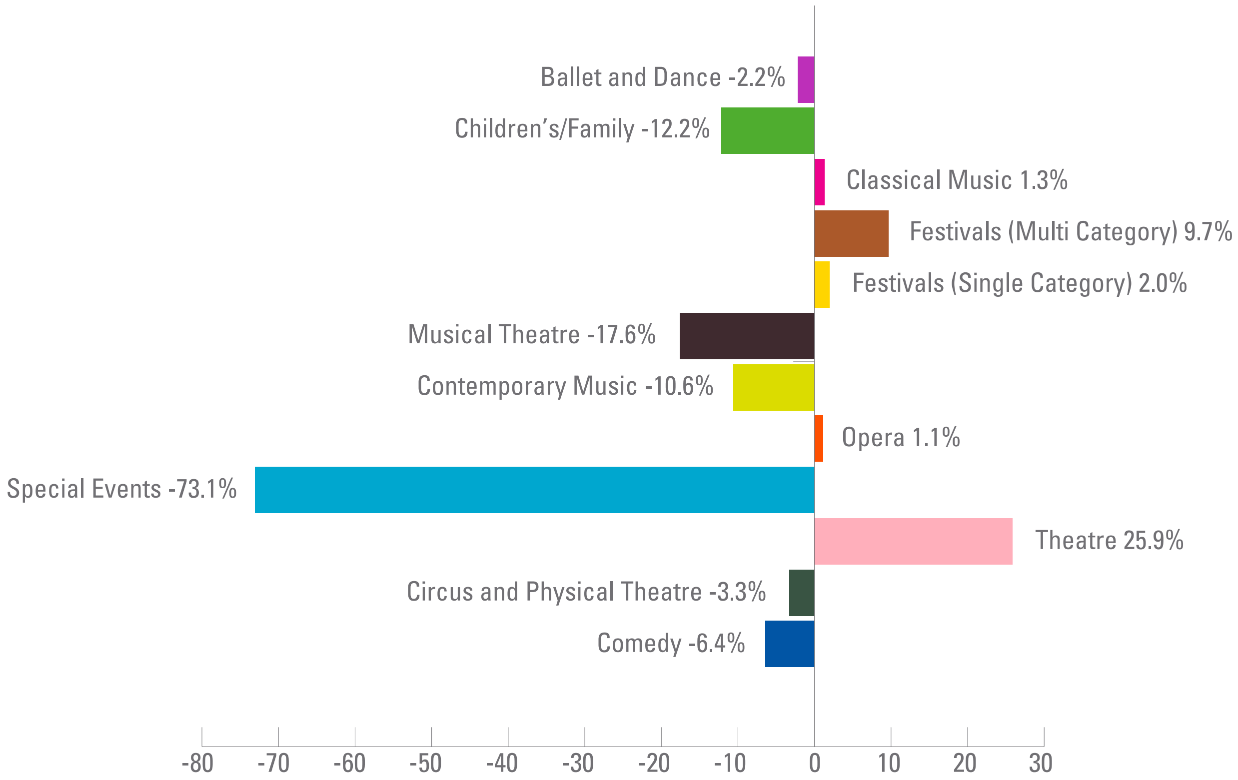


Figure 12: Percentage Movement in Attendance by Category (2011-2012)

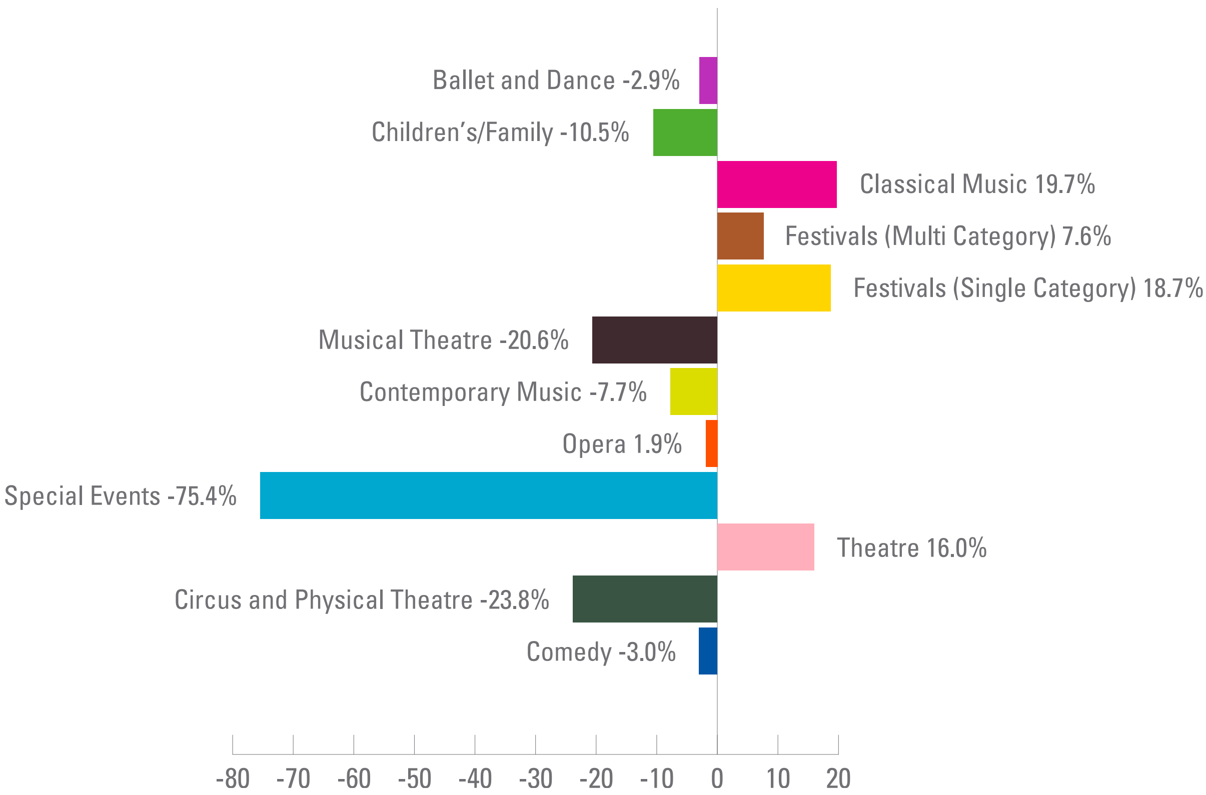


Figure 13: Market Shares (Gross Revenue) by Category (2004-2012)

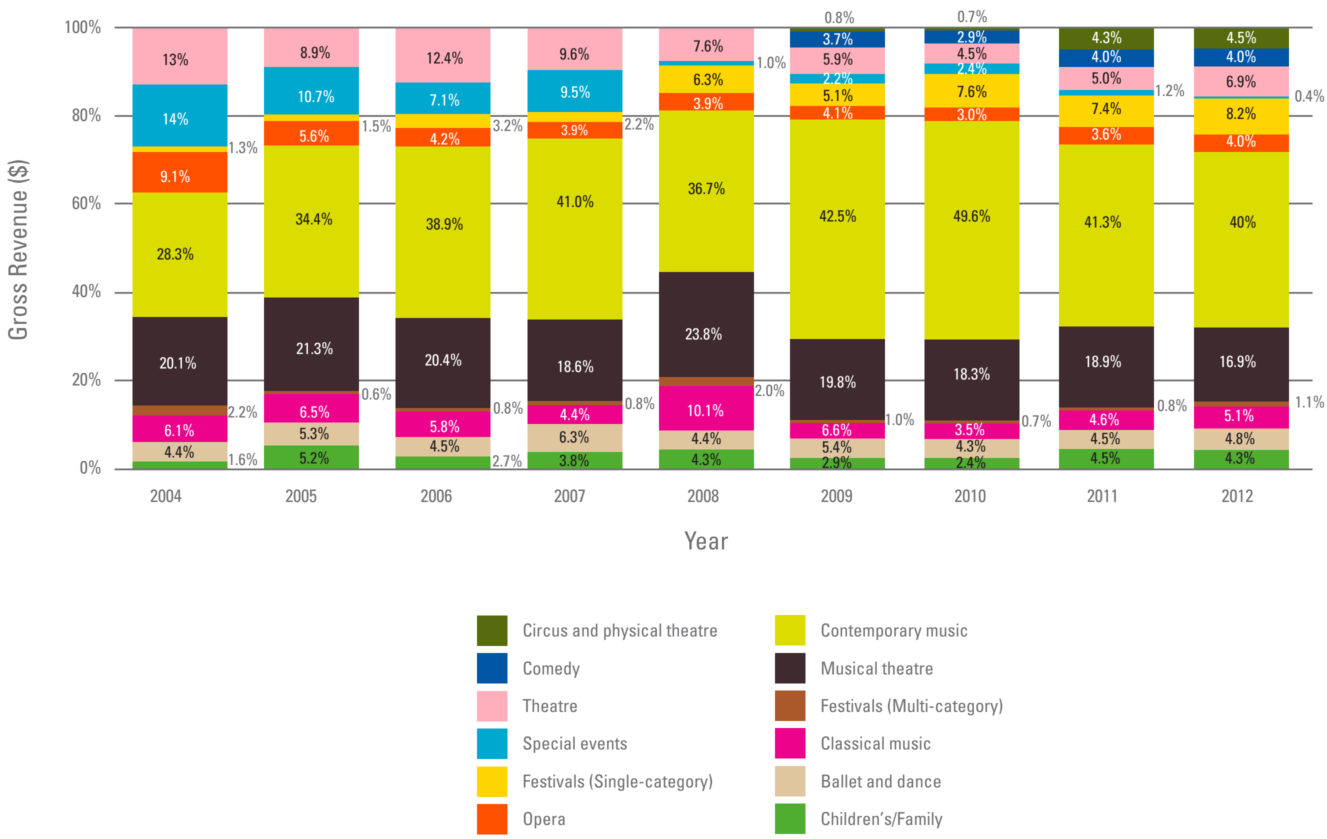
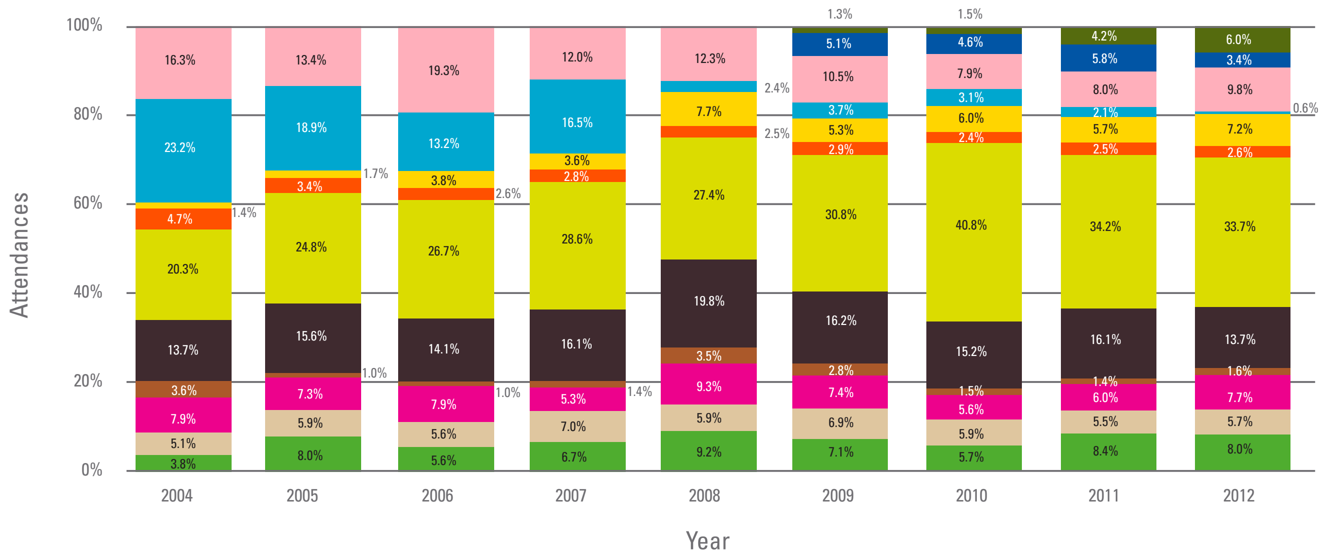


Figure 14: Market Shares (Attendances) by Category (2004-2012)



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.

4.3 Ballet and Dance

4.3.1 National Overview

Reiko Hombo, Jessica Fyfe, Eloise Fryer, Jade Wood: Artists of The Australian Ballet, Swan Lake
Photo - Jeff Busby

The Ballet and Dance category experienced a slight decrease in both gross revenue and attendance in 2012. Gross revenue decreased by 2.2% from $59.16 million in 2011 to $57.87 million in 2012 while total attendances decreased by 2.9% over the same time frame. In contrast, the average ticket price increased by 8.3% from $71.93 to $77.93, however this was not sufficient to offset the decline in patronage.

