Live Performance Industry in Australia

2019 and 2020 Ticket Attendance and Revenue Report

Live Performance Australia

Reliance Restricted

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EY

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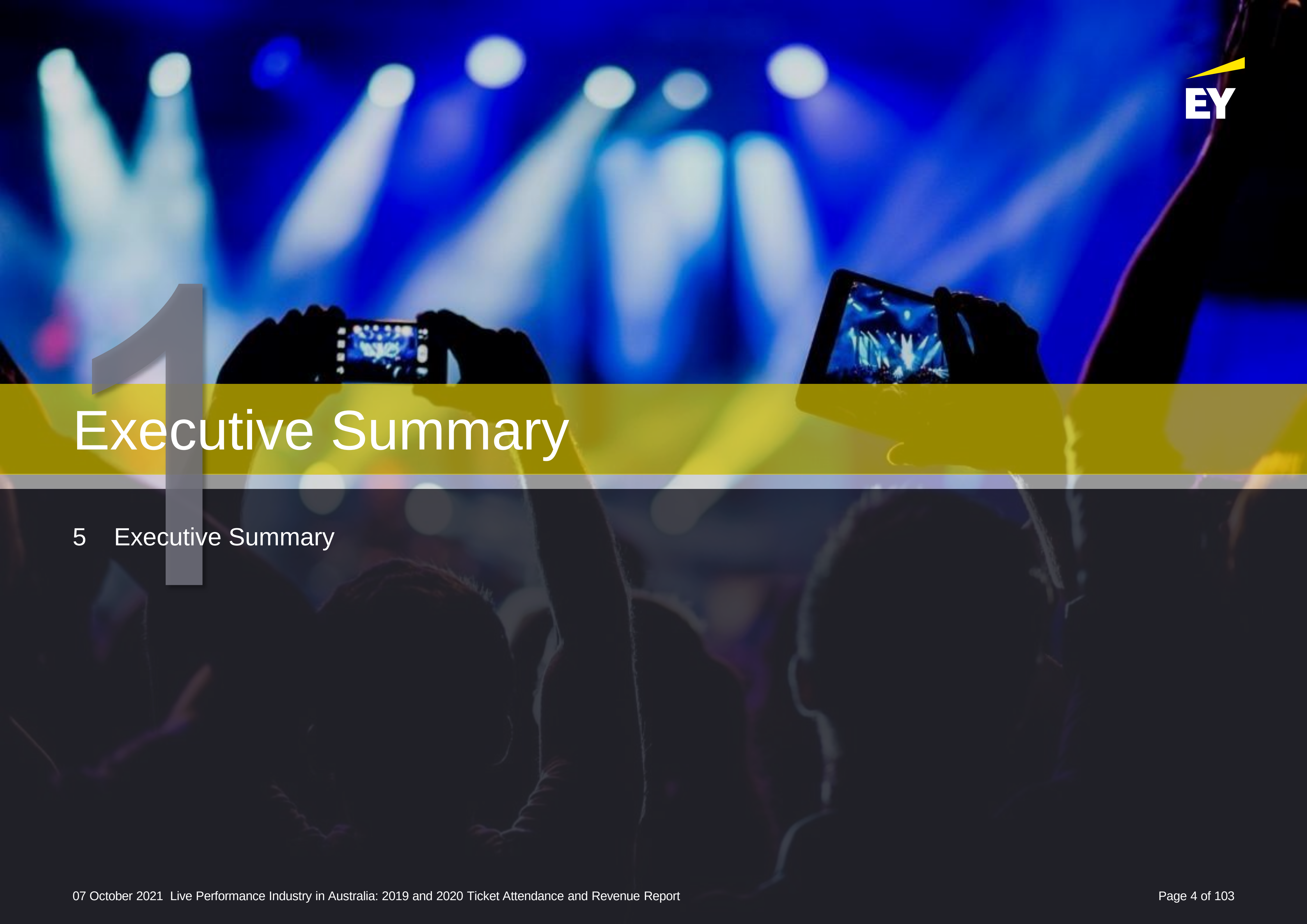

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Executive Summary

1 Executive Summary

Following a record year in 2018, the live performance industry recorded its second highest revenue, attendance and average ticket price in 2019. The industry shutdown from March 2020 due to COVID-19 caused significant industry disruption in 2020.

2019

$2.0b revenue — 4.8% y-o-y decline

23.9m attendance — 7.5% y-o-y decline

2020

$0.6b revenue — 69.2% y-o-y decline

7.8m attendance — 67.5% y-o-y decline

Top Events

- Splendour in the Grass, *The Book of Mormon*, Melbourne International Comedy Festival and performances by U2 and Eminem generated the highest revenue in 2019.
- Adelaide Fringe, Fringe World Festival and performances by Queen + Adam Lambert, Elton John and Michael Bublé generated the highest revenue in 2020.

Key Highlights

- Circus and Physical Theatre, experienced a significant increase in revenue and attendance in 2019, primarily attributed to the return of Cirque du Soleil.
- Festivals (Contemporary Music) experienced significant growth in revenue and in attendance in 2019, driven by major festivals held in NSW and QLD.
- Top events in Contemporary Music across 2019 and 2020 included performances from U2, Queen + Adam Lambert, Elton John and Eminem.
- In 2020, COVID-19 restrictions such as bans on mass gatherings, venue closures and patron limits caused significant disruption to the live entertainment Industry across Australia.

New South Wales (NSW)

- NSW accounted for the highest market share of revenue (33.9%) and second highest market share of attendance (30.0%) in 2019.
- NSW recorded the highest market share of revenue (30.1%) and attendance (25.3%) in 2020.

Victoria (VIC)

- VIC accounted for the second highest market share of revenue (31.9%) and highest market share of attendance (31.0%) in 2019.
- VIC recorded the second highest share of revenue (26.1%) and attendance (19.9%) in 2020.

Contemporary Music

- Contemporary Music continued to be the top live performance category in 2019 and 2020.
- Contemporary Music accounted for 42.5% of revenue and 34.7% of attendance in 2019, followed by 51.0% of revenue and 37.0% of attendance in 2020.

Musical Theatre

- Musical Theatre was the second largest category in revenue (17.2%) and second largest category in attendance (14.5%) in 2019.
- Musical Theatre was the second largest category in revenue (11.1%) and third largest category in attendance (9.4%) in 2020.

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Key Findings

Overall Results

2019

$2.0b

Revenue: In 2019, the Australian live performance industry generated total ticket sales revenue of almost $2.0b, a decline of 4.8% from 2018. This can be primarily attributed to the decline in the total number of paid tickets, coupled with a decline in the average ticket price in 2019.

23.9m

Attendance: Approximately 23.9m tickets were issued in 2019, a 7.5% decline from 2018. Of the 23.9m total tickets, the number of paid tickets issued was 21.2m (a slight decline from 21.4m tickets sold in 2018). The remaining 2.7m tickets issued in 2019 were complimentary, sponsor allocated and zero priced tickets.

$92.89

Average ticket price: There was a decline in the average ticket price by 3.9% from $96.61 in 2018 to $92.89 in 2019.

2020

$0.6b

Revenue: In 2020, the Australian live performance industry generated total ticket sales revenue of almost $0.6b, a decline of 69.2% from 2019, due to a decline in the total number of paid tickets and a decline in the average ticket price in 2020. This significant decline can be primarily attributed to COVID-19 restrictions.

7.8m

Attendance: Approximately 7.8m tickets were issued in 2020, a 67.5% decline from 2019. Of the 7.8m total tickets, the number of paid tickets issued was 7.0m (a decline from 21.2m tickets sold in 2019). The remaining 0.8m tickets issued in 2020 were complimentary, sponsor allocated and zero priced tickets.

$87.14

Average ticket price: There was a decline in the average ticket price by 6.2% from $92.89 in 2019 to $87.14 in 2020.

Key Insights

- NSW and VIC combined accounted for the largest share of revenue and attendance (65.8% and 61.0% respectively in 2019 and 56.1% and 45.2% respectively in 2020).
- Circus and Physical Theatre experienced the highest growth in revenue among all the categories, primarily attributed to the return of Cirque du Soleil in 2019.
- Contemporary Music was the largest category in the industry in 2019, representing approximately 43% of revenue and 35% of attendance of the overall live performance market. In 2020, it accounted for 51% of revenue and 37% of attendance of the overall market share.
- Growth in revenue and attendance in any given year is mainly attributed to the increase in major tours or events, particularly international tours, notably concerts and comedy.
- Limited touring activity across Australia and the shutdown of events and venues in response to COVID-19 restrictions, led to a significant decline in revenue and attendance in 2020.

Overall Results

2018 vs 2019 Summary

- In 2019, the Australian live performance industry reported revenue of approximately $2.0b (a y-o-y decline of 4.8%) and reported 23.9m in attendance (a y-o-y decline of 7.5%).
- The decline in revenue in 2019 was primarily attributed to the decline across Contemporary Music, Musical Theatre and Comedy. Combined these three categories contributed to 73.6% of the overall revenue and 62.0% of the overall attendance in 2018, while they contributed 65.0% to the overall revenue and 58.3% to the overall attendance in 2019.

Contemporary Music

Revenue: **$835.5m** in 2019 vs **$993.7m** in 2018

Attendance: **8.3m** in 2019 vs **9.6m** in 2018

- Contemporary Music accounted for 48.1% of the overall revenue and 37.3% of overall attendance in 2018, which declined to 42.5% of revenue and 34.7% of attendance in 2019. The category witnessed a decline in revenue of 15.9% and a decline in attendance of 13.7% in 2019.
- The annual variability of this category is as a result of the number of high-profile international artists that tour in any given year, particularly the number of stadium tours that attract large audiences.
- Some of the major tours in the Contemporary Music category such as P!NK, Ed Sheeran, Bruno Mars, Taylor Swift and Katy Perry which contributed to significant revenue in 2018, were missing in 2019 which impacted the revenue.

Musical Theatre

Revenue: **$337.3m** in 2019 vs **$400.2m** in 2018

Attendance: **3.5m** in 2019 vs **3.9m** in 2018

- Musical Theatre accounted for 19.4% of the overall revenue and 15.2% of overall attendance in 2018, which declined to 17.2% of revenue and 14.5% of attendance in 2019. The category witnessed a decline in revenue of 15.7% and a decline in attendance of 11.9% in 2019.
- NSW and VIC account for the major revenue and attendance in this category. Combined they generated a 71.0% market share of revenue and a 69.8% market share of attendance in 2018. This declined to a 68.6% market share of revenue and a 67.2% market share of attendance in 2019.
- Some of the top events in 2018, namely *Beautiful: The Carole King Musical* and *Priscilla, Queen of the Desert* were not held in 2019, which impacted revenue. A decrease in revenue and attendance may also be explained by shorter seasons of *The Book of Mormon* in Queensland, Western Australia and South Australia.

Comedy

Revenue: **$103.2m** in 2019 vs **$124.7m** in 2018

Attendance: **2.2m** in 2019 vs **2.5m** in 2018

- Comedy accounted for 6.0% of the overall revenue and 9.5% of overall attendance in 2018, which declined to 5.3% of revenue and 9.1% of attendance in 2019. The category witnessed a decline in revenue of 17.3% and a decline in attendance of 11.6% in 2019.
- 2018 accounted for the highest recorded revenue and attendance for Comedy, while 2019 was the second highest recorded revenue and attendance for Comedy since the introduction of this category in the Report in 2009.
- 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.

Overall Results

Trend analysis over the years

Total Attendance and Revenue

2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance*	Growth (%)	Average Ticket Price ($)**	Growth (%)
2004	$689,599,070	-	13,477,231	-	$55.13	-
2005	$834,337,206	21.0%	15,808,790	17.3%	$60.62	10.0%
2006	$1,158,064,526	38.8%	19,835,756	25.5%	$64.08	5.7%
2007	$1,228,658,664	6.1%	20,887,365	5.3%	$66.03	3.1%
2008	$1,061,273,304	(13.6%)	15,823,705	(24.2%)	$76.60	16.0%
2009	$1,083,329,949	2.1%	15,196,773	(4.0%)	$80.57	5.2%
2010	$1,327,805,816	22.6%	17,241,139	13.5%	$86.43	7.3%
2011	$1,309,187,150	(1.4%)	17,345,720	0.6%	$85.99	(0.5%)
2012	$1,204,883,551	(8.0%)	16,273,730	(6.2%)	$85.46	(0.6%)
2013	$1,478,976,893	22.7%	17,926,626	10.2%	$92.16	7.8%
2014	$1,507,963,952	2.0%	18,536,434	3.4%	$91.57	(0.6%)
2015***	$1,413,208,686	(6.3%)	18,626,457	0.5%	$86.34	(5.7%)
2016	$1,430,399,693	1.2%	18,782,588	0.8%	$83.72	(3.0%)
2017	$1,884,141,882	31.7%	23,027,550	22.6%	$90.59	8.2%
2018^	$2,063,885,872	9.5%	25,788,548	12.0%	$96.61	6.6%
2019	$1,964,641,552	(4.8%)	23,864,415	(7.5%)	$92.89	(3.9%)
2020	$605,973,596	(69.2%)	7,761,710	(67.5%)	$87.14	(6.2%)

Trend analysis considerations

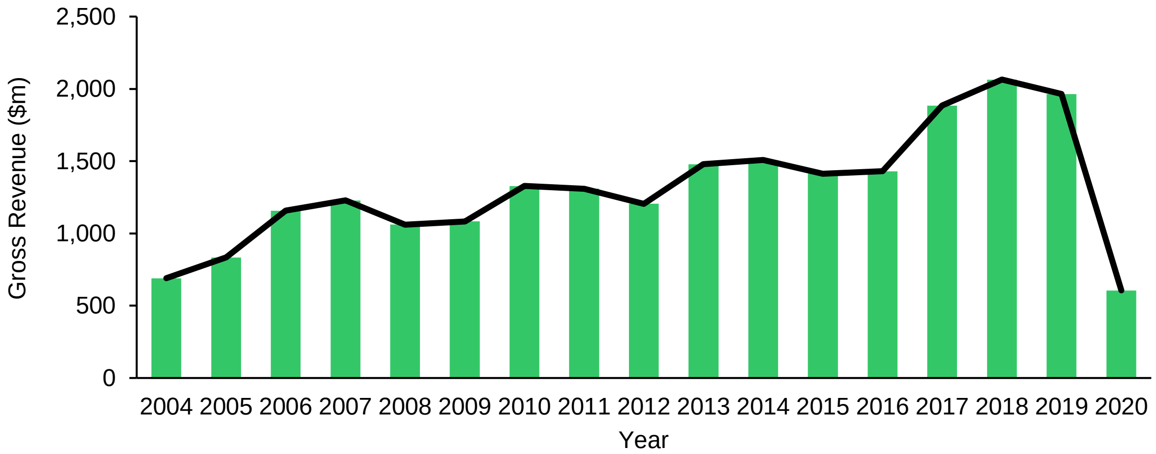
An analysis of longer term trends that follows over the page provides an indication of how the industry has performed in recent years. However, given that data used to prepare the reports prior to 2008 was not provided in a disaggregated format, EY was unable to validate the accuracy of the allocation of events in these years. Our trend analysis has only been performed on data from 2008 to 2020. Further, these trends do not account for the inclusion of new data providers over time.

* Based on both paid and unpaid tickets ** Average Ticket Prices are calculated based on paid tickets only ^ The 2018 data has been updated since the previous Report release to account for an error in the data received *** The 2015 survey did not include the revenue and attendance generated by the Fringe World Festival in 2015. To ensure the report is comparing figures on a like for like basis. EY has adjusted the 2015 revenue and attendance figures in the 2016 report.

Overall Results

Revenue

2004 → 2020

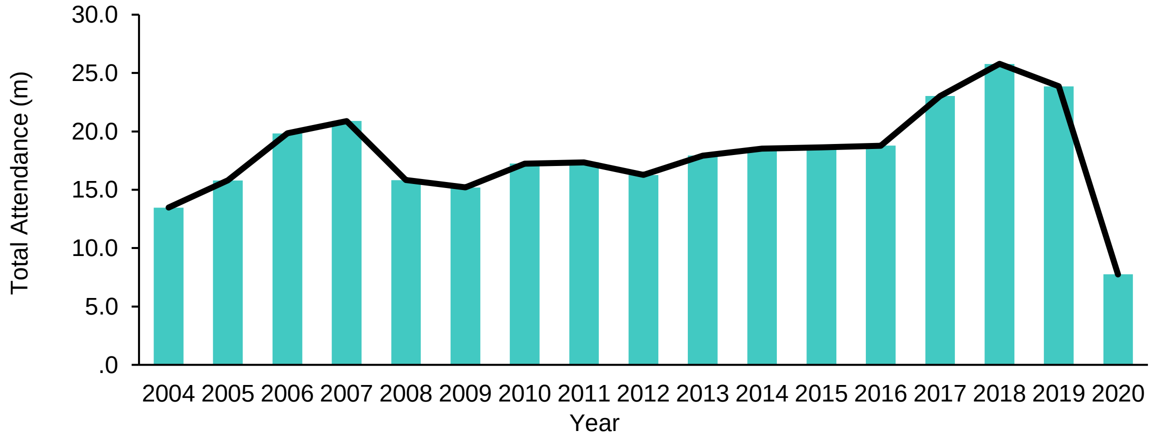


Key Revenue Insights

- In 2019, industry revenue decreased by 4.8% y-o-y.
- In 2020, industry revenue fell by 69.2% y-o-y due to COVID-19 restrictions.
- Revenue has grown at a compound annual growth rate (CAGR) of 5.8% over the period from 2008 to 2019 whereas from 2008 to 2020, it reported a negative CAGR of 4.6%.
- TAS witnessed the highest y-o-y growth in revenue in Australia (by 18.8%) in 2019. None of the states witnessed any y-o-y increase in 2020 and ACT witnessed the largest decline (81.9%).
- Circus and Physical Theatre witnessed the highest y-o-y growth (102.7%) in 2019, among all the other categories. This was driven by Cirque du Soleil tours.
- In 2020, Ballet and Dance witnessed the largest y-o-y decline of 88.6% driven by COVID-19 restrictions and limited touring activity.

