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Live performance continues to drive cultural economy - but growth rate slowing

The live performance industry continued to drive Australia’s cultural economy in 2018 with more than 26 million attendances generating almost \$2.2 billion in ticket revenue.

Revenue increased by 14.8% on the previous year with growth in all states and territories except the Northern Territory. Attendances also increased by 14.1% on the previous year.

“These are solid results, but the rate of growth year on year is slowing compared to previous years, underscoring the need for a positive policy framework from the federal, state and territory governments which support live performance,” said Evelyn Richardson, Chief Executive of Live Performance Australia (LPA).

Total revenues and attendance had grown by 32% and 23% respectively in the previous year (2017).

Growth in 2018 was driven largely by contemporary music which accounted for slightly over half of total revenue for live performance in at \$1.09 billion. This was a 32% increase on the previous year and accounted for 38.4% of attendances (over 10 million).

Musical theatre was the next biggest category, contributing \$400 million in revenue which was 18.5% of the industry total, and 3.9 million attendances which was 14.9% of the industry total.

Musical theatre revenue was down by 4% and attendances dropped by 3.1%.

The next best performing categories by revenue were comedy, music festivals, classical music, theatre, multi-category festivals, ballet and dance, children’s/family, opera, circus and physical theatre, and special events.

Ms Richardson said the live performance industry made a significant contribution to national and regional economies, but governments needed to pay closer attention to policy settings, investment levels and infrastructure required to support growth across all genres.

“In particular, we’ve recently seen a period of uncertainty in NSW – our largest market for live performance – due to the State Government’s approach to music festival regulations and a lack of strategy around theatre venues for Sydney.

“NSW is our largest live performance market in Australia, and we need it to perform well for the health of the industry overall.

“While total revenue increased in NSW by 22% and attendances were up by 19%, for 2018, Queensland recorded a 20% increase in both revenues and attendance for the same period,” Ms Richardson said.

NSW’s growth was largely driven by increases in the Special Events, Festivals (Multi-Category) and Theatre categories. Queensland’s significant growth was supported by live performance events associated with the Commonwealth Games.

Tasmania also enjoyed exceptional results, largely due to its range of world class multi-arts festivals; it experienced the highest year-on-year growth in attendance (67%) and a 17% increase in revenue.

Victorians value their live performance experience by spending the most on tickets, at an average of \$107.08 per person compared with the national average of \$99.03. Victoria was the second largest contributor in revenue (32.3%) and attendance (30.5%) and, for the first time, outperformed NSW in contemporary music, generating the largest market share in revenue (37.3%) and attendance (33.2%).

Combined NSW and Victoria generated approximately 67% of all revenue and 62% of attendance in 2018.

Produced annually since 2004, the Ticket Attendance and Revenue Report is the most comprehensive and reliable survey of ticket sales and attendance for Australian live performance events.

The 2018 Ticket Attendance and Revenue Report can be accessed as an interactive web-based document (available here: <http://reports.liveperformance.com.au/ticket-survey-2018>) or PDF. Key facts and figures can be accessed via infographics for national, state and territories and genres.

For further commentary on genres and a state by state analysis see below.

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About LPA

LPA is the peak body for Australia’s live performance industry. Established over 100 years ago in 1917 and registered as an employers’ organisation under the Fair Work (Registered Organisations) Act 2009, LPA has over 400 Members nationally. We represent commercial producers, music promoters, major performing arts companies, small to medium companies, independent producers, major performing arts centres, metropolitan and regional venues, commercial theatres, stadiums and arenas, arts festivals, music festivals, and service providers such as ticketing companies and technical suppliers. Our membership spans from small-medium and not-for-profit organisations to large commercial entities. LPA has a clear mandate to advocate for and support policy decisions that benefit the sustainability and growth of the live performance industry in Australia.

