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## **COVID-19 wiped \$1.4 billion from live entertainment industry in 2020, a 70% decline nationally**

### **- LPA calls for insurance and wage support for phase 2 industry recovery**

Following record years in 2018 and 2019, the COVID-19 pandemic had a devastating impact on the live entertainment industry, with \$1.4 billion in lost revenue in 2020. The ticketing data shows close to 70 percent revenue and attendance was obliterated after the industry was shut down in March last year.

Live Performance Australia's Chief Executive, Evelyn Richardson, said "EY's analysis of 2019 and 2020 data clearly shows the massive hit the live entertainment industry took in 2020. Ongoing restrictions, lockdowns and border closures caused significant disruption to an industry heavily reliant on national touring. In 2020, the number of tickets issued to live performance events fell by 68% to under 8 million, ticket sales revenue fell by 69% to \$600 million, and the average ticket price fell from \$92.89 to \$87.14. These are stark numbers."

The impact of COVID-19 was most apparent in Victoria, where an extended lockdown saw the highest decline in attendance (79%) and the second-highest decline in revenue (75%). Victorians typically spend the most on tickets to live performance, spending an average of \$94.19 in 2019, the highest spend per capita average in Australia and far above the national average of \$76.88. In 2020, the spend per capita decreased to \$23.76. Similarly, New South Wales experienced a 73% decline in both revenue and attendance in 2020, and the spend per capita fell from \$81.94 in 2019 to \$22.33 in 2020.

While Contemporary Music remained the biggest category, accounting for over 50% total revenue of live performance at \$309 million and 37% of attendances (nearly 3 million), the sector experienced an overall decline of 63% in revenue and 65% in attendance between 2019 and 2020.

Musical Theatre, the next biggest category, lost 80% in revenue and 79% of attendances. In 2020, this genre contributed \$67 million in revenue, which was 11% of the industry total, and approximately 730,000 attendances, 9% of the industry total.

The impacts of COVID-19 were felt by both the commercial and not for profit sectors and are particularly apparent in categories dominated by AMPAG / NPAP companies (i.e. Ballet and Dance, Classical Music, Opera and Theatre) and larger-scale events (i.e. Contemporary Music, Festivals (Contemporary Music) and Musical Theatre).

South Australia experienced the smallest decline in revenue (55%) and attendance (40%) in 2020 compared to other states/territories, largely because the State's key events (e.g. Adelaide Fringe and Adelaide Festival) were substantially presented before COVID-19 restrictions came into effect. There were also smaller declines in Festivals (Multi Category) as three of the largest festivals –

Adelaide Fringe, Adelaide Festival and Perth Festival – were held before COVID-19 restrictions were introduced.

Combined, NSW and VIC continued to account for the largest share of revenue and attendance in both 2019 (66% of revenue and 61% of attendance) and 2020 (56% of revenue and 45% of attendance), but the scale of market share dropped due to Victoria’s extended lockdown in 2020.

“As the largest live entertainment markets in Australia, we need NSW and VIC to perform well for the health of the industry overall – this is particularly important as we emerge from the pandemic and move into the recovery phase. These markets suffered significantly in all categories in 2020, particularly in Comedy for VIC (89% decrease in revenue and 94% decrease in attendance) and Festivals (Contemporary Music) in NSW (83% decrease in revenue and 80% decrease in attendance),” Ms Richardson said.

“Contemporary music combined with festivals comprised 60% of total industry revenue and 43% of attendances. This sector has been severely impacted by the pandemic over the past 20 months with the Delta variant disrupting the industry’s reactivation plans. Our live music businesses have now lost their small window of opportunity to schedule international artists for concerts and music festivals in the final quarter of this year. These events have now been cancelled or postponed until late 2022/early 2023.

“Live entertainment events drive visitation across regions and cities, pumping billions of dollars of spending into the economy. Our industry is a key driver of many other sectors, notably hospitality, travel and cultural tourism.

“The forecast for the next 12 months indicates industry viability is seriously threatened with reactivation and recovery now delayed. The lag time required to plan and deliver events sees companies trying to retain staff to work on pipeline events through Q4 and well into the middle of next year.

“As the two major markets, NSW and VIC, reopen in October/November, major barriers to trading and touring nationally remain: border closures, domestic and international; reduced venue capacity and operational restrictions; mandatory quarantine requirements for international artists and crew; ongoing risk of targeted lockdowns; and inability to insure against cancellation or business interruption.

“We expect the impacts of COVID-19 in 2021 may be even greater given our two major markets have been closed for extended periods. These impacts have seen business confidence collapse and the industry needs an insurance scheme to underwrite investment risk in 2022/23. The live music and entertainment industry also urgently requires a targeted, Business Reactivation package to ensure we retain capacity to operate when border, venue capacity and operational restrictions are eased. While much of the economy will be returning to pre-COVID activity, the live music and entertainment industry will be constrained by venue capacity and border restrictions for some months”, she said.

Ms Richardson said the live entertainment 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. This would be critical for the rebuild phase in 2022/23.

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 2019 and 2020 Ticket Attendance and Revenue Report can be accessed as an interactive web-based document (available here: <https://reports.liveperformance.com.au/ticket-survey-2019-2020/#/>) or PDF.