Attendance

2004 → 2020



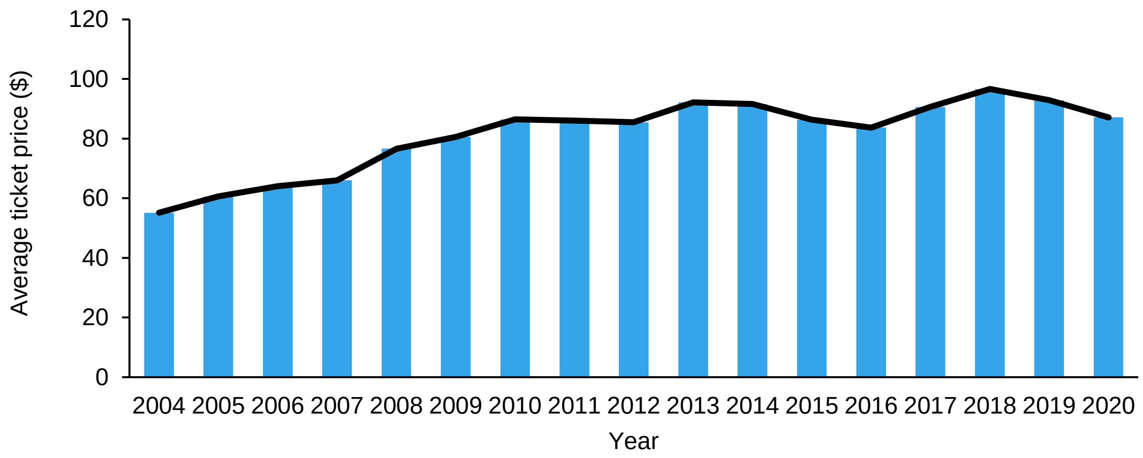
Key Attendance Insights

- Total attendance has declined y-o-y in 2019 by 7.5% (to 23.9m), followed by a 67.5% decline (to 7.8m) in 2020.
- Attendance has grown at a CAGR of 3.8% from 15.8m in 2008 to 23.9m in 2019. However, over the period 2008 to 2020, attendance has declined at a CAGR of 5.8%, driven by the significant impact of COVID-19 restrictions.
- In 2019, Special Events witnessed the highest y-o-y increase in attendance (152.9%) amongst all the categories. The ACT experienced the highest y-o-y growth in attendance (6.4%) in Australia.
- In 2020, all the categories and states and territories witnessed a decline in attendance, with Comedy (84.4%) and Victoria (79.1%) experiencing the highest y-o-y decline. This was due to bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions, and the extended lockdown in Victoria.

Overall Results

Average Ticket Price

2004 → 2020



Key Average Ticket Price Insights

- The average ticket price increased by 13.8%, from $76.60 in 2008 to $87.14 in 2020.
- The average ticket price grew at a CAGR of 1.1% over the period 2008 to 2020.
- The average ticket price decreased by 3.9% y-o-y in 2019, from $96.61 in 2018 to $92.89 in 2019. It further declined in 2020 by 6.2% to $87.14 in 2020.
- The highest y-o-y growth in average ticket price was observed in Theatre (69.1%) in 2019 and in Comedy (30.9%) in 2020.The increase in Theatre revenue was primarily due to the opening of *Harry Potter and the Cursed Child.* The increase in Comedy revenue was primarily due to tours of renowned comedians, including Jack Whitehall, Russell Brand and Carl Barron.
- Festivals (Contemporary Music) command the highest average ticket price among all the categories at $147.86 in 2019 and $142.33 in 2020.

Overall State and Territory Results

New South Wales (NSW) experienced the highest y-o-y decline in revenue and the second highest y-o-y decline in attendance in 2019, followed by a significant decline in revenue and attendance in 2020, driven by COVID-19 restrictions and limited touring activity.

- **NSW** experienced a y-o-y decline in revenue between 2018 and 2020 (by 11.5% to $666.7m in 2019 and 72.6% to $182.5m in 2020) and a y-o-y decline in attendance (by 13.0% to 7.2m in 2019 and 72.6% to 2.0m in 2020).
- In 2019, the decline in revenue was driven by a significant decline in **Festivals (Multi-Category)** (40.4%), **Children's/Family** (37.3%), **Comedy** (27.9%) and **Musical Theatre** (26.2%). This was partially offset by a growth in **Circus and Physical Theatre** (222.9%), **Special Events** (157.0%) and **Festivals (Contemporary Music)** (43.1%).
  - **Festivals (Multi-Category)**, **Comedy** and **Musical Theatre** revenue declined, primarily driven by a decline in both attendance and average ticket price. **Children's/Family** revenue declined, primarily driven by a decline in attendance. This was partially offset by a slight increase in average ticket price.
  - **Circus and Physical Theatre** revenue increased due to an increase in attendance and the average ticket price, which was driven by Cirque du Soleil tours. **Special Events** revenue increased due to a significant increase in attendance, partially offset by the decline in average ticket price. **Festivals (Contemporary Music)** revenue increased due to an increase in attendance and average ticket price.
- In 2020, all categories experienced a significant decline in revenue and attendance due to COVID-19 restrictions.
  - The decline in revenue was primarily driven by a significant decline in **Circus and Physical Theatre** (97.4%), **Special Events** (95.8%), **Ballet and Dance** (87.9%) and **Classical Music** (87.5%).
  - **Circus and Physical Theatre** and **Classical Music** revenue decline was driven by a decline in attendance, partially offset by the increase in average ticket price. **Special Events** and **Ballet and Dance** revenue decline was driven by a decline in attendance and average ticket price.

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Queensland (QLD) experienced the second highest y-o-y decline in revenue and third highest y-o-y decline in attendance in 2019, followed by a significant decline in revenue and attendance in 2020, driven by COVID-19 restrictions and limited touring activity.

- **Queensland** experienced a y-o-y decline in revenue between 2018 and 2020 (by 9.8% to $286.2m in 2019 and 59.2% to $116.9m in 2020) and a y-o-y decline in attendance (by 9.5% to 3.5m in 2019 and 63.7% to 1.3m in 2020).
- In 2019, the decline in revenue was primarily attributable to **Special Events** (93.6%), **Comedy** (37.3%) and **Festivals (Multi-Category)** (25.9%). The decline was partially offset by growth in revenue in **Festivals (Contemporary Music)** (85.1%) and **Ballet and Dance** (36.3%).
  - Top events included *The Book of Mormon*, CMC Rocks QLD and performances from Eminem and U2.
- In 2020, the decline in revenue was primarily due to **Ballet and Dance** (90.7%), **Festivals (Multi-Category)** (87.5%), **Musical Theatre** (85.1%) and **Opera** (85.1%). The decline was partially offset by a growth in revenue in **Circus and Physical Theatre** (216.7%) and **Special Events** (74.4%).
  - Top events included *The Book of Mormon* and performances from Queen + Adam Lambert and Elton John.

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Overall State and Territory Results

Victoria experienced the third highest y-o-y growth in revenue, despite a moderate decline in attendance in 2019, followed by the second highest y-o-y decline in revenue and the highest y-o-y decline in attendance in 2020.

- **Victoria** experienced a y-o-y growth in revenue (by 4.5% to $627.4m) despite a moderate y-o-y decline in attendance (by 1.5% to 7.4m) in 2019, followed by a y-o-y decline in revenue (by 74.8% to $158.3m) and y-o-y decline in attendance (by 79.1% to 1.5m) in 2020.
- In 2019, revenue growth was driven by growth in **Theatre** (287.0%), **Festivals (Contemporary Music)** (129.3%) and **Classical Music** (16.5%). This was partially offset by decline in **Contemporary Music** (17.8%), **Children's/Family** (16.6%) and **Opera** (10.3%).
  - **Theatre** revenue increased primarily due to an increase in attendance by 51.5%, driven by events such as *Harry Potter and the Cursed Child*, *The Lady in the Van*, *Shakespeare in Love and Kiss of the Spider Woman*. **Festivals (Contemporary Music)** revenue increased primarily due to an increase in attendance by 61.1%, driven by festivals such as Spilt Milk, Download Festival: Melbourne, Festival X and Groovin' the Moo.
  - **Contemporary Music** revenue decline was driven by a decline in attendance and average ticket price. Artists that toured Victoria in 2019 did not attract the same audience numbers as the international artists that toured in 2018 (such as P!NK and Ed Sheeran). **Opera** revenue decline was primarily driven by a decline in the average ticket price. **Children's/Family** revenue decline was primarily driven by a decline in attendance, partially offset by a slight growth in the average ticket price.
- As a result of the extended lockdown in Victoria in 2020, all categories experienced a significant decline in revenue and attendance. The revenue decline was primarily driven by a decline in **Ballet and Dance** (97.4%), **Opera** (94.7%) and **Comedy** (89.4%), due to the key companies and events in these categories not being able to present their shows.
  - Top events include performances from Queen + Adam Lambert, Elton John and Michael Bublé.

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Western Australia (WA) experienced a moderate y-o-y decline in revenue and attendance in 2019, followed by a significant y-o-y decline in revenue and attendance in 2020.

- **WA** experienced a y-o-y decline in revenue between 2018 and 2020 (by 8.2% to $194.2m in 2019 and 62.5% to $72.7m in 2020) and a y-o-y decline in attendance (by 4.5% to 2.6m in 2019 and 51.4% to 1.3m in 2020).
- In 2019, the decline in revenue was driven by a significant decline in **Circus and Physical Theatre** (60.4%), **Children's/Family** (41.6%), **Musical Theatre** (37.4%) and **Comedy** (30.0%). This was partially offset by a growth in **Theatre** (125.5%), **Festivals (Contemporary Music)** (106.1%) and **Special Events** (25.0%).
  - **Circus and Physical Theatre** and **Children's/Family** revenue decline was driven by a decline in attendance, despite growth in the average ticket price. **Comedy** and **Musical Theatre** revenue decline was driven by a decline in attendance and the average ticket price.
  - **Theatre** revenue increased primarily due to an increase in attendance by 165.9%, driven by events such as *Peter Pan Goes Wrong*, *The Torrents* and *Black is the New White*.
  - **Festivals (Contemporary Music)** revenue increased primarily due to an increase in attendance by 55.7%, driven by festivals such as Falls Festival, Groovin' the Moo and St. Jerome's Laneway Festival.
- In 2020, the revenue decline was primarily driven by a decline in **Theatre** (83.9%), **Comedy** (80.2%), **Contemporary Music** (71.5%) and **Children's/Family** (71.3%), partially offset by the growth in **Special Events** (131.5%).
  - Top events include festivals such as Fringe World Festival, Falls Downtown and performances from Queen + Adam Lambert and Michael Bublé.

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Overall State and Territory Results

South Australia (SA) and the Australian Capital Territory (ACT) experienced y-o-y growth in revenue and attendance in 2019, followed by a significant y-o-y decline in revenue and attendance in 2020.

- **SA** experienced a moderate y-o-y growth in revenue (by 1.4% to $133.5m) and y-o-y growth in attendance (by 4.7% to 2.3m) in 2019, followed by a y-o-y decline in revenue (by 55.3% to $59.7m) and y-o-y decline in attendance (by 39.9% to 1.4m) in 2020.
- In 2019, the growth in revenue was primarily driven by **Circus and Physical Theatre** (463.8%), **Festivals (Contemporary Music)** (236.4%), **Classical Music** (51.7%) and **Musical Theatre** (50.7%). The growth in revenue was partially offset by a decline in **Children's/Family** (34.2%) and **Contemporary Music** (27.0%).
  - **Circus and Physical Theatre** revenue increased primarily due to an 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 by 115.4%, driven by festivals such as WOMADelaide, Groovin the Moo, Spin Off Festival and St. Jerome's Laneway Festival.
  - **Classical Music** revenue increased primarily due to an increase in attendance by 60.0%, driven by concerts such as Star Wars V, *Love Actually In Concert* and *Harry Potter & the Goblet of Fire*. **Musical Theatre** revenue increased primarily due to an increase in attendance by 45.5%, driven by musicals such as *Aladdin, The Book of Mormon and West Side Story*.
- In 2020, the revenue decline was primarily driven by a decline in **Circus and Physical Theatre** (99.8%), **Opera** (97.9%), **Ballet and Dance** (91.3%), **Musical Theatre** (85.4%), **Children's/Family** (82.3%) and **Classical Music** (77.4%). The decline in revenue was partially offset by growth in **Festivals (Multi-Category)** (12.3%) and other events which were presented before the introduction of COVID-19 restrictions.
  - Top events include festivals such as Adelaide Fringe, WOMADelaide, performances from Queen + Adam Lambert, Michael Bublé and musicals such as *Billy Elliot The Musical*.
- **Australian Capital Territory (ACT)** experienced a y-o-y growth in revenue (by 13.2% to $31.5m) and y-o-y growth in attendance (by 6.4% to 0.4m) in 2019, followed by a y-o-y decline in revenue (by 81.9% to $5.7m) and y-o-y decline in attendance (by 76.6% to 0.1m) in 2020.
- The revenue growth in 2019 was driven by significant growth across the **Children's/Family**, **Festivals (Contemporary Music)**, **Musical Theatre** and **Special Events** categories. The decline in revenue in 2020 was primarily impacted by the decline in revenue across **Festivals (Contemporary Music)**, **Musical Theatre**, **Theatre** and **Ballet and Dance**.

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Due to their size, the Northern Territory (NT) and Tasmania contributed the least to national live performance revenue in 2019.

- **Tasmania** witnessed the highest y-o-y growth (18.8% to $22.5m) in revenue, despite the highest y-o-y decline in attendance (52.5% to 0.4m) in 2019.
- The growth in revenue is primarily driven by a growth in **Festivals (Contemporary Music)**, **Circus and Physical Theatre**, **Contemporary Music** and **Theatre**.
- **Tasmania** witnessed a y-o-y decline in revenue (by 58.7% to $9.3m) and a y-o-y decline in attendance (by 47.0% to 0.2m) in 2020. All categories except **Children's/Family** and **Musical Theatre**, contributed to the decline in revenue.
- **Northern Territory (NT)** experienced a y-o-y decline in revenue (by 9.2% to $2.7m) and a y-o-y decline in attendance (by 4.2% to 65k) in 2019, followed by a y-o-y decline in revenue (by 68.0% to $0.8m) and a y-o-y decline in attendance (by 61.5% to 25k) in 2020.
- The revenue decline in 2019 was primarily due to a decline in revenue in **Festivals (Multi-Category)**, **Musical Theatre**, **Circus and Physical Theatre**, **Children's/Family** and **Theatre**. All categories except **Special Events** contributed to the decline in revenue in 2020.

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Overall State and Territory Results

Victoria and NSW combined generated the largest share of revenue and attendance in 2019 and 2020.

- In 2019, **NSW** recorded the highest market share of revenue (33.9%) and the second highest market share of attendance (30.0%) in Australia. In 2020 NSW recorded the highest market share of revenue (30.1%) and highest market share of attendance (25.3%).
- In 2019, **Victoria** recorded the second highest share of revenue (31.9%) and the highest market share of attendance (31.0%). In 2020 Victoria recorded the second highest market share of revenue (26.1%) and second highest market share of attendance (19.9%).
- Combined, **Victoria** and **NSW** generated approximately 65.9% of Australia's live performance revenue and 61.1% of attendance in 2019, followed by a 56.2% share of revenue and 45.2% share of attendance in 2020.
- National spend per capita in 2019 was $76.88. **Victoria** and **NSW** held the top positions in spend per capita in 2019, with $94.19 (22.5% higher than national spend per capita) and $81.94 (6.6% higher than national spend per capita) respectively.
- National spend per capita in 2020 was $23.59. **SA** and **WA** held the top positions in spend per capita in 2020, with $33.71 (42.9% higher than national spend per capita) and $27.24 (15.5% higher than national spend per capita) respectively.

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- **NSW** and **Victoria** accounted for the largest market share of revenue and attendance in most categories in 2019 and 2020.
- Notable exceptions in 2019 included:
  - **Festivals (Multi-Category)**: **SA** and **WA** accounted for the largest market share of revenue, with a combined 63.9% market share of revenue, while **SA** and **VIC** accounted for the largest market share of attendance (a combined 68.6% market share of attendance). Major annual festivals held in **SA** and **WA** included Adelaide Fringe and Fringe World Festival.
  - In **Festivals (Contemporary Music)**, **NSW** and **QLD** combined accounted for the largest market share of revenue and attendance. In **Circus and Physical Theatre**, **NSW** and **QLD** accounted for the largest market share of revenue, while **NSW** and **VIC** accounted for the largest market share of attendance.
  - In **Special Events**, NSW and VIC accounted for the largest market share of revenue, while **NSW** and **QLD** accounted for the largest market share of attendance.
- Notable exceptions in 2020 included:
  - In **Ballet and Dance**, **NSW** and **WA** combined accounted for the largest market share of revenue and attendance. In **Circus and Physical Theatre**, **QLD** and **VIC** combined accounted for the largest market share of revenue and attendance.
  - In **Festivals (Contemporary Music)**, **Children's/Family** and **Comedy**, **NSW** and **QLD** combined accounted for the largest market share of revenue and attendance.
  - In **Festivals (Multi-Category)**, **SA** and **WA** generated the majority of revenue and attendance, with a combined 91.4% market share of revenue and 91.7% of attendance. Major annual festivals held in **SA** and **WA** included Adelaide Fringe, Fringe World Festival and Adelaide Festival.
  - In **Special Events**, **WA** and **QLD** accounted for the largest market share of revenue, while **WA** and **NSW** accounted for the largest market share of attendance.

2019 Analysis of Top 5 Categories and Top 3 Biggest Changes

Categories with highest industry share and biggest change y-o-y

Top 5 Categories - Revenue and Attendance 2019

Revenue 2019			Attendance 2019		
Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
Contemporary Music	$835,544,629	42.5%	Contemporary Music	8,290,100	34.7%
Musical Theatre	$337,338,257	17.2%	Musical Theatre	3,451,543	14.5%
Festivals (Contemporary Music)	$180,852,859	9.2%	Festivals (Multi-Category)	2,174,359	9.1%
Theatre	$146,562,112	7.5%	Comedy	2,172,296	9.1%
Comedy	$103,216,361	5.3%	Theatre	1,530,912	6.4%

Top 3 Biggest Changes by Category 2019

Biggest Increase in Revenue		Biggest Decline in Revenue	
Category	Increase from 2018	Category	Decrease from 2018
Circus and Physical Theatre	102.7%	Children's/Family	(27.0%)
Theatre	86.7%	Festivals (Multi-Category)	(20.3%)
Festivals (Contemporary Music)	77.3%	Comedy	(17.3%)
Biggest Increase in Attendance		**Biggest Decline in Attendance**	
Category	Increase from 2018	Category	Decrease from 2018
Special Events	152.9%	Children's/Family	(29.0%)
Festivals (Contemporary Music)	48.5%	Festivals (Multi-Category)	(15.7%)
Circus and Physical Theatre	41.9%	Contemporary Music	(13.7%)

2020 Analysis of Top 5 Categories and Top 3 Biggest Changes

Categories with highest industry share and biggest change y-o-y

Top 5 Categories - Revenue and Attendance 2020

Revenue 2020			Attendance 2020		
Category	Total Revenue	Industry Share	Category	Total Attendance	Industry Share
Contemporary Music	$309,203,112	51.0%	Contemporary Music	2,872,206	37.0%
Musical Theatre	$67,051,689	11.1%	Festivals (Multi-Category)	1,567,551	20.2%
Festivals (Contemporary Music)	$54,174,572	8.9%	Musical Theatre	729,099	9.4%
Theatre	$39,867,422	6.6%	Festivals (Contemporary Music)	437,472	5.6%
Festivals (Multi-Category)	$39,493,105	6.5%	Theatre	421,868	5.4%

Top 3 Biggest Changes by Category 2020

Biggest Decline in Revenue	
Category	Decrease from 2019
Ballet and Dance	(88.6%)
Musical Theatre	(80.1%)
Classical Music	(79.3%)

Biggest Decline in Attendance	
Category	Decrease from 2019
Comedy	(84.4%)
Ballet and Dance	(82.9%)
Musical Theatre	(78.9%)

No categories experienced a y-o-y increase in 2020.