KEY HIGHLIGHTS – STATE/TERRITORY SUMMARY

Revenue

State/Territory	Revenue	Share of Industry (2018)	Change in Revenue (from 2017)
New South Wales	\$753,667,850	34.9%	22.4%
Victoria	\$698,857,788	32.3%	9.2%
Queensland	\$317,179,536	14.7%	20.2%
Western Australia	\$211,421,549	9.8%	7.5%
South Australia	\$131,560,865	6.1%	6.5%
Australian Capital Territory	\$27,848,747	1.3%	12.3%
Tasmania	\$18,965,730	0.9%	17.0%
Northern Territory	\$2,923,333	0.1%	-12.8%
Total	\$2,162,425,399	100.0%	14.8%

Attendance

State/Territory	Attendance	Share of Industry (2018)	Change in Attendance (from 2017)
New South Wales	8,230,950	31.3%	19.4%
Victoria	7,999,434	30.5%	8.6%
Queensland	3,840,497	14.6%	20.1%
Western Australia	2,772,963	10.6%	6.5%
South Australia	2,212,725	8.4%	5.4%
Tasmania	738,444	2.8%	67.1%
Australian Capital Territory	405,899	1.5%	12.6%
Northern Territory	67,876	0.3%	1.9%
Total	26,268,788	100.0%	14.1%

KEY HIGHLIGHTS – GENRE SUMMARY

Revenue

Category	Revenue	Share of Industry (2018)	Change in Revenue (from 2017)
Contemporary Music	\$1,092,275,549	50.5%	32.2%
Musical Theatre	\$400,199,798	18.5%	-4.0%
Comedy	\$124,742,437	5.8%	72.5%
Festival (Contemporary Music)	\$102,015,922	4.7%	1.3%
Classical Music	\$79,456,707	3.7%	2.0%
Theatre	\$78,505,052	3.6%	22.2%
Festivals (Multi-Category)	\$68,972,653	3.2%	26.2%
Ballet and Dance	\$63,988,882	3.0%	2.6%
Children's/Family	\$59,777,596	2.8%	16.5%
Opera	\$46,965,221	2.2%	29.2%
Circus and Physical Theatre	\$23,410,423	1.1%	-79.9%
Special Events	\$22,115,160	1.0%	337.9%
Total	\$2,162,425,399	100.0%	14.8%

Attendance

Category	Revenue	Share of Industry (2018)	Change in Attendance (from 2017)
Contemporary Music	10,088,329	38.4%	19.2%
Musical Theatre	3,917,532	14.9%	-3.1%
Festivals (Multi-Category)	2,577,932	9.8%	38.1%
Comedy	2,458,198	9.4%	98.5%
Children's/Family	1,650,955	6.3%	26.4%
Theatre	1,430,263	5.4%	-1.9%
Classical Music	1,261,565	4.8%	-4.3%
Festival (Contemporary Music)	975,233	3.7%	14.4%
Ballet and Dance	800,781	3.0%	-1.2%
Opera	487,195	1.9%	31.9%
Circus and Physical Theatre	450,446	1.7%	-61.3%
Special Events	170,359	0.6%	24.5%
Total	26,268,788	100.0%	14.1%

KEY HIGHLIGHTS – BY STATE/TERRITORY

New South Wales

- In 2018, NSW recorded \$753.7 million in ticket revenue and 8.2 million attendances
- Between 2017 and 2018, ticket revenue grew by 22.4% and attendance grew by 19.4%
- NSW holds the largest share of the industry for both ticket revenue and attendance
- On average, each person in NSW spent \$93.67 on tickets to see live events
- The most well attended events were Contemporary Music, Musical Theatre and Children's/Family
- The events that generated the most revenue were Contemporary Music, Musical Theatre and Festivals (Contemporary Music)

Victoria

- Between 2017 and 2018, revenue grew by 9.2% to \$698.9 million and attendances grew by 8.6% to 8.0 million
- Victoria holds the second largest share of the industry for both ticket revenue and attendance
- On average, every Victorian spent \$107.08 on tickets to see live events, which is the highest spend per capita in Australia
- The most popular events in terms of attendance and revenue were Contemporary Music, Musical Theatre and Comedy

Queensland

- In 2018, Queensland recorded \$317.2 million in ticket revenue. It experienced the largest revenue growth in Australia of 20.2% between 2017 and 2018
- In 2018, Queensland recorded 3.8 million attendances, which was 20.1% higher than the attendances recorded in 2017
- On average, every Queenslanders spent \$62.77 on tickets to see live events
- The most popular events in terms of attendance and revenue were Contemporary Music, Musical Theatre and Comedy