Major performances in the Ballet and Dance category in 2012 included tours by Eifman Ballet, the Shen Yun Chinese Performing Arts Group, English National Ballet and Hamburg Ballet's 'A Midsummer Night's Dream'. Tap Dogs, Burn the Floor and Rock the Ballet were also major performances in this category.

In particular, the Hamburg Ballet's exclusive run at the Queensland Performing Arts Centre helped contribute to healthy gains between 2011 and 2012 for the State. The decline in New South Wales from 2011 is in part due to a much smaller tour of the State by the production Tap Dogs. In 2011, Tap Dogs performed 40 shows at Sydney's Capitol Theatre over more than one month. However in 2012, Tap Dogs' only New South Wales performances took place in regional centres (which are not counted in the Survey) over a total of 11 days.

As with previous years, local productions from the AMPAG companies comprise the majority of performances and thus gross revenue in this event category. Major companies within this group included The Australian Ballet, The Queensland Ballet, Bangarra Dance Theatre and West Australian Ballet.

Figure 15: Ballet and Dance – Gross Revenue (2004-2012)

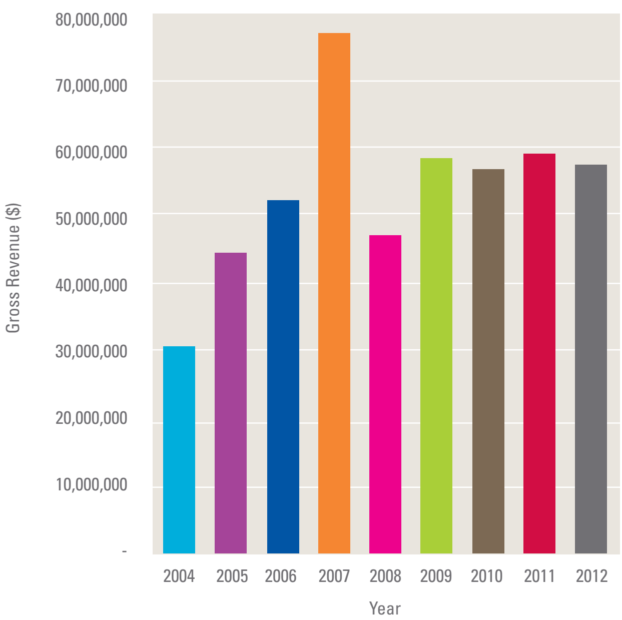


Figure 16: Ballet and Dance – Total Attendance (2004-2012)

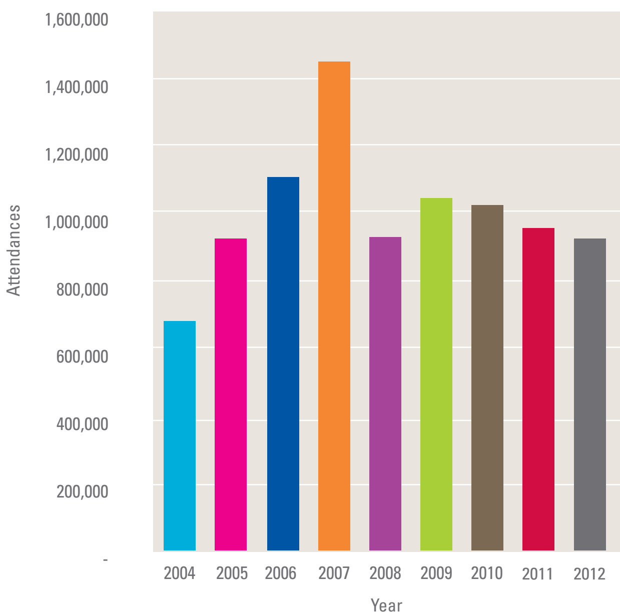


Table 12: Ballet and Dance - Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$30,664,060		682,755		$50.07	
2005	$44,563,085	45.3%	930,639	36.3%	$52.76	5.4%
2006	$52,523,644	17.9%	1,113,849	19.7%	$50.52	-4.2%
2007	$77,287,071	47.1%	1,457,306	30.8%	$57.39	13.6%
2008	$47,051,946	-39.1%	934,533	-35.9%	$60.67	5.7%
2009	$58,570,704	24.5%	1,050,763	12.4%	$63.33	4.4%
2010	$57,509,401	-1.8%	1,023,077	-2.6%	$64.86	2.4%
2011	$59,164,135	2.9%	947,846	-7.4%	$71.93	10.9%
2012	$57,865,897	-2.2%	920,193	-2.9%	$77.93	8.3%

4.3.2 State/Territory Breakdown

Figure 17: Ballet and Dance
Revenue by State/Territory (2012)

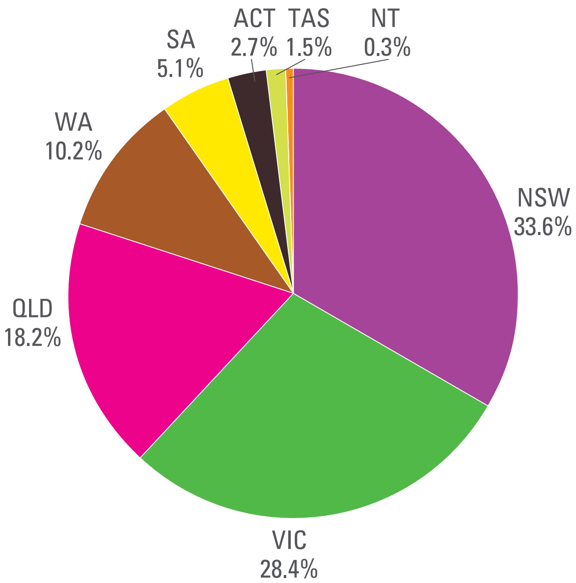


Table 13: Ballet and Dance
Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$19,455,855	33.6%	-8.1%
VIC	$16,412,119	28.4%	1.3%
QLD	$10,528,468	18.2%	4.8%
WA	$5,896,799	10.2%	-1.2%
SA	$2,956,596	5.1%	2.1%
ACT	$1,581,833	2.7%	0.3%
TAS	$863,181	1.5%	0.9%
NT	$171,046	0.3%	0.0%
Total	**$57,865,897**	**100.0%**	

Figure 18: Ballet and Dance
Attendance by State/Territory (2012)

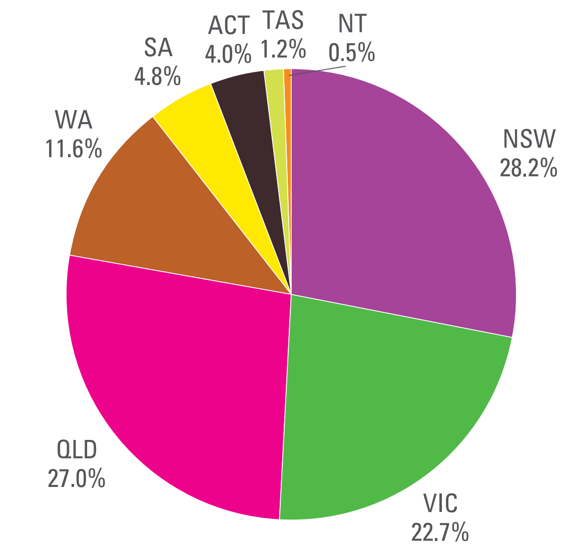


Table 14: Ballet and Dance
Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	259,221	28.2%	-9.3%
VIC	208,941	22.7%	0.5%
QLD	248,458	27.0%	8.7%
WA	106,736	11.6%	-1.2%
SA	44,133	4.8%	1.6%
ACT	36,880	4.0%	-0.7%
TAS	11,191	1.2%	0.6%
NT	4,633	0.5%	-0.1%
Total	**920,193**	**100.0%**	

4.4 Children's/Family Events

4.4.1 National Overview

Amber McMahon in Windmill Theatre's School Dance
Photo - Tony Lewis

2012 saw declines in gross revenue, attendance and average ticket prices for the Children's/Family Events category. Gross revenue declined by 12.2% from $58.78 million in 2011 to $51.59 million in 2012. Total attendance fell by 10.5% while the average ticket price declined by 1.6%, from $43.87 to $43.17.

Major events in 2012 in this category were Disney on Ice, the How to Train Your Dragon Arena Spectacular, Disney Live and a tour by The Wiggles. Perennial children's favourites such as Ben 10, Dora the Explorer, The Gruffalo and Hi-5 also returned in 2012.

However, the Walking with Dinosaurs Arena Spectacular which toured in 2011 was not staged in 2012, which has impacted upon revenue and attendance. Tickets for this event ranged from $50 to $100, which helps to explain the slight fall in the average ticket price. Further, the 2011 Walking with Dinosaurs tour performed more than 70 shows, far greater than any Children's/Family event in 2012.

Figure 19: Children's/Family Events
Gross Revenue (2004-2012)

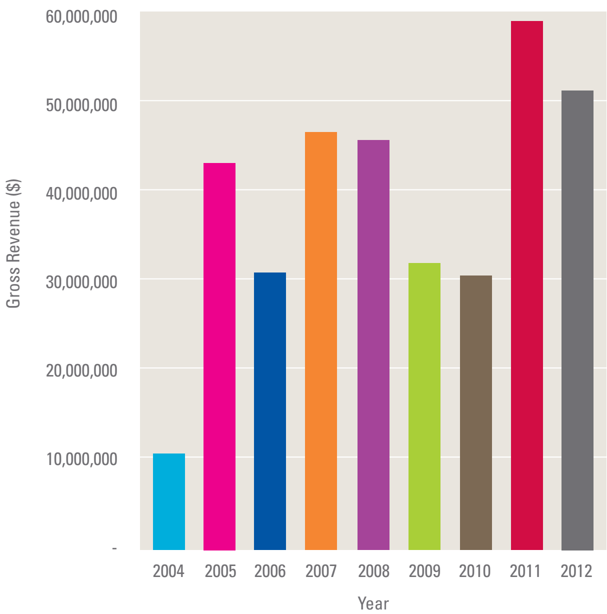


Figure 20: Children's/Family Events
Total Attendance (2004-2012)

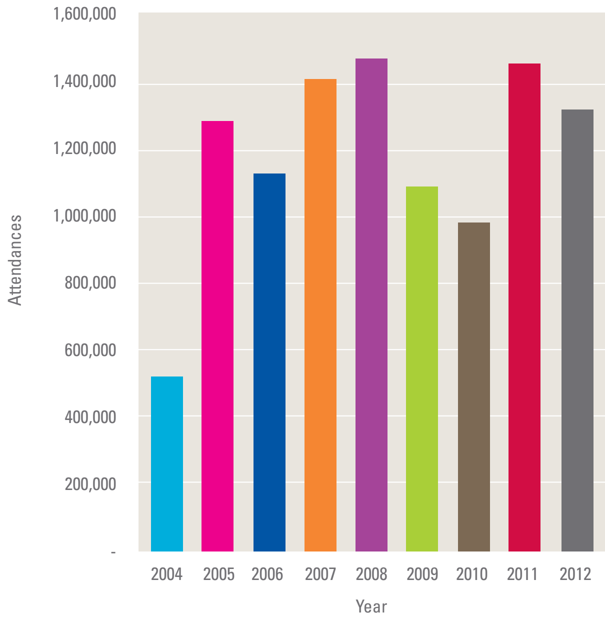


Table 15: Children's/Family Events - Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$10,737,662		515,276		$21.25	
2005	$43,108,863	301.5%	1,271,239	146.7%	$35.52	67.1%
2006	$30,944,086	-28.2%	1,114,427	-12.3%	$28.96	-18.5%
2007	$46,535,403	50.4%	1,393,942	25.1%	$36.49	26.0%
2008	$45,647,441	-1.9%	1,455,400	4.4%	$34.24	-6.2%
2009	$31,904,974	-30.1%	1,076,332	-26.0%	$32.38	-5.4%
2010	$31,247,780	-2.1%	974,624	-9.4%	$34.23	5.7%
2011	$58,777,398	88.1%	1,453,012	49.1%	$43.87	28.1%
2012	$51,587,317	-12.2%	1,300,334	-10.5%	$43.17	-1.6%

4.4.2 State/Territory Breakdown

Figure 21: Children's/Family Events Revenue by State/Territory (2012)

