

Ticket Attendance and Revenue Survey Live Entertainment Industry in Australia

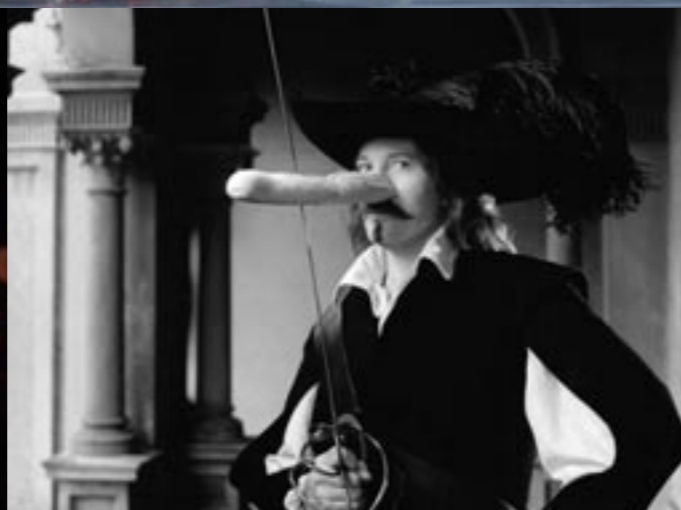
2005 REPORT

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Introduction

This is the second year of the Live Performance Australia (LPA) Ticket Attendance and Revenue Survey, which has already become an invaluable industry resource. The Survey reports revenue and attendance figures across ten key industry categories, aggregated on a quarterly basis.

The top line figures of the Survey, total gross revenue of \$834.3 million and 13.7 million tickets sold, once again demonstrate the tremendous cultural, social and economic contribution made by the Australian live performance industry.

The 2005 Report builds on the Survey data collected to date, allowing comparisons to be drawn between two consecutive years of data for the first time. The results for 2005 compare favourably with the previous report, with sales of tickets up 10%, total attendances increasing by 17.3% and gross revenue up by 21%.

The particularly strong results in the categories of non-classical (contemporary) music and musical theatre reiterate the vital role that commercial promoters and producers play in sustaining the live performance industry and provide further evidence in support of one of LPA's key policy priorities: the introduction of investment incentives for live production.

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

Ticketing companies provide their revenue and attendance data directly to the Survey consultants, excluding all events produced by AMPAG member companies. Each AMPAG company reports its own revenue and attendance figures to the Australia Council for the Arts, which collates the results and provides them to the Survey consultants.

While the Survey's transactional basis ensures that it is a more accurate measure than those previously applied to the industry, we also know that the Survey does not capture certain performances and therefore underestimates the value of the industry. In particular, the Survey does not count performances at many regional venues, nor revenue and attendance for events where tickets are sold directly by smaller self-ticketing venues or boutique ticketing agencies. As the Survey becomes more established, it is our intention to develop supplementary reports covering these significant industry sectors.

Our thanks are due to the participating companies (listed on page 38) who freely give of their time and resources to provide data to the Survey. Thanks also to the Survey Consultants – Professor Tom O'Regan, School of English, Media Studies and Art History, University of Queensland and Dr Stephen Cox – as well as Wayne McKenna at the Major Performing Arts Board of the Australia Council for the Arts, for their efforts in ensuring the accuracy of the data. Lastly, thank you to our survey sponsor, JUST SUPER, the entertainment industry super fund. The cooperation and commitment of all parties involved is greatly appreciated.

Suzanne Daley Carr
Acting Chief Executive
Live Performance Australia

October 2006

CLOCKWISE FROM TOP: *Jirri – Forgotten Land*, The Australian Ballet, photo: Jim McFarlane, dancers: Madeline Eastoe, Rachel Rawlins, Lana Jones; *Cyrano de Bergerac*, Melbourne Theatre Company; *Stuff Happens*, Company B and Newtheatricals in association with Lunchbox Theatricals; *Fledermaus*, Opera Australia, photo: Branco Gaica

Ticket Attendance and Revenue Results

This report covers the 2005 year of the *LPA Ticket Attendance and Revenue Survey: Live Entertainment Industry in Australia*. It also offers a comparison of data from January to December 2004 and the December quarter of 2003. It is based on data collected under the auspices of Live Performance Australia (LPA) (formerly the Australian Entertainment Industry Association). This survey reports on paid attendance and associated revenue data.

The National Attendance and Revenue report for 2005 is presented in two sections. The first section presents the attendance and revenue data aggregated across 2005 for each of the ten live performance event categories collected in this survey. The second section of the report presents data for each quarter of the survey to date. These data are then discussed for each of the ten event categories.

1. Total Revenue and Attendance for 2005 and 2004

Total Revenue and Attendance at the ten event categories for live entertainment events held within Australia in 2005 are provided below in Table 1. In 2005, a total of 13,762,410 people paid for tickets to attend a live performance event, there were a total of 2,046,380 complimentary, sponsor and zero priced tickets, representing 15,808,799 tickets overall, generating total revenue of \$834,337,206.

In 2004, a total of 12,508,461 people paid for tickets to attend a live performance event, there were a total of 968,770 complimentary, sponsor and zero priced tickets, totalling 13,477,231 tickets overall, and generating total revenue of \$689,599,070 (see Table 2).

Compared to 2004, sales of tickets in 2005 were up 10%, total attendances increased by 17.3%, and gross revenue was up by 21%.

Table 1. Total Revenue and Attendance for 2005

Category description	Total Tickets (No.)	Total Tickets (%)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (%)
Children's/Family	1,271,239	8.0	1,213,488	\$43,108,863	5.2%
Classical music	1,154,340	7.3	1,027,226	\$54,395,768	6.5%
Non-classical music	3,924,276	24.8	3,444,995	\$287,201,319	34.4%
Musical theatre	2,460,314	15.6	2,342,198	\$178,032,172	21.3%
Theatre	2,117,854	13.4	1,945,282	\$73,988,892	8.9%
Ballet and Dance	930,639	5.9	844,640	\$44,563,085	5.3%
Opera	531,595	3.4	491,544	\$46,390,544	5.6%
Multi-category festivals	157,228	1.0	132,126	\$5,170,934	0.6%
Single-category festivals	269,208	1.7	192,366	\$12,128,384	1.5%
Special events/Other	2,992,097	18.9	2,128,545	\$89,357,246	10.7%
Total National	15,808,790	100.0	13,762,410	\$834,337,206	100.0

Table 2. Total Revenue and Attendance for 2004

Category description	Total Tickets (No.)	Total Tickets (%)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (%)
Children's/Family	515,276	3.8	505,224	\$10,737,662	1.6
Classical music	1,062,071	7.9	969,076	\$41,875,659	6.1
Non-classical music	2,737,873	20.3	2,530,118	\$195,058,791	28.3
Musical theatre	1,847,505	13.7	1,817,052	\$138,718,880	20.1
Theatre	2,202,812	16.3	2,038,150	\$89,417,616	13.0
Ballet and Dance	682,755	5.1	612,367	\$30,664,060	4.4
Opera	629,808	4.7	574,582	\$62,562,433	9.1
Multi-category festivals	483,858	3.6	460,020	\$14,842,476	2.2
Single-category festivals	190,260	1.4	164,826	\$9,015,128	1.3
Special events/Other	3,125,013	23.2	2,837,046	\$96,706,366	14.0
Total National	13,477,231	100.0	12,508,461	\$689,599,070	100

Paid Ticket Sales 2005 and 2004

The four event categories with the largest paid attendance in 2005 were Non-classical music, Musical theatre, Theatre, and Special events/Other, as shown in Figure 1 below. Together, these four categories accounted for 71.7% of all tickets sold in 2005. This compared to 73.7% of all tickets sold in 2004 (see Figure 2).

Figure 1. Total Paid Tickets by Event Category 2005 (Year) %

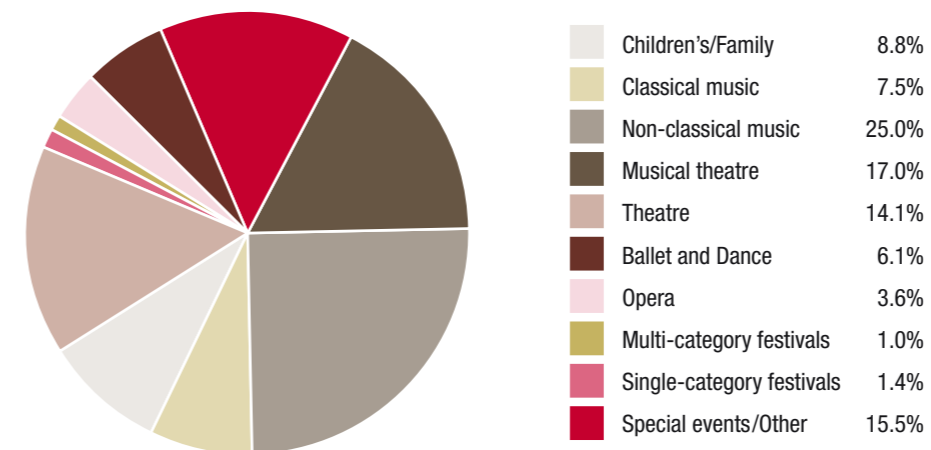


Figure 2. Total Paid Tickets by Event Category 2004 (Year) %

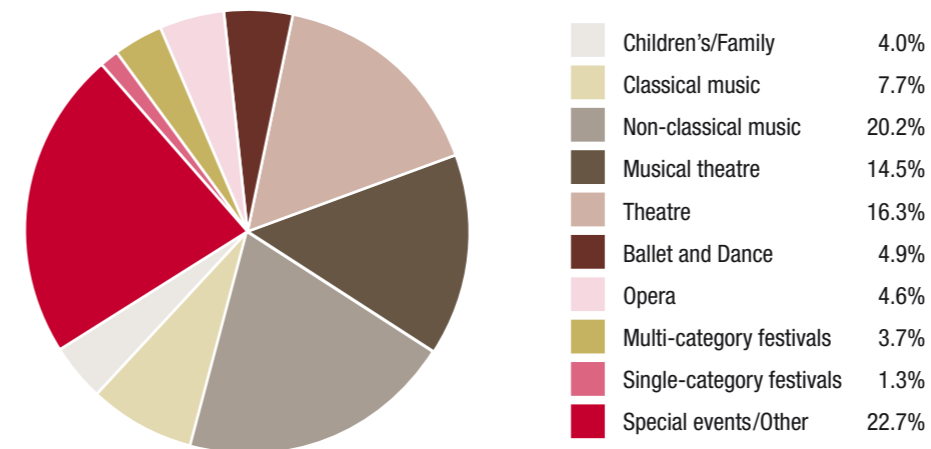


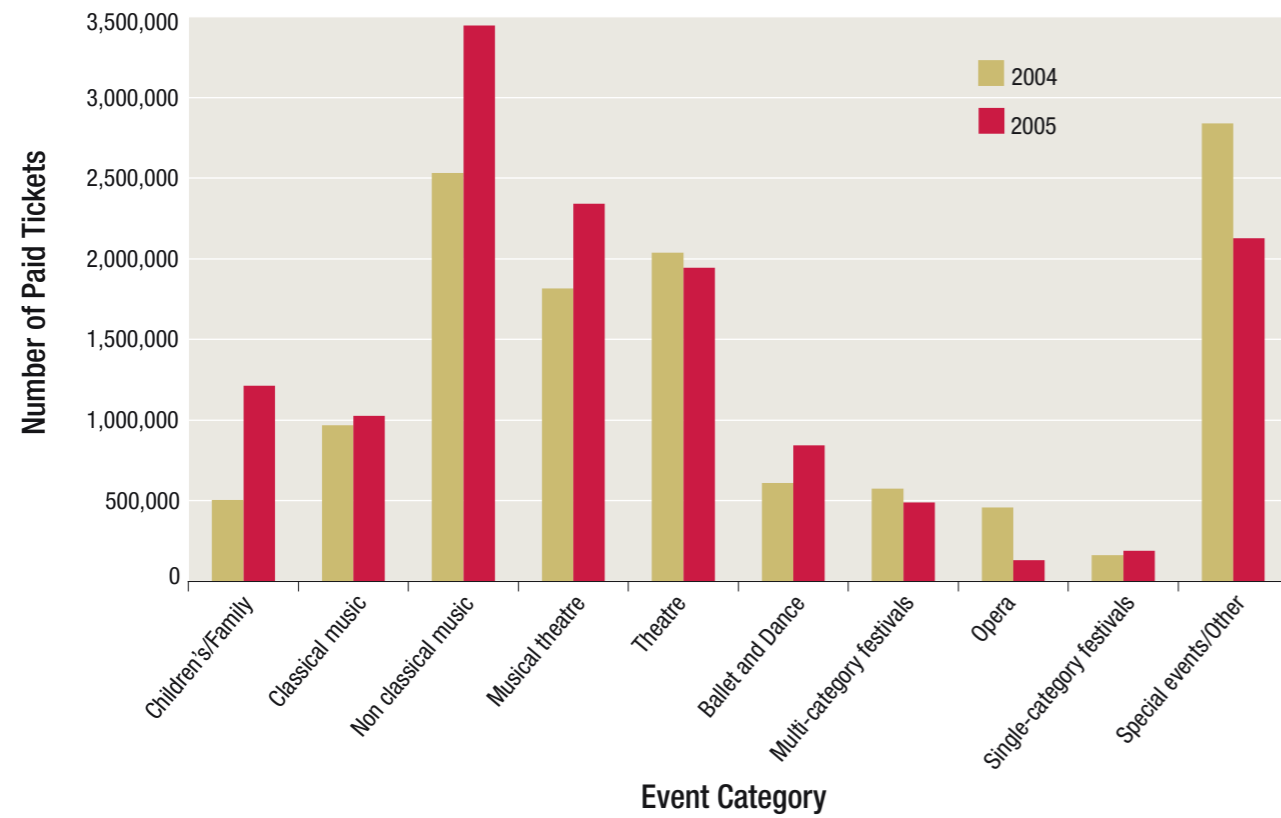
Figure 3, below, presents the total number of ticket sales (paid tickets) in each event category for the calendar years of 2004 and 2005. Overall 2005 showed a 10% increase in paid ticket sales over 2004.