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

## ***ENDS***

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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 350 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 (2020)

State/Territory	Revenue	Share of Industry (2020)	Change in Revenue (from 2019)
New South Wales	\$182,518,521	30.1%	(72.6%)
Victoria	\$158,294,023	26.1%	(74.8%)
Queensland	\$116,868,728	19.3%	(59.2%)
Western Australia	\$72,739,451	12.0%	(62.5%)
South Australia	\$59,698,701	9.9%	(55.3%)
Tasmania	\$9,304,123	1.5%	(58.7%)
Australian Capital Territory	\$5,700,108	0.9%	(81.9%)
Northern Territory	\$849,939	0.1%	(68.0%)
<b>Total</b>	<b>\$605,973,596</b>	<b>100.0%</b>	<b>(69.2%)</b>

### Attendance (2020)

State/Territory	Attendance	Share of Industry (2020)	Change in Attendance (from 2019)
New South Wales	1,960,925	25.3%	(72.6%)
Victoria	1,546,959	19.9%	(79.1%)
Queensland	1,260,436	16.2%	(63.7%)
Western Australia	1,287,780	16.6%	(51.4%)
South Australia	1,393,346	18.0%	(39.9%)
Tasmania	186,150	2.4%	(47.0%)
Australian Capital Territory	101,081	1.3%	(76.6%)
Northern Territory	25,035	0.3%	(61.5%)
<b>Total</b>	<b>7,761,710</b>	<b>100.0%</b>	<b>(67.5%)</b>

### Revenue (2019)

State/Territory	Revenue	Share of Industry (2019)	Change in Revenue (from 2018)
New South Wales	\$666,736,971	33.9%	(11.5%)
Victoria	\$627,378,900	31.9%	4.5%
Queensland	\$286,191,954	14.6%	(9.8%)
Western Australia	\$194,184,329	9.9%	(8.2%)
South Australia	\$133,455,773	6.8%	1.4%
Tasmania	\$22,522,431	1.1%	18.8%
Australian Capital Territory	\$31,517,432	1.6%	13.2%
Northern Territory	\$2,653,762	0.1%	(9.2%)
<b>Total</b>	<b>\$1,964,641,552</b>	<b>100.0%</b>	<b>(4.8%)</b>

### Attendance (2019)

State/Territory	Attendance	Share of Industry (2019)	Change in Attendance (from 2018)
New South Wales	7,164,995	30.0%	(13.0%)
Victoria	7,408,467	31.0%	(1.5%)
Queensland	3,477,020	14.6%	(9.5%)
Western Australia	2,648,785	11.1%	(4.5%)
South Australia	2,317,420	9.7%	4.7%
Tasmania	350,977	1.5%	(52.5%)
Australian Capital Territory	431,706	1.8%	6.4%
Northern Territory	65,045	0.3%	(4.2%)
<b>Total</b>	<b>23,864,415</b>	<b>100.0%</b>	<b>(7.5%)</b>

## KEY HIGHLIGHTS – GENRE SUMMARY

### Revenue (2020)

Category	Revenue	Share of Industry (2020)	Change in Revenue (from 2019)
Contemporary Music	\$309,203,112	51.0%	(63.0%)
Musical Theatre	\$67,051,689	11.1%	(80.1%)
Festivals (Contemporary Music)	\$54,174,572	8.9%	(70.0%)
Theatre	\$39,867,422	6.6%	(72.8%)
Festivals (Multi-Category)	\$39,493,105	6.5%	(28.2%)
Circus and Physical Theatre	\$22,693,371	3.7%	(52.2%)
Comedy	\$21,489,790	3.5%	(79.2%)
Classical Music	\$18,111,125	3.0%	(79.3%)
Opera	\$11,313,725	1.9%	(71.9%)
Children's/Family	\$10,396,875	1.7%	(76.2%)
Ballet and Dance	\$7,534,678	1.2%	(88.6%)
Special Events	\$4,644,130	0.8%	(78.2%)
<b>Total</b>	<b>\$605,973,596</b>	<b>100.0%</b>	<b>(69.2%)</b>

### Attendance (2020)

Category	Attendance	Share of Industry (2020)	Change in Attendance (from 2019)
Contemporary Music	2,872,206	37.0%	(65.4%)
Festivals (Multi-Category)	1,567,551	20.2%	(27.9%)
Musical Theatre	729,099	9.4%	(78.9%)
Festivals (Contemporary Music)	437,472	5.6%	(69.8%)
Theatre	421,868	5.4%	(72.4%)
Children's/Family	378,053	4.9%	(67.7%)
Comedy	338,448	4.4%	(84.4%)
Classical Music	289,888	3.7%	(78.0%)
Circus and Physical Theatre	274,977	3.5%	(57.0%)
Special Events	166,777	2.1%	(61.3%)
Opera	147,982	1.9%	(66.0%)
Ballet and Dance	137,389	1.8%	(82.9%)
<b>Total</b>	<b>7,761,710</b>	<b>100.0%</b>	<b>(67.5%)</b>

### Revenue (2019)

Category	Revenue	Share of Industry (2019)	Change in Revenue (from 2018)
Contemporary Music	\$835,544,629	42.5%	(15.9%)
Musical Theatre	\$337,338,257	17.2%	(15.7%)
Festivals (Contemporary Music)	\$180,852,859	9.2%	77.3%
Theatre	\$146,562,112	7.5%	86.7%
Comedy	\$103,216,361	5.3%	(17.3%)
Classical Music	\$87,333,188	4.4%	9.9%
Ballet and Dance	\$66,158,598	3.4%	3.4%
Festivals (Multi-Category)	\$54,984,915	2.8%	(20.3%)
Circus and Physical Theatre	\$47,447,405	2.4%	102.7%
Children's/Family	\$43,649,235	2.2%	(27.0%)
Opera	\$40,201,835	2.0%	(14.4%)
Special Events	\$21,352,158	1.1%	(3.5%)
<b>Total</b>	<b>\$1,964,641,552</b>	<b>100.0%</b>	<b>(4.8%)</b>