Overall Category Results

All categories experienced a decline in revenue and attendance in 2020, driven by COVID-19 restrictions and limited touring activity.

This section presents an analysis for each of the 12 event categories, as defined in Appendix B.

Circus and Physical Theatre, Theatre and Festivals (Contemporary Music) experienced a significant increase in revenue and attendance in 2019, followed by a significant decline in revenue and attendance in 2020.

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- **Circus and Physical Theatre** experienced the highest growth in revenue and the third highest growth in attendance amongst all categories, generating 102.7% growth in revenue (to $47.4m) and 41.9% growth in attendance (to 0.6m) in 2019. The growth was primarily attributed to the Cirque du Soleil tours in 2019. Additionally, an increase in the average ticket price (by 31.4% to $80.08) contributed to the growth in revenue.
- In 2020, this category experienced a significant decline in revenue (by 52.2% to $22.7m) and decline in attendance (by 57.0% to 0.3m), largely due to the cancellation of Cirque du Soleil's Australian tour following the introduction of COVID-19 restrictions in March 2020. The decline in revenue was partially offset by an increase in the average ticket price (by 11.7% to $89.48).

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- **Theatre** experienced the second highest growth in revenue (by 86.7% to $146.6m) despite a moderate growth in attendance (by 7.0% to 1.5m). The growth in revenue is primarily attributed to the increase in average ticket prices (by 69.1% to $108.07) in 2019. The top events in this category in 2019 were *Harry Potter and the Cursed Child*, *The Lady in the Van*, *Cat on a Hot Tin Roof*, *Shakespeare in Love* and *The Beauty Queen of Leenane*.
- In 2020, this category experienced a significant decline in revenue (by 72.8% to $39.9m) and a decline in attendance (by 72.4% to 0.4m), due to the COVID-19 restrictions and limited touring activity of Australian Major Performing Arts Group (AMPAG) / National Performing Arts Partnership (NPAP) companies. The decline in revenue was also due to a decline in the average ticket price (by 2.7% to $105.14). The 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*.

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- **Festivals (Contemporary Music)** experienced the third highest growth in revenue and the second highest growth in attendance amongst all categories, generating 77.3% growth in revenue (to $180.9m) and 48.5% growth in attendance (to 1.4m) in 2019. Additionally, an increase in the average ticket price by 12.4% (to $147.86) contributed to the growth in revenue. The top events in this category in 2019 were Splendour in the Grass, Bluesfest, CMC Rocks QLD, and Festival X.
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions in 2020 meant this category experienced a significant decline in revenue (by 70.0% to $54.2m) and decline in attendance (by 69.8% to 0.4m) in 2020. The decline in revenue was also a result of the reduction in the average ticket price (by 3.7% to $142.33). The top events in this category in 2020 were Falls Downtown, WOMADelaide and St. Jerome's Laneway Festival.

Overall Category Results

Classical Music and Ballet and Dance experienced a moderate increase in revenue and attendance in 2019, followed by a significant decline in revenue and attendance in 2020.

- **Classical Music** witnessed a growth in revenue (by 9.9% to $87.3m) and a growth in attendance (by 4.3% to 1.3m) in 2019. Additionally, an increase in the average ticket price (by 2.8% to $81.35) contributed to the growth in revenue. 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*.
- In 2020, this category experienced a significant decline in revenue (by 79.3% to $18.1m) and a decline in attendance (by 78.0% to 0.3m), due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies. The decline was partially offset by a slight increase in the average ticket price (by 0.5% to $81.75). The top events in this category in 2020 were Music from the *Studio Ghibli Films of Hayao Miyazaki* and *Vivaldi's Venice*.

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- **Ballet and Dance** experienced a growth in revenue (by 3.4% to $66.2m) and a slight growth in attendance (by 0.3% to 0.8m) in 2019. Additionally, an increase in the average ticket price (by 1.5% to $92.17) contributed to the growth in revenue. The top events in this category in 2019 were *The Nutcracker,* Alice's *Adventures in Wonderland, Giselle* and *Sylvia*.
- In 2020, this category experienced a significant decline in revenue (by 88.6% to $7.5m) and a decline in attendance (by 82.9% to 0.1m), due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies. The decline was also contributed by the decline in the average ticket price (by 35.3% to $59.64). The top events in this category in 2020 were *The Happy Prince, Volt, Shen Yun and The Nutcracker*.

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Children's/Family, Contemporary Music, Festivals (Multi-Category), Comedy, Musical Theatre, and Opera experienced a decline in revenue and attendance in 2019, followed by a significant decline in 2020.

- **Children's/Family** experienced a decline in revenue (by 27.0% to $43.6m) and a decline in attendance (by 29.0% to 1.2m) in 2019. The decline was partially offset by a slight increase in the average ticket price (by 1.1% to $41.08). The top events in this category in 2019 were *Disney on Ice* and *The Wiggles*.
- This category experienced a decline in revenue (by 76.2% to $10.4m) and a decline in attendance (by 67.7% to 0.4m) in 2020. Additionally, a decline in the average ticket price by 26.2% (to $30.33) further contributed to the decline in revenue. The top events in this category in 2020 were *The 91 Storey Treehouse, Bluey's Big Play* and *The Midnight Gang*.

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- **Contemporary Music** witnessed a decline in revenue (by 15.9% to $835.5m) and a decline in attendance (by 13.7% to 8.3m) in 2019. A decline in the average ticket price (by 3.0% to $109.54) further contributed to the decline in revenue. Additionally, 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. The top events in this category in 2019 were performances from U2, Eminem, Elton John and Fleetwood Mac.
- In 2020, **Contemporary Music** experienced a decline in revenue (by 63.0% to $309.2m) and a decline in attendance (by 65.4% to 2.9m), due to COVID-19 restrictions and limited national and international touring activity. The decline was partially offset by the increase in the average ticket price (by 5.7% to $115.82). The top events in this category in 2020 were Fire Fight Australia and performances from Queen + Adam Lambert, Elton John, and Michael Bublé.

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Overall Category Results

Children's/Family, Contemporary Music, Festivals (Multi-Category), Comedy, Musical Theatre, and Opera experienced a decline in revenue and attendance in 2019, followed by a significant decline in 2020.

- **Festivals (Multi-Category)** experienced a decline in revenue (by 20.3% to $55.0m) and a decline in attendance (by 15.7% to 2.2m) in 2019. Additionally, a reduction in the average ticket price (by 17.8% to $33.31) further contributed to the decline in revenue. The top events in this category in 2019 were Adelaide Fringe, Fringe World Festival and Dark Mofo Festival.
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions in 2020 resulted in **Festivals (Multi-Category)** experiencing a decline in revenue (by 28.2% to $39.5m) and a decline in attendance (by 27.9% to 1.6m) in 2020. A reduction in the average ticket price (by 14.0% to $28.66) further contributed to the decline in revenue. The top events in this category in 2020 were Adelaide Fringe, Fringe World Festival and Adelaide Festival.

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- **Comedy** experienced a decline in revenue (by 17.3% to $103.2m) and a decline in attendance (by 11.6% to 2.2m) in 2019. 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. A decline in the average ticket price (by 53.9% to $52.62) further contributed to the decline in revenue. The top events in this category in 2019 were Melbourne International Comedy Festival and performances from renowned comedians such as Michael McIntyre and Steve Martin & Martin Short.
- In 2020, this category experienced a decline in revenue (by 79.2% to $21.5m) and a decline in attendance (by 84.4% to 0.3m) in 2020. This was largely due to the cancellation of the Melbourne International Comedy Festival, Perth Comedy Festival and cancelled headline tours of some major high-profile international comedians. The decline was partially offset by an increase in the average ticket price (by 30.9% to $68.88). The top events in this category in 2020 were Brisbane Comedy Festival and performances from renowned comedians such as Jack Whitehall, Russell Brand and Carl Barron.

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- **Musical Theatre** experienced a decline in revenue (by 15.7% to $337.3m) and a decline in attendance (by 11.9% to 3.5m) in 2019. Additionally, a reduction in the average ticket price (by 4.2% to $104.33) further contributed to the decline in revenue. The top events in this category in 2019 were *The Book of Mormon, West Side Story, Charlie and the Chocolate Factory* and *Aladdin.*
- In 2020, this category experienced a decline in revenue (by 80.1% to $67.1m) and decline in attendance (by 78.9% to 0.7m), due to COVID-19 restrictions and limited touring activity. Additionally, a decline in the average ticket price (by 5.0% to $99.07) further contributed to the decline in revenue. The top events in this category in 2020 were *The Book of Mormon, Billy Elliot the Musical, Shrek the Musical, Chicago,* and *Six the Musical.*

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Overall Category Results

Special Events experienced a moderate decline in revenue despite the highest y-o-y growth in attendance in 2019 and a significant decline in revenue and attendance in 2020.

- **Opera** experienced a decline in revenue (by 14.4% to $40.2m) and decline in attendance (by 10.6% to 0.4m) in 2019. Additionally, the decline in the average ticket price (by 8.3% to $113.83) further contributed to the decline in revenue. The top events in this category in 2019 were Opera Australia's Sydney Summer Season, Opera Australia's Sydney Winter Season and Great Opera Hits.
- In 2020, this category experienced a decline in revenue (by 71.9% to $11.3m) and a decline in attendance (by 66.0% to 0.1m), due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies. A decline in the average ticket price (by 23.2% to $87.47) further contributed to the decline in revenue. The top events in this category in 2020 were *Carmen, La Boheme* and *Don Giovanni*.
- **Special Events** experienced a moderate decline in revenue (by 3.5% to $21.3m) despite a significant growth in attendance (by 152.9% to 0.4m) in 2019. This was primarily attributed to a decline in the average ticket price (by 53.1% to $71.68). The decline in Special Events revenue may also be explained by the special events presented as part of the Commonwealth Games in Brisbane in 2018. The top events in this category in 2019 were the *Royal Edinburgh Military Tattoo, Life the Show* and *Psychic Medium: John Edward*.
- This category experienced a decline in revenue (by 78.2% to $4.6m) and a decline in attendance (by 61.3% to 0.2m) in 2020. A decline in the average ticket price (by 22.7% to $55.40) further contributed to the decline in revenue. The top events in this category in 2020 were *Cuban Club, Fire Aid* and *Heaps Gay Planet Xtra Mardi Pardi*. The Special Events category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.

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Contemporary Music continues to be the top live performance category.

Contemporary Music generated approximately 43% of revenue and 35% of attendance of the overall live performance market in 2019. The category generated more than 51% of revenue and 37% of attendance in 2020.

- The top 5 categories accounted for approximately 81.6% of industry revenue and 70.8% of attendance in 2019 (Contemporary Music, Musical Theatre, Festivals (Contemporary Music), Theatre and Comedy) followed by 84.1% of industry revenue and 77.7% of attendance in 2020 (Contemporary Music, Musical Theatre, Festivals (Contemporary Music), Theatre and Festivals (Multi-Category)).
- In 2019, **Contemporary Music** and **Musical Theatre** represented the two largest categories in the industry generating 42.5% and 17.2% of revenue respectively, and 34.7% and 14.5% of attendance respectively. Combined, these two categories account for 59.7% of the live performance industry in terms of revenue and 49.2% of attendance in 2019.
- In 2020, **Contemporary Music** and **Musical Theatre** accounted for 51.0% and 11.1% of revenue respectively, and 37.0% and 9.4% of attendance respectively. Combined, these two categories account for 62.1% of the live performance industry in terms of revenue and 46.4% of attendance in 2020. **Festivals (Multi-Category)** accounted for 6.5% of revenue and accounted for the second highest share (20.2%) of overall attendance in 2020.

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3 Introduction

Scope of Work and Approach

Defining our tasks performed and our approach

Scope of Work

Ernst & Young (EY) has been engaged by Live Performance Australia (LPA) for preparation of both the 2019 and 2020 Live Performance Australia Ticket Attendance and Revenue Report ("Report"). The live performance industry encompasses performances, productions, previews and concerts that are performed in front of a live audience.

The scope of our work included:

- Data collection of the number of ticket sales and revenue data for the live performance industry in Australia (2019 and 2020 national survey data) from the survey participants in conjunction with LPA's Senior Policy Advisor, Eliza Harris.
- Assessment of the 2019 and 2020 national survey data on an overall basis and by event category. This included an assessment and consolidation of Australia Council of Arts (AMPAG / NPAP companies) data from its various providers in 2020.
- Performing an analysis of the 2019 and 2020 national survey data on an overall basis (and in comparison, to previous years) and by State and event categories
- Incorporating the data from a selection of the larger regional venues into the report.

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

Approach

EY has compiled data from ticketing companies, self-ticketing venues, event promoters and the Australia Council for the Arts (collectively referred to in this study as the "Survey Participants"). A list of the survey participants is provided in Appendix A of this Report.

Based on the guidelines established by LPA, the Survey Participants assigned ticketing data to defined event categories. In Appendix B of this Report, these event categories are described.

Further, as part of these guidelines, the ticketing companies and venues were requested to exclude from their data all events produced or presented by the AMPAG / NPAP companies. This was to avoid double counting of revenue and attendance data.

EY received data directly from survey participants. Data providers and EY signed confidentiality agreements when requested. As a result, and consistent with our agreement, EY did not divulge disaggregated raw survey data or event-specific revenue or ticketing data to LPA.

Despite the fact that our scope of work did not encompass a detailed review of all data to determine the appropriateness of event and category allocations, obvious anomalies were identified and they were corrected. Examples of such anomalies included:

- Events which were wrongly classified were reallocated. For example, music festivals were reallocated to Festivals (Contemporary Music).
- Online streamed events in 2019 were excluded. However, they were included in 2020 due to an increase in online streaming as an impact of COVID-19.
- Non live performance events such as sporting events, talk shows, fashion festivals, food festivals (that do not include music line ups), workshops, cinema screenings, award nights and graduation ceremonies were excluded.
- Amateur events such as school performances, dance academy concerts and other community group performances were excluded.

Scope of Work and Approach

Limitations and report changes from previous years

Limitations

The information and analysis contained in this Report is based on ticketing data provided by Survey Participants as outlined in Appendix B of this Report. We do not imply and it should not be construed that we have verified any of the information provided to us, or that our enquiries could have identified any matter that a more extensive examination might disclose.

As with previous studies, data on ticket revenue and attendances for the live performance industry were limited to those provided by the Survey Participants. While national in reach, the coverage of this Report excludes events in some regional venues as well as contract-fee performances by AMPAG / NPAP companies. Small to medium companies and independent theatre are also under-represented as many of these companies either self-ticket or use ticketing service providers and venues not currently involved in the Report. LPA and EY are working towards improving the Report's inclusion of these events by increasing the regional providers' dataset.

It is important to note that festivals are under-reported in this Report as some festivals maintain their own ticketing systems and many of these do not contribute data into this Report. The inclusion of ticketing data from Oztix, Bluesfest, MONA FOMA and Dark Mofo in recent years addresses some under reporting in the festival categories. However, revenue and attendance are likely to be undervalued in the category because a number of boutique festival events are self-ticketed and are not presently contributing data to the Report. For numerous festivals, the Report only documents paid tickets and does not include the substantial unpaid and/or unticketed components.

The Contemporary Music category is subject to similar limitations, as pub and club venues that self-ticket, or use ticketing companies who are not part of the Report are not included in the results. However, data from Oztix, Ticketek, Ticketmaster and Moshtix (The Ticket Group) helps to decrease the level of under-reporting, as these ticketing agencies include smaller performances at certain bars and hotels. Still, this Report provides a conservative estimate of the total ticket revenue and attendances sourced from live performance events in Australia.

As part of our analysis, the 2019 and 2020 data was compared against historical data sourced directly from Live Performance Australia's Live Performance Industry in Australia 2006 - 2018 Reports. EY acknowledges that we did not revisit the data collection and allocation methodology used in 2006 and 2007 as the historical data used to prepare the reports in these years was not provided in a disaggregated format. As such, EY was unable to query the accuracy of the allocation of events in these years. Therefore, data was compared from 2008 to 2020. Inconsistencies may exist in the data collection methodology between the surveys performed in these ten years, and for previous surveys (where more detailed event specific information was not requested).

Changes in the report compared to previous years

- In 2016, the term Festivals (Single-Category) was renamed Festivals (Contemporary Music) and is currently referred to as Festivals (Contemporary Music). In 2019 and 2020, Falls Festival has been recategorised to Festivals (Contemporary Music) from Festivals (Multi Category).
- New providers have been added to the report including Darwin Festival, Melbourne International Arts Festival, Gippsland Performing Arts Centre, Mackay Entertainment & Convention Centre, Manning Entertainment Centre, Seymour Centre, Performing Arts Centre - Devonport City Council, The Events Centre, Caloundra and Charters Tower Regional Council.

4 State Analysis

2019 Revenue and Attendance by State/Territory

Revenue and Attendance by State/Territory

2019

	Revenue				Attendance			
State/Territory	Revenue	Share of Industry (2019)	Share of Industry (2018)	Change in Revenue from 2018	Tickets	Share of Industry (2019)	Share of Industry (2018)	Change in Attendance from 2018
New South Wales	$666,736,971	33.9%	36.5%	(11.5%)	7,164,995	30.0%	31.9%	(13.0%)
Victoria	$627,378,900	31.9%	29.1%	4.5%	7,408,467	31.0%	29.2%	(1.5%)
Queensland	$286,191,954	14.6%	15.4%	(9.8%)	3,477,020	14.6%	14.9%	(9.5%)
Western Australia	$194,184,329	9.9%	10.2%	(8.2%)	2,648,785	11.1%	10.8%	(4.5%)
South Australia	$133,455,773	6.8%	6.4%	1.4%	2,317,420	9.7%	8.6%	4.7%
Australian Capital Territory	$31,517,432	1.6%	1.3%	13.2%	431,706	1.8%	1.6%	6.4%
Tasmania	$22,522,431	1.1%	0.9%	18.8%	350,977	1.5%	2.9%	(52.5%)
Northern Territory	$2,653,762	0.1%	0.1%	(9.2%)	65,045	0.3%	0.3%	(4.2%)
Total	**$1,964,641,552**	**100.0%**	**100.0%**	**(4.8%)**	**23,864,415**	**100.0%**	**100.0%**	**(7.5%)**

Analysis

- In 2019, the live performance industry across Australia experienced a y-o-y decline in both revenue (4.8%) and attendance (7.5%).
- NSW had the highest industry share of revenue in Australia (33.9%) and Victoria had the highest industry share of attendance (31.0%).