The largest increases in paid tickets in percentage terms occurred in Children's/Family, which exhibited a 140% increase in paid tickets in 2005 over 2004. Other categories also showed large increases, with Ballet and Dance increasing by 37.9%, Non-classical music increasing by 36.2%, and Musical theatre

increasing by 28.9%. The latter two categories accounted for the majority of the actual increase in overall ticket sales, as these are two of the largest event categories.

Some categories showed large percentage decreases in the number of tickets sold. Multi-category festivals decreased by 71.3%, although this accounted for only a relatively small number of actual tickets. Special events/Other events decreased by 25% in the number of paid tickets in 2005 compared to 2004.

Figure 3. Total Paid Tickets by Event Category 2004, 2005 (Number)



Gross Revenue 2005

In 2005, the majority of Gross Revenue was generated from four event categories: Non-classical music, Musical theatre, Special events/Other and Theatre. Together, these four categories accounted for 75.3% of total Gross Revenue across all event categories in 2005 (see Figure 4). In 2004, these same four categories generated 75.4% of total revenue for that year (see Figure 5).

Figure 4. Gross Revenue by Event Category 2005 Year (%)

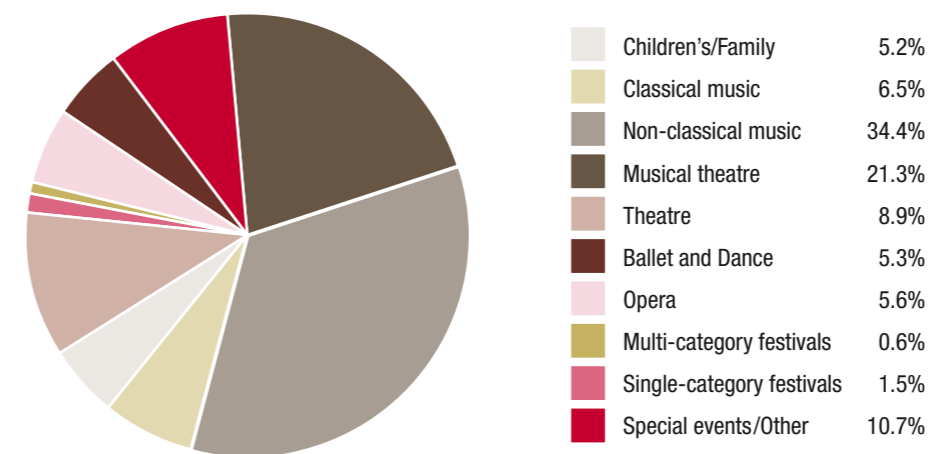


Figure 5. Gross Revenue by Event Category 2004 Year (%)

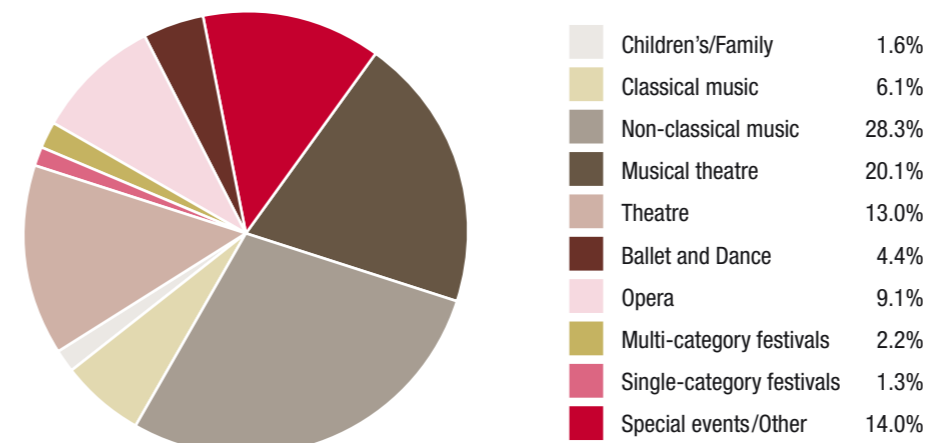
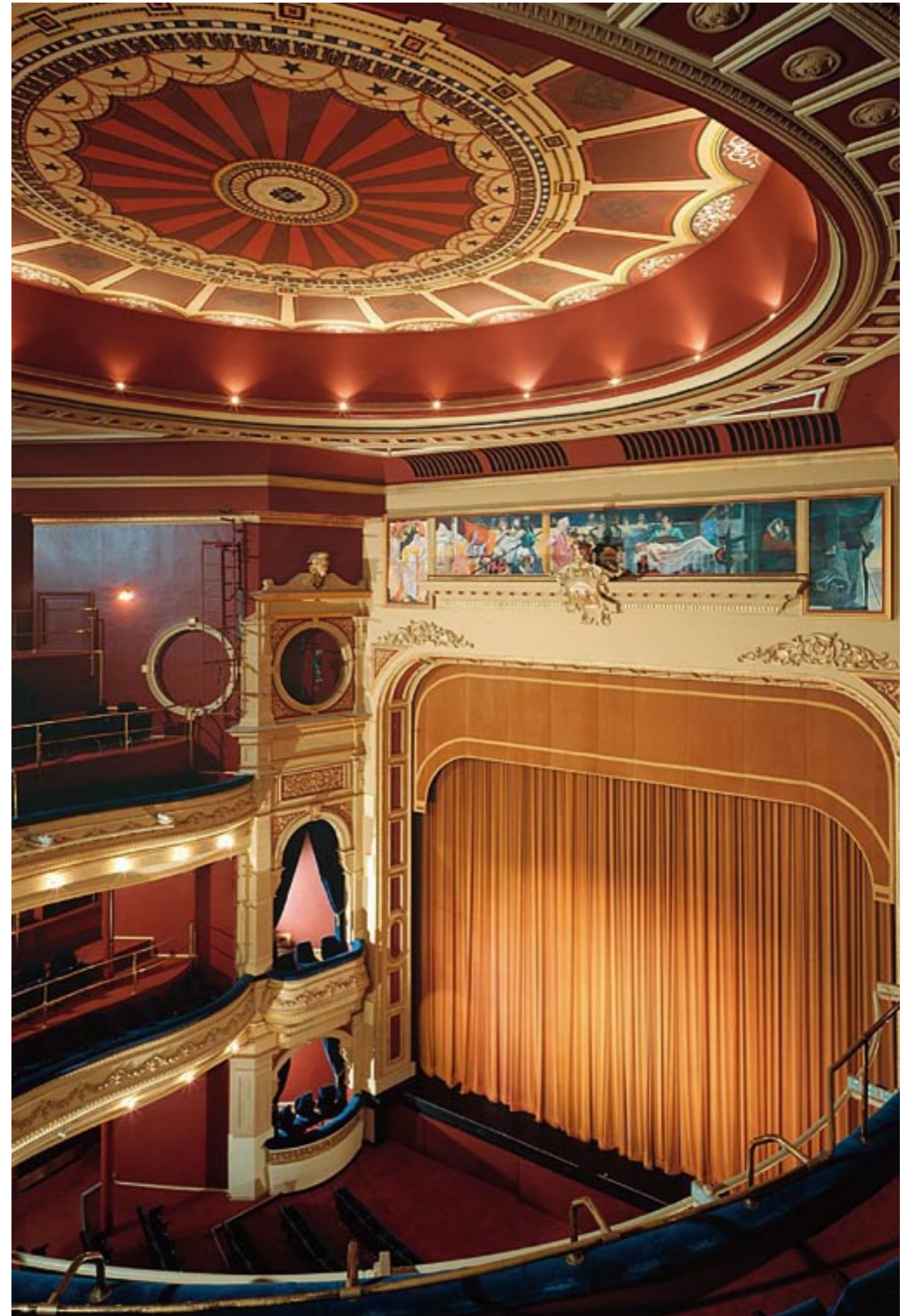
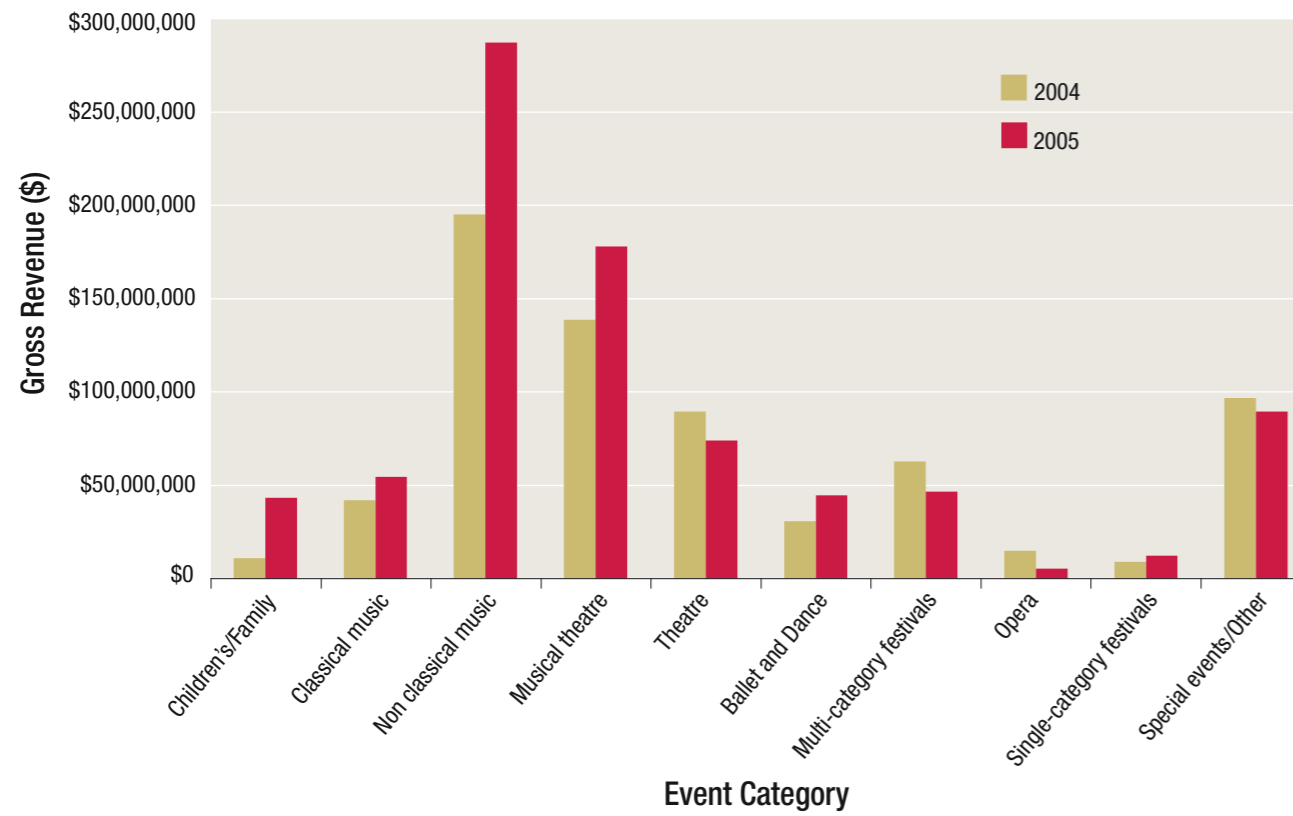


Figure 6, below, presents the Gross Revenue generated by each event category for the calendar years 2005 and 2004. The largest increases in gross revenue in percentage terms occurred in Children's/Family, which exhibited a 301.5% increase in revenue in 2005 over 2004. This large percentage increase is off a low revenue base in 2004 and accounts for a modest amount of actual revenue increase. Other categories also showed large percentage increases, with Ballet and Dance increasing 45.3%, Non-classical music increasing by 47.2%, and Musical theatre increasing by

28.3%. The latter two categories accounted for the majority of the actual increase in overall revenue, as these are two of the largest event categories.

Some categories showed large percentage decreases in the revenue generated. Multi-category festivals decreased by 65.2%, although this accounted for only a relatively small amount of actual revenue. Opera decreased by 25.8% in revenue in 2005 from 2004, and Theatre decreased by 17.3% in revenue.

Gross Revenue By Event Category 2004 and 2005 Year (\$)



2. Quarterly Attendance and Revenue Data

The remainder of the report presents data for each quarter of the survey to date, from December 2003 through to December 2005. The first section presents data aggregated across all event categories, and then the data for each category is presented separately. At the end of the report are two graphs which collate the individual category data to assist with cross-category comparisons.

The following graph (Figure 7) presents the number of Paid, Zero price and Total tickets for each quarter in 2005 and 2004 and for the December quarter in 2003. The number of tickets bought across all events in 2005 was highest in the first two quarters, and then steadily fell away after that. In 2004 sales built up to the September quarter and then slightly fell towards the end of the year.