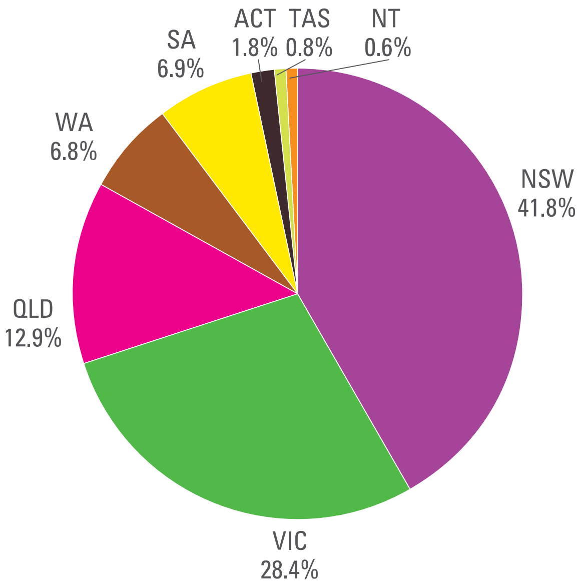


Table 16: Children's/Family Events Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$21,557,868	41.8%	6.8%
VIC	$14,640,484	28.4%	-3.6%
QLD	$6,677,540	12.9%	-1.8%
WA	$3,533,623	6.8%	1.2%
SA	$3,581,632	6.9%	-2.4%
ACT	$903,233	1.8%	0.2%
TAS	$387,505	0.8%	-0.5%
NT	$305,431	0.6%	0.1%
Total	**$51,587,317**	**100.0%**	

Figure 22: Children's/Family Events Attendance by State/Territory (2012)

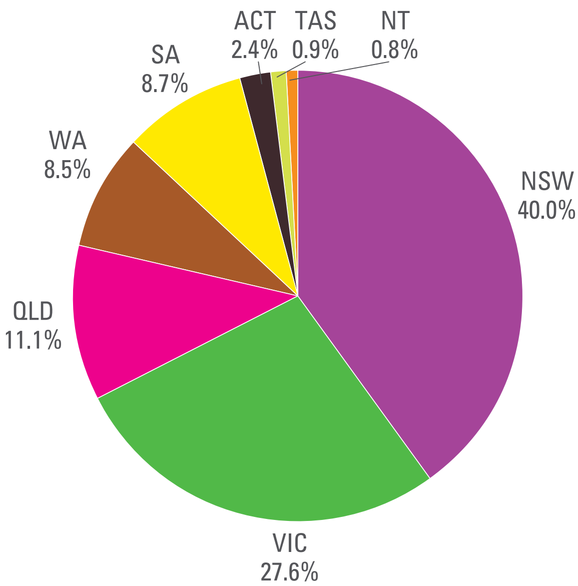


Table 17: Children's/Family Events Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	520,588	40.0%	3.9%
VIC	359,358	27.6%	-0.3%
QLD	143,792	11.1%	-1.8%
WA	110,533	8.5%	1.0%
SA	112,761	8.7%	-2.9%
ACT	30,630	2.4%	0.3%
TAS	11,700	0.9%	-0.2%
NT	10,972	0.8%	-0.1%
Total	**1,300,334**	**100.0%**	

4.5 Classical Music

4.5.1 National Overview

Australian Chamber Orchestra Beethoven 9
Photo - Paul Henderson-Kelly

In 2012, the Classical Music category experienced a rise in both revenue and total attendances from 2011. Gross revenue increased by a modest 1.3% from $60.10 million to $60.88 million. Total attendance grew strongly by 19.7%. However, the average ticket price fell by 12.3% from $68.82 to $60.34, which provides an explanation as to why growth in revenue did not match the growth in attendance.

Increases in both revenue and attendance were largely driven by the Victorian market, where the reopening of Hamer Hall at the Arts Centre Melbourne in July 2012 brought this major venue back online after being closed for two years. However, most of the other States and Territories saw a decline in revenue and attendance, particularly New South Wales and Queensland. This is due to the extensive 2011 national tour by Dutch violinist Andre Rieu, who did not return to perform in 2012.

In 2012, the majority of revenue and ticket sales in the Classical Music category came from the AMPAG companies. Major companies include 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.

Outside of AMPAG, other performances included national tours by Celtic Thunder, the Vienna Boys' Choir and performances by the Hamburg Philharmonic Orchestra during its exclusive run at the Queensland Performing Arts Centre.

Figure 23: Classical Music – Gross Revenue (2004-2012)

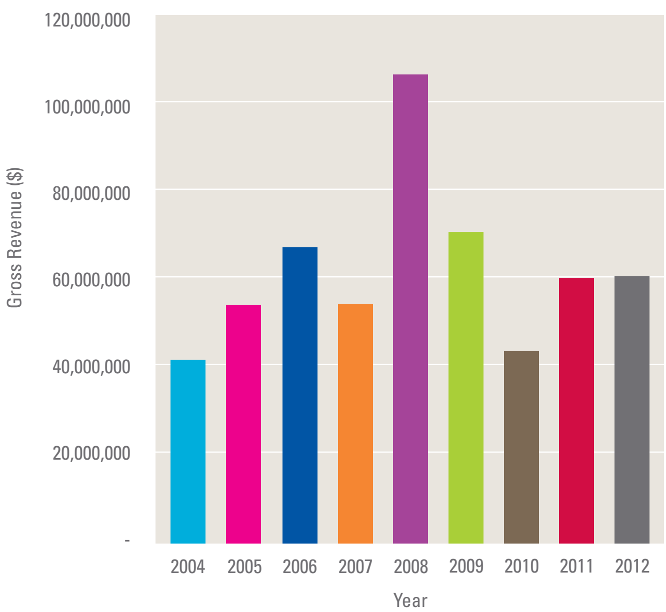


Figure 24: Classical Music – Total Attendance (2004-2012)

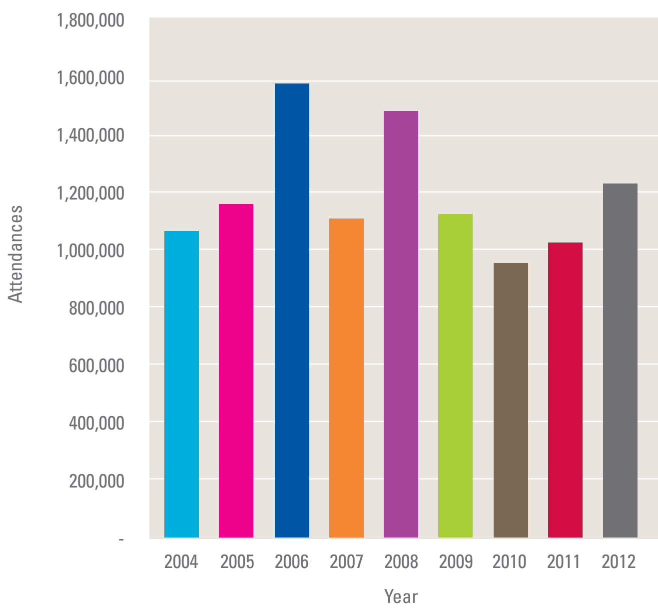


Table 18: Classical Music – Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$41,875,659		1,062,071		$43.21	
2005	$54,395,768	29.9%	1,154,340	8.7%	$52.95	22.5%
2006	$67,568,915	24.2%	1,571,748	36.2%	$46.93	-11.4%
2007	$54,615,181	-19.2%	1,104,146	-29.8%	$55.85	19.0%
2008	$107,050,440	96.0%	1,478,281	33.9%	$84.81	51.9%
2009	$71,273,338	-33.4%	1,120,002	-24.2%	$74.01	-12.7%
2010	$45,882,050	-35.6%	962,132	-14.1%	$60.43	-18.3%
2011	$60,096,039	31.0%	1,048,115	8.9%	$68.82	13.9%
2012	$60,884,219	1.3%	1,254,963	19.7%	$60.34	-12.3%

4.5.2 State/Territory Breakdown

Figure 25: Classical Music
Revenue by State/Territory (2012)

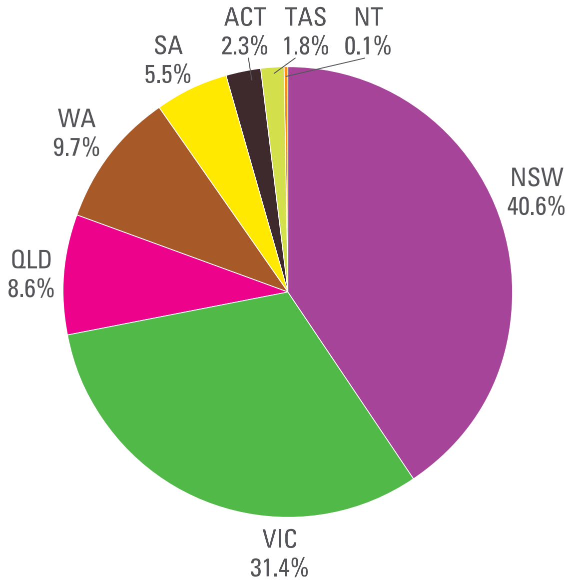


Table 19: Classical Music
Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$24,736,102	40.6%	-6.8%
VIC	$19,142,310	31.4%	8.7%
QLD	$5,237,521	8.6%	-3.3%
WA	$5,935,995	9.7%	2.3%
SA	$3,327,287	5.5%	-1.0%
ACT	$1,386,680	2.3%	0.1%
TAS	$1,070,777	1.8%	0.3%
NT	$47,547	0.1%	-0.1%
Total	**$60,884,219**	**100.0%**	

Figure 26: Classical Music
Attendance by State/Territory (2012)

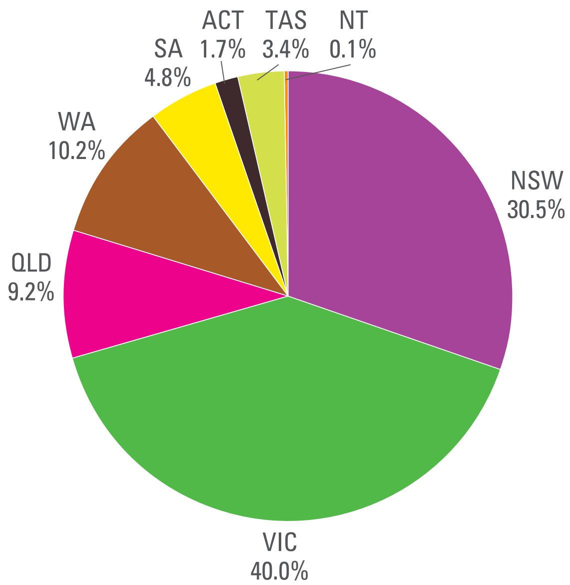


Table 20: Classical Music
Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	382,223	30.5%	-8.4%
VIC	502,421	40.0%	12.8%
QLD	115,197	9.2%	-2.3%
WA	128,361	10.2%	0.1%
SA	60,168	4.8%	-2.1%
ACT	21,933	1.7%	-0.9%
TAS	42,870	3.4%	0.9%
NT	1,790	0.1%	-0.3%
Total	**1,254,963**	**100.0%**	

4.6 Festivals (Multi-Category)

4.6.1 National Overview

Sydney Opera House
Vivid LIVE 2012, Janelle Monae
Photo - Prudence Upton

In the period 2011 to 2012, Festivals (Multi-Category) grew in terms of revenue, attendance and average ticket price. Gross revenue increased by 9.7% from $11.78 million to $12.92 million. The increase in total attendance was slightly softer at 7.6% and thus, the increase in revenue is mostly explained by a jump in ticket prices. Average ticket prices increased from $47.88 in 2011 to $59.58 in 2012, an increase of 24.4%.

In 2012, major events in this category included the WOMADelaide Music, Arts and Dance Festival and the annual Sydney Festival, Brisbane Festival, Perth International Arts Festival and Melbourne Festival. The relatively new yet increasingly popular Vivid Sydney also attracted strong patronage to ticketed live music performances at the Sydney Opera House and overall, drew record crowds for the two-week Festival.