2020 Revenue and Attendance by State/Territory

Revenue and Attendance by State/Territory 2020

	Revenue				Attendance			
State/Territory	Revenue	Share of Industry (2020)	Share of Industry (2019)	Change in Revenue from 2019	Tickets	Share of Industry (2020)	Share of Industry (2019)	Change in Attendance from 2019
New South Wales	$182,518,521	30.1%	33.9%	(72.6%)	1,960,925	25.3%	30.0%	(72.6%)
Victoria	$158,294,023	26.1%	31.9%	(74.8%)	1,546,959	19.9%	31.0%	(79.1%)
Queensland	$116,868,728	19.3%	14.6%	(59.2%)	1,260,436	16.2%	14.6%	(63.7%)
Western Australia	$72,739,451	12.0%	9.9%	(62.5%)	1,287,780	16.6%	11.1%	(51.4%)
South Australia	$59,698,701	9.9%	6.8%	(55.3%)	1,393,346	18.0%	9.7%	(39.9%)
Australian Capital Territory	$5,700,108	0.9%	1.6%	(81.9%)	101,081	1.3%	1.8%	(76.6%)
Tasmania	$9,304,123	1.5%	1.1%	(58.7%)	186,150	2.4%	1.5%	(47.0%)
Northern Territory	$849,939	0.1%	0.1%	(68.0%)	25,035	0.3%	0.3%	(61.5%)
Total	**$605,973,596**	**100.0%**	**100.0%**	**(69.2%)**	**7,761,710**	**100.0%**	**100.0%**	**(67.5%)**

Analysis

- In 2020, the live performance industry across Australia experienced a decline in both revenue (69.2%) and attendance (67.5%).
- NSW had the highest industry share of revenue (30.1%) and had the highest industry share of attendance (25.3%) in Australia.

2019 Population and Per Capita Results

Per Capita Results

2019

State/Territory	Population (2019) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	8.14	31.8%	33.9%	30.0%	$81.94
Victoria	6.66	26.1%	31.9%	31.0%	$94.19
Queensland	5.14	20.1%	14.6%	14.6%	$55.71
Western Australia	2.65	10.4%	9.9%	11.1%	$73.40
South Australia	1.76	6.9%	6.8%	9.7%	$75.77
Australian Capital Territory	0.43	1.7%	1.6%	1.8%	$73.60
Tasmania	0.54	2.1%	1.1%	1.5%	$41.84
Northern Territory	0.25	1.0%	0.1%	0.3%	$10.82
Total	**25.55**	**100.0%**	**100.0%**	**100.0%**	**$76.88**

Comments

- The state and territory breakdowns do not take into account people who travel from interstate or overseas to attend a live performance. Industry share only accounts for the state or territory in which the performance took place and hence where the revenue and attendance are recognised. This is particularly relevant for categories such as Musical Theatre where musicals open their season in a particular state and often attract a significant audience from outside of that state.
- Similar to previous years, QLD reflected notable disparity in the proportion of industry revenue and attendance when compared with its share of population. Reasons for this disproportionality include:
  - The majority of regional performances are not included in this per capita analysis and as such, performances in larger states with significant regional markets, such as Queensland, are under-reported. Cities such as Brisbane are constrained in their ability to host performances due to a smaller number of venues and limited capacity.
  - Some of Australia's largest performing arts companies are based in NSW and Victoria and conduct the bulk of their performances in Sydney and Melbourne. These companies include Opera Australia (Sydney), Melbourne Symphony Orchestra, Sydney Symphony Orchestra and the Australian Ballet (Melbourne).
  - Destination NSW and Visit Victoria are particularly active in the live performance major events market and as such have been successful in attracting major live performance events to these States.
- Victoria and NSW hold top positions in per capita spend amongst all states and territories in 2019. Victoria ($94.19) and NSW ($81.94) are the only states that are above the national per capita spend ($76.88).

2020 Population and Per Capita Results

Per Capita Results

2020

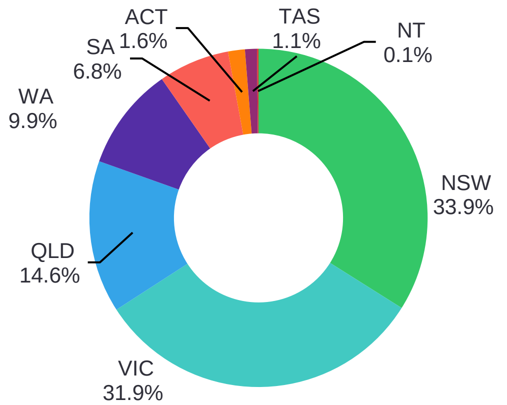
State/Territory	Population (2020) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	8.17	31.8%	30.1%	25.3%	$22.33
Victoria	6.66	25.9%	26.1%	19.9%	$23.76
Queensland	5.19	20.2%	19.3%	16.2%	$22.50
Western Australia	2.67	10.4%	12.0%	16.6%	$27.24
South Australia	1.77	6.9%	9.9%	18.0%	$33.71
Australian Capital Territory	0.43	1.7%	0.9%	1.3%	$13.21
Tasmania	0.54	2.1%	1.5%	2.4%	$17.18
Northern Territory	0.25	1.0%	0.1%	0.3%	$3.45
Total	**25.69**	**100.0%**	**100.0%**	**100.0%**	**$23.59**

Comments

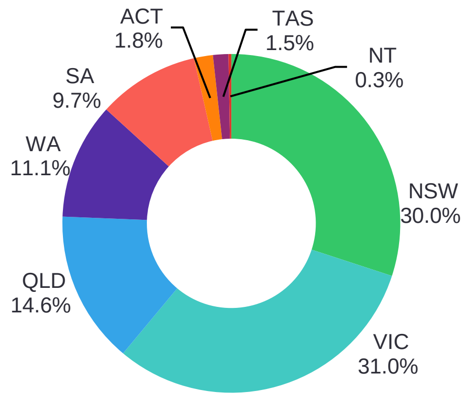
- NSW and Victoria continued to account for the highest share in industry revenue and attendance respectively, due to the following reasons:
  - Some of Australia's largest performing arts companies are based in NSW and Victoria and the bulk of their performances in Sydney and Melbourne. These companies include Opera Australia (Sydney), Melbourne Symphony Orchestra, Sydney Symphony Orchestra and the Australian Ballet (Melbourne).
  - Destination NSW and Visit Victoria are particularly active in the live performance major events markets and have been successful in attracting major live performance events to these States.
- QLD, WA and SA improved its proportion of industry revenue and attendance in 2020, when compared to the previous years. In 2020, these states were less constrained by COVID-19 restrictions relative to other states. In contrast, Victoria lost a market share of industry revenue and attendance relative to its share of population. The extended lockdown experienced in Victoria meant that events could not be held for a large part of 2020.
- Driven by COVID-19 restrictions, the overall live performance industry witnessed a significant decline in revenue and attendance, which resulted in average Spend per Capita reducing from $76.87 in 2019 to $23.58 in 2020.
- SA and WA held top positions in per capita spend amongst all states and territories in 2020. SA ($33.71), WA ($27.24) and Victoria ($23.76) are the only states that had above the national per capita spend ($23.59).

2019 Revenue and Attendance Breakdown

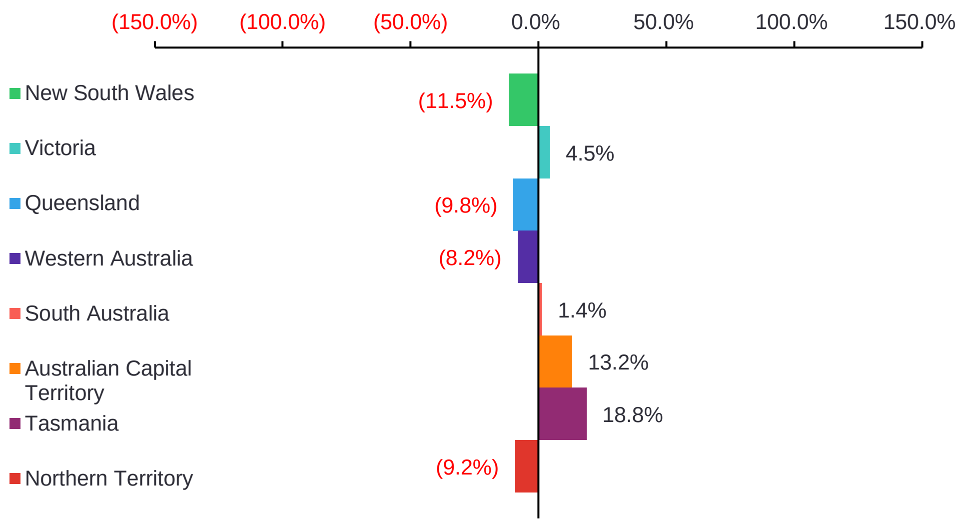
Market Share (Revenue) by State/Territory 2019



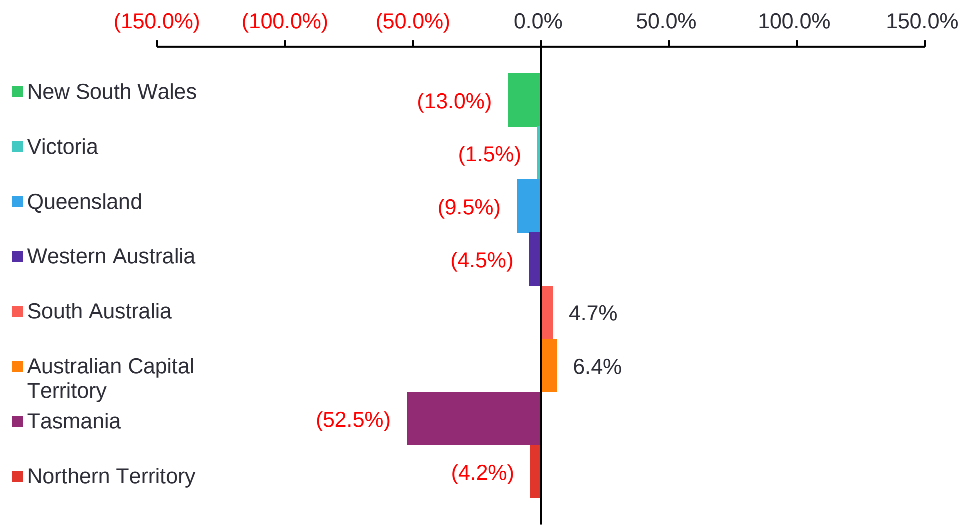
Market Share (Attendance) by State/Territory 2019



Percentage Movement in Revenue by State/Territory 2018 → 19

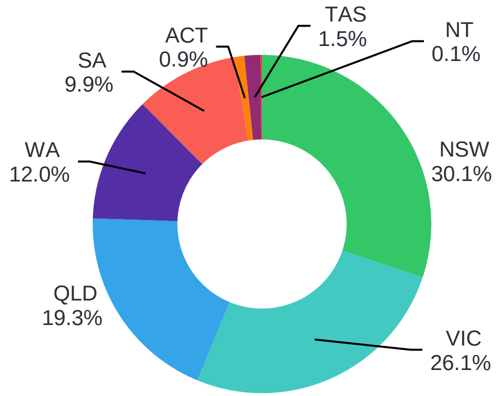


Percentage Movement in Attendance by State/Territory 2018 → 19

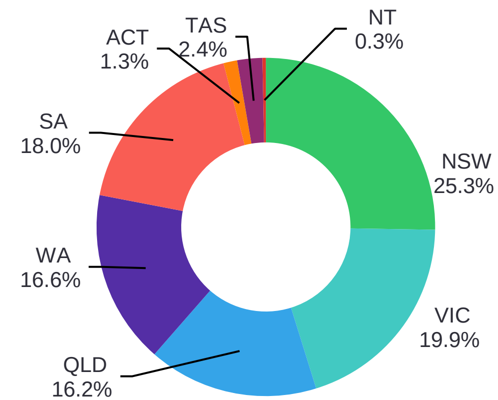


2020 Revenue and Attendance Breakdown

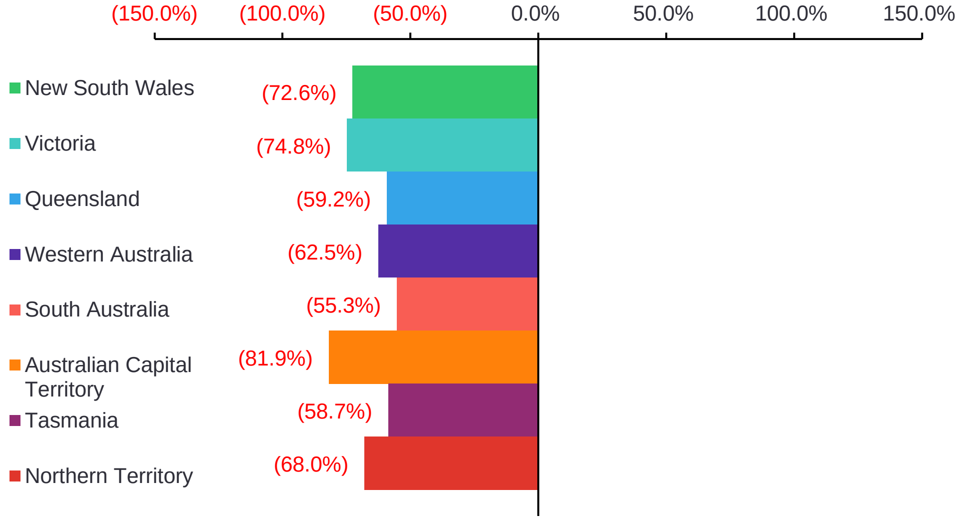
Market Share (Revenue) by State/Territory 2020



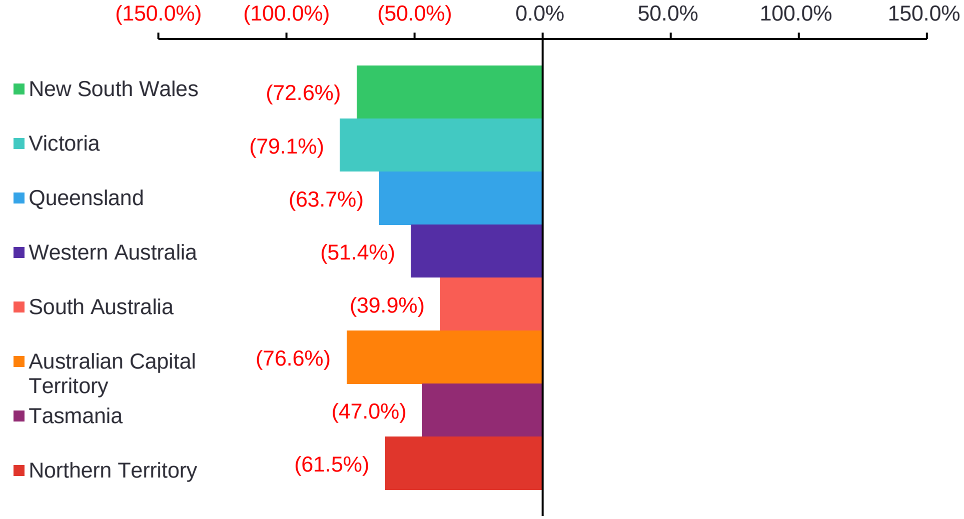
Market Share (Attendance) by State/Territory 2020



Percentage Movement in Revenue by State/Territory 2019 → 20



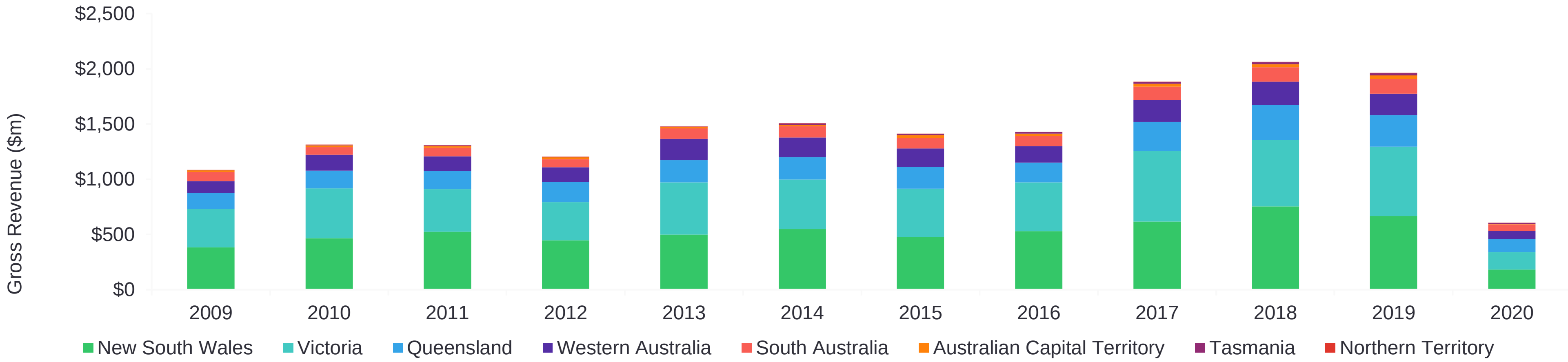
Percentage Movement in Attendance by State/Territory 2019 → 20



State/Territory Revenue and Attendance

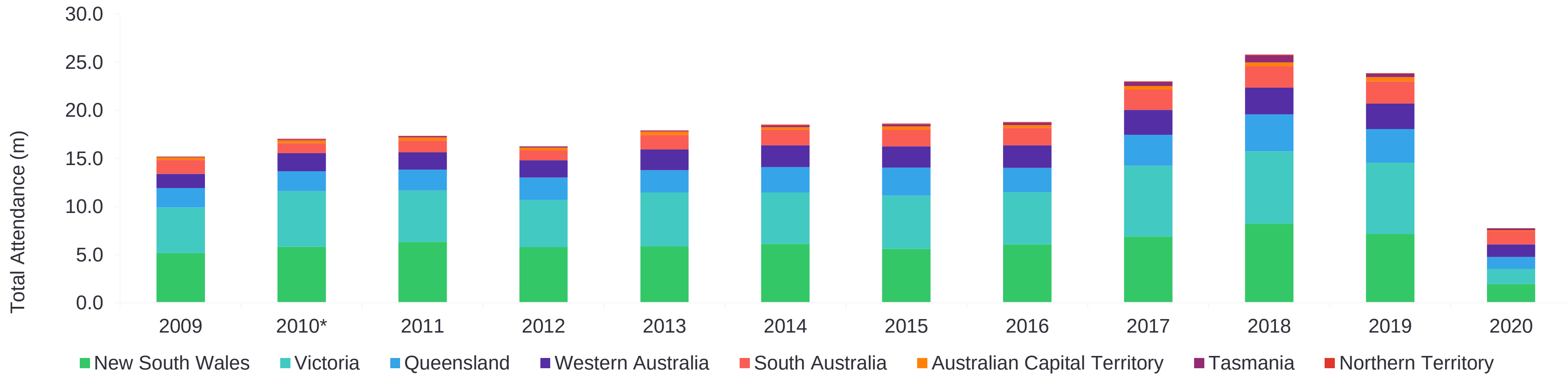
Revenue by State/Territory

2009 → 2020



Attendance by State/Territory

2009 → 2020



State/Territory Revenue and Attendance

Revenue by State/Territory

2009 → 2020

Year	New South Wales	Victoria	Queensland	Western Australia	South Australia	Australian Capital Territory	Tasmania	Northern Territory	Total
2009	$383,713,353	$347,305,100	$146,567,867	$105,312,778	$82,326,982	$14,151,594	$3,543,859	$408,416	**$1,083,329,949**
2010	$465,761,849	$451,053,035	$160,520,942	$145,479,374	$68,538,320	$15,248,151	$3,783,068	$3,313,888	**$1,313,698,627**
2011	$523,903,477	$385,643,996	$165,840,931	$131,936,782	$77,215,957	$16,178,998	$6,739,343	$1,727,665	**$1,309,187,150**
2012	$446,063,403	$344,389,414	$183,775,420	$134,131,622	$73,536,693	$17,293,297	$4,221,182	$1,472,520	**$1,204,883,551**
2013	$497,463,659	$473,516,913	$200,178,524	$194,312,089	$93,864,893	$15,104,224	$2,402,818	$2,133,774	**$1,478,976,893**
2014	$547,173,799	$450,034,039	$203,918,468	$177,326,653	$100,944,048	$13,852,222	$11,600,525	$3,114,197	**$1,507,963,952**
2015	$478,077,501	$436,933,907	$195,336,838	$168,688,271	$96,804,782	$23,506,143	$10,641,913	$3,219,331	**$1,413,208,686**
2016	$530,186,274	$440,330,153	$180,304,512	$147,807,422	$94,316,578	$19,564,660	$14,743,791	$3,146,303	**$1,430,399,693**
2017	$615,837,613	$639,876,934	$263,878,152	$196,671,338	$123,525,390	$24,794,403	$16,203,732	$3,354,321	**$1,884,141,882**
2018	$753,667,850	$600,318,261^	$317,179,536	$211,421,549	$131,560,865	$27,848,747	$18,965,730	$2,923,333	**$2,063,885,872**
2019	$666,736,971	$627,378,900	$286,191,954	$194,184,329	$133,455,773	$31,517,432	$22,522,431	$2,653,762	**$1,964,641,552**
2020	$182,518,521	$158,294,023	$116,868,728	$72,739,451	$59,698,701	$5,700,108	$9,304,123	$849,939	**$605,973,596**

Analysis

- Total revenue reported decreased by 4.8% y-o-y in 2019, due to a decline in major categories i.e. Children's/Family and Festivals (Multi Category). A decline of 69.2% in total revenue in 2020 was due to COVID-19 restrictions.