Figure 7. Attendance December Quarter 2003 – December Quarter 2005

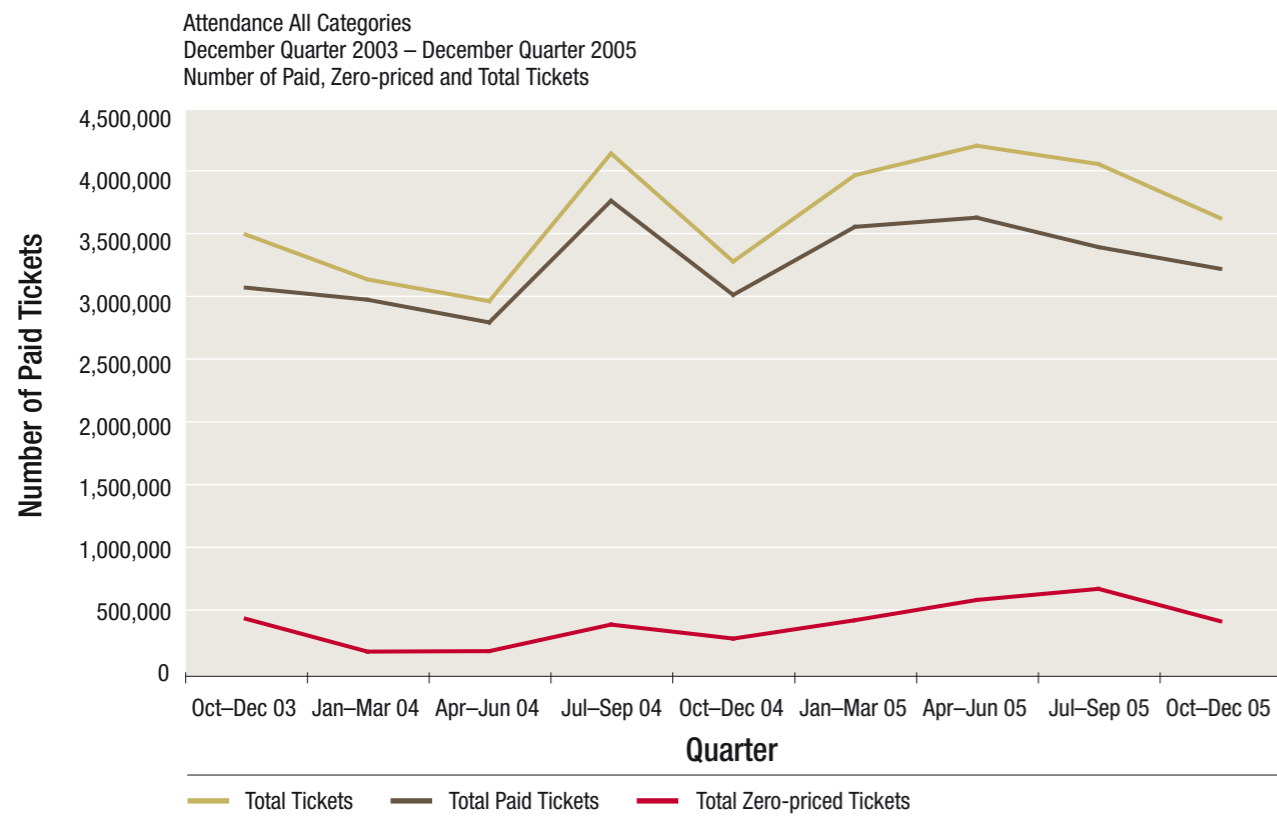
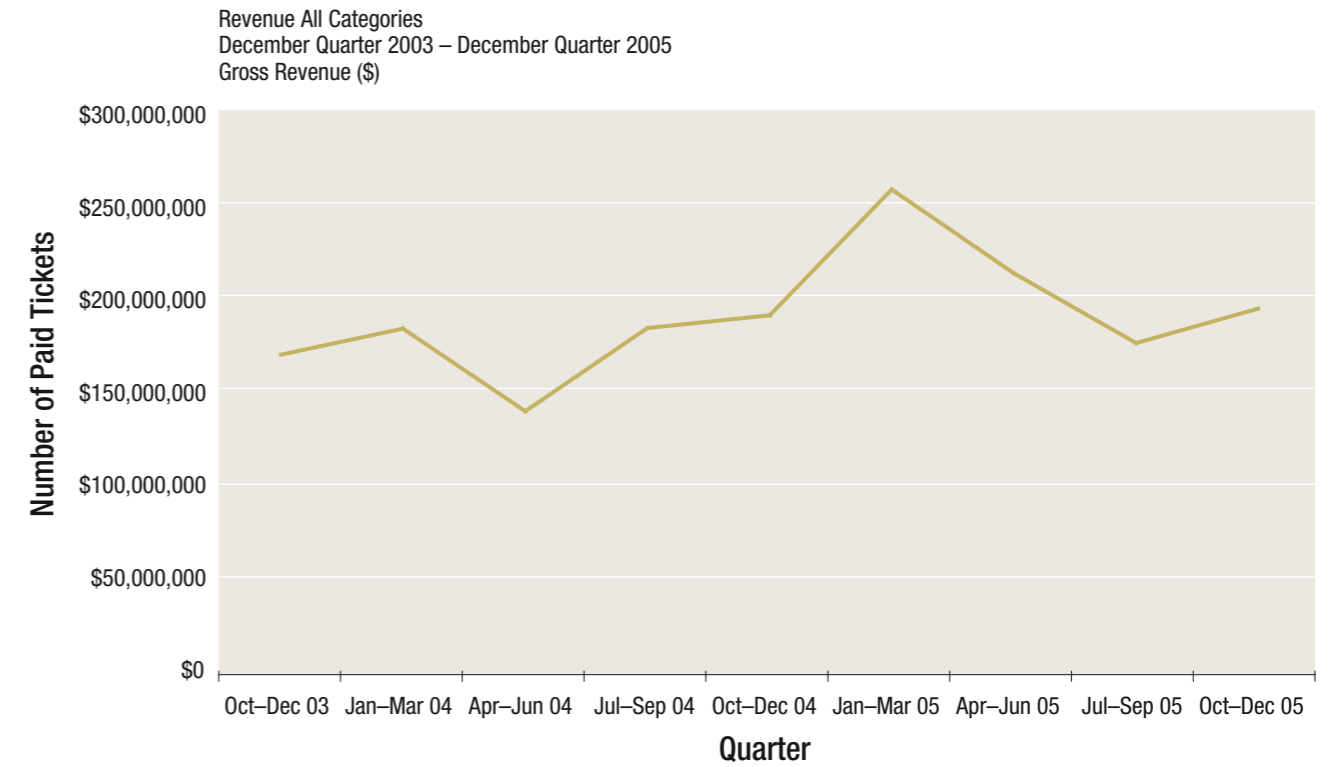


Figure 8 below illustrates total revenue across all quarters. Gross revenue in 2005 was highest in the March quarter and fell away from there, recovering slightly at the end of the year. In 2004, gross revenue was steady for the March and September quarters, with a drop in the June quarter and a rise at the end of the year.

Figure 8. Revenue December Quarter 2003 – December Quarter 2005



Quarterly Data for Individual Event Categories

The data for each event category are presented separately for the remainder of the report. Each table provides the data for that event category for data collected for the years 2005 and 2004, and from the December quarter 2003. After the descriptions of the data for each category, two graphs are presented which show the revenue and attendance totals for the event category across these 9 quarters.

Children's/Family

Children's/Family events accounted for 8.8% of ticket sales in 2005. This category generated 5.2% of gross revenue and though the fifth largest category in terms of ticket sales, was eighth in terms of gross revenue. The majority of ticket sales and gross revenue within this category were generated in the September and December quarters.

Compared to 2004, 2005 showed an extremely large increase in the number of tickets sold and in associated revenue. Paid tickets increased by 140.2% and total revenue increased by 301.5% in 2005 from 2004. This increase meant that Children's/Family events increased from 4% of total paid tickets in 2004 to 8.8% in 2005, while the proportion of total revenue rose 1.6% in 2004 to 5.2% in 2005.



The Green Sheep, Windmill Performing Arts

Table 3. Children's/Family: Attendance and Revenue December Quarter 2003 – December Quarter 2005

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan-Mar 05	64,099	1.6	62,765	\$1,491,346	0.6
Apr-Jun 05	231,505	5.5	220,429	\$5,346,222	2.5
Jul-Sep 05	603,836	14.9	581,098	\$26,818,717	15.4
Oct-Dec 05	371,799	10.3	349,196	\$9,452,577	4.9
2005 Total	1,271,239		1,213,488	\$43,108,863	
Jan-Mar 04	65,796	2.1	64,490	\$1,596,263	0.9
Apr-Jun 04	63,456	2.1	60,682	\$994,206	0.7
Jul-Sep 04	167,950	4.1	165,216	\$3,914,058	2.2
Oct-Dec 04	218,074	6.7	214,836	\$4,233,135	2.2
2004 Total	515,276		505,224	\$10,737,662	
Oct-Dec 03	315,589	9.1	312,579	\$8,951,785	5.3

Figure 9. Children's/Family Attendance December Quarter 2003 – December Quarter 2005

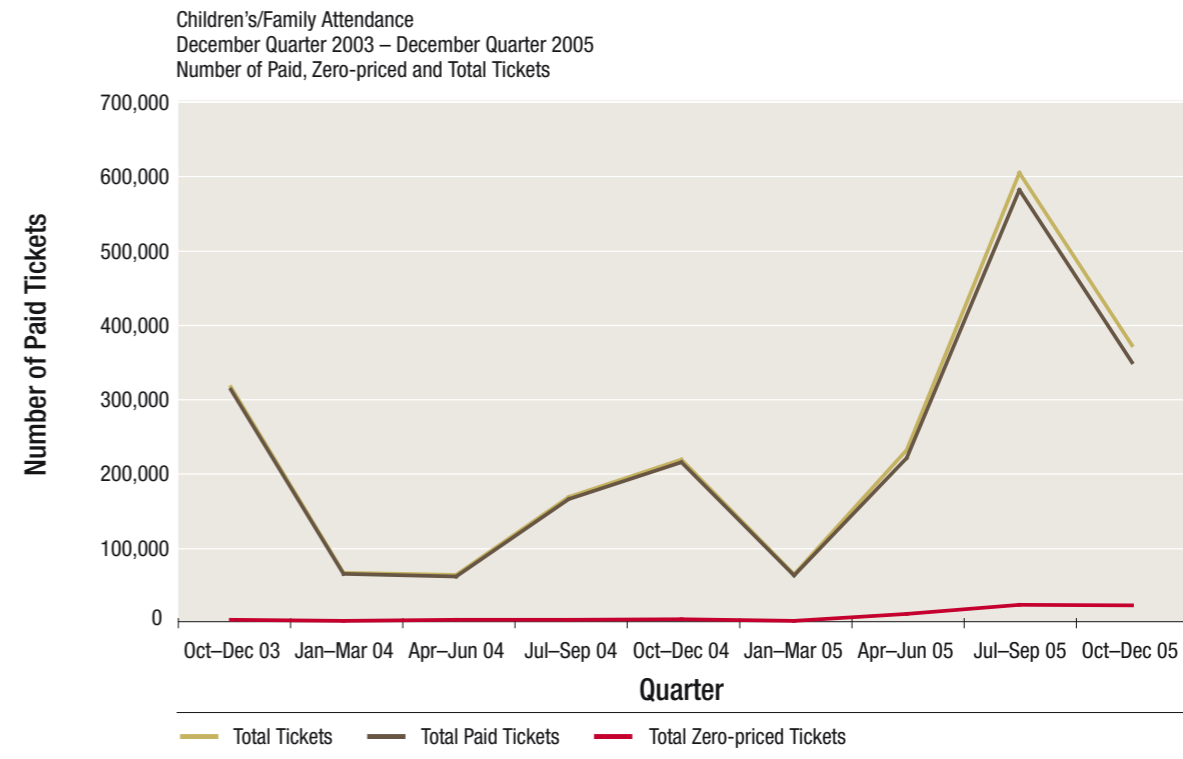


Figure 10. Children's/Family Revenue December Quarter 2003 – December Quarter 2005



Classical Music

Accounting for 7.5% of ticket sales, Classical music was the sixth largest category in terms of ticket sales and the fifth largest in terms of gross revenue for 2005, generating 6.5% of total revenue. Although quite stable across the middle of the year, both ticket sales and gross revenue were higher in the September and December quarters in 2005. Both attendance and revenue increased significantly from 2004. The number of paid tickets increased by 6%, and this generated an increase in revenue of 29.9% in 2005.



Sydney Symphony with Maestro Gelmetti, photo: Keith Saunders

**Table 4. Classical Music:
Attendance and Revenue December Quarter 2003 – December Quarter 2005**

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	216,644	5.5	194,272	\$10,097,210	3.9
Apr–Jun 05	288,392	6.9	258,117	\$11,957,273	5.7
Jul–Sep 05	350,819	8.7	308,040	\$14,869,039	8.6
Oct–Dec 05	298,485	8.3	266,797	\$17,472,246	9.1
2005 Total	1,156,782		1,027,226	\$54,395,768	
Jan–Mar 04	203,215	6.5	185,470	\$8,085,740	4.5
Apr–Jun 04	282,554	9.6	260,095	\$11,090,957	8.1
Jul–Sep 04	333,534	8.1	301,890	\$14,005,394	7.7
Oct–Dec 04	242,768	7.4	221,621	\$8,693,567	4.6
2004 Total	1,062,071		969,076	\$41,875,659	
Oct–Dec 03	248,722	7.1	226,988	\$8,256,218	4.9

Figure 11. Classical Music Attendance December Quarter 2003 – December Quarter 2005