Figure 27: Festivals (Multi-Category)
Gross Revenue (2004-2012)

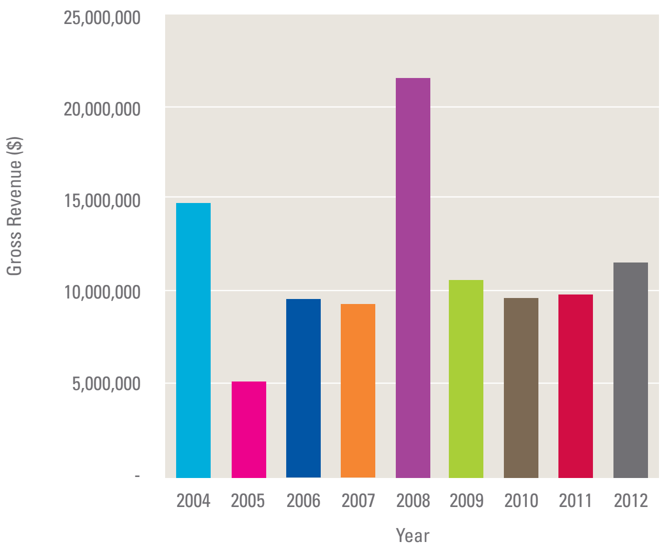


Figure 28: Festivals (Multi-Category)
Total Attendance (2004-2012)

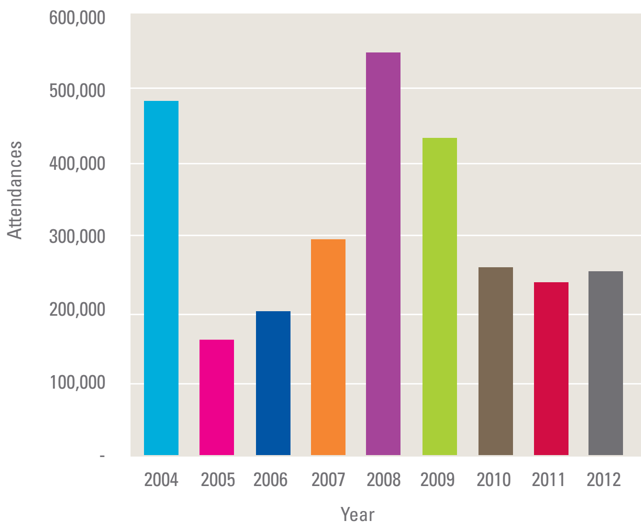


Table 21: Festivals (Multi-Category) - Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$14,842,476		483,858		$32.26	
2005	$5,170,934	-65.2%	157,228	-67.5%	$39.13	21.3%
2006	$9,633,454	86.3%	201,711	28.3%	$56.72	44.9%
2007	$9,318,441	-3.3%	294,296	45.9%	$44.09	-22.3%
2008	$21,615,824	132.0%	551,810	87.5%	$52.11	18.2%
2009	$10,642,917	-50.8%	431,061	-21.9%	$33.60	-35.5%
2010	$9,570,915	-10.1%	263,464	-38.9%	$43.12	28.3%
2011	$11,777,244	23.1%	242,222	-8.1%	$57.02	32.2%
2012	$12,916,787	9.7%	260,623	7.6%	$59.58	4.5%

Note: Due to an under-reporting of revenue in Western Australia in 2011 for the Festivals (Multi-Category) Category, revenue for 2011 has been adjusted from $9,890,881 to $11,777,244; a difference of approximately $1.89 million. The average ticket price has also been adjusted from $47.88 to $57.02. Attendance figures were not affected.

4.6.2 State/Territory Breakdown

Figure 29: Festivals (Multi-Category) Revenue by State/Territory (2012)

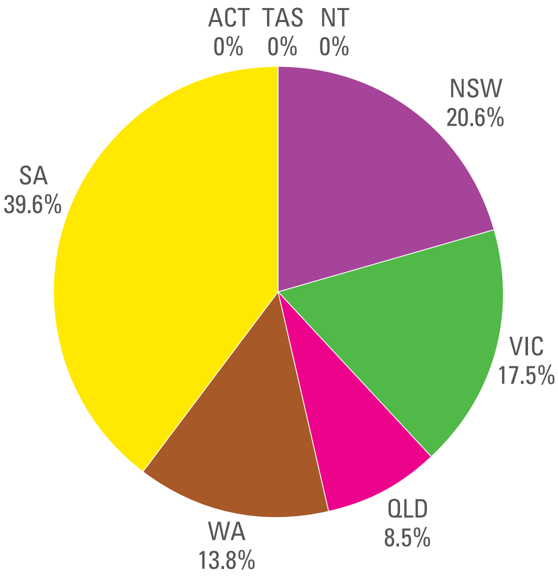


Table 22: Festivals (Multi-Category) Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$2,664,092	20.6%	3.0%
VIC	$2,255,262	17.5%	2.8%
QLD	$1,093,782	8.5%	0.1%
WA	$1,786,563	13.8%	-7.6%
SA	$5,117,088	39.6%*	-14.0%
ACT	$0	0.0%	N/A
TAS	$0	0.0%	0.0%
NT	$0	0.0%	N/A
Total	**$12,916,787**	**100.0%**	

Figure 30: Festivals (Multi-Category) Attendance by State/Territory (2012)

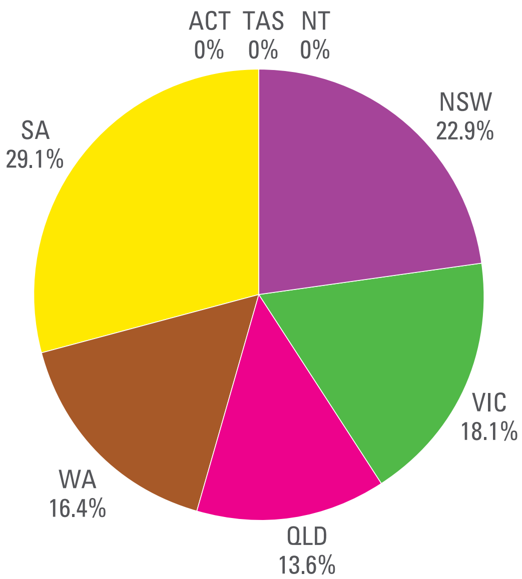


Table 23: Festivals (Multi-Category) Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	59,649	22.9%	5.0%
VIC	47,195	18.1%	9.8%
QLD	35,346	13.6%	4.1%
WA	42,638	16.4%	-16.4%
SA	75,795	29.1%*	-1.4%
ACT	-	0.0%	N/A
TAS	-	0.0%	0.0%
NT	-	0.0%	N/A
Total	**260,623**	**100.0%**	

Notes: N/A signifies where States were combined in 2011 due to single events occurring in each State
* The dominance of SA in this category is due to the large Multi-Category Festival, WOMADelaide.

4.7 Festivals (Single-Category)

4.7.1 National Overview

The Falls Music & Arts Festival, Lorne

There was an increase in revenue and attendance for Festivals (Single-Category) in 2012. Gross revenue increased by 2.0% from $96.45 million to $98.37 million while total attendances experienced a more significant increase of 18.7%. On the other hand, contrary to its previous upward trend, average ticket prices fell by 7.4% from $138.97 in 2011 to $128.71 in 2012.

There are various explanations for the above mentioned changes. First, Music Festivals generally experienced strong patronage in 2012. For example, Splendour in the Grass experienced a sell-out crowd in 2012 unlike in 2011, while the Future Music Festival broke attendance records in 2012. Second, the decline in ticket price was largely driven by a fall in prices for Splendour in the Grass, from $390 for a multi-day ticket in 2011 to $350 in 2012. Splendour in the Grass also re-introduced single-day tickets in 2012.

Other major Festivals in 2012 were Stereosonic, Summadayze, Soundwave and Parklife.

Figure 31: Festivals (Single-Category) Gross Revenue (2004-2012)

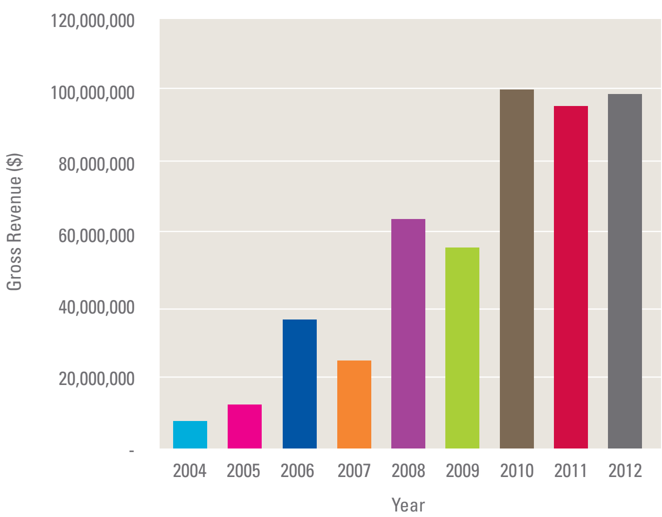


Figure 32: Festivals (Single-Category) Total Attendance (2004-2012)

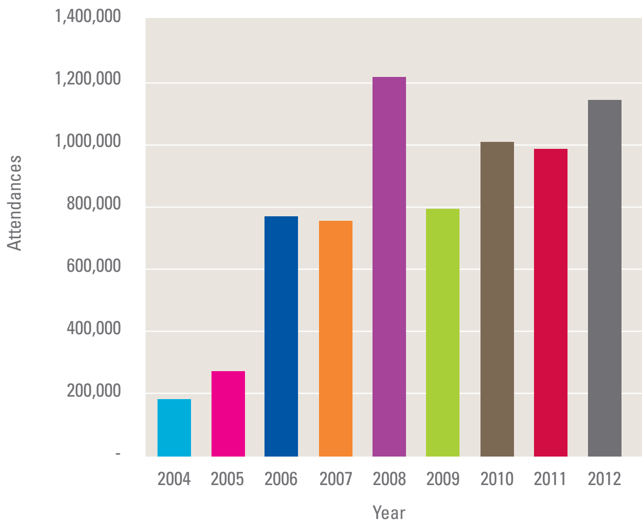


Table 24: Festivals (Single-Category) - Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$9,015,128		190,260		$54.69	
2005	$12,128,384	34.5%	269,208	41.5%	$63.05	15.3%
2006	$36,576,877	201.6%	761,920	183.0%	$50.93	-19.2%
2007	$26,972,082	-26.3%	753,247	-1.1%	$39.00	-23.4%
2008	$66,429,106	146.3%	1,221,972	62.2%	$60.91	56.2%
2009	$55,275,589	-16.8%	800,145	-34.5%	$81.19	33.3%
2010	$100,918,020	82.6%	1,028,170	28.5%	$119.39	47.1%
2011	$96,453,486	-4.4%	984,946	-4.2%	$138.97	16.4%
2012	$98,365,490	2.0%	1,169,233	18.7%	$128.71	-7.4%

4.7.2 State/Territory Breakdown

Figure 33: Festivals (Single-Category) Revenue by State/Territory (2012)

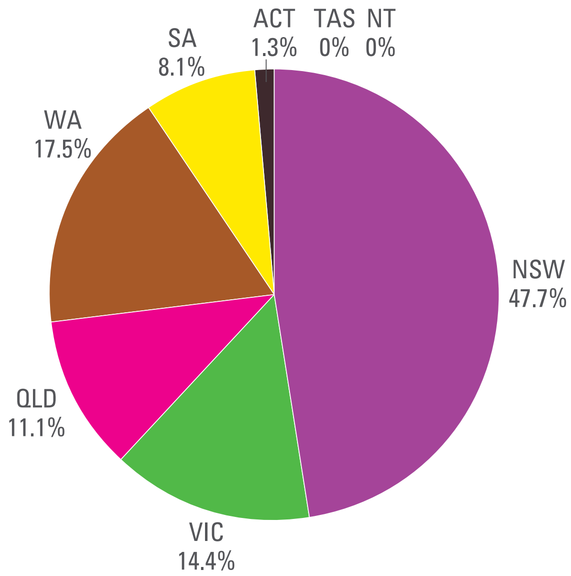


Table 25: Festivals (Single-Category) Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$46,885,791	47.7%	-3.4%
VIC	$14,168,915	14.4%	-7.1%
QLD	$10,910,587	11.1%	3.5%
WA	$17,170,341	17.5%	5.0%
SA	$7,931,980	8.1%	2.9%
ACT	$1,297,878	1.3%	-0.8%
TAS	$0	0.0%	0.0%
NT	$0	0.0%	0.0%
Total	**$98,365,490**	**100.0%**	

Figure 34: Festivals (Single-Category) Attendance by State/Territory (2012)

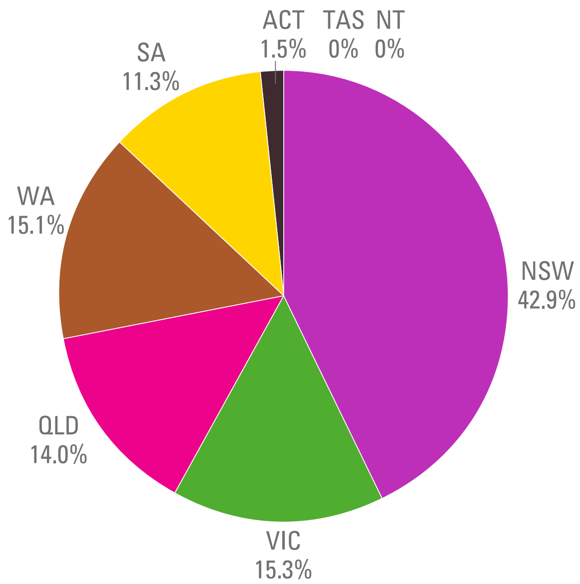


Table 26: Festivals (Single-Category) Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	501,130	42.9%	2.4%
VIC	178,523	15.3%	-6.9%
QLD	163,537	14.0%	5.2%
WA	176,641	15.1%	-1.3%
SA	132,253	11.3%	1.4%
ACT	17,149	1.5%	-0.5%
TAS	-	0.0%	0.0%
NT	-	0.0%	-0.2%
Total	**1,169,233**	**100.0%**	

4.8 Musical Theatre

4.8.1 National Overview

A Funny Thing Happened on the Way to the Forum
Photo - Jeff Busby

The Musical Theatre category experienced declines between 2011 and 2012, with both gross revenue and total attendances falling. Gross revenue declined by 17.6% from $246.79 million in 2011 to $203.28 million in 2012. Total attendance fell more sharply, by 20.6%, offset somewhat by an increase in average ticket prices of 4.6%, from $92.79 in 2011 to $97.08 in 2012.