^ This figure has been updated since the previous Report release to account for an error in the data received

State/Territory Revenue and Attendance

Attendance by State/Territory

2009 → 2020

Year	New South Wales	Victoria	Queensland	Western Australia	South Australia	Australian Capital Territory	Tasmania	Northern Territory	Total
2009	5,176,385	4,744,449	2,006,608	1,468,882	1,449,260	264,174	72,336	14,679	**15,196,773**
2010	5,818,163	5,820,603	2,043,327	1,879,408	1,035,243	304,168	59,753	96,872	**17,057,537**
2011	6,331,001	5,359,749	2,150,329	1,788,262	1,237,386	325,233	99,653	54,107	**17,345,720**
2012	5,795,757	4,916,559	2,302,462	1,791,795	1,053,997	271,525	97,972	43,663	**16,273,730**
2013	5,865,914	5,607,475	2,318,207	2,153,483	1,497,204	351,242	75,115	57,986	**17,926,626**
2014	6,132,827	5,318,537	2,661,632	2,266,435	1,614,267	246,542	185,011	111,183	**18,536,434**
2015	5,592,686	5,548,412	2,914,530	2,217,942	1,699,529	372,546	210,798	70,014	**18,626,457**
2016	6,073,498	5,431,066	2,527,535	2,334,951	1,797,087	313,386	239,778	65,287	**18,782,588**
2017	6,893,117	7,364,313	3,196,581	2,604,391	2,100,226	360,392	441,938	66,592	**23,027,550**
2018	8,230,950	7,519,194^	3,840,497	2,772,963	2,212,725	405,899	738,444	67,876	**25,788,548**
2019	7,164,995	7,408,467	3,477,020	2,648,785	2,317,420	431,706	350,977	65,045	**23,864,415**
2020	1,960,925	1,546,959	1,260,436	1,287,780	1,393,346	101,081	186,150	25,035	**7,761,710**

Analysis

- Total attendance was recorded at 23.8m in 2019, down by (7.5%) y-o-y, and recorded at 7.7m in 2020, down by (67.5%) y-o-y. A decline in attendance for major categories such as Children's/Family and Festivals (Multi Category) were the main reason for the downward trend in 2019, as well as COVID-19 restrictions in 2020.

^ This figure has been updated since the previous Report release to account for an error in the data received

Revenue by Category and State/Territory

Revenue by Category and State/Territory 2019

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$22,786,223	$19,779,095	$14,143,231	$5,147,800	$2,255,621	$1,168,750	$450,389	$427,489	**$66,158,598**
Children's/Family	$13,762,638	$13,123,726	$6,537,285	$4,466,019	$2,898,656	$2,393,743	$242,960	$224,209	**$43,649,235**
Circus & Physical Theatre	$33,954,223	$4,395,934	$5,773,161	$555,572	$1,338,500	$1,201,391	$118,385	$110,240	**$47,447,405**
Classical Music	$35,231,367	$27,518,400	$8,450,021	$7,988,118	$4,946,438	$1,557,300	$1,424,856	$216,688	**$87,333,188**
Comedy	$23,726,443	$45,830,840	$14,023,989	$11,062,762	$4,006,482	$3,173,533	$999,340	$392,973	**$103,216,361**
Contemporary Music	$271,400,452	$253,518,264	$138,353,363	$109,680,915	$46,525,068	$7,832,370	$7,397,231	$836,966	**$835,544,629**
Festivals (Multi Category)	$5,979,561	$6,902,138	$3,046,057	$13,713,445	$21,410,277	-	$3,933,437	-	**$54,984,915**
Festivals (Contemporary Music)	$74,734,834	$27,756,015	$36,216,689	$11,882,068	$14,405,212	$8,760,182	$7,048,488	$49,371	**$180,852,859**
Musical Theatre	$113,278,749	$118,129,761	$51,247,823	$21,167,106	$30,078,081	$2,964,798	$337,881	$134,057	**$337,338,257**
Opera	$27,367,083	$7,872,252	$1,676,716	$1,341,327	$1,560,641	$38,174	$200,795	$144,847	**$40,201,835**
Special Events	$17,343,039	$1,353,769	$802,999	$780,476	$530,644	$449,541	$68,174	$23,515	**$21,352,158**
Theatre	$27,172,359	$101,198,704	$5,920,622	$6,398,721	$3,500,153	$1,977,649	$300,496	$93,408	**$146,562,112**
Total	**$666,736,971**	**$627,378,900**	**$286,191,954**	**$194,184,329**	**$133,455,773**	**$31,517,432**	**$22,522,431**	**$2,653,762**	**$1,964,641,552**

Analysis

- The category with the biggest revenue share was Contemporary Music, contributing 42.5%. The biggest increase in revenue was observed for Circus and Physical Theatre (102.7%). Whereas Children's/Family saw the biggest decline in revenue by 27.0% y-o-y.

Revenue by Category and State/Territory

Revenue by Category and State/Territory 2020

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$2,756,508	$514,577	$1,320,607	$2,550,044	$195,718	$163,202	-	$34,022	**$7,534,678**
Children's/Family	$2,881,279	$1,655,562	$2,036,087	$1,280,547	$513,197	$395,949	$1,472,428	$161,827	**$10,396,875**
Circus & Physical Theatre	$892,459	$2,660,357	$18,285,666	$394,756	$2,478	$456,605	-	$1,050	**$22,693,371**
Classical Music	$4,419,484	$6,432,427	$2,160,863	$3,434,580	$1,116,150	$255,906	$201,332	$90,384	**$18,111,125**
Comedy	$5,875,001	$4,846,775	$5,726,641	$2,187,811	$1,320,116	$1,262,085	$151,667	$119,693	**$21,489,790**
Contemporary Music	$107,705,408	$81,695,994	$64,465,380	$31,260,191	$17,835,208	$2,542,749	$3,300,383	$397,799	**$309,203,112**
Festivals (Multi Category)	$1,098,967	$1,308,410	$380,919	$12,049,000	$24,037,633	-	$618,176	-	**$39,493,105**
Festivals (Contemporary Music)	$12,403,570	$9,742,243	$10,582,508	$9,811,401	$8,932,876	$69*	$2,701,404	$500*	**$54,174,572**
Musical Theatre	$22,721,210	$24,948,721	$7,624,319	$6,497,132	$4,405,311	$210,379	$644,617	-	**$67,051,689**
Opera	$10,148,117	$415,471	$250,389	$434,799	$32,416	$32,534	-	-	**$11,313,725**
Special Events	$721,031	$172,325	$1,400,035	$1,806,683	$274,805	$213,236	$19,473	$36,543	**$4,644,130**
Theatre	$10,895,487	$23,901,160	$2,635,315	$1,032,506	$1,032,796	$167,394	$194,643	$8,120	**$39,867,422**
Total	**$182,518,521**	**$158,294,023**	**$116,868,728**	**$72,739,451**	**$59,698,701**	**$5,700,108**	**$9,304,123**	**$849,939**	**$605,973,596**

Analysis

- The category with the highest revenue contribution was Contemporary Music (51.0%). Ballet and Dance observed a significant decline of 88.6% y-o-y among other categories.

*Note: These festivals were cancelled due to COVID-19 restrictions. The amount reported reflects the remaining revenue once refunds were administered.

2019 Attendance by Category and State/Territory

Attendance by Category and State/Territory

2019

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	228,472	204,390	199,784	99,041	31,397	22,245	8,954	9,189	**803,472**
Children's/Family	369,020	330,193	184,469	128,025	77,579	59,280	15,432	8,131	**1,172,129**
Circus & Physical Theatre	375,310	104,422	87,366	15,993	28,298	17,125	3,699	6,922	**639,135**
Classical Music	456,001	425,547	140,222	153,231	76,055	24,091	35,561	5,527	**1,316,235**
Comedy	375,044	1,219,562	280,197	161,690	55,888	54,392	17,659	7,864	**2,172,296**
Contemporary Music	2,601,539	2,433,473	1,436,560	1,042,420	525,062	115,609	116,648	18,789	**8,290,100**
Festivals (Multi Category)	67,418	505,139	91,787	451,236	987,541	-	71,238	-	**2,174,359**
Festivals (Contemporary Music)	556,447	239,275	295,383	108,362	128,267	63,050	55,888	1,164	**1,447,836**
Musical Theatre	1,171,614	1,147,613	540,430	245,996	305,639	30,354	7,959	1,938	**3,451,543**
Opera	210,102	100,907	38,201	56,847	22,730	418	3,677	2,643	**435,525**
Special Events	290,002	43,445	50,479	22,970	13,394	9,222	788	573	**430,873**
Theatre	464,026	654,501	132,142	162,974	65,570	35,920	13,474	2,305	**1,530,912**
Total	**7,164,995**	**7,408,467**	**3,477,020**	**2,648,785**	**2,317,420**	**431,706**	**350,977**	**65,045**	**23,864,415**

Analysis

- Contemporary Music contributed 34.7% of the total share of attendance, while Special Events reported the biggest increase in attendance for 2019 (by 152.9%). Children's/Family reported the largest decline in attendance (by 29.0% y-o-y).

2020 Attendance by Category and State/Territory

Attendance by Category and State/Territory

2020

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	34,637	6,063	28,965	57,452	4,882	4,235	-	1,155	**137,389**
Children's/Family	131,937	50,666	61,431	45,403	28,606	14,500	38,320	7,190	**378,053**
Circus & Physical Theatre	19,298	43,876	180,993	15,574	82	15,112	-	44	**274,977**
Classical Music	68,505	96,672	32,166	54,985	20,244	3,274	11,438	2,604	**289,888**
Comedy	81,683	68,808	116,907	29,005	18,331	17,872	3,151	2,691	**338,448**
Contemporary Music	931,553	716,436	566,416	396,613	166,330	33,287	52,101	9,470	**2,872,206**
Festivals (Multi Category)	33,109	48,929	11,141	454,454	982,912	-	37,006	-	**1,567,551**
Festivals (Contemporary Music)	111,608	77,397	83,609	71,771	61,910	6*	31,153	18*	**437,472**
Musical Theatre	260,059	236,733	91,093	85,624	42,634	3,713	9,243	-	**729,099**
Opera	79,270	7,031	8,238	20,596	32,416	431	-	-	**147,982**
Special Events	41,336	32,235	28,647	41,452	14,851	5,758	869	1,629	**166,777**
Theatre	167,930	162,113	50,830	14,851	20,148	2,893	2,869	234	**421,868**
Total	**1,960,925**	**1,546,959**	**1,260,436**	**1,287,780**	**1,393,346**	**101,081**	**186,150**	**25,035**	**7,761,710**

Analysis

- Contemporary Music reported the highest attendance share of 37.0%, with the highest share contributed by NSW (32.4%). Comedy witnessed the largest decline in attendance by (84.4% y-o-y). This is largely due to the cancellation of the 2020 Melbourne International Comedy Festival.

*Note: These festivals were cancelled due to COVID-19 restrictions. The amount reported reflects the ticket holders that did not request a refund.

NSW Analysis

NSW Revenue and Attendance

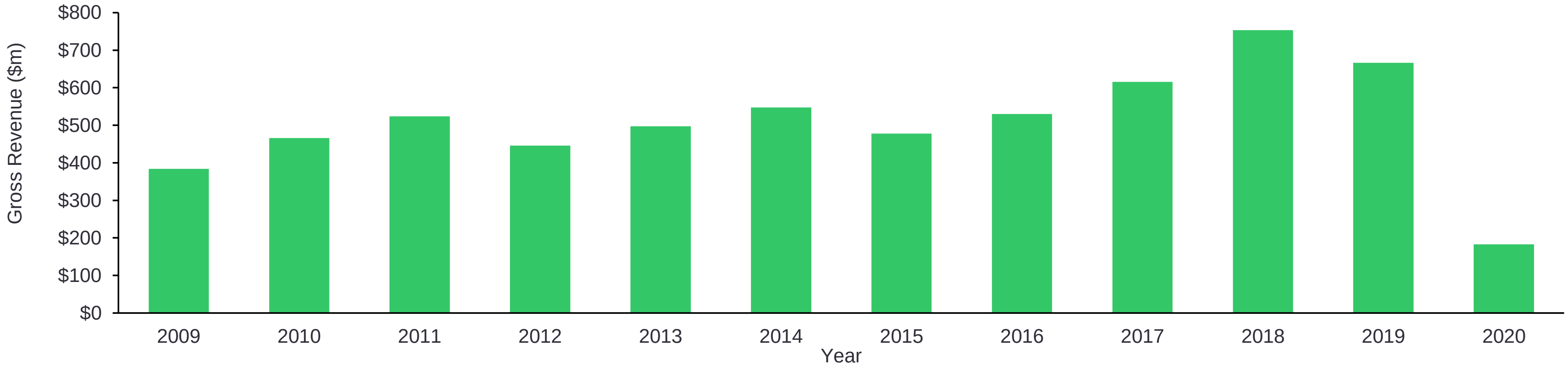
- NSW generated $666.7m in revenue and recorded 7.2m in attendance in 2019, followed by $182.5m in revenue and 2.0m in attendance in 2020.
- NSW accounted for the largest industry share of revenue (33.9%) and the second largest share of attendance (30.0%) in 2019. In 2020, NSW accounted for the largest industry share of revenue (30.1%) and attendance (25.3%).
- The NSW spend per capita in 2019 was $81.94 and $22.33 in 2020.
- In 2019, NSW experienced the highest y-o-y decline in revenue (11.5%) and the second highest y-o-y decline in attendance (13.0%), driven by the following categories:
  - There was a decline in revenue for Festivals (Multi-Category) (40.4%), Children's/Family (37.3%), Comedy (27.9%) and Musical Theatre (26.2%). This was primarily driven by the decline in both attendance and average ticket price in these categories, except for Children's/Family, which was driven by a decline in attendance, partially offset by a slight increase in average ticket price. The decline in Musical Theatre may be attributable to the movement of *The Book of Mormon* to Queensland, Western Australia and South Australia.
- The decrease in revenue in 2019 was partially offset by the growth in revenues for:
  - Circus and Physical Theatre (222.9%), driven by an increase in attendance (118.3%), primarily attributed to the Cirque du Soleil tours.
  - Special Events (157.0%), driven by a 452.9% increase in attendance, primarily attributed to events such as the *Royal Edinburgh Military Tattoo* and *Queertopia - Heaps Gay Pardi Gras.*
  - Festivals (Contemporary Music) (43.1%), driven by events such as Splendour in the Grass, Bluesfest and Festival X.
- In 2020, NSW experienced the third highest y-o-y decline in revenue (72.6%) and attendance (72.6%). All categories experienced a significant decline in revenue and attendance in 2020, due to COVID-19 restrictions. The decline in revenue was primarily driven by a decline in:
  - Circus and Physical Theatre (97.4%) and Classical Music (87.5%), due to a decrease in attendance, partially offset by the increase in average ticket price.
  - Special Events (95.8%) and Ballet and Dance (87.9%), due to a decline in attendance and average ticket price.