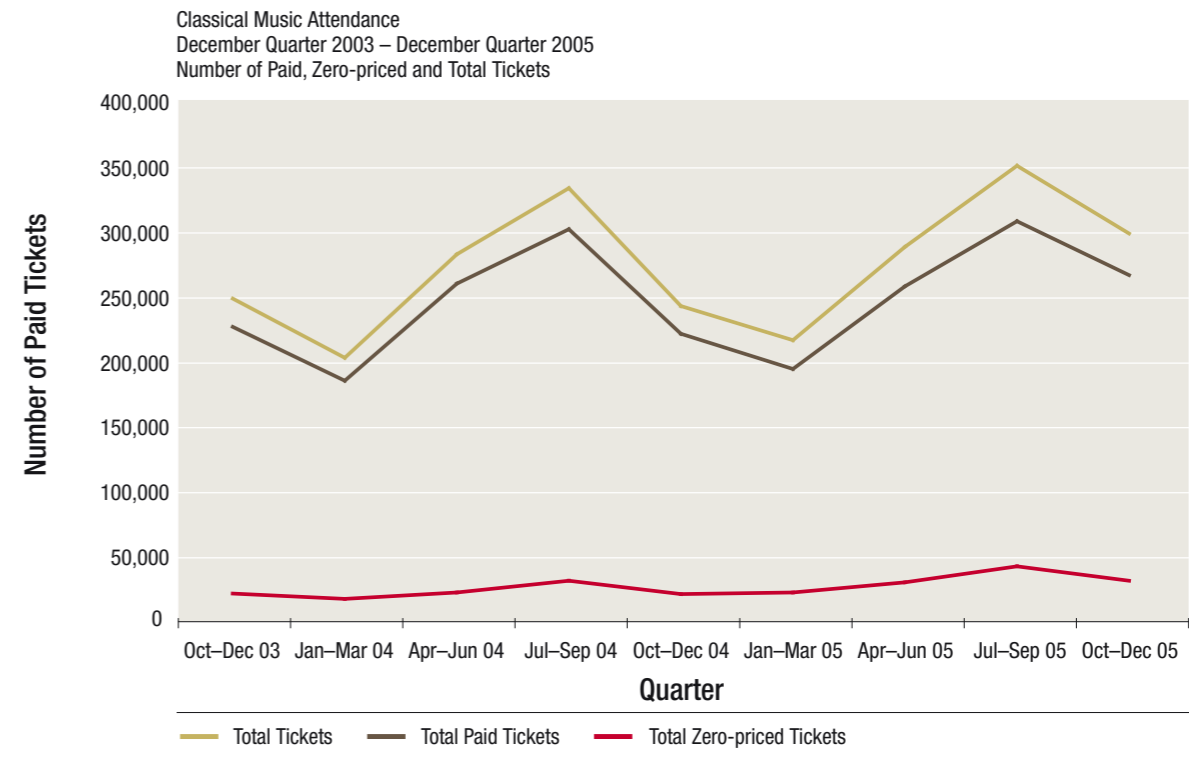
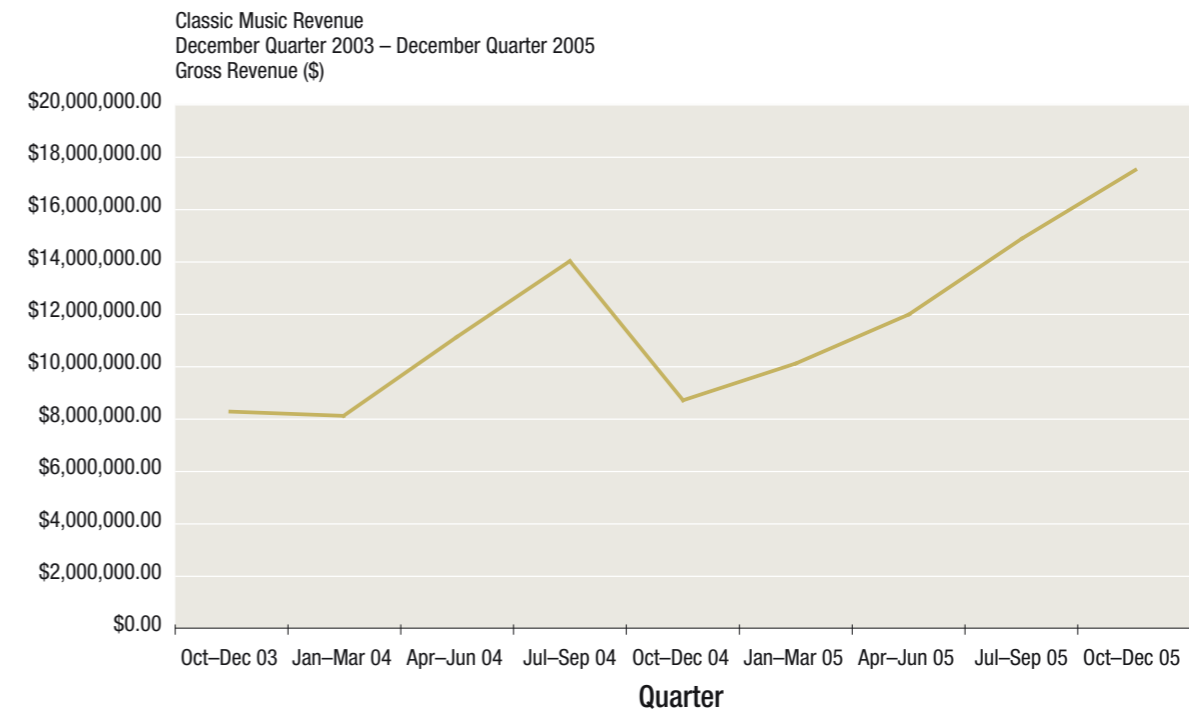


Figure 12. Classical Music Revenue December Quarter 2003 – December Quarter 2005



Non-Classical Music

Non-classical (contemporary) music sold the largest number of tickets of any category in 2005, selling almost 3.5 million tickets and with almost 4 million overall attendances. These sales represented 25.0% of ticket sales across all categories, an increase from 20.2% in 2004. This represented an increase of 36.2% in the number of tickets sold. Revenue from Non-classical music increased by 47.2% in 2005. In both 2005 and 2004 it was the largest generator of gross revenue in the survey, generating 34.4% of total revenue for the 2005 year, up from 28.3% in 2004.

There was a marked peak in both tickets sold and revenue in the March 2005 quarter, followed by much smaller sales and revenue through the year. There was an increase in the December quarter. This general pattern held for 2004 as well.



Delta Goodrem: The Visualise Tour, Dainty Consolidated Entertainment

Table 5. Non-Classical Music: Attendance and Revenue December Quarter 2003 – December Quarter 2005

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	1,466,335	37.1	1,313,895	\$123,079,907	48.0
Apr–Jun 05	845,309	20.1	724,606	\$65,203,477	30.8
Jul–Sep 05	606,038	15.0	511,440	\$34,484,702	19.8
Oct–Dec 05	1,006,594	27.8	895,054	\$64,433,232	33.5
2005 Total	3,924,276		3,444,995	\$287,201,319	
Jan–Mar 04	919,237	29.4	864,657	\$73,153,244	40.3
Apr–Jun 04	478,984	16.2	430,673	\$30,951,847	22.6
Jul–Sep 04	495,445	12.0	467,089	\$24,534,696	13.5
Oct–Dec 04	844,207	25.8	767,699	\$66,419,003	35.2
2004 Total	2,737,873		2,530,118	\$195,058,791	
Oct–Dec 03	951,882	27.3	861,665	\$65,604,674	39.1

Figure 13. Non-Classical Music Attendance December Quarter 2003 – December Quarter 2005

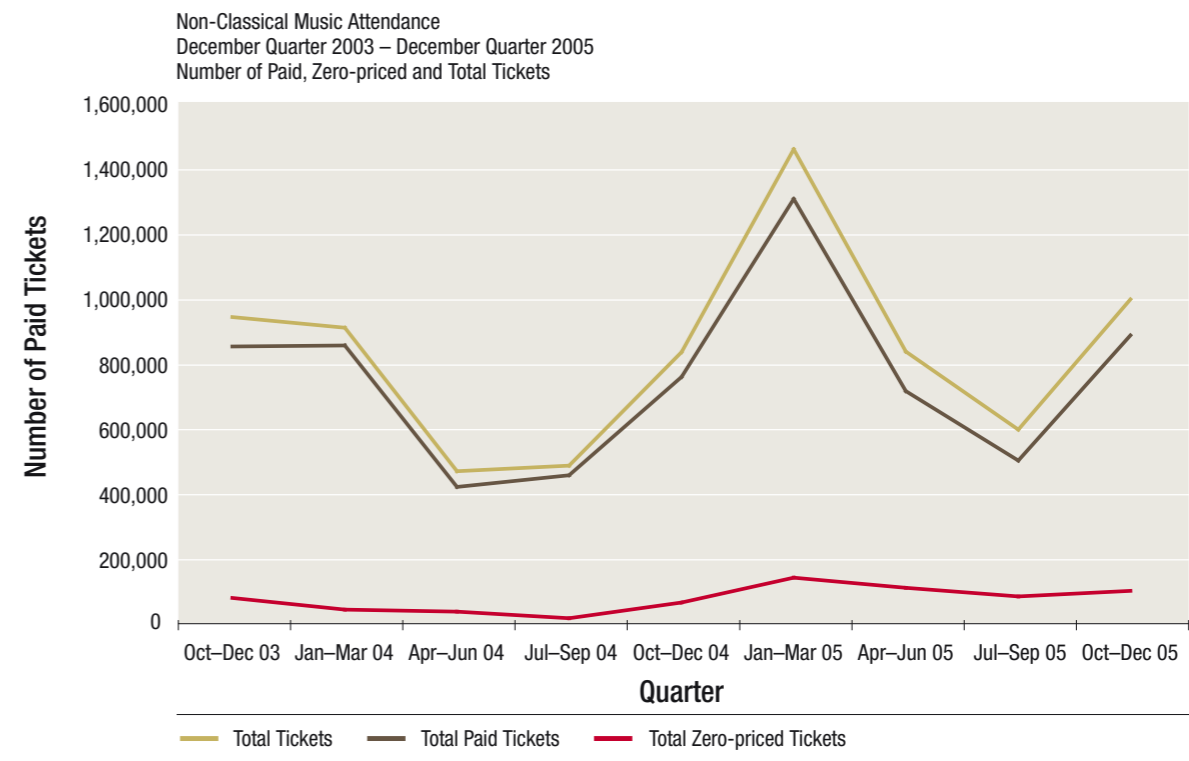


Figure 14. Non-Classical Music Revenue December Quarter 2003 – December Quarter 2005



Musical Theatre

Musical theatre generated the second largest gross revenue in 2005 and in 2004. It was the second largest event category in terms of ticket sales in 2005, up from fourth in 2004. In 2005, Musical Theatre generated 17% of paid tickets, up from 14.5% in 2004. This was a 28.9% increase in the number of paid tickets in the category from 2004 to 2005. Revenue also increased commensurately, up by 28.3%. After an increase from the March 2005 to the June 2005 quarter, attendance and revenue were relatively stable throughout the remainder of the year.



Dusty: The Original Pop Diva, Dusty Productions

**Table 6. Musical Theatre:
Attendance and Revenue December Quarter 2003 – December Quarter 2005**

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	537,959	13.6	518,298	\$39,790,370	15.5
Apr–Jun 05	653,141	15.6	615,873	\$50,055,045	23.7
Jul–Sep 05	657,584	16.2	621,343	\$45,088,831	25.9
Oct–Dec 05	611,630	16.9	586,684	\$43,097,926	22.4
2005 Total	2,460,314		2,342,198	\$178,032,172	
Jan–Mar 04	496,973	15.9	492,425	\$38,851,636	21.4
Apr–Jun 04	411,904	14.0	399,581	\$30,518,671	22.2
Jul–Sep 04	520,209	12.6	514,631	\$38,465,338	21.1
Oct–Dec 04	418,419	12.8	410,415	\$30,883,235	16.4
2004 Total	1,847,505		1,817,052	\$138,718,880	
Oct–Dec 03	452,636	13.0	449,474	\$34,236,174	20.4

Figure 15. Musical Theatre Attendance December Quarter 2003 – December Quarter 2005

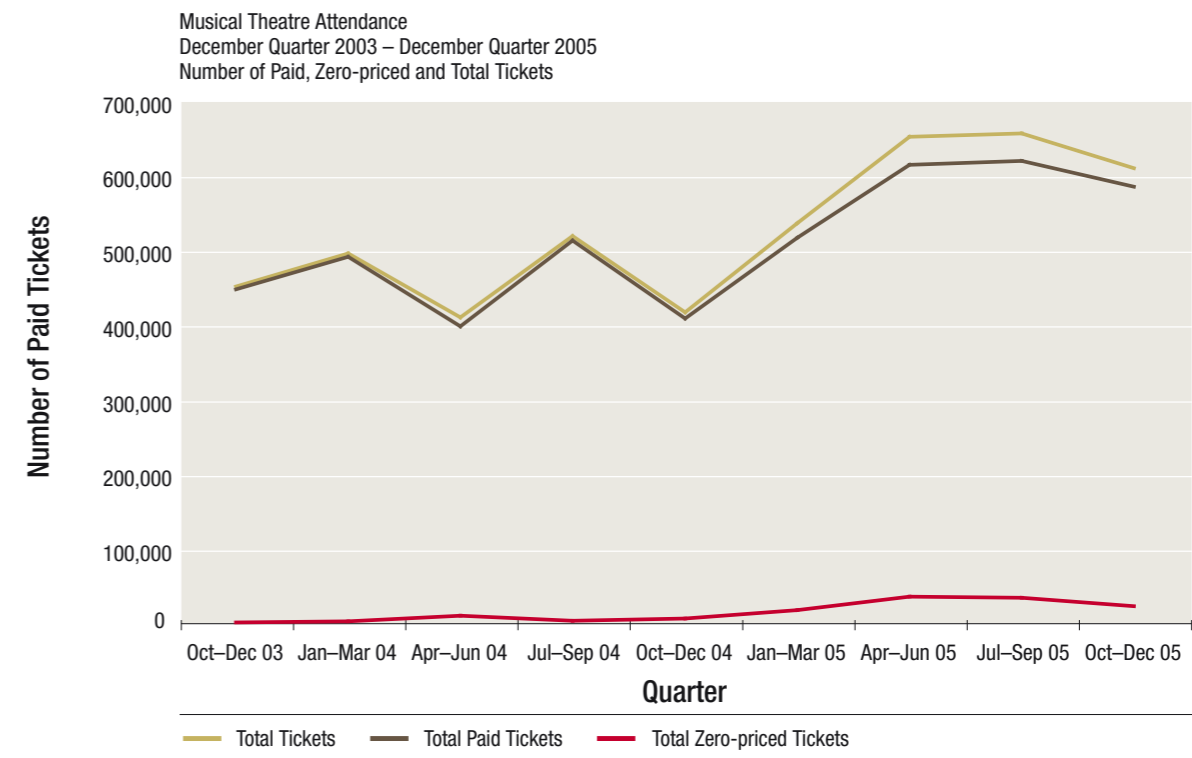
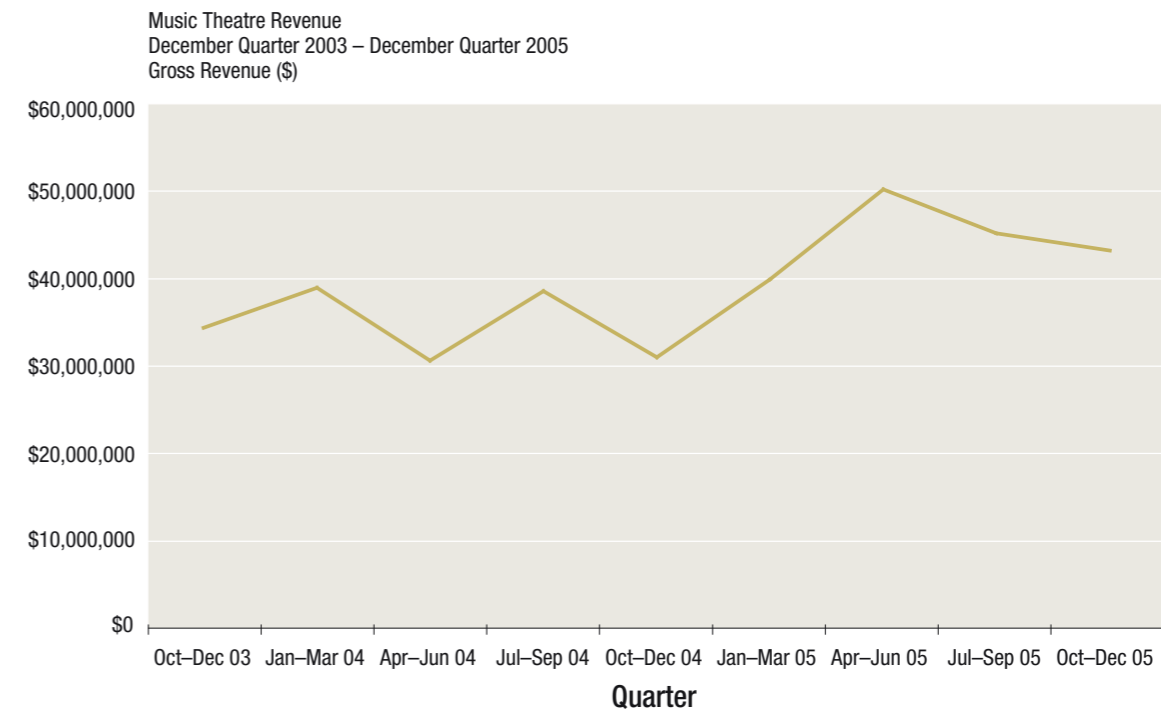