### Attendance (2019)

Category	Attendance	Share of Industry (2019)	Change in Attendance (from 2018)
Contemporary Music	8,290,100	34.7%	(13.7%)
Musical Theatre	3,451,543	14.5%	(11.9%)
Festivals (Multi-Category)	2,174,359	9.1%	(15.7%)
Comedy	2,172,296	9.1%	(11.6%)
Theatre	1,530,912	6.4%	7.0%
Festivals (Contemporary Music)	1,447,836	6.1%	48.5%
Classical Music	1,316,235	5.5%	4.3%
Children's/Family	1,172,129	4.9%	(29.0%)
Ballet and Dance	803,472	3.4%	0.3%
Circus and Physical Theatre	639,135	2.7%	41.9%
Opera	435,525	1.8%	(10.6%)
Special Events	430,873	1.8%	152.9%
<b>Total</b>	<b>23,864,415</b>	<b>100.0%</b>	<b>(7.5%)</b>

## KEY HIGHLIGHTS – BY STATE/TERRITORY (2019 AND 2020)

### New South Wales

#### 2020

- In 2020, NSW recorded \$182.5 million in ticket revenue and 2.0 million attendances. It experienced the third-largest revenue fall (72.6%) and attendance fall (72.6%) in Australia between 2019 and 2020
- NSW held the largest market share of the industry for both ticket revenue (30.1%) and attendance (25.3%). NSW's market share was lower than in previous years
- On average, each person in NSW spent \$22.33 on tickets to see live events in 2020, significantly lower than previous years
- The most popular events in terms of attendance were Contemporary Music, Musical Theatre and Theatre
- The most popular events in terms of revenue were Contemporary Music, Musical Theatre and Festivals (Contemporary Music)

#### 2019

- In 2019, NSW recorded \$666.7 million in ticket revenue and 7.2 million attendances
- Between 2018 and 2019, ticket revenue fell by 11.5% and attendance fell by 13.0%
- NSW held the largest share of the industry for ticket revenue (33.9%) and second-largest share of attendance (30.0%)
- On average, each person in NSW spent \$81.94 on tickets to see live events in 2019, the second-highest per capita in Australia
- Circus and Physical Theatre revenue and attendance increased markedly, due to the *Cirque du Soleil Kurios* tour, while Special Events revenue and attendance increased due to the *Royal Edinburgh Military Tattoo* event
- The most popular events in terms of revenue and attendance were Contemporary Music, Musical Theatre and Festivals (Contemporary Music)

### Victoria

#### 2020

- In 2020, Victoria recorded \$158.3 million in ticket revenue and 1.5 million attendances. As a result of the extended lockdown, Victoria witnessed the second-largest decline in revenue (74.8%) and largest decline in attendance (79.1%) in Australia between 2019 and 2020
- Victoria held the second largest share of the industry for both ticket revenue (26.1%) and attendance (19.9%), although the scale of Victoria's market share was lower than previous years
- On average, every Victorian spent \$23.76 on tickets to see live events in 2020, significantly lower than in previous years
- Top events in 2020 included performances by Queen + Adam Lambert, Elton John and Michael Bublé. These events were presented prior to COVID-19 restrictions
- The most popular events in terms of attendance and revenue were Contemporary Music, Musical Theatre and Theatre

#### 2019

- In 2019, Victoria recorded \$627.4 million in ticket revenue and 7.4 million attendances
- Victoria held the largest share of the industry for attendance (31.0%) and second-largest share for ticket revenue (31.9%)
- Between 2018 and 2019, ticket revenue increased by 4.5% and attendance fell by 1.5%

- On average, every Victorian spent \$94.19 on tickets to see live events in 2019, the highest per capita in Australia
- In 2019, revenue growth was driven by growth in Theatre (287.0%), with popular shows such as *Harry Potter and the Cursed Child*, and Festivals (Contemporary Music) (129.3%) such as Spilt Milk and Download Festival
- The most popular events in terms of revenue were Contemporary Music, Musical Theatre and Theatre
- The most popular events in terms of attendance were Contemporary Music, Musical Theatre and Comedy

## **Queensland**

### **2020**

- In 2020, QLD recorded \$116.9 million in ticket revenue and 1.3 million attendances
- Between 2019 and 2020, ticket revenue fell by 59.2% and attendance fell by 63.7%
- QLD held the third-largest share of the industry for revenue (19.3%) and fifth-largest share for attendance (16.2%). The scale of market share for both indicators was higher than previous years
- On average, every Queenslander spent \$22.50 on tickets to see live events in 2020, significantly lower than previous years
- Circus and Physical Theatre revenue increased, due to a growth in attendance (107.2%) and an increase in average ticket price, driven by events such as *Kurios* by Cirque du Soleil
- Top events in 2020 included *The Book of Mormon* and performances from Queen + Adam Lambert and Elton John
- The most popular events in terms of revenue were Contemporary Music, Circus & Physical Theatre and Festivals (Contemporary Music)
- The most popular events in terms of attendance were Contemporary Music, Circus & Physical Theatre and Comedy

### **2019**

- In 2019, QLD recorded \$286.2 million in ticket revenue and 3.5 million attendances
- Between 2018 and 2019, ticket revenue fell by 9.8% and attendance fell by 9.5%
- On average, every Queenslander spent \$55.71 on tickets to see live events in 2019
- Festivals (Contemporary Music) revenue increased significantly due to an increase in attendance (44.1%), driven by events such as St. Jerome's Laneway Festival, Big Pineapple Music Festival, Festival X and the Red Hot Summer Tour. Ballet and Dance revenue increased due to an increase in attendance (28.5%), driven by events such as *Bolshoi Ballet: Spartacus, Romeo & Juliet* and *Alice's Adventures in Wonderland*
- The most popular events in terms of both revenue and attendance were Contemporary Music, Musical Theatre and Festivals (Contemporary Music)