Annie, South Pacific, A Funny Thing Happened on the Way to the Forum and Chitty Chitty Bang Bang were the largest events in the Musical Theatre category, as were productions of Mary Poppins and Love Never Dies whose Australian runs continued from 2011 and into 2012. The timing of these two musicals over two calendar years helps to explain the decline in this category, as the bulk of performances took place in 2011. Further, Mary Poppins was only performed in Brisbane and Perth in the 2012 calendar year (after completing its 2011 run in the other capital cities), which also explains the increase in revenue and attendance for Queensland and Western Australia. It should be noted that touring musicals outside Sydney and Melbourne impacts on all State-based numbers.

There were overall fewer performances in the Musical Theatre category, highlighting the general volatility in the number of Musical Theatre performances presented nationally in any given year.

Figure 35: Musical Theatre Gross Revenue (2004-2012)

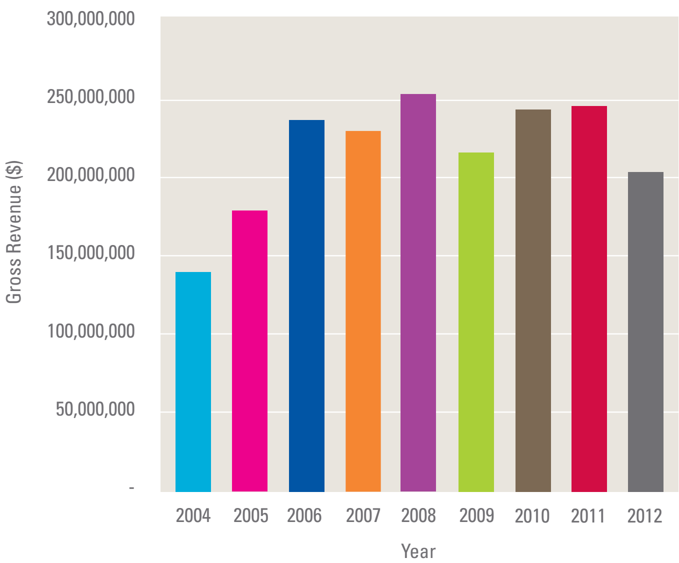


Figure 36: Musical Theatre Total Attendance (2004-2012)

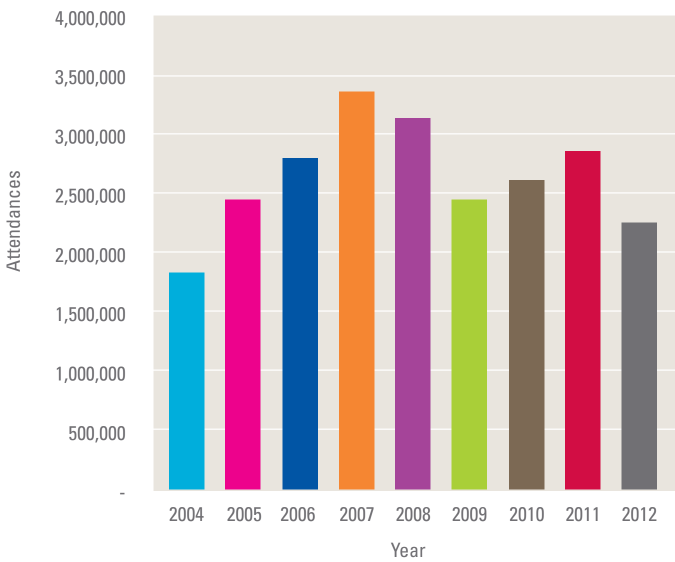


Table 27: Musical Theatre - Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$138,718,880		1,847,505		$76.34	
2005	$178,032,172	28.3%	2,460,314	33.2%	$76.01	-0.4%
2006	$235,922,584	32.5%	2,806,153	14.1%	$86.18	13.4%
2007	$228,854,618	-3.0%	3,358,727	19.7%	$70.50	-18.2%
2008	$252,199,267	10.2%	3,129,729	-6.8%	$89.23	26.6%
2009	$214,959,848	-14.8%	2,458,212	-21.5%	$93.54	4.8%
2010	$242,897,364	13.0%	2,612,507	6.3%	$98.84	5.7%
2011	$246,792,376	1.6%	2,799,918	7.2%	$92.79	-6.1%
2012	$203,278,606	-17.6%	2,224,068	-20.6%	$97.08	4.6%

4.8.2 State/Territory Breakdown

Figure 37: Musical Theatre
Revenue by State/Territory (2012)

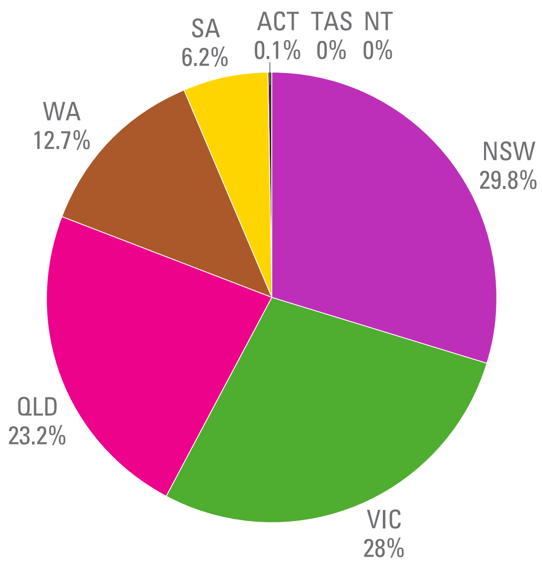


Table 28: Musical Theatre
Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$60,502,328	29.8%	-11.6%
VIC	$56,983,253	28.0%	-8.9%
QLD	$47,084,207	23.2%	12.3%
WA	$25,805,255	12.7%	4.2%
SA	$12,670,798	6.2%	4.2%
ACT	$193,406	0.1%	-0.2%
TAS	$0	0.0%	0.0%
NT	$39,360	0.0%	0.0%
Total	**$203,278,606**	**100.0%**	

Figure 38: Musical Theatre
Attendance by State/Territory (2012)

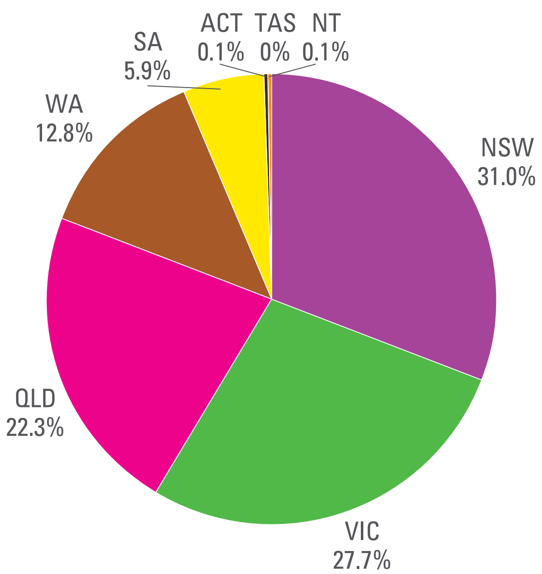


Table 29: Musical Theatre
Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	688,685	31.0%	-5.9%
VIC	616,757	27.7%	-10.2%
QLD	496,616	22.3%	11.2%
WA	285,089	12.8%	4.9%
SA	131,905	5.9%	0.3%
ACT	3,222	0.1%	-0.3%
TAS	-	0.0%	0.0%
NT	1,794	0.1%	0.0%
Total	**2,224,068**	**100.0%**	

4.9 Contemporary Music

4.9.1 National Overview

Gotye
Photo - Dana Yavin

There were declines in the Contemporary Music category between 2011 and 2012 in both revenue and attendance. Gross revenue declined by 10.6% from $539.27 million to $482.18 million while total attendance declined by 7.7%. The average ticket price fell by 3.1% from $103.45 in 2011 to $100.27 in 2012.

Despite these falls, the Contemporary Music category continues to be the biggest in the Live Entertainment Industry, commanding more than one third of the Live Entertainment Industry's share. However, the annual variability of this category strongly reflects the number of big-name artists which tour in any given year, particularly if there are a smaller number of stadium tours.

Victoria was the only State which experienced noteworthy growth in this category, due in large part to the reopening of Hamer Hall at the Arts Centre Melbourne in July.

In 2012 Lady Gaga, Roger Waters, Prince and Taylor Swift held the largest performances along with a stadium tour by Coldplay. Other big-name international artists which toured Australia included Rod Stewart, Elton John, Nicki Minaj, Matchbox Twenty, Jennifer Lopez and One Direction.

Figure 39: Contemporary Music
Gross Revenue (2004-2012)

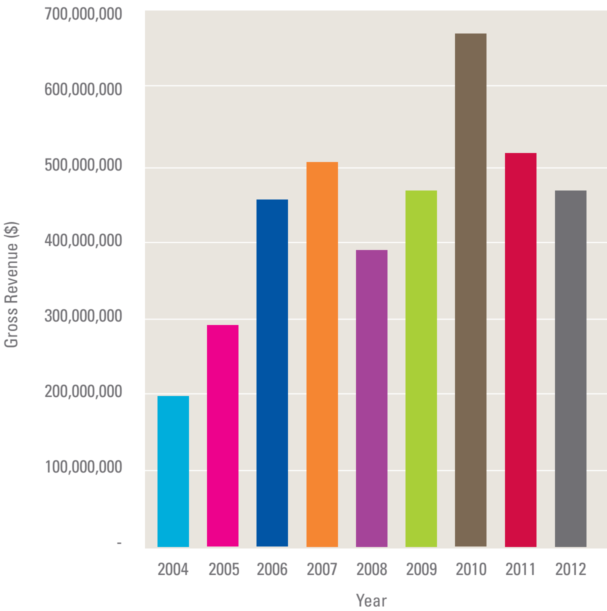


Figure 40: Contemporary Music
Total Attendance (2004-2012)

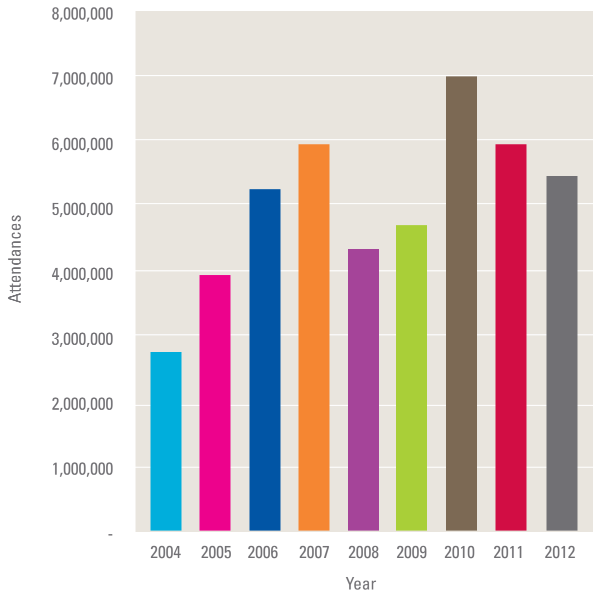


Table 30: Contemporary Music - Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$195,058,791		2,737,873		$77.09	
2005	$287,201,319	47.2%	3,924,276	43.3%	$83.37	8.1%
2006	$450,855,531	57.0%	5,295,988	35.0%	$92.78	11.3%
2007	$503,240,419	11.6%	5,975,561	12.8%	$90.49	-2.5%
2008	$389,160,746	-22.7%	4,330,620	-27.5%	$101.35	12.0%
2009	$460,443,027	18.3%	4,682,805	8.1%	$108.61	7.2%
2010	$659,102,048	43.1%	7,028,235	50.1%	$102.78	-5.4%
2011	$539,274,481	-18.2%	5,939,618	-15.5%	$103.45	0.6%
2012	$482,180,550	-10.6%	5,484,257	-7.7%	$100.27	-3.1%

4.9.2 State/Territory Breakdown

Figure 41: Contemporary Music Revenue by State/Territory (2012)

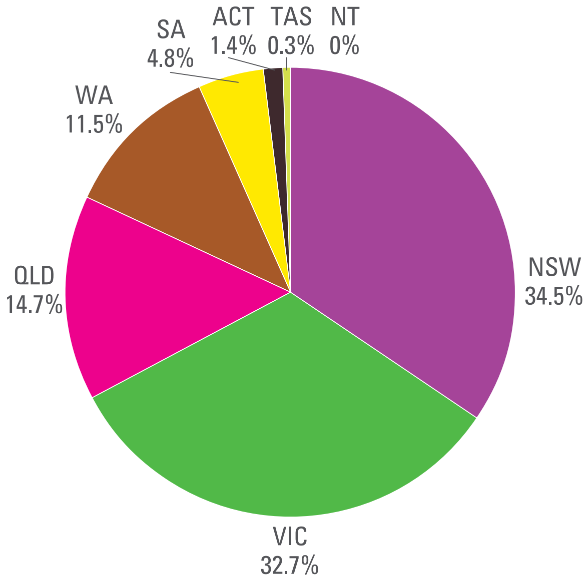


Table 31: Contemporary Music Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$166,537,474	34.5%	-1.2%
VIC	$157,548,428	32.7%	3.5%
QLD	$70,992,764	14.7%	-0.6%
WA	$55,408,813	11.5%	-0.1%
SA	$23,328,290	4.8%	-2.3%
ACT	$6,626,352	1.4%	0.6%
TAS	$1,536,314	0.3%	0.0%
NT	$202,115	0.0%	-0.1%
Total	**$482,180,550**	**100.0%**	