Figure 16. Musical Theatre Revenue December Quarter 2003 – December Quarter 2005



Theatre

Theatre had the fourth largest number of ticket sales and was also the fourth largest in terms of gross revenue generated in 2005, accounting for 14.1% and 8.9% respectively. In 2004 it had the third largest number of ticket sales and was fifth in terms of gross revenue. In 2005, ticket sales were higher in the first two quarters of the year than in the last two, while in 2004 ticket sales were higher in the middle quarters. Theatre revenue and attendance was down in 2005 compared to 2004. Total revenue from theatre decreased by 17.3% and paid attendances decreased by 4.6%.



The Cherry Orchard, Sydney Theatre Company, photo: Heidrun Lohr

**Table 7. Theatre:
Attendance and Revenue December Quarter 2003 – December Quarter 2005**

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	490,420	12.4	451,308	\$16,338,963	6.4
Apr–Jun 05	687,696	16.4	631,442	\$21,927,890	10.4
Jul–Sep 05	466,341	11.5	426,668	\$16,691,757	9.6
Oct–Dec 05	473,397	13.1	435,864	\$19,030,282	9.9
2005 Total	2,117,854		1,945,282	\$73,988,892	
Jan–Mar 04	526,390	16.8	491,890	\$18,132,804	10.0
Apr–Jun 04	544,608	18.4	503,126	\$24,928,114	18.2
Jul–Sep 04	653,250	15.8	597,957	\$26,892,638	14.8
Oct–Dec 04	478,564	14.6	445,177	\$19,464,060	10.3
2004 Total	2,202,812		2,038,150	\$89,417,616	
Oct–Dec 03	517,787	14.9	480,581	\$21,921,307	13.1

Figure 17. Theatre Attendance December Quarter 2003 – December Quarter 2005

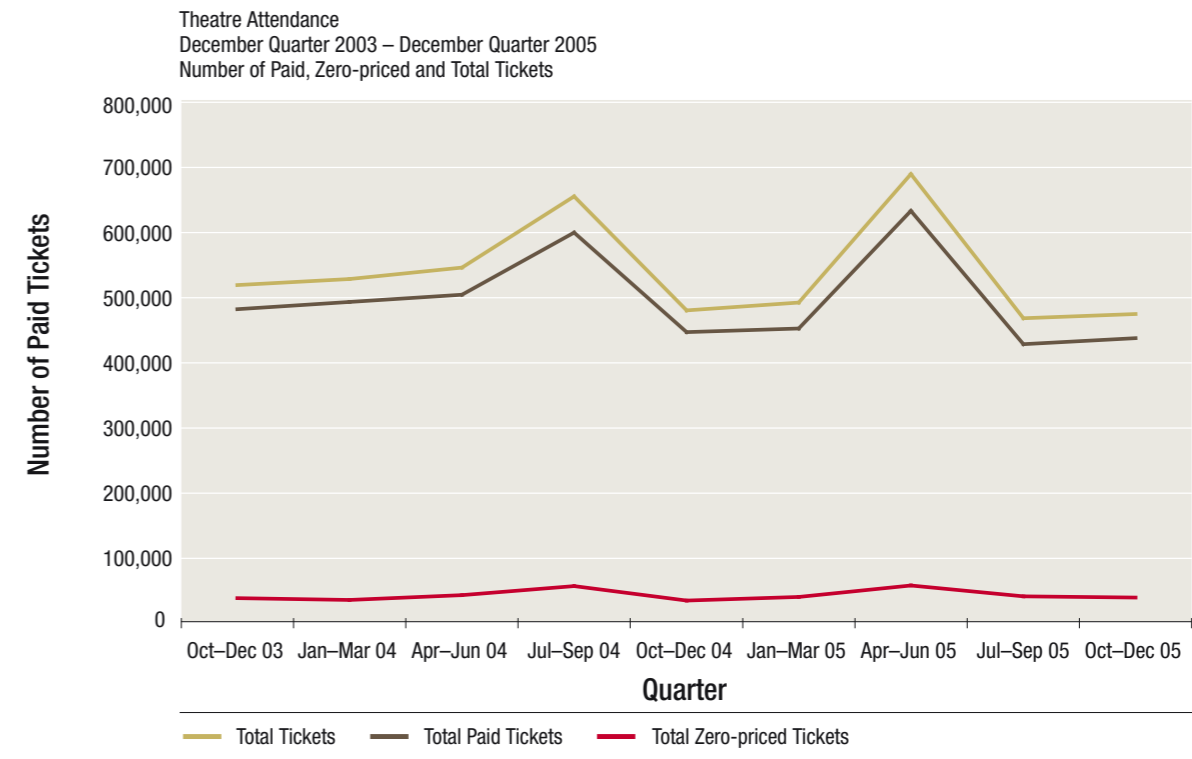
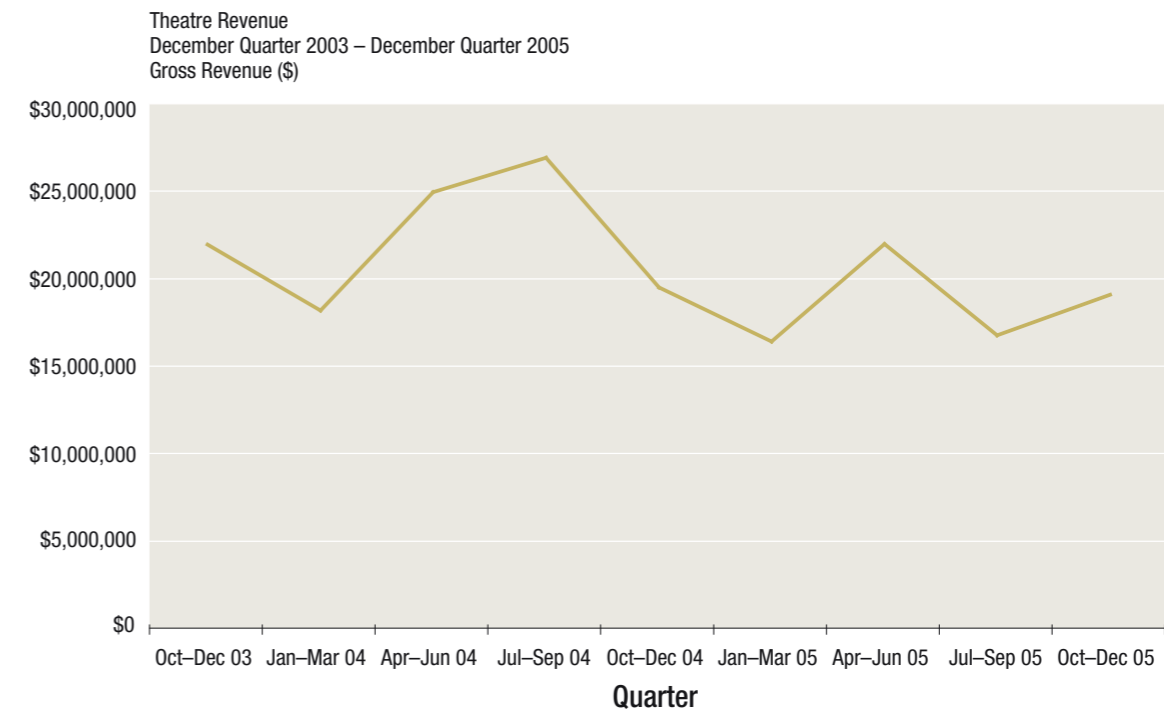


Figure 18. Theatre Revenue December Quarter 2003 – December Quarter 2005



Ballet and Dance

Both ticket sales and revenue increased substantially from 2004. Ticket sales in 2005 increased by 37.9% and total revenue by 45.3%. Ballet and Dance accounted for 6.1% of tickets sold in 2005, which represented 5.3% of gross revenue, making this category the seventh largest category in terms of ticket sold and revenue. In 2004, Ballet and Dance accounted for 4.9% of total ticket sales and generated 4.4% of gross revenue placing it sixth in terms of tickets sold and seventh in terms of revenue. In both years the second and third quarters of the year generated the majority of ticket sales and revenue.



Boomerang, Bangarra Dance Theatre, photo: Frances Lyonne

**Table 8. Ballet and Dance:
Attendance and Revenue December Quarter 2003 – December Quarter 2005**

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	77,312	2.0	70,900	\$3,104,008	1.2
Apr–Jun 05	286,816	6.8	260,598	\$15,041,812	7.1
Jul–Sep 05	339,443	8.4	305,899	\$14,710,525	8.5
Oct–Dec 05	227,068	6.3	207,243	\$11,706,740	6.1
2005 Total	930,639		844,640	\$44,563,085	
Jan–Mar 04	107,440	3.4	100,036	\$4,727,305	2.6
Apr–Jun 04	200,135	6.8	181,601	\$10,218,472	7.4
Jul–Sep 04	244,873	5.9	215,294	\$9,745,906	5.4
Oct–Dec 04	130,307	4.0	115,436	\$5,972,377	3.2
2004 Total	682,755		612,367	\$30,664,060	
Oct–Dec 03	134,580	3.9	120,449	\$5,554,041	3.3

Figure 19. Ballet and Dance Attendance December Quarter 2003 – December Quarter 2005

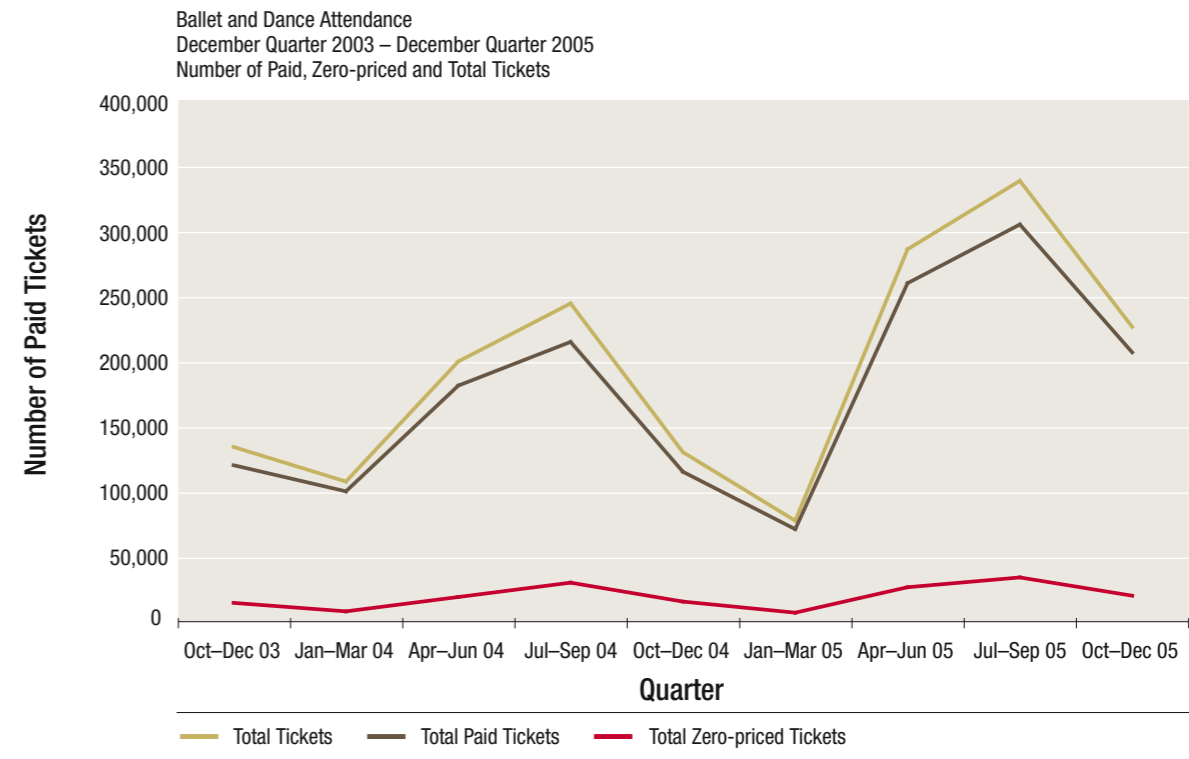
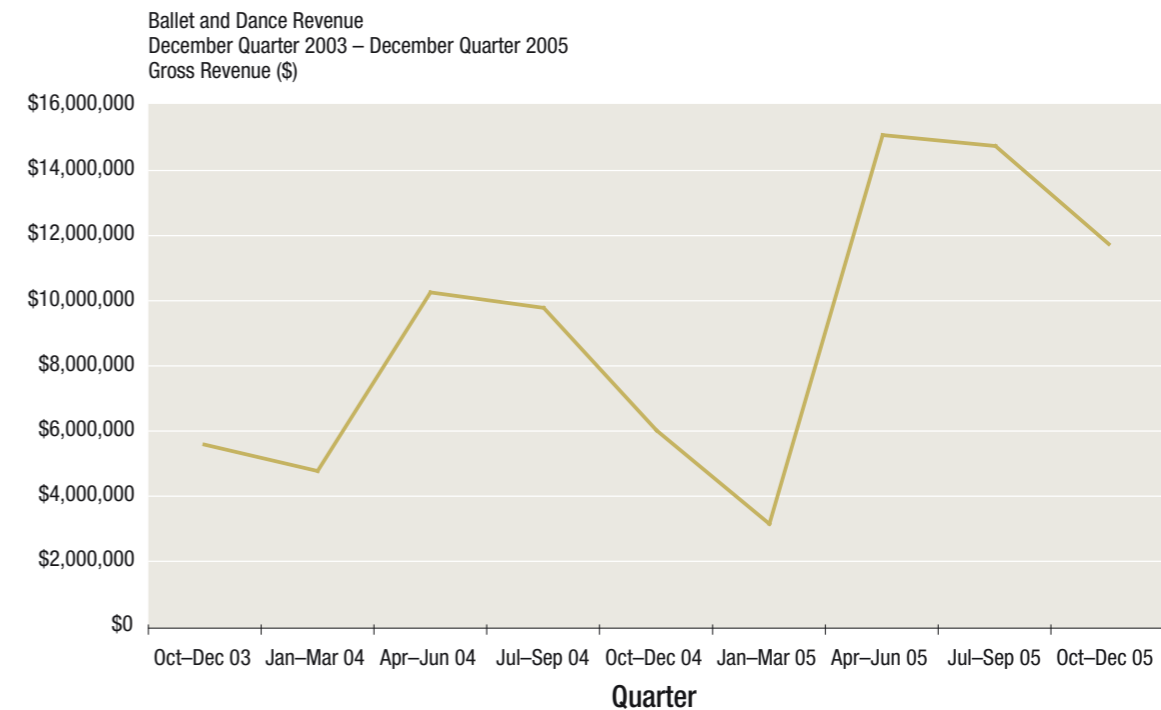