## **Western Australia**

### **2020**

- In 2020, WA recorded \$72.7 million in ticket revenue and 1.3 million attendances
- Between 2019 and 2020, ticket revenue fell by 62.5% and attendance fell by 51.4%
- On average, every Western Australian spent \$27.24 on tickets to see live events in 2020, the second highest per capita spend recorded in Australia, but significantly lower than previous years
- In 2020, Contemporary Music contributed the highest share (43.0%) to WA's total revenue and Festivals (Multi Category) contributed the highest share (35.3%) to WA's total attendance. Top Contemporary Music events in 2020 included performances by Queen + Adam Lambert and Michael Bublé

- In 2020, revenue decline was primarily driven by a decline in revenue in Theatre (83.9%), Comedy (80.2%), Contemporary Music (71.5%) and Children's/Family (71.3%), partially offset by the growth in revenue from Special Events (131.5%)
- The most popular events in terms of revenue were Contemporary Music, Festivals (Multi-Category) and Festivals (Contemporary Music)
- The most popular events in terms of attendance were Contemporary Music, Festivals (Multi-Category) and Musical Theatre

## **2019**

- In 2019, WA recorded \$194.2 million in ticket revenue and 2.6 million attendances
- Between 2018 and 2019, ticket revenue fell by 8.2% and attendance fell by 4.5%
- On average, every Western Australian spent \$73.40 on tickets to see live events in 2019
- In 2019, Contemporary Music contributed the highest share to WA's total revenue and attendance with a 56.5% and 39.4% share respectively. Top Contemporary Music events in 2019 included performances by Eminem and U2
- The most popular events in terms of revenue were Contemporary Music, Musical Theatre and Festivals (Contemporary Music)
- The most popular events in terms of attendance were Contemporary Music, Festivals (Multi-Category) and Musical Theatre

## **South Australia**

### **2020**

- In 2020, SA recorded \$59.7 million in ticket revenue and 1.4 million attendances
- Between 2019 and 2020, ticket revenue fell by 55.3% and attendance fell by 39.9%. South Australia experienced the smallest decline in both revenue and attendance compared to other states/territories, largely because the State's key events (e.g. Adelaide Fringe and Adelaide Festival) were substantially presented before COVID-19 restrictions came into effect
- On average, every South Australian spent \$33.71 on tickets to see live events in 2020, the highest recorded per capita spend in Australia, but significantly lower than previous years
- In 2020, all categories except Festivals (Multi-Category) experienced a decline in revenue, and all categories except Opera and Special Events experienced a decline in attendance. This was due to COVID-19 restrictions
- Festivals (Multi-Category) witnessed a y-o-y growth in revenue (12.3%), despite a slight y-o-y decline in attendance (0.5%). Major events included Adelaide Fringe and Adelaide Festival, which were substantially presented prior to COVID-19 restrictions
- The most popular events in terms of revenue were Festivals (Multi-Category), Contemporary Music and Festivals (Contemporary Music)
- The most popular events in terms of attendance were Festivals (Multi-Category), Contemporary Music and Festivals (Contemporary Music)

### **2019**

- In 2019, SA recorded \$133.5 million in ticket revenue and 2.3 million attendances
- Between 2018 and 2019, ticket revenue increased by 1.4% and attendance increased by 4.7%
- On average, every South Australian spent \$75.77 on tickets to see live events in 2019
- Circus and Physical Theatre revenue increased primarily due to a significant increase in attendance by 887.0%, driven by events such as Circus Rio and Cosentino.
- Festivals (Contemporary Music) revenue increased primarily due to an increase in attendance (115.4%), driven by festivals such as WOMADelaide, Groovin the Moo and Spin Off Festival
- The most popular events in terms of revenue were Contemporary Music, Musical Theatre and Festivals (Multi-Category)

- The most popular events in terms of attendance were Festivals (Multi-Category), Contemporary Music and Musical Theatre

### **Australian Capital Territory**

#### **2020**

- In 2020, the ACT recorded \$5.7 million in ticket revenue and 101,000 attendances
- ACT witnessed the largest decline in revenue in Australia (81.9%) and second largest decline in attendance (76.6%). The decline in revenue was primarily impacted by the decline across Festivals (Contemporary Music), Musical Theatre, Theatre and Ballet and Dance
- On average, every ACT ticket buyer spent \$13.21 on tickets to see live events in 2020, significantly lower than previous years
- The most popular events in terms of revenue and attendance were Contemporary Music, Comedy and Circus & Physical Theatre

#### **2019**

- In 2019, the ACT recorded \$31.5 million in ticket revenue and 432,000 attendances
- On average, every ACT ticket buyer spent \$73.60 on tickets to see live events in 2019
- Between 2018 and 2019, ticket revenue increased by 13.2% and attendance increased by 6.4%
- The revenue growth in 2019 was driven by significant growth across Children's/Family, Festivals (Contemporary Music), Musical Theatre and Special Events. Top events included Spilt Milk, Groovin' the Moo, *West Side Story* and *Disney On Ice*
- The most popular events in terms of revenue were Festivals (Contemporary Music), Contemporary Music and Comedy
- The most popular events in terms of attendance were Contemporary Music, Festivals (Contemporary Music) and Children's/Family

### **Tasmania**

#### **2020**

- In 2020, Tasmania generated \$9.3 million in ticket revenue and 186,000 attendances
- Tasmania witnessed a decline in both revenue (58.7%) and attendance (47.0%)
- On average, every Tasmanian spent \$17.18 on tickets to see live events in 2020
- All categories except Children's/Family and Musical Theatre, contributed to the decline in revenue. Top events in 2020 included *Party In The Paddock*, *Mona Foma* and *Mamma Mia*
- The most popular events in terms of revenue were Contemporary Music, Festivals (Contemporary Music) and Children's/Family
- The most popular events in terms of attendance were Contemporary Music, Children's/Family and Festivals (Multi Category)