Figure 42: Contemporary Music Attendance by State/Territory (2012)

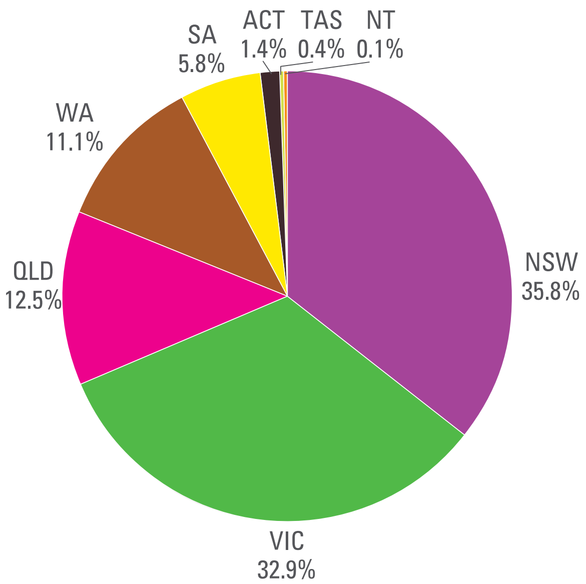


Table 32: Contemporary Music Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	1,965,258	35.8%	-0.1%
VIC	1,803,765	32.9%	2.6%
QLD	683,211	12.5%	-1.5%
WA	606,175	11.1%	0.0%
SA	318,497	5.8%	-1.2%
ACT	79,376	1.4%	0.3%
TAS	23,653	0.4%	0.0%
NT	4,322	0.1%	-0.1%
Total	**5,484,257**	**100.0%**	

4.10 Opera

4.10.1 National Overview

Opera on the Harbour
La Traviata
Opera Australia 2012
Photo - Lightbox Photography

Between 2011 and 2012, the Opera category experienced a slight increase in revenue but a decrease in attendances. Gross revenue grew by 1.1% from $47.31 million to $47.84 million while total attendance fell by 1.9%. The increase in average ticket prices by 1.8% from $124.66 to $126.84 explains the increase in revenue despite the decline in attendance.

The majority of ticket sales and thus revenue came from productions which were staged by AMPAG companies. Within AMPAG, Opera Australia was the largest company in 2012, followed by Opera Queensland, The State Opera of South Australia and West Australian Opera Company.

Notably, Opera Australia performed in Brisbane for the first time in 24 years after securing Queensland Government funding. This provides an explanation for the larger than average growth in Queensland. Further, 2012 saw the first Opera in Australia to be held on a stage built over water - the highly successful Handa Opera on Sydney Harbour's 'La Traviata', which helped to drive attendance and thus revenue in New South Wales.

Other major performances in 2012 included The Magic Flute, Madama Butterfly, Turandot and Lucia di Lammermoor.

Figure 43: Opera
Gross Revenue (2004-2012)

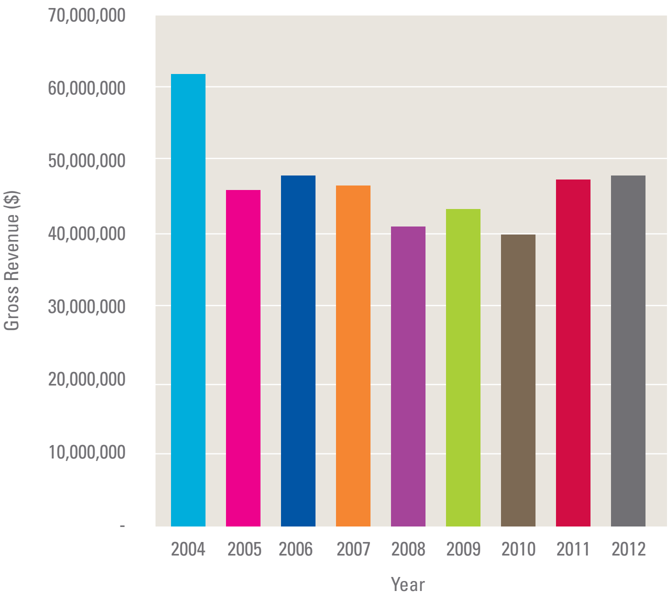


Figure 44: Opera
Total Attendance (2004-2012)

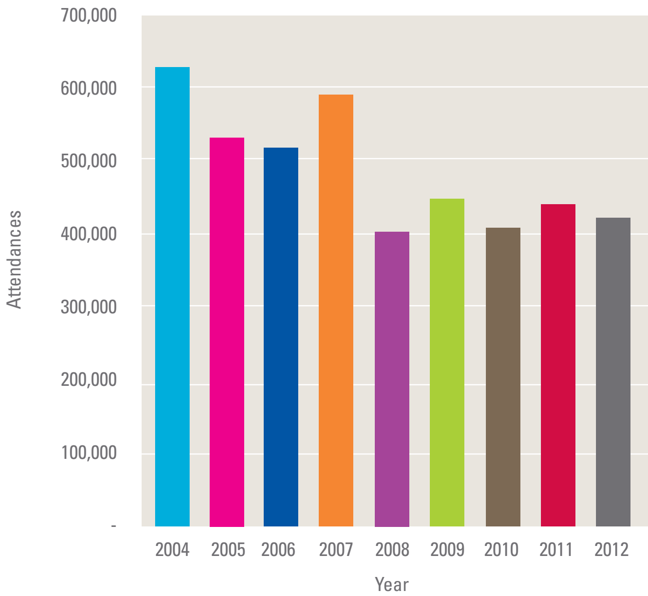


Table 33: Opera - Revenue and Attendance (2004-2012)

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

4.10.2 State/Territory Breakdown

Figure 45: Opera
Revenue by State/Territory (2012)

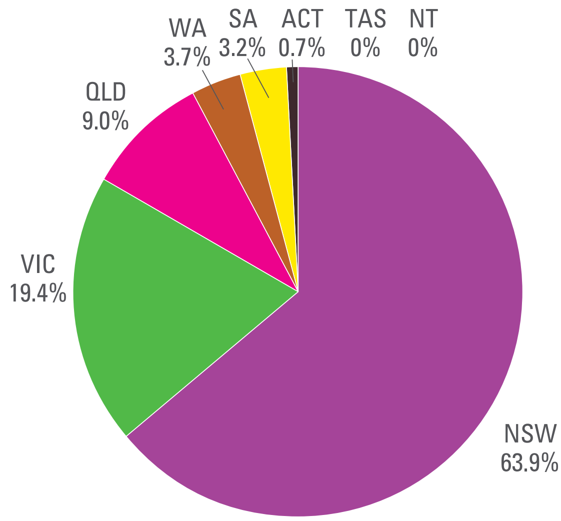


Table 34: Opera
Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$30,569,497	63.9%	1.5%
VIC	$9,301,614	19.4%	-4.6%
QLD	$4,307,911	9.0%	3.6%
WA	$1,759,636	3.7%	0.0%
SA	$1,552,298	3.2%	-1.1%
ACT	$353,016	0.7%	N/A
TAS	$0	0.0%	N/A
NT	$0	0.0%	0.0%
Total	**$47,843,971**	**100.0%**	

Figure 46: Opera
Attendance by State/Territory (2012)

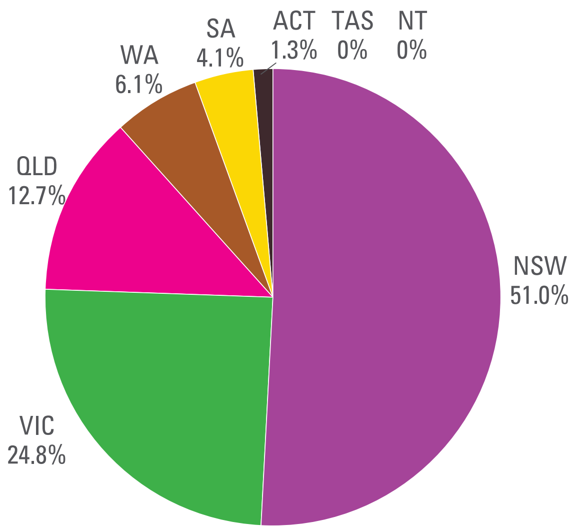


Table 35: Opera
Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	219,712	51.0%	0.9%
VIC	106,831	24.8%	-3.7%
QLD	54,751	12.7%	2.9%
WA	26,316	6.1%	0.5%
SA	17,485	4.1%	-1.4%
ACT	5,809	1.3%	N/A
TAS	-	0.0%	N/A
NT	-	0.0%	0.0%
Total	**430,904**	**100.0%**	

Note: N/A signifies where States were combined in 2011 due to single events occurring in each State

4.11 Special Events

4.11.1 National Overview

The Blue Planet in Concert at Sydney Opera House
Photo - Jamie Williams Photography

As with previous years, the Special Events category is particularly variable as it is highly dependent on whether performances that cannot be classified into other categories take place. In the period 2011 to 2012, the Special Events category declined by 73.1% from $15.80 million to $4.25 million. Total attendances also experienced similar levels of decline, falling by 75.4%. However, average ticket prices remained fairly unchanged, increasing by only 0.5% from $57.28 in 2011 to $57.58 in 2012.

The significant decline in this category can be explained by the aforementioned fluctuation in events. For instance, the sharp drop between 2010 and 2011 is due to a tour by the Edinburgh Military Tattoo, which performed in 2010 but not in 2011. Further, major performances in 2011 of The Horseman from Snowy River as well as psychic medium John Edwards did not return in 2012. In Victoria, the large drop can in part be explained by the highly successful television show QI LIVE, which performed multiple times in 2011 but did not return to Melbourne in 2012.

Major events in this category in 2012 include Rockwiz Live, Enlighten Canberra and the productions 'Planet Earth in Concert' and 'The Blue Planet inConcert' at the Sydney Opera House.

Figure 47: Special Events
Gross Revenue (2004-2012)

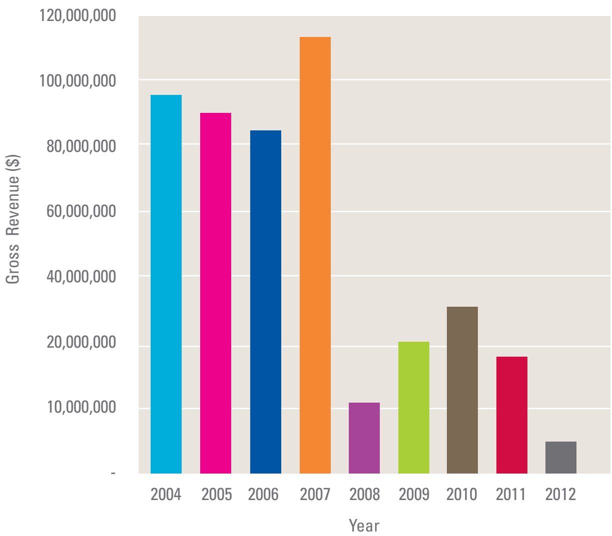


Figure 48: Special Events
Total Attendance (2004-2012)

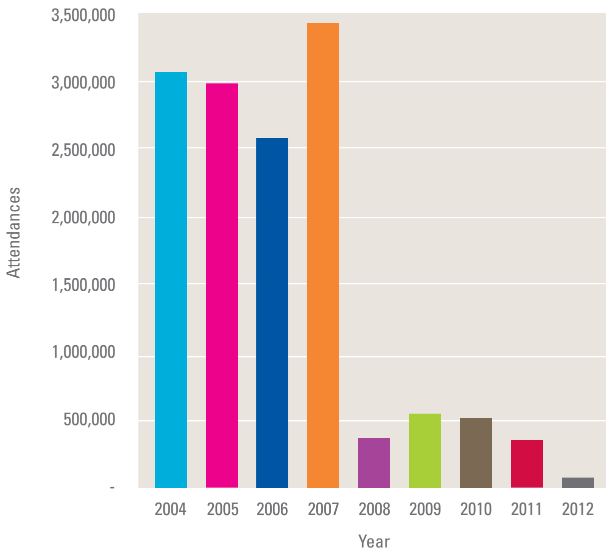


Table 36: Special Events - Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$96,706,366		3,125,013		$45.43	
2005	$89,357,246	-7.6%	2,992,097	-4.3%	$31.50	-30.7%
2006	$82,143,879	-8.1%	2,625,779	-12.2%	$42.64	35.4%
2007	$117,203,892	42.7%	3,453,077	31.5%	$48.56	13.9%
2008	$10,324,979	-91.2%	374,623	-89.2%	$43.60	-10.2%
2009	$23,602,096	128.6%	559,434	49.3%	$67.79	55.5%
2010	$31,449,876	33.3%	526,503	-5.9%	$88.67	30.8%
2011	$15,799,946	-49.8%	370,239	-29.7%	$57.28	-35.4%
2012	$4,250,001	-73.1%	91,189	-75.4%	$57.58	0.5%