Figure 20. Ballet and Dance Revenue December Quarter 2003 – December Quarter 2005



Opera

Opera was one of the categories to experience a decline between 2004 and 2005, with ticket sales decreasing by 14.5% and revenue by 25.8%. Opera was the third smallest (8th largest) category by ticket sales in 2005, accounting for 3.6% of tickets sold, but the sixth largest in terms of gross revenue, accounting for 5.6% of revenue across the year. Ticket sales and gross revenue for Opera was stable across the first, third and fourth quarters, highest in the March quarter and smallest in the June quarter. In 2004 Opera accounted for 4.6% of ticket sales and 9.1% of gross revenue placing it as the fifth largest event category in terms of gross revenue.



La Voix Humaine, Opera Australia, photo: Jeff Busby

Table 9. Opera: Attendance and Revenue December Quarter 2003 – December Quarter 2005

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	129,283	3.3	120,689	\$13,017,297	5.1
Apr–Jun 05	115,530	2.8	106,601	\$8,335,002	3.9
Jul–Sep 05	131,840	3.3	121,152	\$12,290,466	7.1
Oct–Dec 05	154,942	4.4	143,102	\$12,747,779	6.6
2005 Total	531,595		491,544	\$46,390,544	
Jan–Mar 04	83,680	2.7	73,527	\$6,093,672	3.4
Apr–Jun 04	139,513	4.7	127,984	\$8,912,909	6.5
Jul–Sep 04	247,165	6.0	225,901	\$27,837,073	15.3
Oct–Dec 04	159,450	4.9	147,170	\$19,718,779	10.4
2004 Total	629,808		574,582	\$62,562,433	
Oct–Dec 03	183,210	5.3	132,830	\$11,440,029	6.8

Figure 21. Opera Attendance December Quarter 2003 – December Quarter 2005

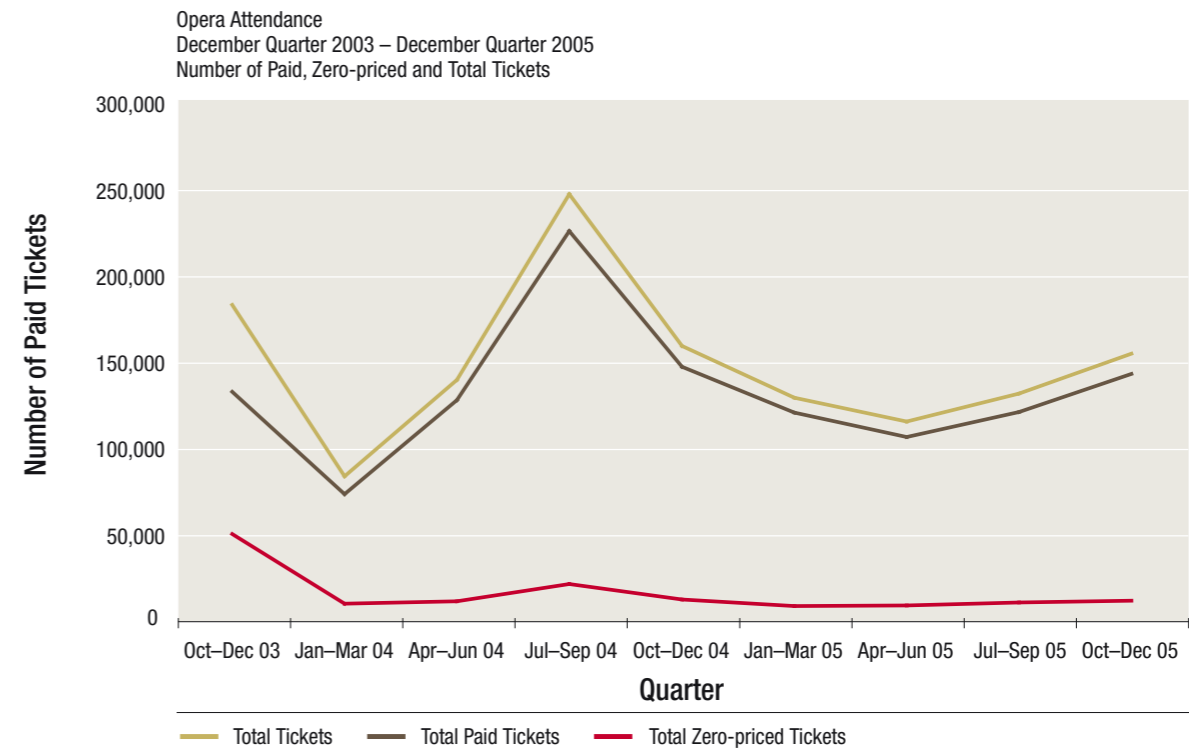
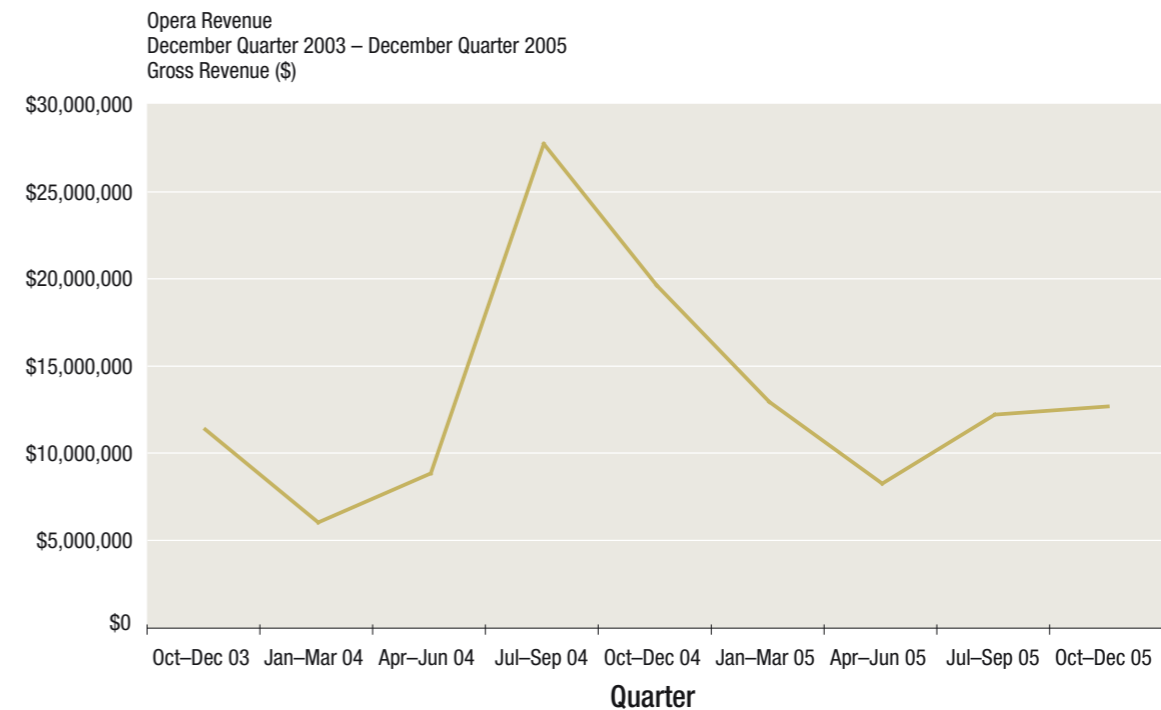


Figure 22. Opera Revenue December Quarter 2003 – December Quarter 2005



Festivals

Multi-category and Single-category festivals accounted for the smallest numbers of ticket sales in both 2005 (1% and 1.4% respectively) and 2004 (3.7% and 1.3%). Multi-category festivals exhibited a 71.3% drop in reported paid attendances in 2005 compared to 2004, and with an associated drop in revenue of 65.2% between the years.

In 2005 Single-category festivals fared better than Multi-category reversing the 2004 figures, Single-category festivals exhibited an increase of 16.7% with respect to ticket sales, and 34.5% in terms of revenue generated.

Both of these categories are relatively small categories in this survey. Therefore, although these are quite sizeable percentages, they represent only a modest amount of actual tickets and revenue. Attendance at festivals is significantly under-represented in the Survey, see Explanatory Note 9.



Small Metal Objects, Back to Back Theatre in association with Melbourne International Arts Festival, photo: Jeff Busby

**Table 10. Multi-Category Festivals:
Attendance and Revenue December Quarter 2003 – December Quarter 2005**

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	129,774	3.3	113,825	\$4,671,022	1.8
Apr–Jun 05	8,502	0.2	5,545	\$138,071	0.1
Jul–Sep 05	9,694	0.2	4,694	\$98,899	0.1
Oct–Dec 05	9,258	0.3	8,062	\$262,942	0.1
2005 Total	157,228		132,126	\$5,170,934	
Jan–Mar 04	420,301	13.4	400,138	\$12,704,014	7.0
Apr–Jun 04	24,706	0.8	24,706	\$447,281	0.3
Jul–Sep 04	21,352	0.5	20,915	\$1,085,432	0.6
Oct–Dec 04	17,499	0.5	14,261	\$605,748	0.3
2004 Total	483,858		460,020	\$14,842,476	
Oct–Dec 03	21,525	0.6	15,599	\$502,119	0.3

Figure 23. Multi-Category Festivals Attendance December Quarter 2003 – December Quarter 2005