#### **2019**

- In 2019, Tasmania generated \$22.5 million in ticket revenue and 351,000 attendances
- Between 2018 and 2019, ticket revenue increased by 18.8% (the highest in Australia), while attendance fell by 52.5%
- On average, every Tasmanian spent \$41.84 on tickets to see live events in 2019
- The most popular events in terms of revenue were Contemporary Music, Festivals (Contemporary Music), and Festivals (Multi Category)
- The most popular events in terms of attendance were Contemporary Music, Festivals (Contemporary Music) and Festivals (Multi Category)

## **Northern Territory**

### **2020**

- In 2020, the NT recorded \$850,000 in ticket revenue and 25,000 attendances
- The NT witnessed a decline in both revenue (68.0%) and attendance (61.5%)
- On average, every NT ticket buyer spent \$3.45 on tickets to see live events in 2020
- The most popular events in terms of both revenue and attendance were Contemporary Music, Children's/Family and Comedy

### **2019**

- In 2019, the NT recorded \$2.7 million in ticket revenue and 65,000 attendances
- The NT witnessed a decline in both revenue (9.2%) and attendance (4.2%)
- On average, every NT ticket buyer spent \$10.82 on tickets to see live events in 2019
- The most popular events in terms of revenue were Contemporary Music, Ballet and Dance, and Comedy
- The most popular events in terms of attendance were Contemporary Music, Ballet and Dance, and Children's/Family

## KEY HIGHLIGHTS – BY GENRE

### Ballet and Dance

#### 2020

- In 2020, the Ballet and Dance category recorded an 88.6% decline in revenue, to \$7.5 million, the largest decline in revenue amongst all categories, due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies
- Attendance also experienced a decline of 82.9% to almost 137,500 in 2020, the second-largest decline in attendance amongst all categories
- In 2020, the Ballet and Dance average ticket price declined by 35.3% to \$59.64, its lowest recorded average ticket price since 2007
- NSW, WA, and QLD were the major markets in which ticket sales and attendances were generated from ballet and dance productions (a combined 88.0% of overall revenue and 88.1% of attendance)
- The top events in this category in 2020 were *The Happy Prince*, *Volt*, *Shen Yun* and *The Nutcracker*
- All jurisdictions recorded a decline in both revenue and attendance in this category in 2020. Tasmania (100% decline in both revenue and attendance) and Victoria (97.4% decline in revenue, 97.0% decline in attendance) recorded the highest decline in both revenue and attendance

#### 2019

- In 2019, the Ballet and Dance category achieved its highest recorded revenue at \$66.2 million, an increase of 3.4%
- Attendance experienced a slight increase of 0.3% from almost 801,000 in 2018 to almost 803,500 in 2019
- In 2019, the Ballet and Dance category achieved its highest recorded average ticket price of \$92.17, increasing by 1.5%
- The revenue in Ballet and Dance was primarily driven by major performances such as *The Nutcracker*, *Alice's Adventures in Wonderland*, *Giselle* and *Sylvia*
- NSW, Victoria, and QLD were the major markets in which ticket sales and attendances were generated from ballet and dance productions (a combined 85.7% of overall revenue and 78.7% of attendance)
- The NT recorded the highest growth in revenue (38.5%) and Tasmania recorded the highest growth in attendance (57.3%)

### Children's/Family

#### 2020

- In 2020, the Children's/Family events category generated \$10.4 million in revenue and 378,000 attendances
- Compared to 2019, this category experienced a significant decrease of 76.2% in revenue and 67.7% in attendance
- Top events in this category in 2020 were *The 91 Storey Treehouse*, *Bluey's Big Play*, *The Midnight Gang* and *Operation Ouch*
- NSW and QLD were the major markets in which ticket sales and attendances were generated from children's and family productions (national market share of 27.7% and 19.6% respectively in revenue and 34.9% and 16.2% respectively in attendance)
- Tasmania recorded the largest growth in this category – revenue grew by 506.0% and attendance grew by 148.3% – driven by major performances such as *Operation Ouch Live!*, *The Wiggles* and *Sesame Street Circus*, which were all presented prior to COVID-19 restrictions

- The average ticket price declined by 26.2% to \$30.33. This is the lowest recorded average ticket since 2006

#### **2019**

- In 2019, the Children's/Family events category generated \$43.6 million in revenue and 1.2 million attendances
- Compared to 2018, this category experienced a decline of 27.0% in revenue and 29.0% in attendance, and a small increase in the average ticket price (1.1%)
- NSW and Victoria were the major markets in which ticket sales and attendances were generated from children's and family productions (national market share of 31.5% and 30.1% respectively in revenue and 31.5% and 28.2% respectively in attendance)
- The ACT recorded growth in both revenue (62.3%) and attendance (27.1%) – driven by major performances such as *Disney on Ice*, *The Wiggles* and *Deadly 60 Down Under*

#### **Circus & Physical Theatre**

##### **2020**

- In 2020, the Circus & Physical Theatre category recorded approximately \$22.7 million in ticket sales and nearly 275,000 attendances
- This category experienced a significant decline in ticket sales (52.2%) and attendance (57.0%) between 2019 and 2020
- This category can be variable depending on whether international companies conduct major tours in any given year, particularly Cirque du Soleil. In 2020, the Cirque du Soleil *Kurios* tour was cancelled following the introduction of COVID-19 restrictions
- Nonetheless, this category experienced an increase of 11.7% in average ticket price to \$89.48
- QLD was the only jurisdiction that experienced growth in revenue (216.7%) and attendance (107.2%) as the Cirque du Soleil *Kurios* tour ran in January and February 2020