4.11.2 State/Territory Breakdown

Figure 49: Special Events
Revenue by State/Territory (2012)

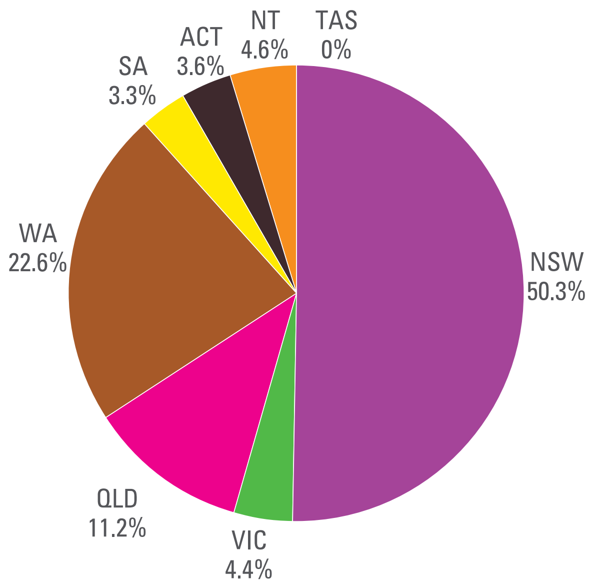


Table 37: Special Events
Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$2,138,338	50.3%	9.6%
VIC	$185,419	4.4%	-24.0%
QLD	$476,329	11.2%	2.7%
WA	$959,782	22.6%	7.9%
SA	$138,718	3.3%	-0.3%
ACT	$154,105	3.6%	N/A
TAS	$0	0.0%	0.0%
NT	$197,311	4.6%	N/A
Total	**$4,250,001**	**100.0%**	

Figure 50: Special Events
Attendance by State/Territory (2012)

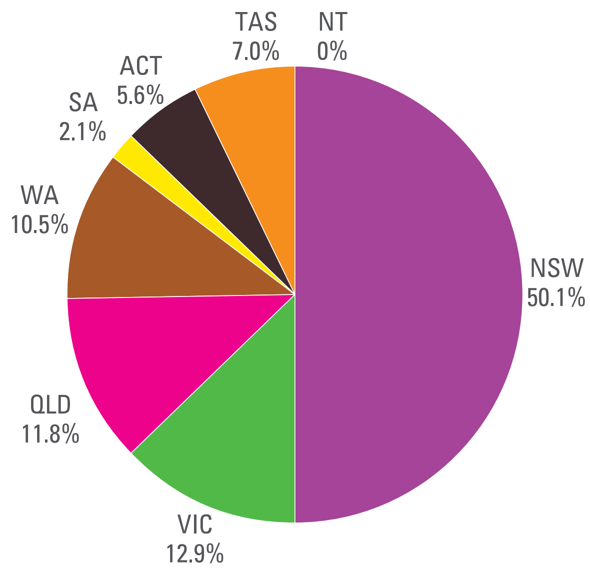


Table 38: Special Events
Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	45,656	50.1%	1.5%
VIC	11,798	12.9%	-9.2%
QLD	10,784	11.8%	4.0%
WA	9,543	10.5%	0.8%
SA	1,875	2.1%	-1.8%
ACT	5,111	5.6%	N/A
TAS	-	0.0%	0.0%
NT	6,422	7.0%	N/A
Total	**91,189**	**100.0%**	

Note: N/A signifies where States were combined in 2011 due to single events occurring in each State

4.12 Theatre

4.12.1 National Overview

Belvoir
Death of a Salesman
Photo - Heidrun Löhr

The Theatre category experienced overall gains between 2011 and 2012. Gross revenue increased by 25.9% from $65.88 million to $82.97 million. Total attendance also grew strongly, by 16.0% while the average ticket price increased by 6.6% from $56.14 to $59.86.

These increases were in large part driven by Dame Edna Everage's "Eat, Pray, Laugh" national Farewell Tour, which drew large audiences. However, as with previous years, performances through the AMPAG companies generated the majority of ticket sales and revenue.

In 2012, other major performances in the Theatre category included the national tour of the commercially produced 'The Mousetrap', 'Australia Day' from the Sydney Theatre Company and Melbourne Theatre Company, and Sydney Theatre Company's 'Under Milk Wood' and 'Les Liaisions Dangereuses'.

The significant drop in New South Wales' revenue figures can be explained by the fact that the international touring production of Richard III, starring actor Kevin Spacey, which ran an exclusive season in Sydney in 2011 did not return in 2012.

Figure 51: Theatre
Gross Revenue (2004-2012)

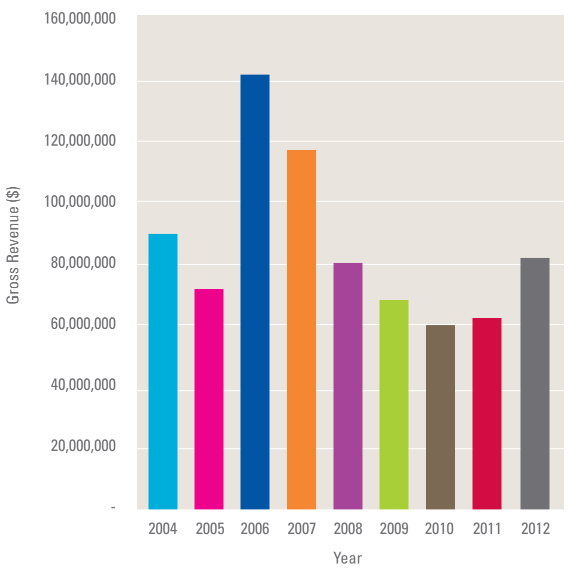


Figure 52: Theatre
Total Attendance (2004-2012)

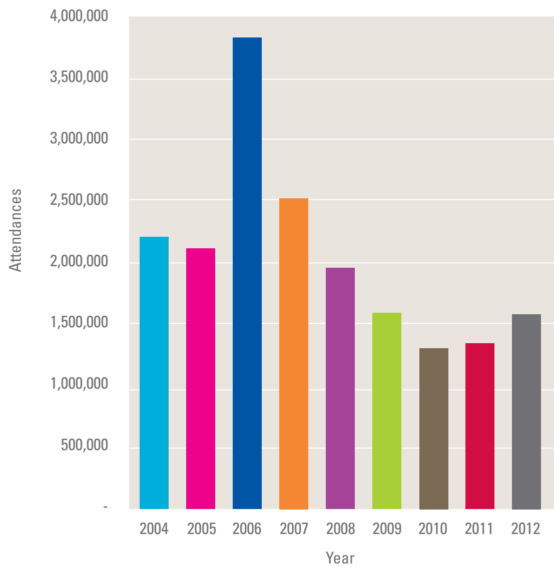


Table 39: Theatre - Revenue and Attendance (2004-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2004	$89,417,616		2,202,812		$43.87	
2005	$73,988,892	-17.3%	2,117,854	-3.9%	$38.04	-13.3%
2006	$143,564,232	94.0%	3,828,254	80.8%	$39.42	3.6%
2007	$117,382,525	-18.2%	2,505,458	-34.6%	$50.42	27.9%
2008	$80,476,671	-31.4%	1,944,188	-22.4%	$46.92	-6.9%
2009	$76,192,784	-5.3%	1,710,204	-12.0%	$51.34	9.4%
2010	$60,151,139	-21.1%	1,354,336	-20.8%	$51.47	0.2%
2011	$65,880,712	9.5%	1,380,622	1.9%	$56.14	9.1%
2012	$82,973,259	25.9%	1,601,425	16.0%	$59.86	6.6%

Note: 2008 revenue and ticketing data for the Theatre category is not directly comparable to the 2009-2012 ticketing data due to the introduction of new categories being Comedy, and Circus and Physical Theatre. A large number of events which were previously in the Theatre category are now reallocated into these new categories. As a result, this has contributed to the decrease in reported revenue and attendances in this category.

4.12.2 State/Territory Breakdown

Figure 53: Theatre
Revenue by State/Territory (2012)

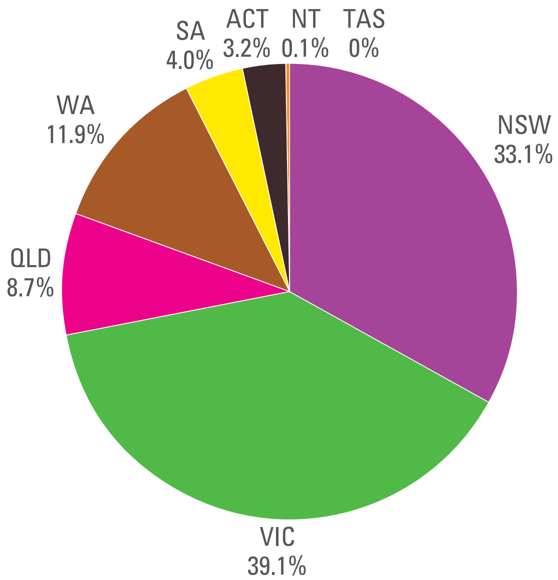


Table 40: Theatre
Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$27,466,312	33.1%	-20.3%
VIC	$32,440,355	39.1%	11.0%
QLD	$7,192,975	8.7%	2.4%
WA	$9,867,396	11.9%	7.1%
SA	$3,307,037	4.0%	0.4%
ACT	$2,646,499	3.2%	-0.4%
TAS	$0	0.0%	0.0%
NT	$52,686	0.1%	0.0%
Total	**$82,973,259**	**100.0%**	

Figure 54: Theatre
Attendance by State/Territory (2012)

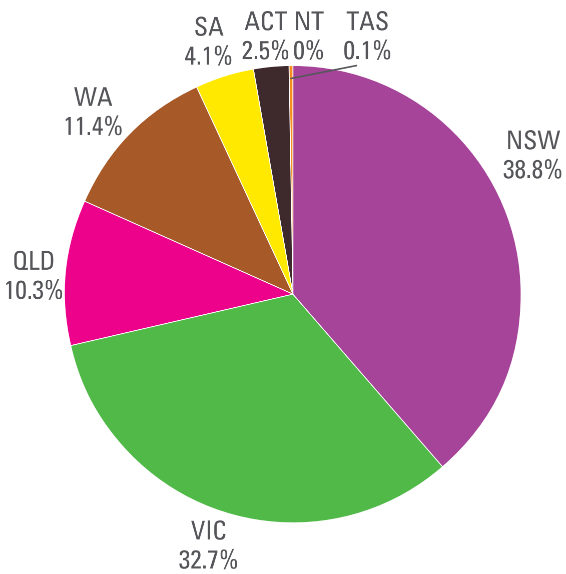


Table 41: Theatre
Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	621,971	38.8%	-5.7%
VIC	523,515	32.7%	2.6%
QLD	164,294	10.3%	2.7%
WA	182,950	11.4%	3.1%
SA	65,870	4.1%	-1.1%
ACT	40,829	2.5%	-1.7%
TAS	-	0.0%	0.0%
NT	1,996	0.1%	-0.1%
Total	**1,601,425**	**100.0%**	

4.13 Circus and Physical Theatre

4.13.1 National Overview

Perth Theatre Company, It's Dark Outside, Arielle Gray and Chris Isaacs
Photo - Richard Jefferson

In 2012, the Circus and Physical Theatre category experienced a decline in both revenue and attendance compared to 2011. Gross revenue fell by 3.3% from $55.87 million to $54.04 million while total attendance fell by 23.8%. However, average ticket prices rose sharply, by 19.4% from $86.81 to $103.67.

Following the success of its 2011 'Saltimbanco' tour, Cirque du Soleil once again dominated this category in 2012 with its 'Ovo' production. However, Cirque du Soleil's national tour crossed two calendar years, and only Sydney, Brisbane and some Adelaide performances have been included in the Survey. As such, 'Ovo's' 2013 performances in Melbourne, Perth and the remainder of the Adelaide shows do not correspond to the Survey period. The exclusion of this data provides an explanation for the skewed distribution of revenue and attendance by State.

It should be noted that the Canadian entertainment company does not conduct tours of Australia every year (it did not stage any performances in 2010 and only had limited shows in 2009).

Other major events in the Circus and Physical Theatre category include the Great Moscow Circus, El Cabello Blanco, the magician Cosentino and Circus Oz's annual Australian season.

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.