	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$383,713,353	-	5,176,385	-
2010	$465,761,849	21.4%	5,818,163	12.4%
2011	$523,903,477	12.5%	6,331,001	8.8%
2012	$446,063,403	(14.9%)	5,795,757	(8.5%)
2013	$497,463,659	11.5%	5,865,914	1.2%
2014	$547,173,799	10.0%	6,132,827	4.6%
2015	$478,077,501	(12.6%)	5,592,686	(8.8%)
2016	$530,186,274	10.9%	6,073,498	8.6%
2017	$615,837,613	16.2%	6,893,117	13.5%
2018	$753,667,850	22.4%	8,230,950	19.4%
2019	$666,736,971	(11.5%)	7,164,995	(13.0%)
2020	$182,518,521	(72.6%)	1,960,925	(72.6%)

NSW Analysis

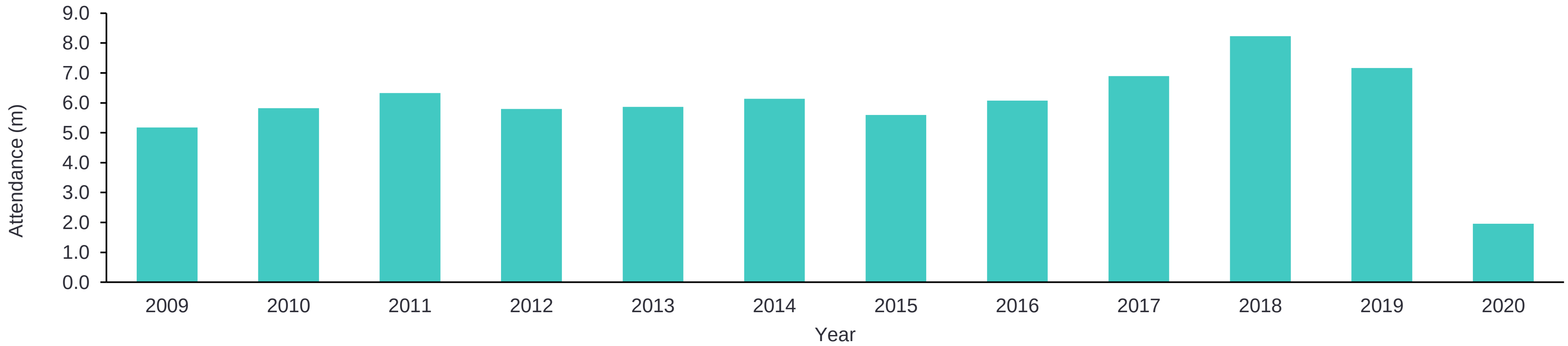
Revenue – NSW

2009 → 2020



Attendance – NSW

2009 → 2020



VIC Analysis

VIC Revenue and Attendance

- Victoria generated $627.4m in revenue and recorded 7.4m in attendance in 2019, followed by $158.3m in revenue and 1.5m in attendance in 2020.
- The Victoria spend per capita in 2019 was $94.19 (highest in Australia) and $23.76 (third highest in Australia) in 2020.
- Victoria recorded the second highest share of revenue (31.9%) and the highest share of attendance (31.0%) in 2019, followed by the second highest share of revenue (26.1%) and attendance (19.9%) in 2020.
- Victoria experienced the third highest y-o-y growth in revenue (4.5%), despite slight y-o-y decline in attendance (1.5%) in 2019. As a result of the extended lockdown in 2020, Victoria witnessed the second highest y-o-y decline in revenue (74.8%) and the highest y-o-y decline in attendance (79.1%) in 2020.
- In 2019, revenue growth was driven by growth in Theatre (287.0%), Festivals (Contemporary Music) (129.3%) and Classical Music (16.5%). This was partially offset by a decline in Contemporary Music (17.8%), Children's/Family (16.6%) and Opera (10.3%).
  - Theatre revenue increased primarily due to an increase in attendance by 51.5%, driven by events such as *Harry Potter and the Cursed Child*, *The Lady in the Van*, *Shakespeare in Love* and *Kiss of the Spider Woman*. Festivals (Contemporary Music) revenue increased primarily due to an increase in attendance by 61.1%, driven by festivals such as Spilt Milk, Download Festival, Festival X and Groovin' the Moo.
  - Contemporary Music revenue decline was driven by a decline in attendance and the average ticket price. Opera revenue decline was primarily driven by a decline in the average ticket price. Children's/Family revenue decline was primarily driven by a decline in attendance, partially offset by a slight growth in average ticket price.
- In 2020, a significant decline in revenue and attendance was seen across all categories, due to COVID-19 restrictions. The decrease in revenue in 2020 was mainly due to a decline in Ballet and Dance (97.4%), Opera (94.7%), and Comedy (89.4%), which was driven by a decrease in attendance and average ticket price.
- Top events in 2020 included performances by Queen + Adam Lambert, Elton John and Michael Bublé. These events were presented prior to COVID-19 restrictions.

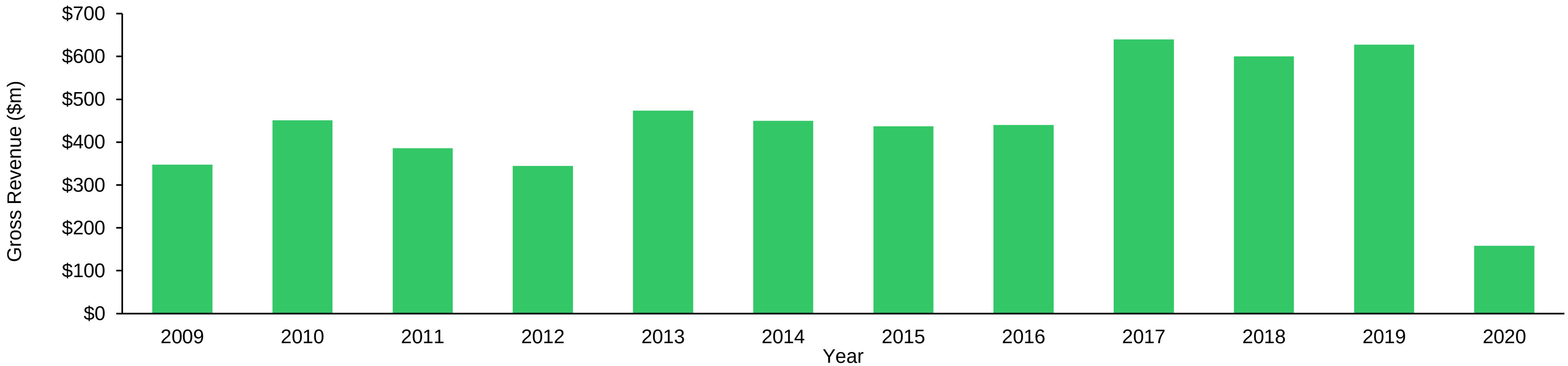
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$347,305,100	-	4,744,449	-
2010	$451,053,035	29.9%	5,820,603	22.7%
2011	$385,643,996	(14.5%)	5,359,749	(7.9%)
2012	$344,389,414	(10.7%)	4,916,559	(8.3%)
2013	$473,516,913	37.5%	5,607,475	14.1%
2014	$450,034,039	(5.0%)	5,318,537	(5.2%)
2015	$436,933,907	(2.9%)	5,548,412	4.3%
2016	$440,330,153	0.8%	5,431,066	(2.1%)
2017	$639,876,934	45.3%	7,364,313	35.6%
2018^	$600,318,261	(6.2%)	7,519,194	2.1%
2019	$627,378,900	4.5%	7,408,467	(1.5%)
2020	$158,294,023	(74.8%)	1,546,959	(79.1%)

^This figure has been updated since the previous Report release to account for an error in the data received

VIC Analysis

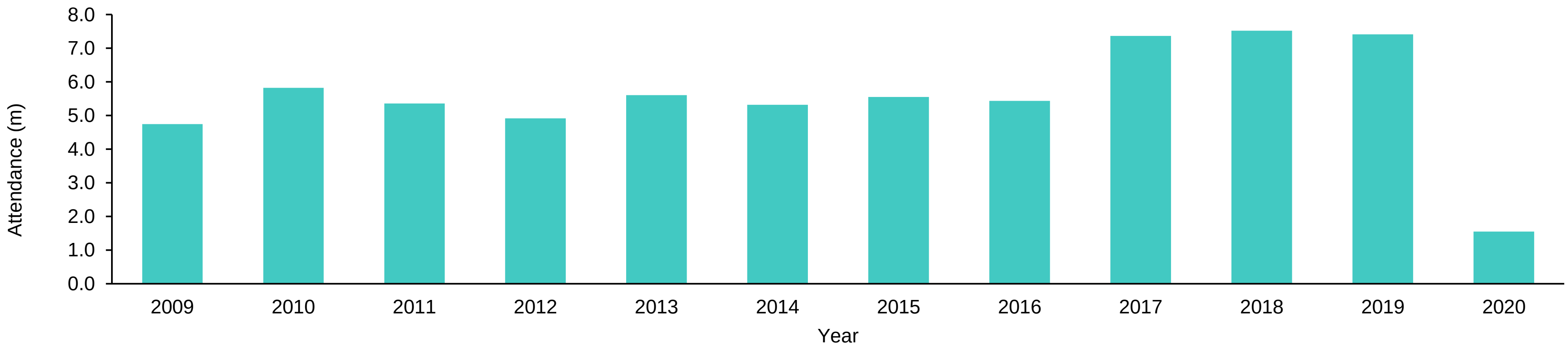
Revenue – VIC

2009 → 2020



Attendance – VIC

2009 → 2020



QLD Analysis

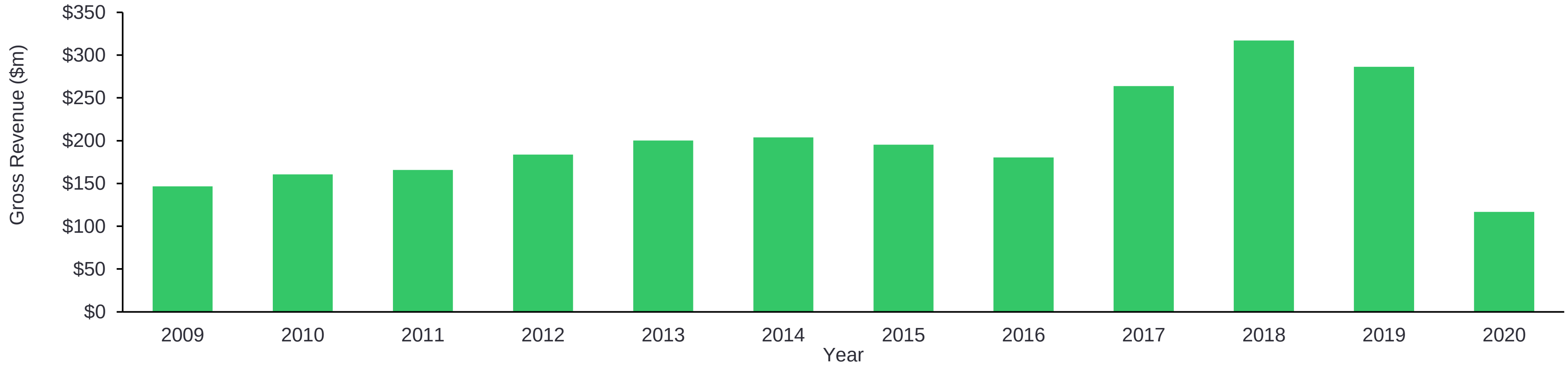
QLD Revenue and Attendance

- QLD generated $286.2m in revenue and recorded 3.5m of attendance in 2019, followed by $116.9m in revenue and 1.3m in attendance in 2020. The QLD spend per capita was $55.71 in 2019 and $22.50 in 2020.
- QLD was the third highest contributor to the market share of revenue (14.6%) and attendance (14.6%) in 2019. In 2020, it was the third highest contributor to revenue (19.3%) and the fifth highest contributor to attendance (14.6%).
- QLD witnessed a y-o-y decline in revenue (9.8%) and a y-o-y decline in attendance (9.5%) in 2019. In 2020, QLD experienced a significant y-o-y decline in revenue (59.2%) and y-o-y decline in attendance (63.7%), due to COVID-19 restrictions.
- In 2019, the decline in revenue was primarily driven by a decline in Special Events (93.6%), Comedy (37.3%) and Festivals (Multi-Category) (25.9%), due to a decline in attendance and average ticket prices. The decline in Special Events revenue may be explained by the special events held as part of the Commonwealth Games in Brisbane in 2018.
- The decline was partially offset by a growth in revenue in Festivals (Contemporary Music) (85.1%) and Ballet and Dance (36.3%).
- 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*.
- In 2020, QLD witnessed a decline in revenue, primarily driven by a decline in Ballet and Dance (90.7%), Festivals (Multi-Category) (87.5%), Musical Theatre (85.1%) and Opera (85.1%), due to COVID-19 restrictions.
- Revenue decline was partially offset by a growth in revenue in Circus and Physical Theatre (216.7%) and Special Events (74.4%). 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* and *Infamous the Show*.
- Top events in 2020 included *The Book of Mormon* and performances from Queen + Adam Lambert and Elton John.

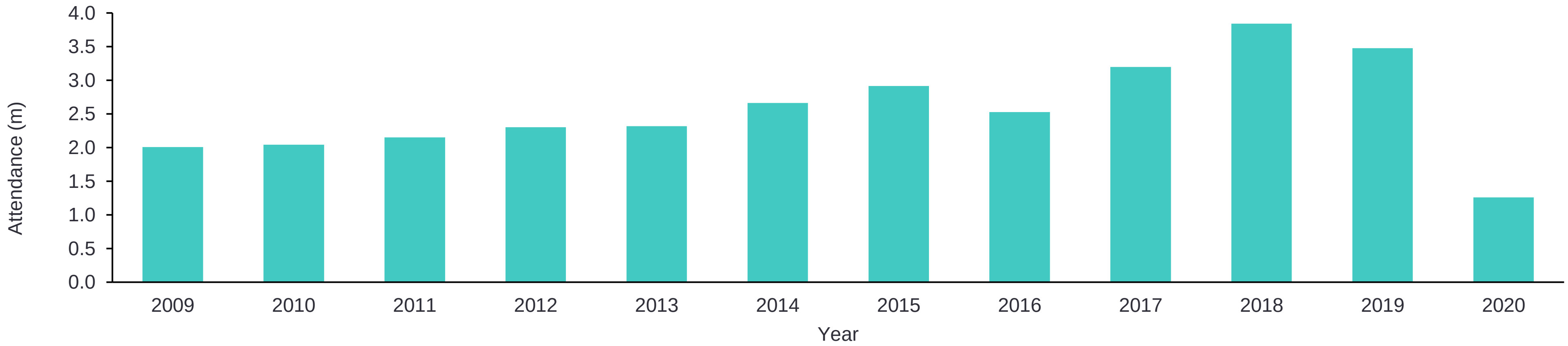
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$146,567,867	-	2,006,608	-
2010	$160,520,942	9.5%	2,043,327	1.8%
2011	$165,840,931	3.3%	2,150,329	5.2%
2012	$183,775,420	10.8%	2,302,462	7.1%
2013	$200,178,524	8.9%	2,318,207	0.7%
2014	$203,918,468	1.9%	2,661,632	14.8%
2015	$195,336,838	(4.2%)	2,914,530	9.5%
2016	$180,304,512	(7.7%)	2,527,535	(13.3%)
2017	$263,878,152	46.4%	3,196,581	26.5%
2018	$317,179,536	20.2%	3,840,497	20.1%
2019	$286,191,954	(9.8%)	3,477,020	(9.5%)
2020	$116,868,728	(59.2%)	1,260,436	(63.7%)

QLD Analysis

Revenue – QLD 2009 → 2020



Attendance – QLD 2009 → 2020



WA Analysis

WA Revenue and Attendance

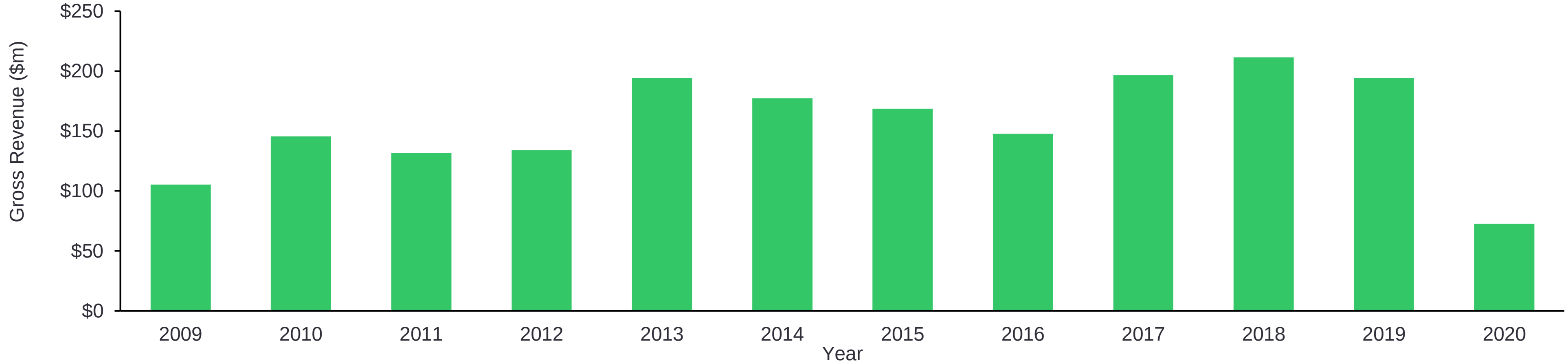
- WA generated $194.2m in revenue and recorded 2.6m in attendance in 2019, followed by $72.7m in revenue and 1.3m in attendance in 2020.
- The WA spend per capita in 2019 was $73.40 and $27.24 (second highest in Australia) in 2020.
- WA witnessed a y-o-y decline in revenue (8.2%) and a y-o-y decline in attendance (4.5%) in 2019. This was followed by a significant y-o-y decline in revenue (62.5%) and y-o-y decline in attendance (51.4%) in 2020, due to COVID-19 restrictions.
- In 2019, Contemporary Music contributed the highest share to WA's total revenue and attendance with a 56.5% and 39.4% share respectively. 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 2019 included performances by Eminem and U2 and top Contemporary Music events in 2020 included performances by Queen + Adam Lambert and Michael Bublé .
- In 2019, the decline in revenue was driven by a significant decline in revenue in Circus and Physical Theatre (60.4%), Children's/Family (41.6%), Musical Theatre (37.4%) and Comedy (30.0%), partially offset by growth in Theatre (125.5%), Festivals (Contemporary Music) (106.1%) and Special Events (25.0%).
- Circus and Physical Theatre and Children's/Family revenue declined, driven by a decline in attendance, despite growth in the average ticket price. Comedy and Musical Theatre revenue declined, driven by a decline in attendance and average ticket price.
- Theatre and Festivals (Contemporary Music) revenue increased, driven by an increase in attendance and average ticket price. Special Events revenue increased driven by an increase in attendance, despite a decline in average ticket price.
- 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%). Top events in Special Events included *Cuban Club*, *Fire Aid* and *Christmas Spectacular*.