##### **2019**

- In 2019, the Circus & Physical Theatre category recorded approximately \$47.4 million in ticket sales and 639,000 attendances
- This category experienced a significant increase in ticket sales (102.7%) and attendance (41.9%) between 2018 and 2019, the largest increase in revenue and third-largest increase in attendance in 2019
- This category can be variable depending on whether international companies conduct major tours in any given year, particularly Cirque du Soleil. In 2019, the Cirque du Soleil *Kurios* tour commenced, and *Cirque Stratosphere* also performed
- This category also experienced an increase of 31.4% in average ticket price to \$80.08
- SA (463.8% increase in revenue and 887.0% increase in attendance – due to Circus Rio) and NSW (222.9% increase in revenue and 118.3% increase in attendance – due to Cirque du Soleil *Kurios* tour) experienced a significant growth in revenue and attendance

#### **Classical Music**

##### **2020**

- In 2020, the Classical Music category recorded \$18.1 million in ticket sales, decreasing by 79.3%
- This category recorded nearly 290,000 attendances, a decline of 78.0% between 2019 and 2020
- All jurisdictions recorded a decline in both revenue and attendance in this category in 2020, due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies. NSW (87.5% decline in revenue) and the ACT (86.4% decline in attendance) recorded the highest decline in revenue and attendance respectively

- The top events in this category in 2020 were *Music from the Studio Ghibli Films of Hayao Miyazaki* and *Vivaldi's Venice*
- The average ticket price increased slightly from \$81.35 in 2019 to \$81.75 in 2020

## **2019**

- In 2019, the Classical Music category achieved its second-highest recorded revenue of \$87.3 million, an increase of 9.9% from 2018
- This category recorded 1.3 million attendances, an increase of 4.3% between 2018 and 2019
- The NT experienced the largest growth in both revenue (128.7%) and attendance (57.7%), with growth also recorded in SA (51.7% increase in revenue and 60.0% increase in attendance), NSW (13.4% increase in revenue and 10.4% in attendance) and Victoria (16.5% increase in revenue and 5.1% increase in attendance)
- The top events in this category in 2019 were *Hans Zimmer: Live on Tour*, *Love Actually In Concert* and *Star Wars: Return of the Jedi*
- This category also experienced an increase of 2.8% in average ticket price to \$81.35

## **Comedy**

### **2020**

- In 2020, the Comedy category achieved its lowest recorded revenue of \$21.5 million and lowest recorded attendance of 338,000, a decrease of 79.2% and 84.4% respectively
- In 2020, all jurisdictions experienced a significant decline in revenue and attendance, largely due to the cancellation of the Melbourne International Comedy Festival, Perth Comedy Festival and cancelled headline tours of major high-profile international comedians
- Victoria experienced the greatest decline in both revenue (89.4% decline in revenue and 94.4% decline in attendance)
- NSW was the largest market in which ticket sales (27.3%) was generated from Comedy events and QLD was the largest market in which attendance (34.5%) was generated from Comedy events
- Major events in this category in 2020 were Brisbane Comedy Festival and performances from renowned comedians such as Jack Whitehall, Russell Brand and Carl Barron
- In 2020, the average ticket price was \$68.88, which was 30.9% higher than in 2019

### **2019**

- In 2019, the Comedy category recorded \$103.2 million in ticket sales and 2.2 million attendances, a decrease of 17.3% and 11.6% respectively
- The decline in 2019 can be attributed to the absence of tours by major high-profile comedians that headlined tours in 2018 such as Kevin Hart, Jim Jefferies, Trevor Noah and Russell Peters
- The ACT (9.2% increase in revenue and 21.2% increase in attendance) and Victoria (5.7% increase in revenue and 12.4% increase in attendance) experienced growth in revenue and attendance
- Victoria was the largest market in which ticket sales (44.4%) and attendances (56.1%) were generated from Comedy events
- Revenue in this category was driven by the Melbourne International Comedy Festival and performances from comedians such as Michael McIntyre and Steve Martin & Martin Short
- In 2018, the average ticket price was \$52.62, 53.9% lower than in 2019

## **Contemporary Music**

### **2020**

- In 2020, the Contemporary Music category achieved its lowest recorded ticket sales revenue (\$309.2 million) since 2005 and lowest recorded attendance (2.9 million) since 2004

- There was a 63.0% decline in revenue and a 65.4% decline in attendance between 2019 and 2020 due to COVID-19 restrictions and limited national and international touring activity
- In 2020, all jurisdictions experienced a significant decline in revenue and attendance. The two largest markets for Contemporary Music (NSW and Victoria) experienced a decrease in revenue of 60.3% and 67.8% respectively, and a decrease in attendance of 64.2% and 70.6% respectively
- Nonetheless, the Contemporary Music category continued to hold the largest market share of the industry, contributing 51.0% of revenue and 37.0% of attendances in 2020
- NSW and Victoria combined generated 61.3% of the market share in revenue and 57.4% of the market share in attendance in 2020
- Major events in this category in 2020 were Fire Fight Australia and performances from Queen + Adam Lambert, Elton John and Michael Bublé
- In 2020, the average ticket price of \$115.82 was the highest recorded and was 5.7% higher than in 2019