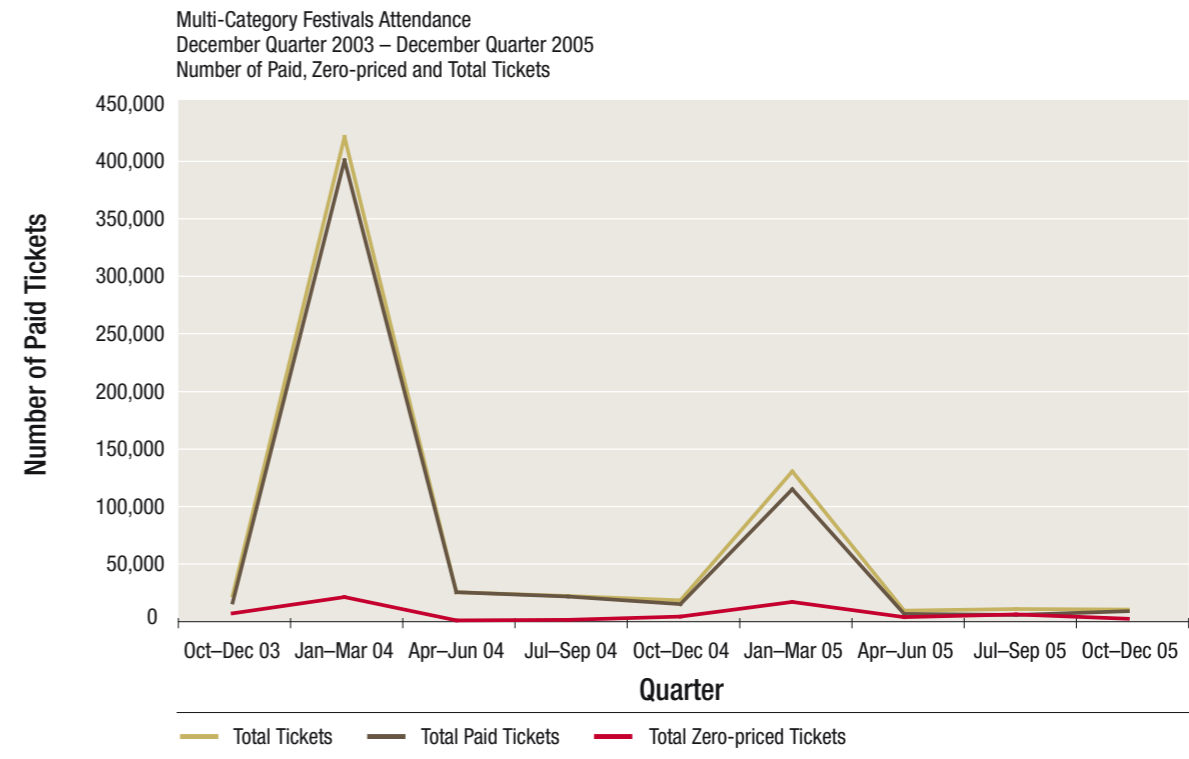
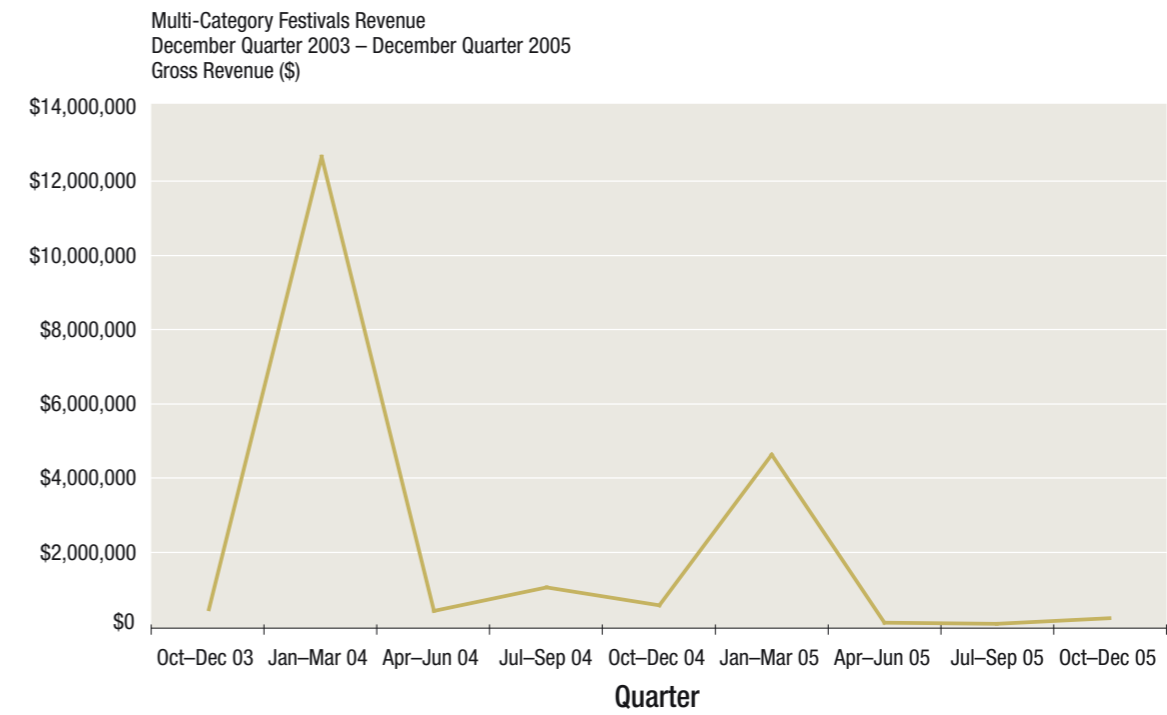


Figure 24. Multi-Category Festivals Revenue December Quarter 2003 – December Quarter 2005



Festivals (continued)



Escape, Queensland Music Festival

Table 11. Single-Category Festivals: Attendance and Revenue December Quarter 2003 – December Quarter 2005

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	79,288	2.0	61,329	\$4,614,559	1.8
Apr–Jun 05	110,708	2.6	77,128	\$2,605,611	1.2
Jul–Sep 05	14,120	0.3	12,995	\$1,409,169	0.8
Oct–Dec 05	65,092	1.8	40,914	\$3,499,045	1.8
2005 Total	269,208		192,366	\$12,128,384	
Jan–Mar 04	42,139	1.3	36,408	\$2,972,072	1.6
Apr–Jun 04	63,402	2.1	62,148	\$2,240,276	1.6
Jul–Sep 04	12,604	0.3	12,604	\$1,077,420	0.6
Oct–Dec 04	72,115	2.2	53,666	\$2,725,360	1.4
2004 Total	190,260		164,826	\$9,015,128	
Oct–Dec 03	125,082	3.6	109,771	\$4,355,936	2.6

Figure 25. Single-Category Festivals Attendance December Quarter 2003 – December Quarter 2005

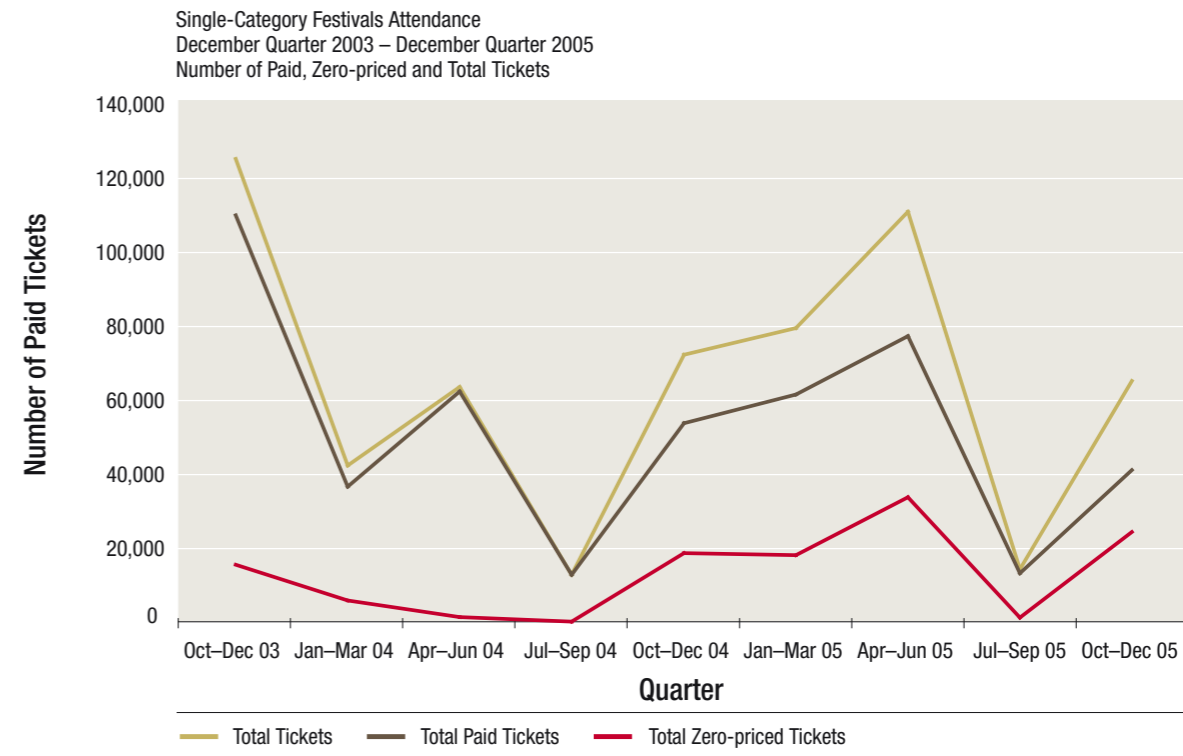
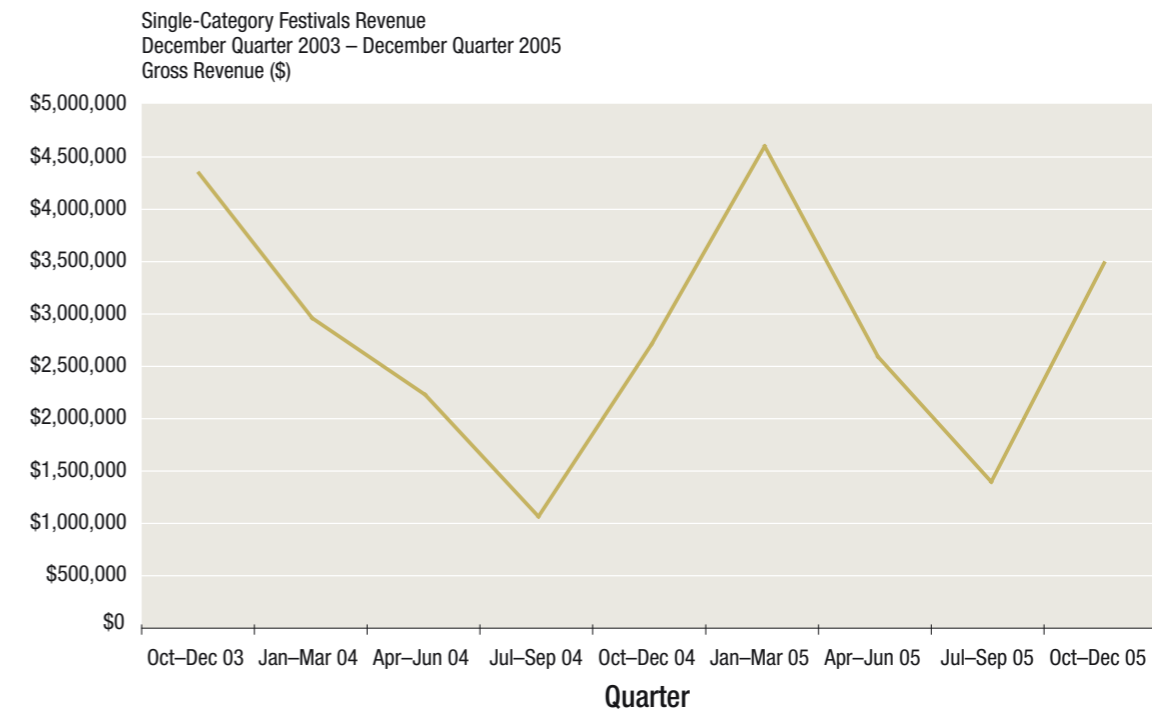


Figure 26. Single-Category Festivals Revenue December Quarter 2003 – December Quarter 2005



Special Events/Other

The Special events/Other category contains events that are unique presentations which do not fall into any other category. This means that the category is not homogenous in terms of the events that can be classified here, and could therefore be expected to exhibit some volatility. As a category Special events/Other is not strictly comparable with the other categories, but nonetheless represents a valid part of the live entertainment industry. The data within this category therefore should be interpreted with some caution.

Special events accounted for 15.5% of ticket sales and 10.7% of gross revenue in 2005 making it the third largest by both ticket sales and gross revenue. This category showed a decrease of 25% in the number of paid tickets from 2004 to 2005, and an associated drop in revenue of 7.6% between the years. While revenues peaked in the March quarter, the peak of ticket sales was the June quarter. By contrast, the Special events/Other category had the highest number of total attendance, the third highest number of paid tickets in 2004. Peak attendance in 2005 was in the June quarter, while in 2004 it was in the September quarter.



World Wrestling Entertainment, inc. Dainty Consolidated Entertainment

Table 12. Special Events/Other Attendance and Revenue December Quarter 2003 – December Quarter 2005

Survey Quarter	Total Tickets (No.)	Total Tickets (% of quarter)	Paid Tickets (No.)	Gross Revenue (Amount \$)	Gross Revenue (% of quarter)
Jan–Mar 05	765,656	19.4	639,286	\$40,369,560	15.7
Apr–Jun 05	963,037	23.0	718,730	\$30,836,248	14.6
Jul–Sep 05	867,064	21.4	493,141	\$7,431,004	4.3
Oct–Dec 05	396,340	11.0	277,388	\$10,720,433	5.6
2005 Total	2,992,097		2,128,545	\$89,357,246	
Jan–Mar 04	260,499	8.3	254,628	\$15,379,395	8.5
Apr–Jun 04	742,726	25.2	735,155	\$16,909,917	12.3
Jul–Sep 04	1,433,571	34.7	1,232,521	\$34,412,209	18.9
Oct–Dec 04	688,217	21.0	614,742	\$30,004,845	15.9
2004 Total	3,125,013		2,837,046	\$96,706,366	
Oct–Dec 03	534,209	15.3	353,204	\$6,774,946	4.0

Figure 27. Special Events/Other Attendance December Quarter 2003 – December Quarter 2005

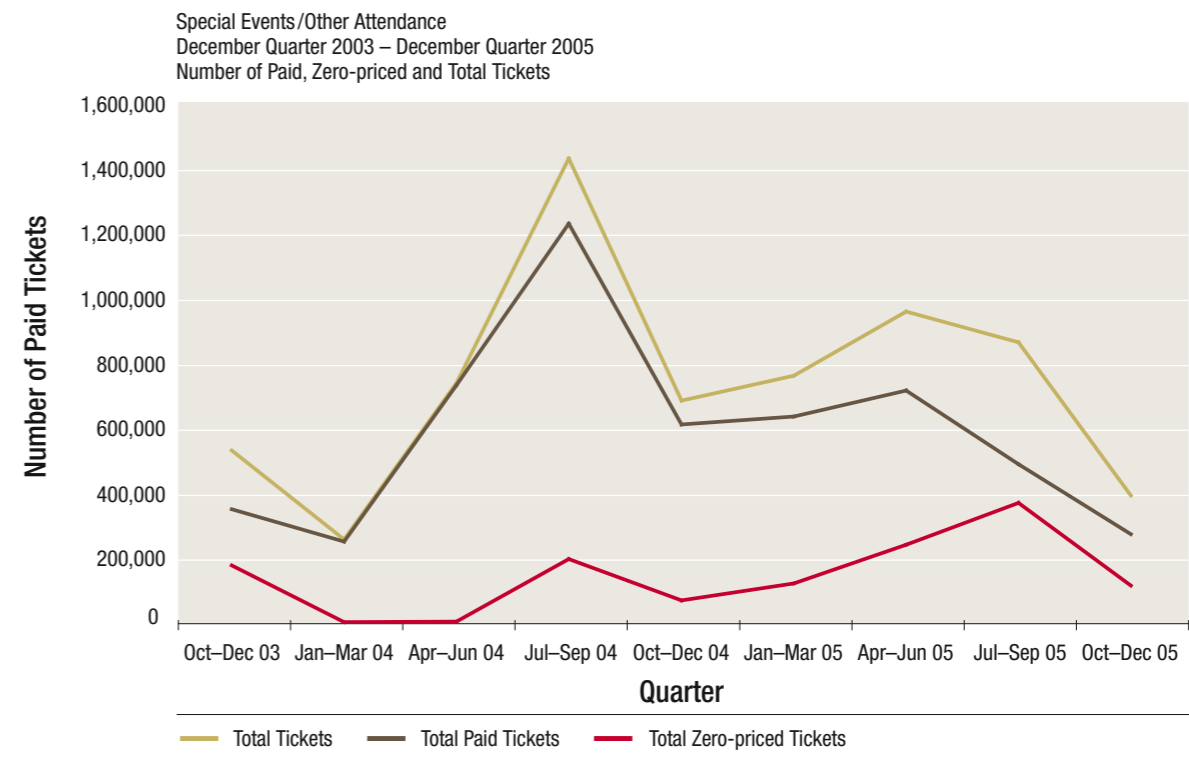


Figure 28. Special Events/Other Revenue December Quarters 2003 – December Quarter 2005