	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$105,312,778	-	1,468,882	-
2010	$145,479,374	38.1%	1,879,408	27.9%
2011	$131,936,782	(9.3%)	1,788,262	(4.8%)
2012	$134,131,622	1.7%	1,791,795	0.2%
2013	$194,312,089	44.9%	2,153,483	20.2%
2014	$177,326,653	(8.7%)	2,266,435	5.2%
2015	$168,688,271	(4.9%)	2,217,942	(2.1%)
2016	$147,807,422	(12.4%)	2,334,951	5.3%
2017	$196,671,338	33.1%	2,604,391	11.5%
2018	$211,421,549	7.5%	2,772,963	6.5%
2019	$194,184,329	(8.2%)	2,648,785	(4.5%)
2020	$72,739,451	(62.5%)	1,287,780	(51.4%)

WA Analysis

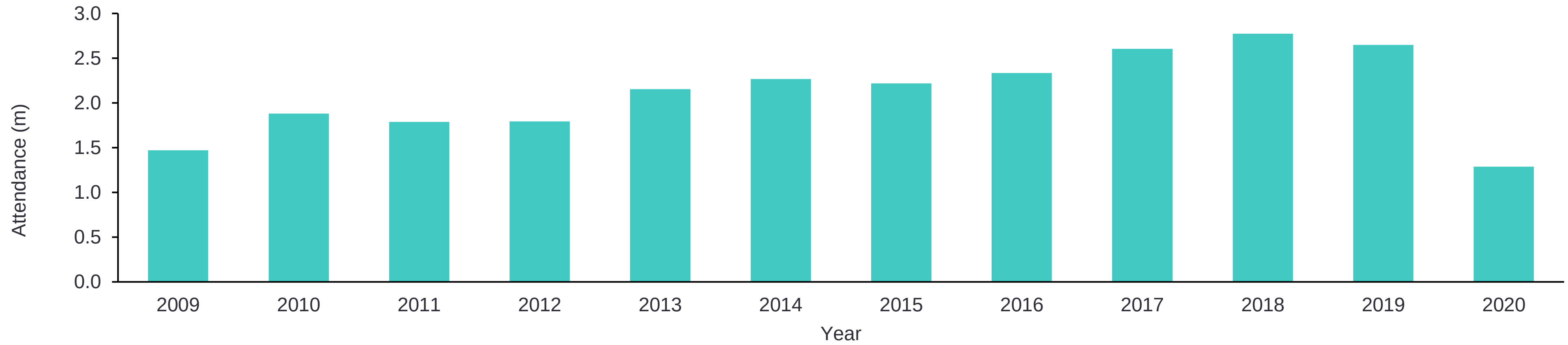
Revenue – WA

2009 → 2020



Attendance – WA

2009 → 2020



SA Analysis

SA Revenue and Attendance

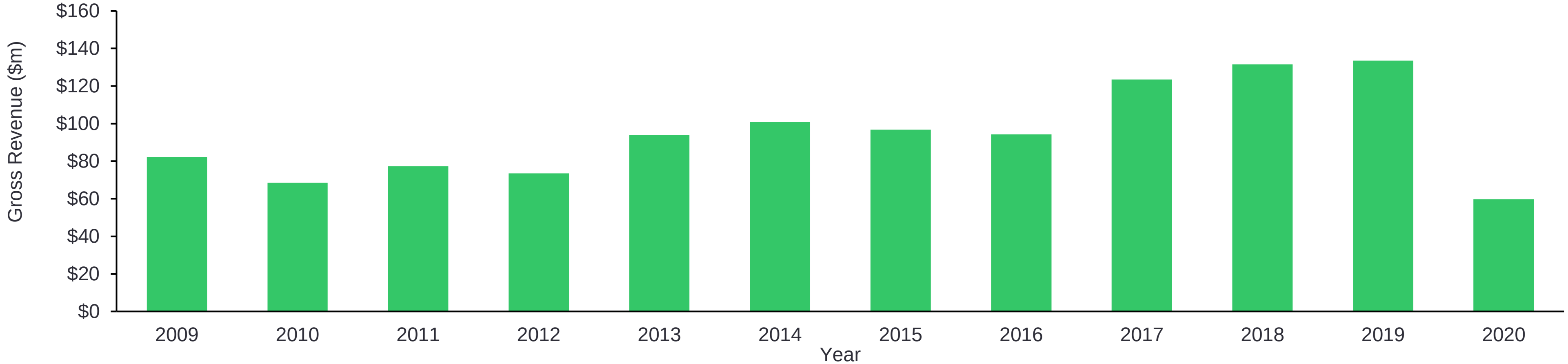
- In 2019, SA generated $133.5m in revenue and recorded 2.3m in attendance. SA experienced a moderate y-o-y growth in revenue by (1.4%), while attendance increased (by 4.7%). However, in 2020, revenue decreased significantly to $59.7m, and attendance decreased to 1.4m.
- The SA spend per capita in 2019 was $75.77 and $33.71 (highest in Australia) in 2020.
- SA accounted for a 6.8% market share of revenue and a 9.7% market share of overall attendance in 2019, followed by a 9.9% market share of revenue and 18.0% of overall attendance in 2020.
- Contemporary Music contributed the highest share (34.9%) to SA's total revenue in 2019 whereas Festivals (Multi Category) contributed the highest share (40.3%) to SA's total revenue in 2020.
- In 2019, the growth in revenue was primarily driven by Circus and Physical Theatre (463.8%), Festivals (Contemporary Music) (236.4%), Classical Music (51.7%) and Musical Theatre (50.7%). The growth in revenue was partially offset by a decline in Children's/Family (34.2%) and Comedy (28.6%).
- 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. Classical Music and Musical Theatre revenue increased primarily due to an increase in attendance by 60.0% and 45.5% respectively.
- In 2020, revenue decline was primarily driven by a decline in revenue in Circus and Physical Theatre (99.8%), Opera (97.9%), Ballet and Dance (91.3%), Musical Theatre (85.4%), Children's/Family (82.3%) and Classical Music (77.4%).
- 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.

	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$82,326,982	-	1,449,260	-
2010	$68,538,320	(16.7%)	1,035,243	(28.6%)
2011	$77,215,957	12.7%	1,237,386	19.5%
2012	$73,536,693	(4.8%)	1,053,997	(14.8%)
2013	$93,864,893	27.6%	1,497,204	42.1%
2014	$100,944,048	7.5%	1,614,267	7.8%
2015	$96,804,782	(4.1%)	1,699,529	5.3%
2016	$94,316,578	(2.6%)	1,797,087	5.7%
2017	$123,525,390	31.0%	2,100,226	16.9%
2018	$131,560,865	6.5%	2,212,725	5.4%
2019	$133,455,773	1.4%	2,317,420	4.7%
2020	$59,698,701	(55.3%)	1,393,346	(39.9%)

SA Analysis

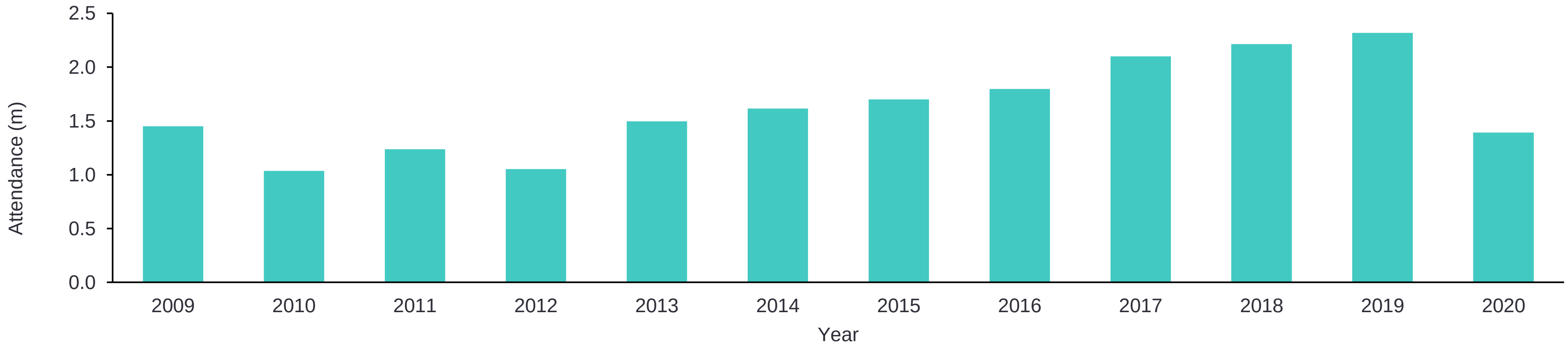
Revenue – SA

2009 → 2020



Attendance – SA

2009 → 2020



ACT/TAS/NT Analysis

ACT/TAS/NT Revenue and Attendance

- In 2019, ACT/TAS/NT revenue increased by 14.0% to $56.7m and attendance declined by 30.1% to 0.8m. In 2020, ACT/TAS/NT revenue decreased by 72.0% to $15.9m and attendance decreased by 63.2% to 0.3m. This was due to COVID-19 restrictions.
- Among these three jurisdictions, ACT had the highest spend per capita ($73.60) in 2019, whereas TAS had the highest spend per capita ($17.18) in 2020.
- ACT revenue increased by 13.2% and attendance increased by 6.4% in 2019. However, in 2020, ACT witnessed the largest decline in revenue in Australia (81.9%) and second largest decline in attendance (76.6%).
  - 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 decline in revenue 2020 was primarily impacted by the decline across Festivals (Contemporary Music), Musical Theatre, Theatre and Ballet and Dance.
- Despite a 52.5% decline in attendance (down to 0.4m), TAS had the highest y-o-y revenue growth (18.8% to $22.5m) in 2019. However, in 2020, TAS witnessed a decline in both revenue (58.7%) and attendance (47.0%).
  - The increase in revenue in 2019 was primarily due to an increase in revenue in Festivals (Contemporary Music), Circus and Physical Theatre, Contemporary Music and Theatre. Top events in 2019 included Dark Mofo and Falls Festival.
  - 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*.
- NT experienced a y-o-y decline in revenue to $2.7m and attendance to 65k in 2019, followed by a y-o-y decline in revenue to $0.8m and attendance to 25k in 2020.
  - The revenue decline in 2019 was primarily due to a decline in revenue in Festivals (Multi-Category), Musical Theatre, Circus and Physical Theatre, Children's/Family and Theatre, partially offset by the growth in Special Events, Classical Music, Contemporary Music and Ballet and Dance.
  - All categories except Special Events contributed to the decline in revenue in 2020.

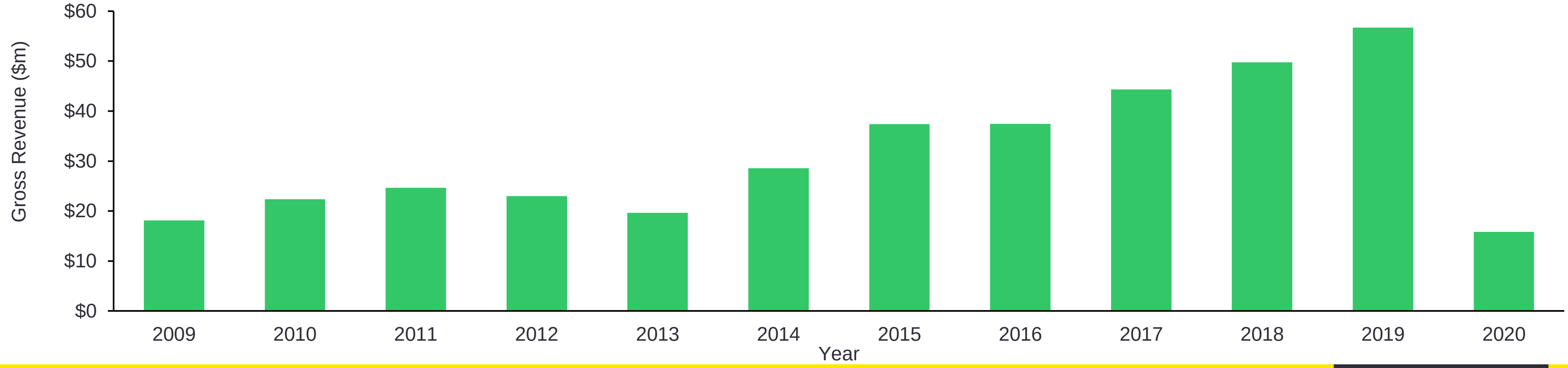
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$18,103,869	-	351,189	-
2010	$22,345,107	23.4%	460,793	31.2%
2011	$24,646,007	10.3%	478,993	3.9%
2012	$22,986,999	(6.7%)	413,160	(13.7%)
2013	$19,640,815	(14.6%)	484,343	17.2%
2014	$28,566,945	45.4%	542,736	12.1%
2015	$37,367,387	30.8%	653,358	20.4%
2016	$37,454,754	0.2%	618,451	(5.3%)
2017	$44,352,456	18.4%	868,922	40.5%
2018	$49,737,811	12.1%	1,212,219	39.5%
2019	$56,693,625	14.0%	847,728	(30.1%)
2020	$15,854,170	(72.0%)	312,266	(63.2%)

Note: ACT/TAS/NT revenue and attendance numbers and commentary have been combined for confidentiality purposes.

ACT/TAS/NT Analysis

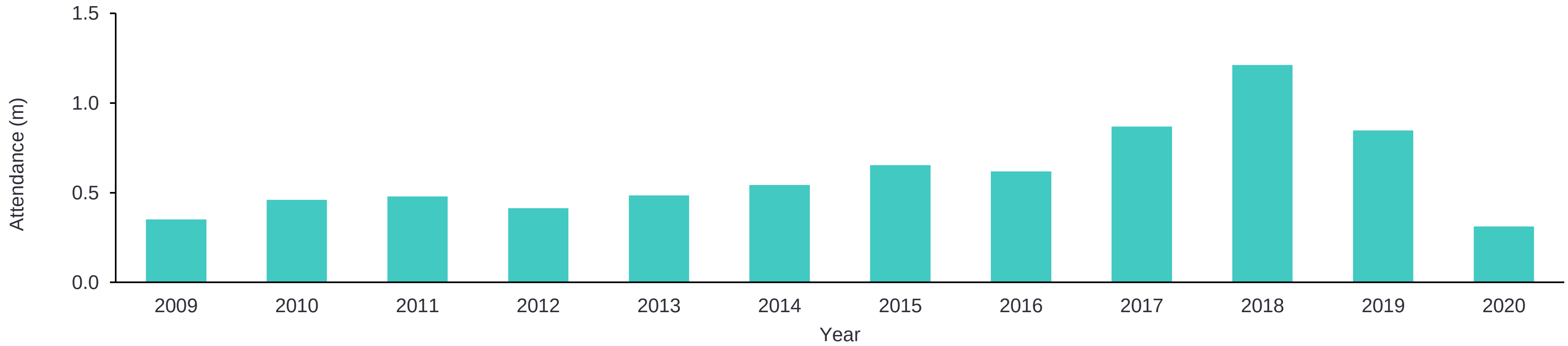
Revenue – ACT/TAS/NT

2009 → 2020



Attendance – ACT/TAS/NT

2009 → 2020



5 Category Analysis

Total Revenue and Attendance by Category

Revenue and Attendance by Category

2019

	Revenue			Attendance		
Category	Revenue	% Change in Revenue (from 2018)	Share of Industry	Tickets	% Change in Attendance (from 2018)	Share of Industry
Ballet and Dance	$66,158,598	3.4%	3.4%	803,472	0.3%	3.4%
Children's/Family	$43,649,235	(27.0%)	2.2%	1,172,129	(29.0%)	4.9%
Circus and Physical Theatre	$47,447,405	102.7%	2.4%	639,135	41.9%	2.7%
Classical Music	$87,333,188	9.9%	4.4%	1,316,235	4.3%	5.5%
Comedy	$103,216,361	(17.3%)	5.3%	2,172,296	(11.6%)	9.1%
Contemporary Music	$835,544,629	(15.9%)	42.5%	8,290,100	(13.7%)	34.7%
Festivals (Multi-Category)	$54,984,915	(20.3%)	2.8%	2,174,359	(15.7%)	9.1%
Festivals (Contemporary Music)	$180,852,859	77.3%	9.2%	1,447,836	48.5%	6.1%
Musical Theatre	$337,338,257	(15.7%)	17.2%	3,451,543	(11.9%)	14.5%
Opera	$40,201,835	(14.4%)	2.0%	435,525	(10.6%)	1.8%
Special Events	$21,352,158	(3.5%)	1.1%	430,873	152.9%	1.8%
Theatre	$146,562,112	86.7%	7.5%	1,530,912	7.0%	6.4%
Total	**$1,964,641,552**	**(4.8%)**	**100.0%**	**23,864,415**	**(7.5%)**	**100.0%**