## **2019**

- In 2019, the Contemporary Music category recorded \$835.5 million in ticket sales revenue and 8.3 million attendances
- The Contemporary Music category continued to hold the largest market share of the industry, contributing 42.5% of revenue and 34.7% of attendances in 2019
- There was a 15.9% decline in revenue and 13.7% decline in attendance between 2018 and 2019. The scale of the P!NK and Ed Sheeran tours, with arena or stadium tours that attracted large crowds and toured to most of the five major cities in 2018, was not replicated at the same level in 2019
- NSW and Victoria combined generated 62.8% of the market share in revenue and 60.7% of the market share in attendance in 2019
- Tasmania (63.8% increase in revenue and 41.7% increase in attendance) and the NT (34.3% increase in revenue and 39.1% increase in attendance) experienced a growth in revenue and attendance
- Major events in this category in 2019 were performances from U2, Eminem, Elton John and Fleetwood Mac
- In 2019, the average ticket price was \$109.54 which was 3.0% less than in 2018

## **Festivals (Multi-Category)**

### **2020**

- In 2020, 1.6 million people attended Festivals (Multi-Category) events, generating \$39.5 million from ticket sales
- Attendance figures decreased by 27.9% between 2019 and 2020 and revenue decreased by 28.2% as a result of COVID-19 restrictions, including bans on mass gatherings, border closures and density limits
- SA was the largest contributor to the Festivals (Multi-Category) category, contributing 60.9% of revenue and 62.7% of attendance. WA was the second largest contributor to revenue and attendance in this category
- All states and territories experienced a decline in revenue in 2020, apart from SA. SA experienced a 12.3% increase in revenue, primarily attributed to major events including Adelaide Fringe and Adelaide Festival, which were substantially presented prior to COVID-19 restrictions
- In 2020, the average ticket price from Festivals (Multi-Category) events decreased 14.0% to \$28.66

## **2019**

- In 2019, 2.2 million people attended Festivals (Multi-Category) events, generating \$55.0 million from ticket sales
- Attendance figures decreased by 15.7% between 2019 and 2020 and revenue decreased by 20.3%
- SA was the largest contributor to the Festivals (Multi-Category) category, contributing 38.9% of revenue and 45.4% of attendance
- SA and WA experienced growth in attendance between 2018 and 2019 of 4.7% and 0.3% respectively
- In 2019, the major contributing events in this category were Adelaide Fringe, Fringe World Festival and Dark Mofo
- In 2019, the average ticket price from Festivals (Multi-Category) events decreased 17.8% to \$33.31

## **Festivals (Contemporary Music)**

### **2020**

- In 2020, nearly 437,500 people attended Festivals (Contemporary Music) events, generating over \$54.2 million from ticket sales
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions in 2020 meant that this category experienced a significant decline in revenue (70.0%) and a decline in attendance (69.8%)
- The average ticket price also decreased slightly (3.7%) to \$142.33
- In 2020, all jurisdictions experienced a significant decline in revenue and attendance. The two largest markets for Festivals (Contemporary Music) (NSW and Queensland) experienced a decrease in revenue of 83.4% and 70.8% respectively, and a decrease in attendance of 79.9% and 71.1% respectively
- NSW was the key market in which ticket sales and attendance were generated from Festival (Contemporary Music) events
- QLD accounted for the second highest market share in revenue (19.5%) and second highest market share in attendance (19.1% in 2020) in this category. The major event in 2020 was St. Jerome's Laneway Festival
- Major festivals in this category in 2020 were Falls Downtown, WOMADelaide and St. Jerome's Laneway Festival

### **2019**

- In 2019, nearly 1.5 million people attended Festivals (Contemporary Music) events, generating \$180.9 million from ticket sales, the highest recorded revenue and attendance
- Ticket sales revenue increased significantly by 77.3% and attendance increased significantly by 48.5% between 2018 and 2019
- The average ticket price also increased (12.4%) to \$147.86, the highest recorded average ticket price
- In 2019, all jurisdictions experienced an increase in revenue and attendance. The two largest markets for Festivals (Contemporary Music) (NSW and QLD) experienced an increase in revenue of 43.1% and 85.1% respectively, and an increase in attendance of 33.2% and 44.1% respectively
- NSW was the key market in which ticket sales and attendance were generated from Festival (Contemporary Music) events
- QLD accounted for the second highest market share in revenue (20.0%) and second highest market share in attendance (20.4%) in this category. The major event in 2019 was CMC Rocks QLD

- Major events in this category in 2019 were Splendour in the Grass, Bluesfest, CMC Rocks QLD, and Festival X

## Musical Theatre

### 2020

- In 2020, the Musical Theatre category recorded \$67 million in ticket sales revenue, declining significantly by 80.1%
- Attendance also declined significantly by 78.9% to 729,000 in 2020, due to the industry shutdown, COVID-19 restrictions and limited touring activity from March to November 2020
- The Musical Theatre category was the second largest industry contributor to revenue and third largest contributor to attendances, generating 11.1% of revenue and 9.4% of attendance respectively
- All states and territories experienced a decline in revenue in 2020, apart from Tasmania, where the top event was *Mamma Mia*
- The two largest markets for Musical Theatre (Victoria and NSW) experienced a decrease in revenue of 78.9% and 79.9% respectively, and a decrease in attendance of 79.4% and 77.8% respectively
- Top events in this category in 2020 were *The Book of Mormon*, *Billy Elliot the Musical*, *Shrek the Musical*, *Chicago* and *Six the Musical*
- In 2020, the average ticket price was \$99.07, a decline of 5.0% from \$104.33 in 2019