Western Australia

- Between 2017 and 2018, revenue grew by 7.5% to \$211.4 million and attendances grew by 6.5% to 2.8 million
- On average, every Western Australian spent \$81.12 on tickets to see live events
- The most popular events in terms of attendance were Contemporary Music, Festivals (Multi-Category) and Musical Theatre
- The events that generated the most revenue were Contemporary Music, Musical Theatre and Comedy

South Australia

- In 2018, South Australia recorded \$131.6 million in ticket revenue and 2.2 million attendances
- Between 2017 and 2018, ticket revenue grew by 6.5% and attendance grew by 5.4%
- On average, every South Australian spent \$75.49 on tickets to see live events
- The most popular events in terms of attendance were Festivals (Multi-Category), Contemporary Music and Musical Theatre
- The most popular events in terms of revenue were Contemporary Music, Festivals (Multi-Category) and Musical Theatre

Tasmania

- Between 2017 and 2018, Tasmania recorded the largest attendance growth across Australia. Attendance grew by 67.1% to over 738,000
- In 2018, Tasmania generated \$19.0 million in ticket revenue, which was 17.0% higher than the attendances recorded in 2017
- On average, every Tasmanian spent \$35.68 on tickets to see live events
- The most popular events in terms of attendance and revenue were Festivals (Multi-Category), Contemporary Music and Classical Music

Australian Capital Territory

- In 2018, the ACT recorded \$27.8 million in ticket revenue. It experienced 12.3% revenue growth between 2017 and 2018
- In 2018, the ACT recorded over 405,000 attendances, which was 12.6% higher than the attendances recorded in 2017
- On average, every ACT ticket buyer spent \$65.71 on tickets to see live events
- The most popular events in terms of attendance were Contemporary Music, Festivals (Contemporary Music) and Children's/Family
- The most popular events in terms of revenue were Contemporary Music, Festivals (Contemporary Music) and Comedy

Northern Territory

- In 2018, the NT recorded \$2.9 million in ticket revenue. It experienced 12.8% revenue decline between 2017 and 2018
- In 2018, the NT recorded almost 68,000 attendances, which was 1.9% higher than the attendances recorded in 2017
- On average, every NT ticket buyer spent \$11.89 on tickets to see live events
- The most events that generated the most attendances were Children's/Family, Contemporary Music and Ballet and Dance
- The most events that generated the most revenue were Contemporary Music, Comedy and Children's/Family

KEY HIGHLIGHTS – BY GENRE

Ballet and Dance

- In 2018, the Ballet and Dance category recorded \$64.0 million in ticket sales revenues, increasing by 2.6%
- Attendance experienced a slight decline of 1.2% from 810,483 in 2017 to 800,781 in 2018
- In 2018, the Ballet and Dance category achieved its highest recorded average ticket price of \$90.81, increasing by 6.1%
- NSW, Victoria and Queensland were the major markets in which ticket sales and attendances were generated from ballet and dance productions
- Western Australia, South Australia and the Northern Territory recorded growth for both revenue and attendance

Children's/Family

- In 2018, the Children's/Family events category generated \$59.8 million in ticket sales and 1.7 million attendances
- Compared to 2017, this category experienced an increase of 16.5% in revenue and 26.4% in attendance
- Tasmania recorded the largest growth in this category – revenue grew by 253.2% and attendance grew by 97.8%
- The average ticket price declined by 4.1% to \$40.63. This is slightly lower than the highest recorded average ticket price of \$43.87 in 2011

Circus & Physical Theatre

- In 2018, the Circus & Physical Theatre category recorded approximately \$23.4 million in ticket sales and over 450,000 in attendance
- This category experienced a significant decline in ticket sales (79.9%) and attendance (61.3%) between 2017 and 2018
- This category can be variable depending on whether international companies conduct major tours in any given year, particularly Cirque du Soleil. In 2018, there were no Cirque du Soleil tours
- This category also experienced a decline of 44.1% in average ticket price to \$60.96
- The ACT and the Northern Territory were the only jurisdictions that experienced growth in revenue and attendance

Classical Music

- In 2018, the Classical Music category recorded \$79.5 million in ticket sales revenues, increasing by 2.0% in 2018
- Attendance experienced a decline of 4.3% between 2017 and 2018
- The Northern Territory experienced the largest growth in both revenue and attendance, with growth also recorded in the ACT and Western Australia
- The average ticket price increased slightly from \$77.12 in 2017 to \$79.13 in 2018