Figure 29. All Categories Attendance December Quarter 2003 – December Quarter 2005

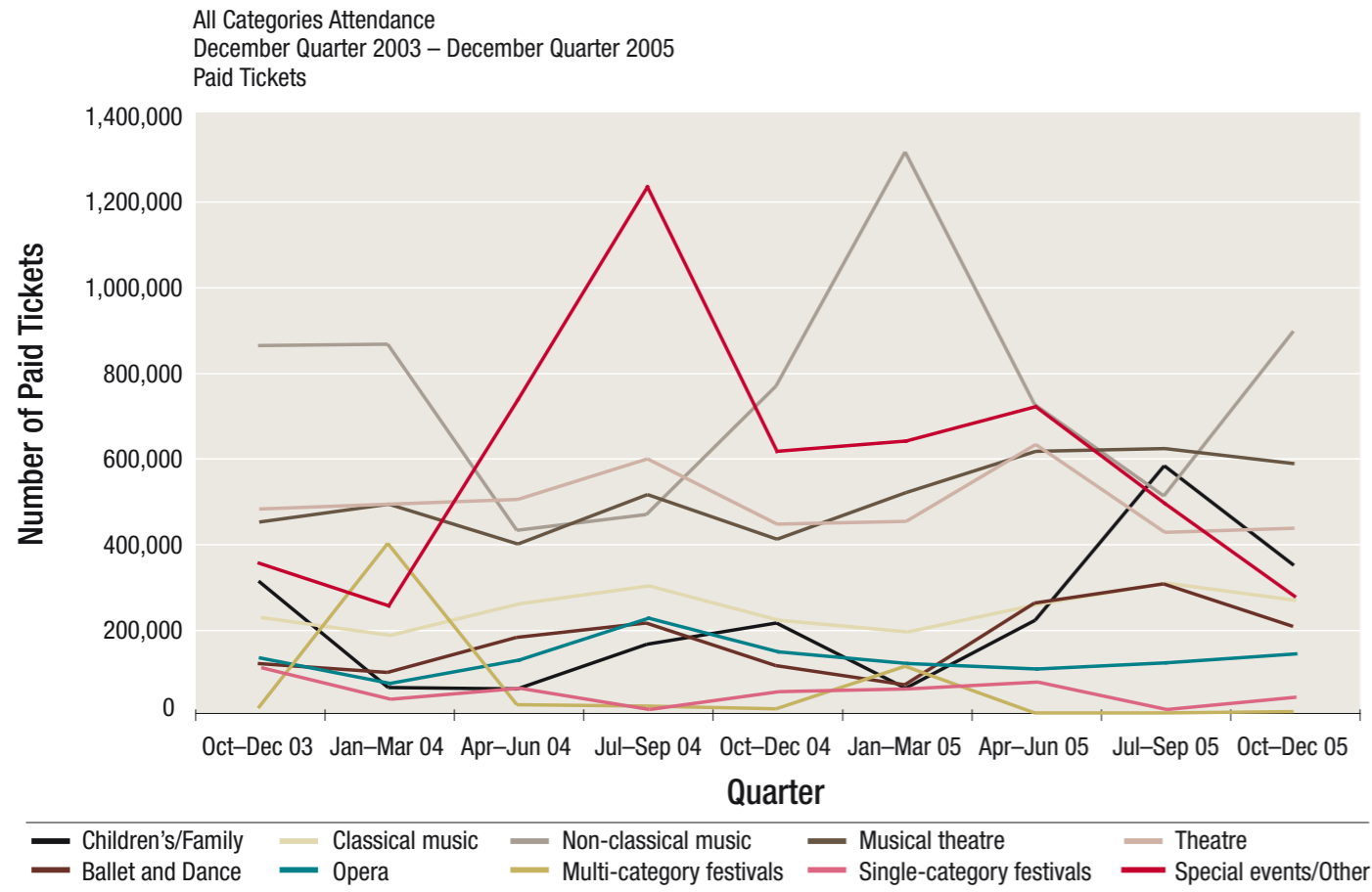
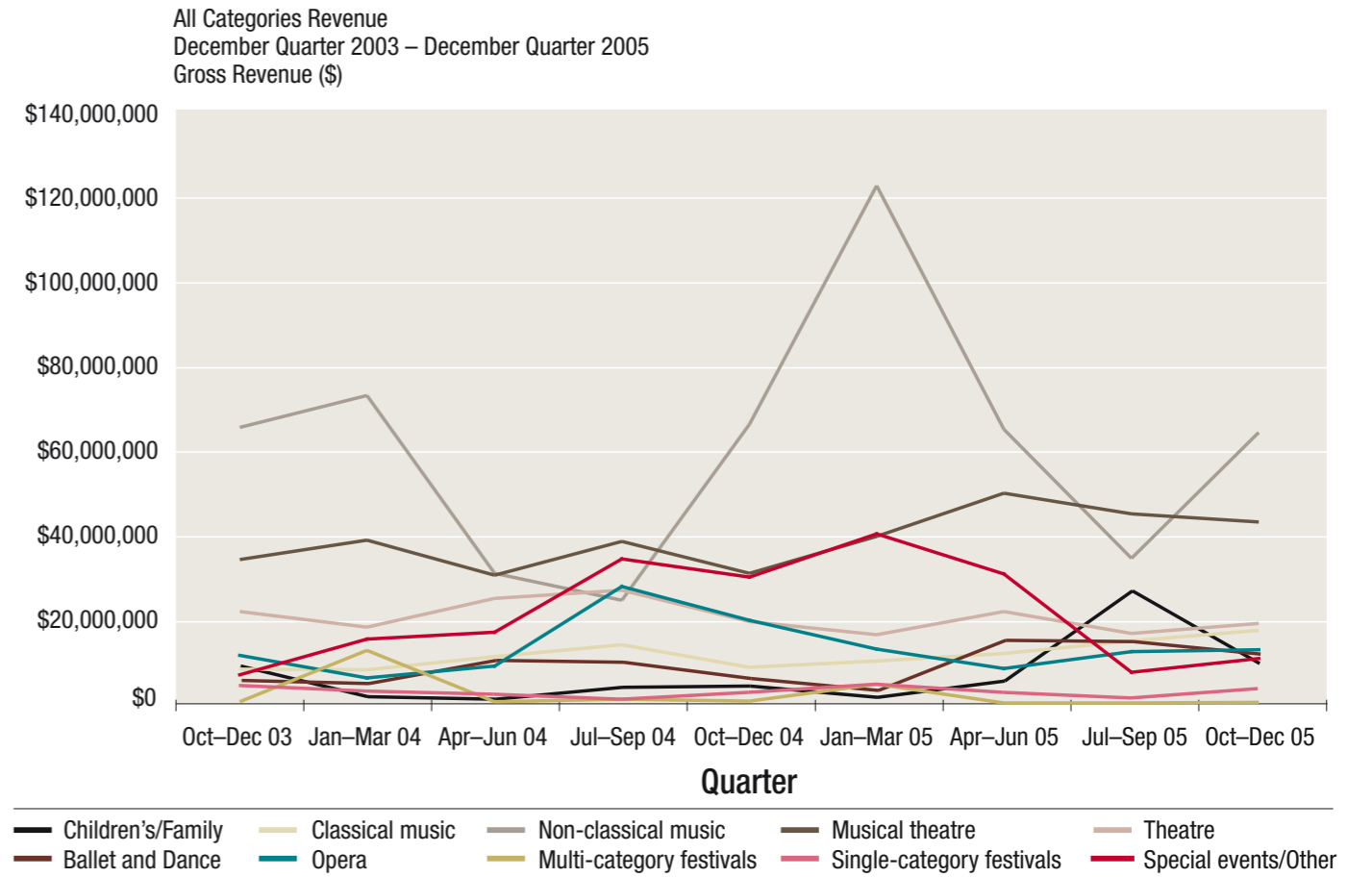


Figure 30. All Categories Revenue December Quarter 2003 – December Quarter 2005



Explanatory Notes

- Revenue and attendance is the aggregate of figures supplied by Australia's major ticketing companies and the Australian Major Performing Arts Group (AMPAG) through the Australia Council for the Arts. Australia Council for the Arts data is limited to that provided to it by the Australian Major Performing Arts Group (AMPAG) of companies listed in this report.
- Ticketing company data is limited to that provided by those companies listed in this report.
- Revenue data refers to the revenue from events that occur in the quarter. Revenue will be reported for the quarter in which the event occurs. This is not necessarily the quarter in which the sale is made. Subscription data are allocated to the quarter in which the event occurs.
- Complimentary/sponsor/zero price tickets are defined as those tickets that are given away for free or as part of contra, sponsorship, or sales incentive agreements. It may also include tickets with an undetermined value at the time of issue, providing the ticket is pulled with a zero price.
- The survey lists complimentary and sponsors' tickets separately from paid tickets. Not all tickets have been split, so paid tickets will be slightly over-accounted and complimentary and sponsors' tickets slightly under-accounted.
- Attendance data refers to the number of tickets sold for events that occur in the quarter. These figures include only paid tickets and not complimentary tickets. It also excludes 'sponsorship' tickets.
- Event Categorisation. Ticketing companies, Australia Council for the Arts and festivals assign events to the respective event categories on the basis of definitions developed by the partners.
- Data collection. On a quarterly basis, ticketing companies and the Australia Council for the Arts send their data to the University of Queensland. This data consists of total attendance and revenue data aggregated across the events within each of the ten live entertainment categories. No data is provided to the University of Queensland about individual events. This data is then compiled to produce national figures for each category of event.
- Festivals. Attendance at festivals is under-reported in this survey. Firstly, some festivals maintain their own ticketing systems and are not yet part of this survey. Secondly, the survey only reports paid tickets and does not include the substantial unpaid and/or unticketed components of festivals. As each of the ten event categories is mutually exclusive, single events which are a component of a festival are reported only in the festival category. Attendance and revenues for other event categories will not, therefore, include events held as part of festivals. This ensures that attendance and revenues for the other eight categories of event are necessarily also under-reported.
- Coverage. While national in reach the coverage of this survey collects data on that part of the market covered by the major ticketing companies, the major performing arts companies and the leading festivals included in this survey. The survey is therefore an under-estimation of the total live entertainment industry in Australia. For instance the survey does not collect revenue and detailed attendance data for some regional touring (for performances in community venues), for free performances, and also for schools performances of the AMPAG companies. Audited annual returns for subsidised performing arts companies indicate up to 1 million paid attendances of school-aged children and teachers in education venues across Australia. Free performances, including outdoor concerts, are a core part of the work of many companies in dance, music, opera and circus and are not included here.

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Category Descriptor Guide

Category	Description
Ballet and Dance	<p>Traditional forms</p> <p>Ethnic dance</p> <p>Folk dance</p> <p>Ballet</p> <p>Ballroom</p> <p>Latin dance</p> <p>Liturgical dance</p> <p>Modern dance</p> <p>Ballet</p> <p>Tap</p> <p>Breakdancing</p>
Theatre	<p>Script-based theatre</p> <p>Drama</p> <p>Comedy theatre</p> <p>Mime</p> <p>Physical theatre</p> <p>Plays</p>
Musical Theatre	<p>Staged productions which include music/drama/movement in popular form, primarily (but not limited to):</p> <p>Musicals</p> <p>Cabarets in cabaret mode/style</p>
Classical Music	<p>Any of the following in classical/contemporary art (i.e. current, but not 'pop') style:</p> <p>Orchestral music</p> <p>Chamber music</p> <p>Choirs and choral music</p> <p>Recitals</p> <p>Singing/playing</p> <p>All styles of the following:</p> <p>Sacred music</p> <p>Traditional music/ethnic music/world music</p>
Non-Classical Music	<p>All forms of the following, performed by any type of ensemble or soloist (including any ensemble/chorus/solo musicians advertising a program which is exclusively one of the following categories, e.g. 'pop' or 'jazz,' as in The Australian Jazz Orchestra):</p> <p>Pop</p> <p>Jazz</p> <p>Blues</p> <p>Country</p> <p>Rock</p> <p>Folk</p> <p>Soul</p> <p>R&B</p> <p>Techno</p> <p>Hip hop</p> <p>Rap</p> <p>Heavy metal</p> <p>Dance parties</p>
Opera	<p>Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style:</p> <p>Opera</p> <p>Operetta (including Gilbert and Sullivan)</p>
Children's/Family	<p>Children's workshops</p> <p>Live entertainment for children (including interactive performances)</p>
Multi-Category Festivals	<p>Festivals/events which contains a number of different types of events which fall into two or more categories</p>
Single-Category Festivals	<p>Festivals/events which contain a number of events but which fall into one category only</p>
Special Events	<p>Unique presentations which do not fall into any other category</p>

Survey Participants

Participating Ticketing Companies

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

Australian Major Performing Arts Group (AMPAG) Companies

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

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

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