### 2019

- In 2019, the Musical Theatre category recorded \$337.3 million in ticket sales revenue, declining by 15.7%
- Attendance also declined by 11.9% from 3.9 million in 2018 to 3.5 million in 2019
- The decline in Musical Theatre may be attributable to the movement of *The Book of Mormon* to QLD, WA and SA
- The Musical Theatre category was the second largest industry contributor to revenue and attendances, generating 17.2% of revenue and 14.5% of attendance respectively
- SA (50.7% increase in revenue and 45.5% increase in attendance) and the ACT (28.9% increase in revenue and 8.5% increase in attendance) both experienced growth in revenue and attendance in 2019
- Top events in this category in 2019 were *The Book of Mormon*, *West Side Story*, *Charlie and the Chocolate Factory* and *Aladdin*
- In 2019, the average ticket price was \$104.33, a slight decline of 4.2% from \$108.85 in 2018

## Opera

### 2020

- In 2020, nearly 148,000 people attended Opera events, generating \$11.3 million from ticket sales
- The Opera category experienced a significant decline in ticket sales of 71.9% and in attendance by 66.0% between 2019 and 2020, due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies
- NSW was the key market in which revenue and attendance were generated by Opera events
- In 2020, NSW and WA generated the majority of Opera revenue with a combined 93.5% of revenue market share (89.7% and 3.8% respectively), while NSW and SA generated the majority of Opera attendance with combined 75.5% of market share (53.6% and 21.9% respectively)
- All jurisdictions recorded a decline in both revenue and attendance in this category in 2020. The two largest markets for Opera (NSW and Victoria) experienced a decrease in revenue of 62.9% and 94.7% respectively, and a decrease in attendance of 62.3% and 93.0% respectively

- Major opera performances in 2020 included *Carmen*, *La Boheme* and *Don Giovanni*
- In 2020, the average ticket price decreased by 23.2% to \$87.47

## **2019**

- In 2019, over 435,000 people attended Opera events, generating \$40.2 million from ticket sales
- The Opera category experienced a decrease in ticket sales of 14.4% and in attendance by 10.6% between 2018 and 2019
- NSW was the key market in which revenue and attendance were generated by Opera events
- In 2019, NSW and Victoria generated the majority of Opera revenue and attendance, with a combined 87.7% of revenue market share (68.1% and 19.6% respectively) and 71.4% of attendance market share
- SA (37.3% increase in revenue and 68.8% increase in attendance) and QLD (0.9% increase in revenue and 67.6% increase in attendance) both experienced growth in revenue and attendance
- Major opera performances in 2019 included Opera Australia's Sydney Summer Season, Opera Australia's Sydney Winter Season and Great Opera Hits
- In 2019, the average ticket price decreased by 8.3% to \$113.83

## **Special Events**

### **2020**

- In 2020, nearly 170,000 people attended Special Events, generating \$4.6 million from ticket sales
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions resulted in a significant decline of 78.2% in revenue and 61.3% in attendances
- In 2020, WA and QLD accounted for the largest market share in revenue in this category, with 38.9% and 30.1% respectively. WA and NSW accounted for the largest market share in attendance in this category, with 24.9% and 24.8% respectively, of the overall market share.
- WA (131.5% increase in revenue and 80.5% increase in attendance) experienced the largest growth in revenue and attendance
- Major events in this category included *Cuban Club*, *Fire Aid* and *Heaps Gay Planet Xtra Mardi Pardi*
- In addition, in 2020, the average ticket price decreased by 22.7% to \$55.40

### **2019**

- In 2019, over 430,000 people attended Special Events, generating \$21.4 million from ticket sales
- This category experienced a slight decline of 3.5% in revenue and a significant increase of 152.9% 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
- NSW (157.0% increase in revenue and 452.9% increase in attendance) experienced the second largest growth in revenue and largest growth in attendance, which can be attributed to the top event in this category, the *Royal Edinburgh Military Tattoo*
- In addition, in 2019, the average ticket price decreased by 53.1% to \$71.68, which can primarily be attributed to the higher ticket prices for special events held as part of the Gold Coast Commonwealth Games in 2018

## **Theatre**

### **2020**

- The Theatre category generated \$39.9 million in ticket sales, which was 72.8% lower than the previous year
- In 2020, over 420,000 people attended Theatre events, a significant decline of 72.4%

- Victoria and NSW had a combined 87.3% of market share in revenue (60.0% and 27.3% respectively) and a combined 78.2% of market share in attendance (38.4% and 39.8% respectively)
- All jurisdictions recorded a decline in both revenue and attendance in this category in 2020. The two largest markets for Theatre (Victoria and NSW) experienced a decrease in revenue of 76.4% and 59.9% respectively, and a decrease in attendance of 75.2% and 63.8% respectively
- Top events in this category in 2020 were *Harry Potter and the Cursed Child*, *Home, I'm Darling*, *The Deep Blue Sea* and *A Christmas Carol*
- In 2020, the average ticket price decreased slightly by 2.7% to \$105.14

## **2019**

- The Theatre category generated \$146.6 million in ticket sales, an increase of 86.7%, the highest recorded revenue for the Theatre category
- In 2019, over 1.5 million people attended Theatre events, an increase of 7%
- Victoria and NSW had a combined 87.5% of market share in revenue (69.0% and 18.5% respectively) and a combined 73.1% of market share in attendance (42.8% and 30.3% respectively) in 2019
- Victoria was the largest contributor to revenue (69.0%) and attendance (42.8%) in 2019 and experienced the largest increase in revenue and attendance (287.0% and 51.5% respectively). The growth in revenue and attendance was primarily due to the opening, and subsequent popularity, of *Harry Potter and the Cursed Child*
- Other top events in this category included *The Lady in the Van*, *Cat on a Hot Tin Roof*, *Shakespeare in Love* and *The Beauty Queen of Leenane*
- In 2019, the average ticket price increased by 69.1% to \$108.07, the highest recorded average ticket price