Comedy

- In 2018, the Comedy category recorded \$124.7 million in ticket sales and 2.5 million in attendance and is the third largest contributor to the industry in terms of revenue and fourth largest contributor to the industry in terms of attendance
- These results are 72.5% and 98.5% respectively higher than those recorded in 2017, in part due to additional providers submitting data
- Tasmania experienced the greatest growth in both revenue and attendance

- Victoria was the largest market in which ticket sales and attendances were generated from Comedy events
- In 2018, the average ticket price was \$114.20 which is 83.3% higher than in 2017

Contemporary Music

- In 2018, the Contemporary Music category recorded its highest levels of ticket sales revenue (\$1.1 billion) and attendance (10.1 million)
- There was 32.2% growth in revenue and 19.2% growth in attendance between 2017 and 2018
- The majority of states and territories experienced growth in both revenue and attendance
- The Contemporary Music category holds the largest market share of the industry, contributing 50.5% of revenue and 38.1% of attendances in 2018
- In 2018, the average ticket price was \$117.77 which is 11.4% higher than in 2017

Festivals (Multi-Category)

- In 2018, 2.6 million people attended Festivals (Multi-Category) events, generating \$69.0 million from ticket sales
- Attendance figures increased by 38.1% between 2017 and 2018 and revenue increased by 26.2%
- South Australia is the largest contributor to the Festivals (Multi-Category) category, contributing 34.2% of revenue and 36.6% of attendance. Western Australia is the second largest contributor to revenue in this category
- All states and territories experienced growth in attendance between 2017 and 2018. The largest growth in revenue was experienced in the ACT (1184.5%) and in attendance (1455.7%)
- In 2018, the average ticket price from Festivals (Multi-Category) events increased 10.7% to \$40.52

Festivals (Contemporary Music)

- In 2018, over 975,000 people attended Festivals (Contemporary Music) events, generating over \$102.0 million from ticket sales
- Ticket sales revenue increased by 1.3% and attendance increased by 14.4% between 2017 and 2018
- The average ticket price also increased slightly (3.9%) to \$131.58
- Queensland and South Australia experienced the largest growth in revenue and attendance between 2017 and 2018. The ACT also experienced growth in revenue and attendance
- New South Wales was the key market in which ticket sales and attendance were generated from Festival (Contemporary Music) events

Musical Theatre

- In 2018, the Musical Theatre category recorded \$400.2 million in ticket sales revenue, declining slightly by 4.0%
- Attendance also declined by 3.1% from over 4 million in 2017 to 3.9 million in 2018
- The Musical Theatre category is the second largest industry contributor to revenue and attendances
- The Northern Territory, Queensland, New South Wales, South Australia and Western Australia all experienced growth in revenue and attendance between 2017 and 2018
- New South Wales was the key market in which revenue and attendance were generated by Musical Theatre events
- In 2018, the average ticket price was \$108.85, which declined slightly by 0.7% from \$109.66 in 2017

Opera

- In 2018, over 485,000 people attended Opera events, generating \$47.0 million from ticket sales
- The Opera category experienced an increase in ticket sales of 29.2% and in attendance by 31.9% between 2017 and 2018
- New South Wales was the key market in which revenue and attendance were generated by Opera events
- New South Wales, Victoria, South Australia, Tasmania and the ACT experienced growth in both revenue and attendance between 2017 and 2018
- In 2018, the average ticket price increased by 7.5% to \$124.11

Special Events

- In 2018, over 170,000 people attended Special Events, generating over \$22.0 million from ticket sales
- This category experienced growth of 337.9% in revenue and 24.5% in attendances. This category is highly variable from year to year, as it depends upon whether events that cannot be classified into other categories take place
- The top event in this category were special events presented as part of the Commonwealth Games
- In addition, in 2018, the average ticket price increased by 202.8% to \$152.70

Theatre

- In 2018, over 1.4 million people attended Theatre events, declining slightly by 1.9% compared to the previous year
- The Theatre category generated \$78.5 million in ticket sales, which was 22.2% higher than the previous year
- New South Wales and Victoria were the largest contributors to revenues and attendances
- New South Wales, Queensland and ACT were the only jurisdictions to record growth in both revenue and attendance between 2017 and 2018
- In 2018, the average ticket price increased by 29.8% to \$63.91