Figure 55: Circus and Physical Theatre Gross Revenue (2009-2012)

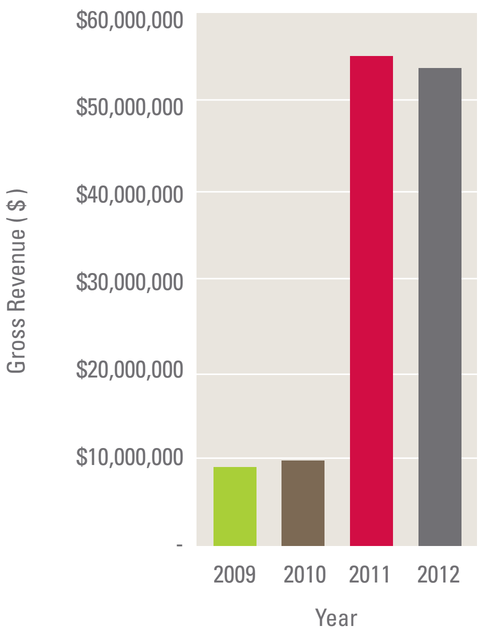


Figure 56: Circus and Physical Theatre Total Attendance (2009-2012)

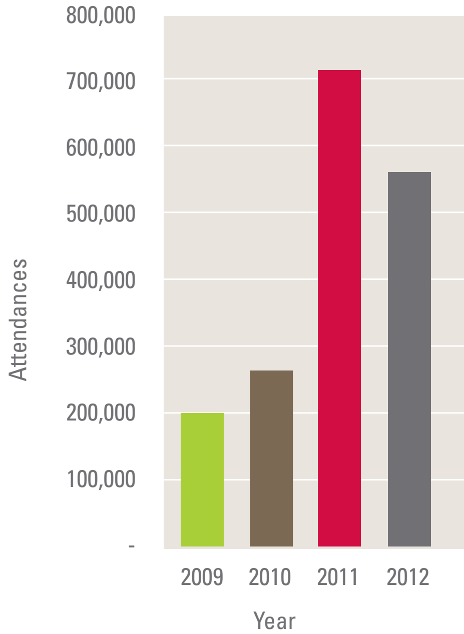


Table 42: Circus and Physical Theatre - Revenue and Attendance (2009-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$8,601,990	N/A	198,274	N/A	$47.98	N/A
2010	$9,900,116	15.1%	265,837	34.1%	$43.03	-10.3%
2011	$55,865,945	464.3%	728,799	174.2%	$86.81	101.8%
2012	$54,042,789	-3.3%	555,506	-23.8%	$103.67	19.4%

4.13.2 State/Territory Breakdown

Figure 57: Circus and Physical Theatre Revenue by State/Territory (2012)

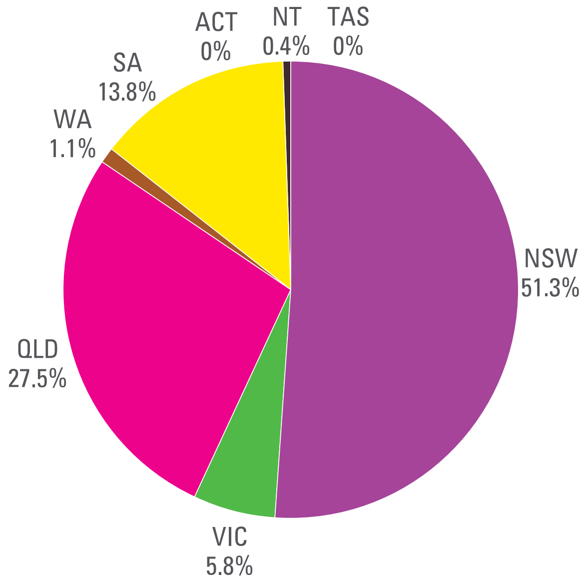


Table 43: Circus and Physical Theatre Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$27,748,585	51.3%	20.2%
VIC	$3,151,615	5.8%	-21.2%
QLD	$14,867,599	27.5%	9.5%
WA	$619,546	1.1%	-10.0%
SA	$7,444,604	13.8%	5.7%
ACT	$0	0.0%	-0.1%
TAS	$195,517	0.4%	-4.1%
NT	$15,322	0.0%	-0.2%
Total	**$54,042,789**	**100.0%**	

Figure 58: Circus and Physical Theatre Attendance by State/Territory (2012)

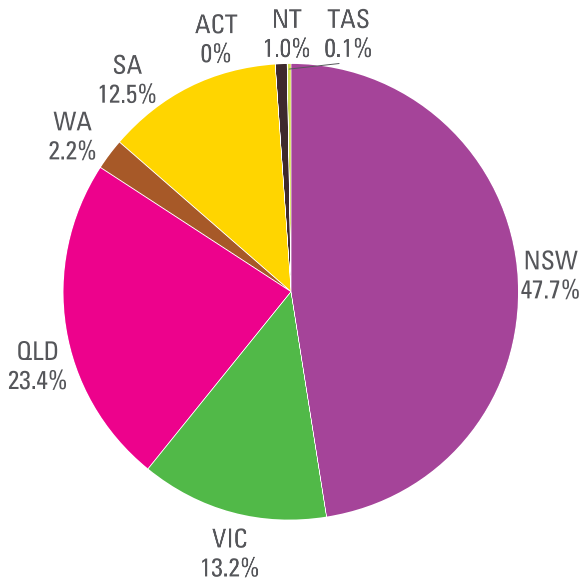


Table 44: Circus and Physical Theatre Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	265,055	47.7%	21.0%
VIC	73,278	13.2%	-20.0%
QLD	129,740	23.4%	2.9%
WA	12,095	2.2%	-5.0%
SA	69,349	12.5%	3.8%
ACT	-	0.0%	-0.2%
TAS	5,530	1.0%	-2.3%
NT	459	0.1%	-0.1%
Total	**555,506**	**100.0%**	

4.14 Comedy

4.14.1 National Overview

Julia Morris
Photo - Kurt Sneddon

The Comedy category experienced across-the-board declines between 2011 and 2012. Gross revenue fell by 6.4% from $52.00 million to $48.69 million. Total attendance fell by 3.0% while the average ticket price decreased from $55.07 to $53.55, or 2.8%.

Like previous years, revenue and attendances in the Comedy category largely came from the Melbourne International Comedy Festival and Sydney Comedy Festival. In particular, the Melbourne International Comedy Festival fell just shy of two consecutive record-breaking years. Major touring acts at these Festivals included Stephen K. Amos, Ross Noble and Steve Hughes.

Other notable comedians that toured in 2012 include Russell Brand, Tim Minchin, Wil Anderson and John Cleese. However, tours outside of the major Comedy Festivals were of a smaller scale compared to 2011. Notably, popular acts such as Billy Connolly, William Shatner and Arj Barker who toured in 2011 did not return to Australia in 2012.

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

Figure 59: Comedy
Gross Revenue (2009-2012)

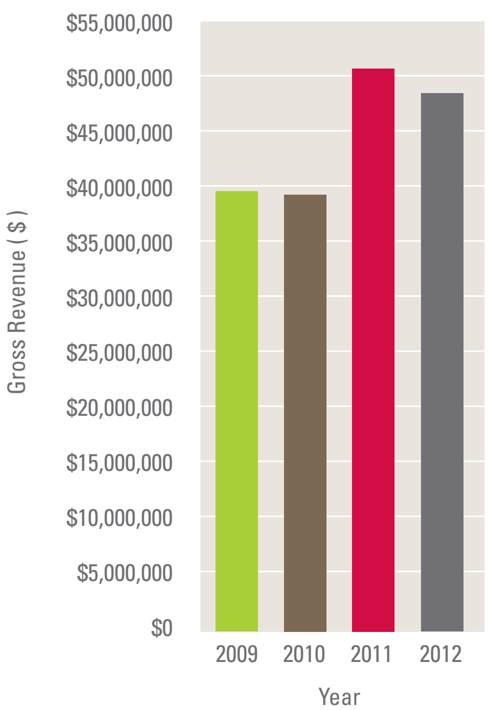


Figure 60: Comedy
Total Attendance (2009-2012)

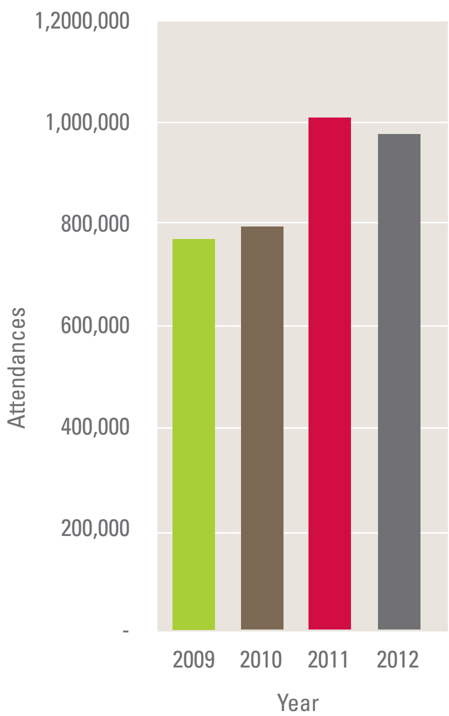


Table 45: Comedy - Revenue and Attendance (2009-2012)

	Revenue	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price	Growth (%)
2009	$39,570,117	N/A	661,445	N/A	$44.07	N/A
2010	$39,048,164	-1.3%	792,713	19.8%	$51.53	16.9%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	-6.4%	981,035	-3.0%	$53.55	-2.8%

4.14.2 State/Territory Breakdown

Figure 61: Comedy
Revenue by State/Territory (2012)

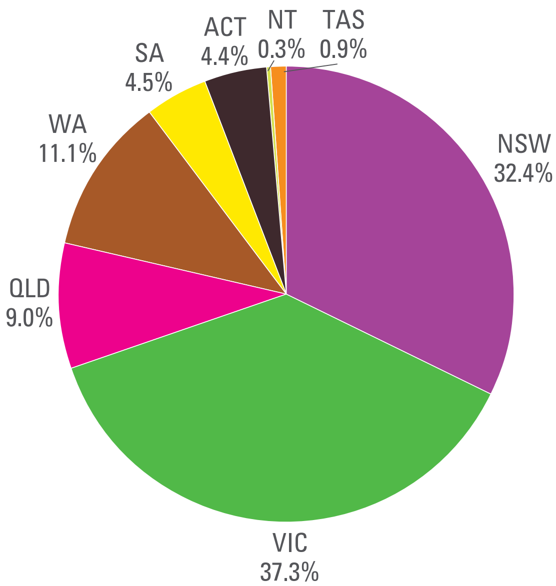


Table 46: Comedy
Revenue by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	$15,801,162	32.4%	1.2%
VIC	$18,159,639	37.3%	4.6%
QLD	$4,405,735	9.0%	-3.6%
WA	$5,387,874	11.1%	-1.0%
SA	$2,180,367	4.5%	-1.2%
ACT	$2,150,297	4.4%	0.3%
TAS	$167,889	0.3%	-0.7%
NT	$441,701	0.9%	0.2%
Total	**$48,694,665**	**100.0%**	

Figure 62: Comedy
Attendance by State/Territory (2012)

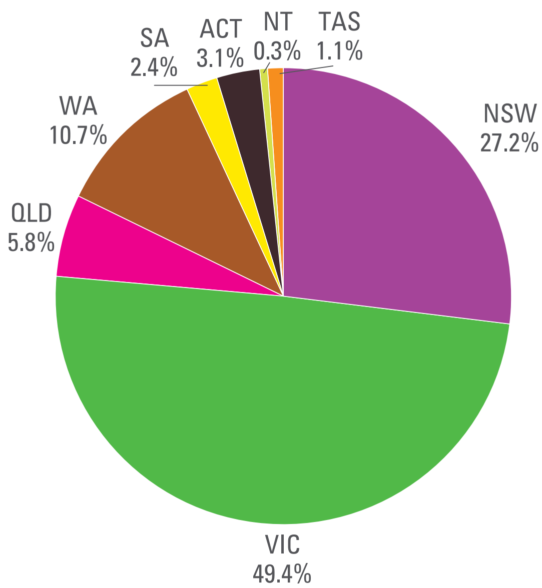


Table 47: Comedy
Attendance by State/Territory (2012)

State/ Territory	Revenue	Proportion	Industry Share Change from 2011
NSW	266,609	27.2%	4.6%
VIC	484,177	49.4%	0.8%
QLD	56,736	5.8%	-3.2%
WA	104,718	10.7%	0.4%
SA	23,906	2.4%	-2.1%
ACT	30,586	3.1%	-0.5%
TAS	3,028	0.3%	-0.2%
NT	11,275	1.1%	0.2%
Total	**981,035**	**100.0%**	

Survey Participants

Araluen Centre for Arts & Entertainment NT

Arts Projects Australia (WOMADelaide)

BASS SA

BOCS Ticketing WA

Canberra Ticketing

Cirque du Soleil

Darwin Entertainment Centre

Arts Centre Melbourne

Melbourne Recital Centre

News Ticketing (Moshtix and Foxtix)

Queensland Performing Arts Centre (Qtix)

SeatAdvisor Box Office (SABO)

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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