Total Revenue and Attendance by Category

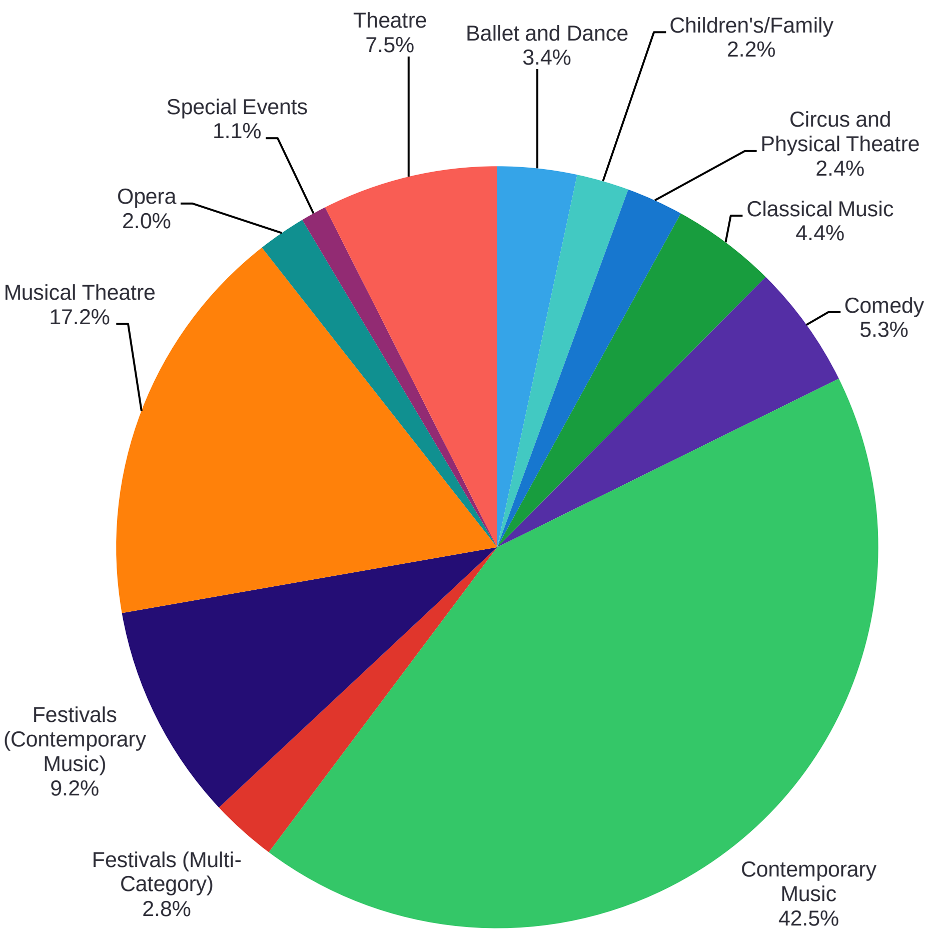
Revenue and Attendance by Category

2020

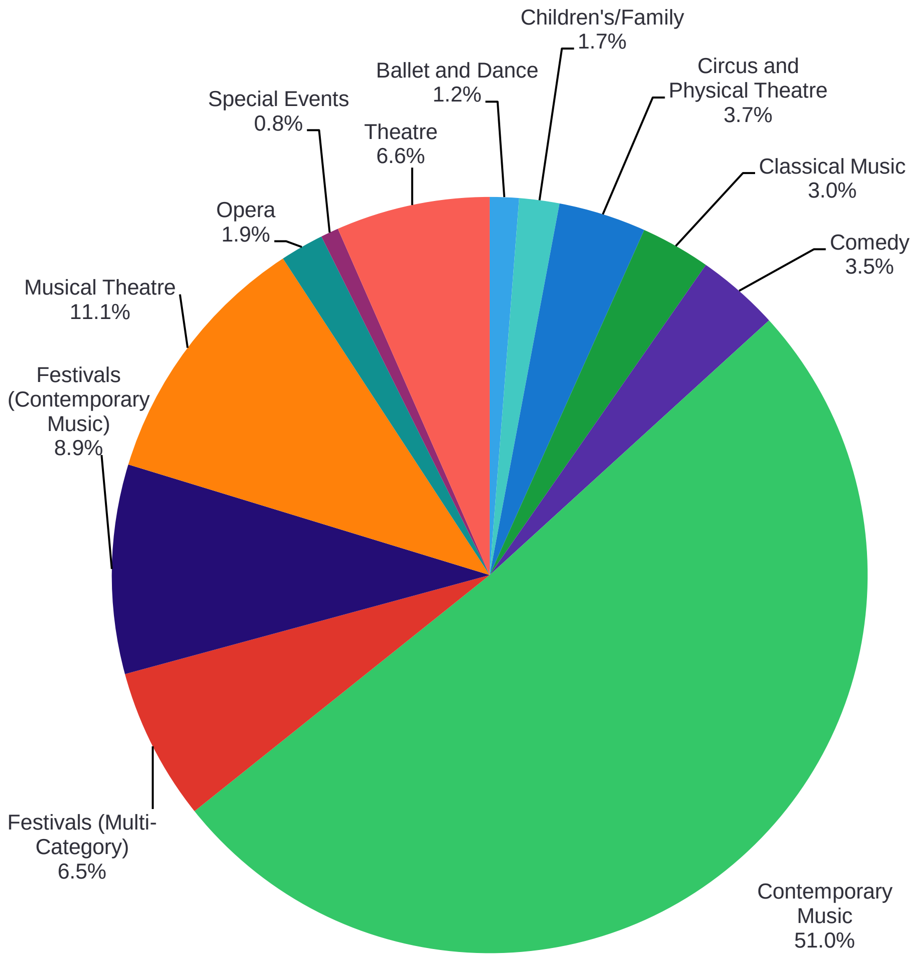
	Revenue			Attendance		
Category	Revenue	% Change in Revenue (from 2019)	Share of Industry	Tickets	% Change in Attendance (from 2019)	Share of Industry
Ballet and Dance	$7,534,678	(88.6%)	1.2%	137,389	(82.9%)	1.8%
Children's/Family	$10,396,875	(76.2%)	1.7%	378,053	(67.7%)	4.9%
Circus and Physical Theatre	$22,693,371	(52.2%)	3.7%	274,977	(57.0%)	3.5%
Classical Music	$18,111,125	(79.3%)	3.0%	289,888	(78.0%)	3.7%
Comedy	$21,489,790	(79.2%)	3.5%	338,448	(84.4%)	4.4%
Contemporary Music	$309,203,112	(63.0%)	51.0%	2,872,206	(65.4%)	37.0%
Festivals (Multi-Category)	$39,493,105	(28.2%)	6.5%	1,567,551	(27.9%)	20.2%
Festivals (Contemporary Music)	$54,174,572	(70.0%)	8.9%	437,472	(69.8%)	5.6%
Musical Theatre	$67,051,689	(80.1%)	11.1%	729,099	(78.9%)	9.4%
Opera	$11,313,725	(71.9%)	1.9%	147,982	(66.0%)	1.9%
Special Events	$4,644,130	(78.2%)	0.8%	166,777	(61.3%)	2.1%
Theatre	$39,867,422	(72.8%)	6.6%	421,868	(72.4%)	5.4%
Total	**$605,973,596**	**(69.2%)**	**100.0%**	**7,761,710**	**(67.5%)**	**100.0%**

Total Revenue and Attendance by Category

Revenue by Category 2019

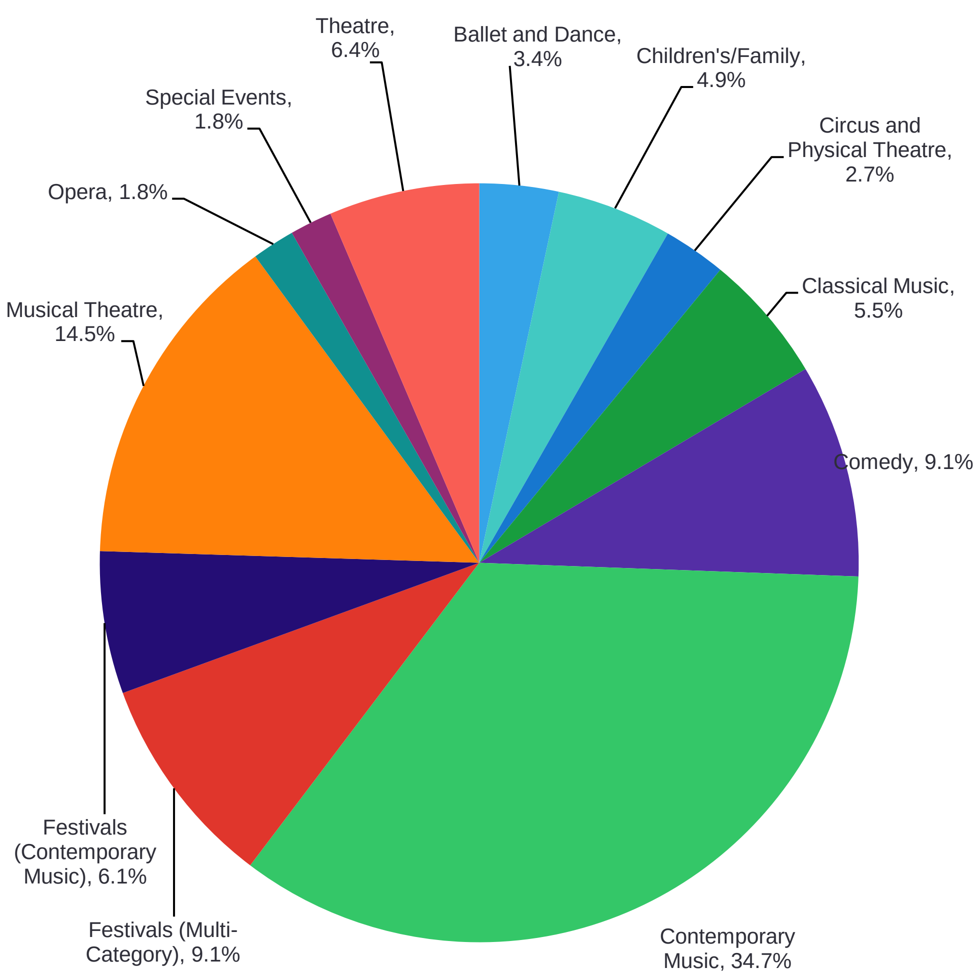


Revenue by Category 2020

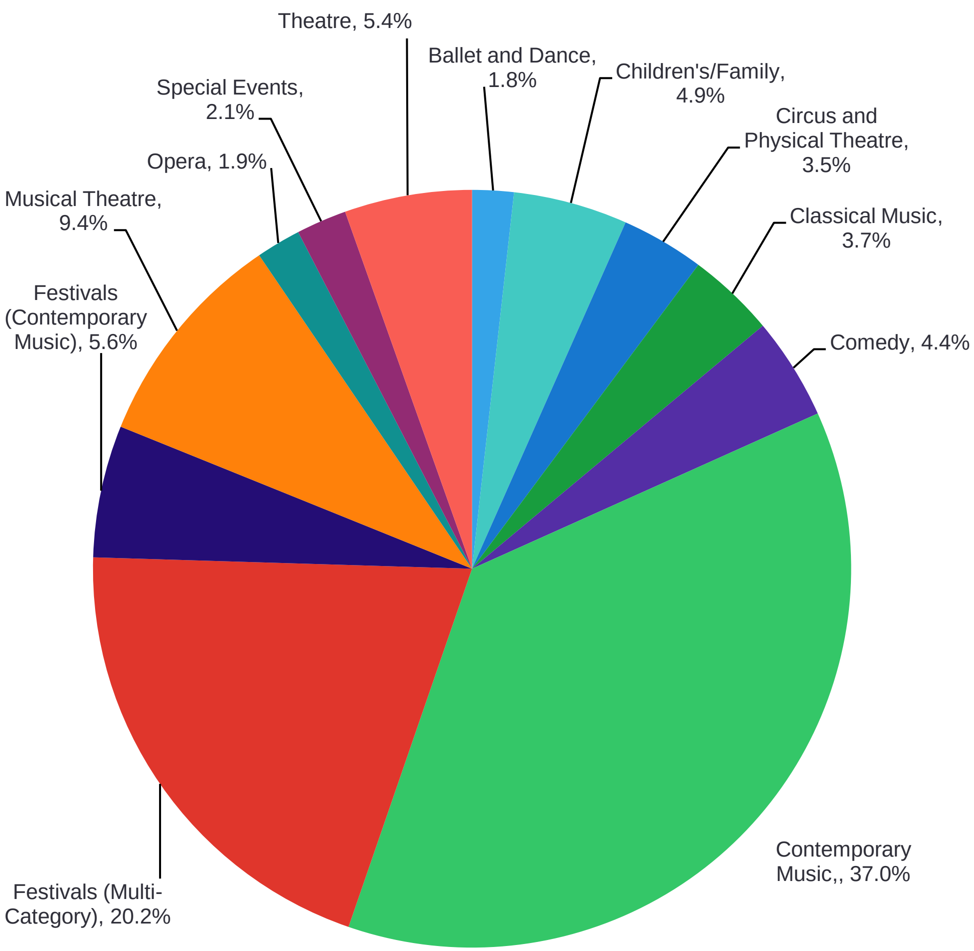


Total Revenue and Attendance by Category

Attendance by Category 2019

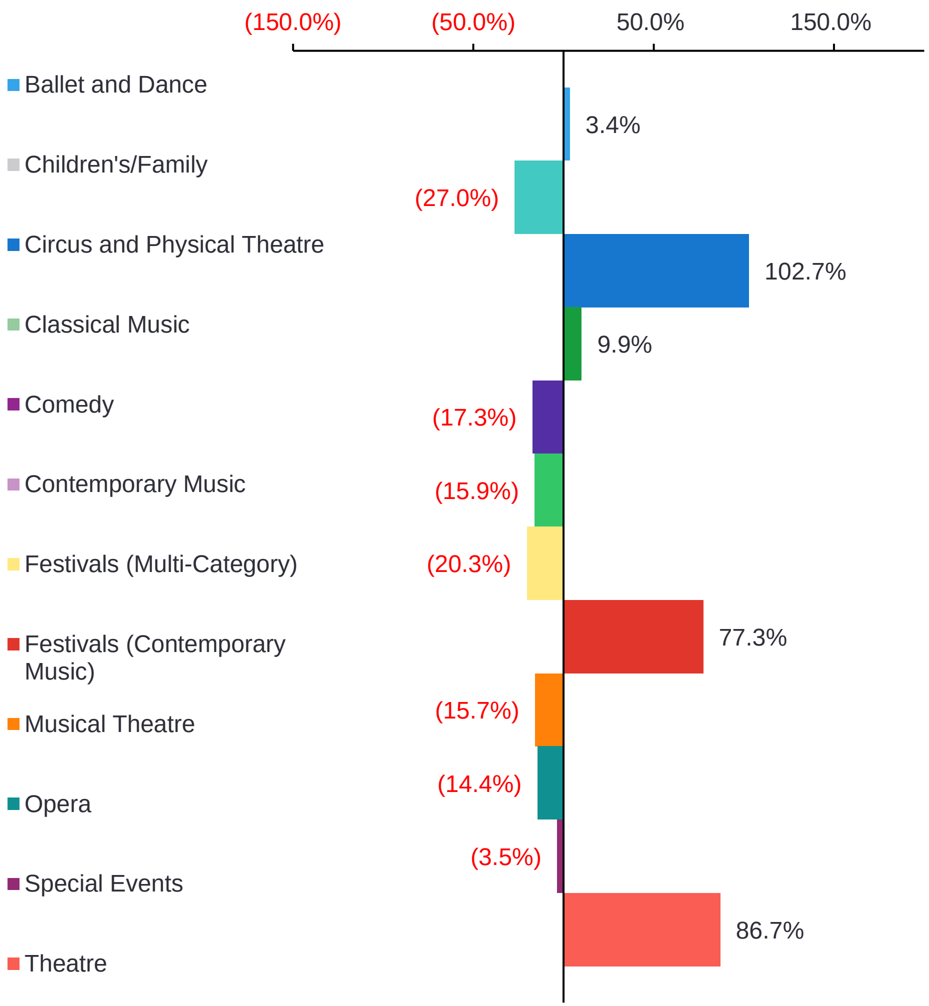


Attendance by Category 2020

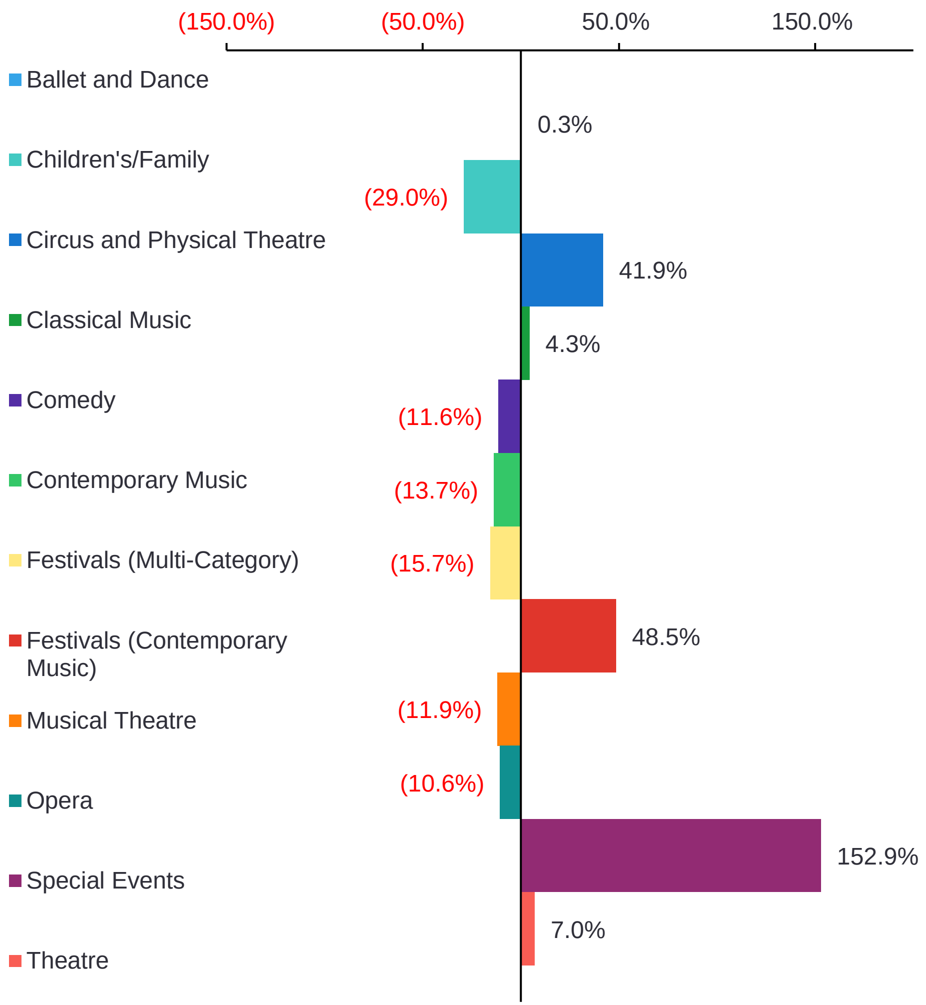


Total Revenue and Attendance by Category

Percentage Movement in Revenue by Category 2018 → 19

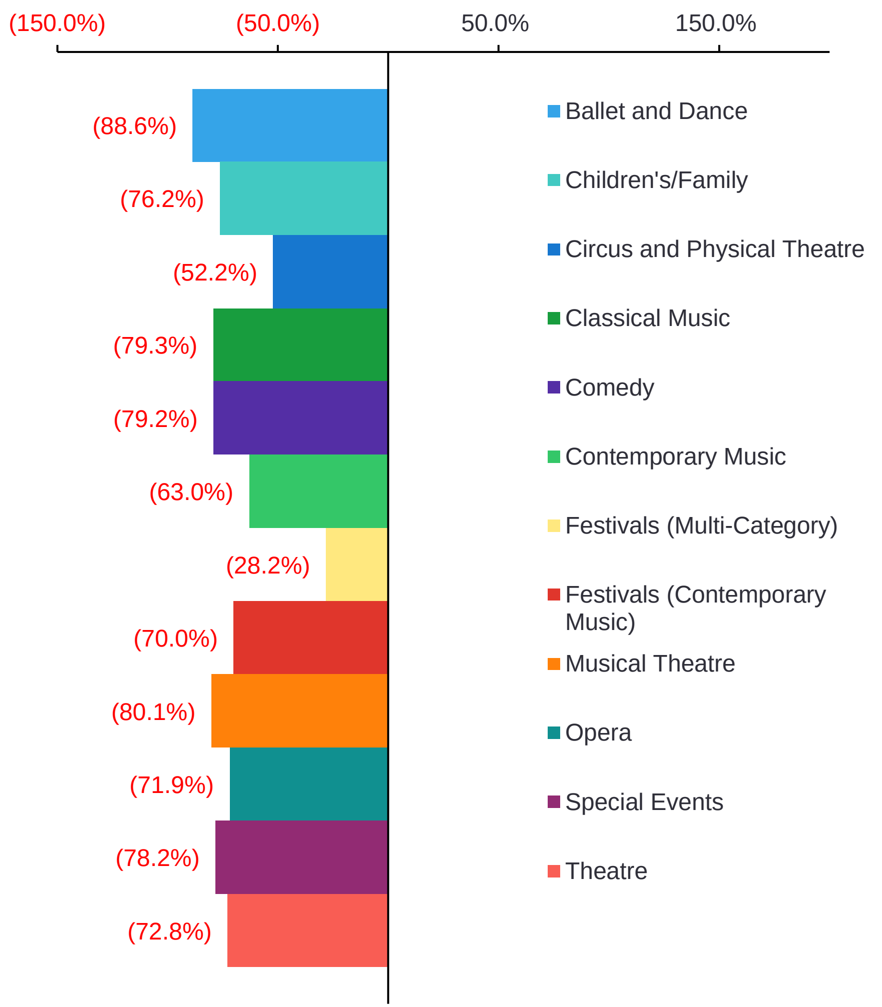


Percentage Movement in Attendance by Category 2018 → 19

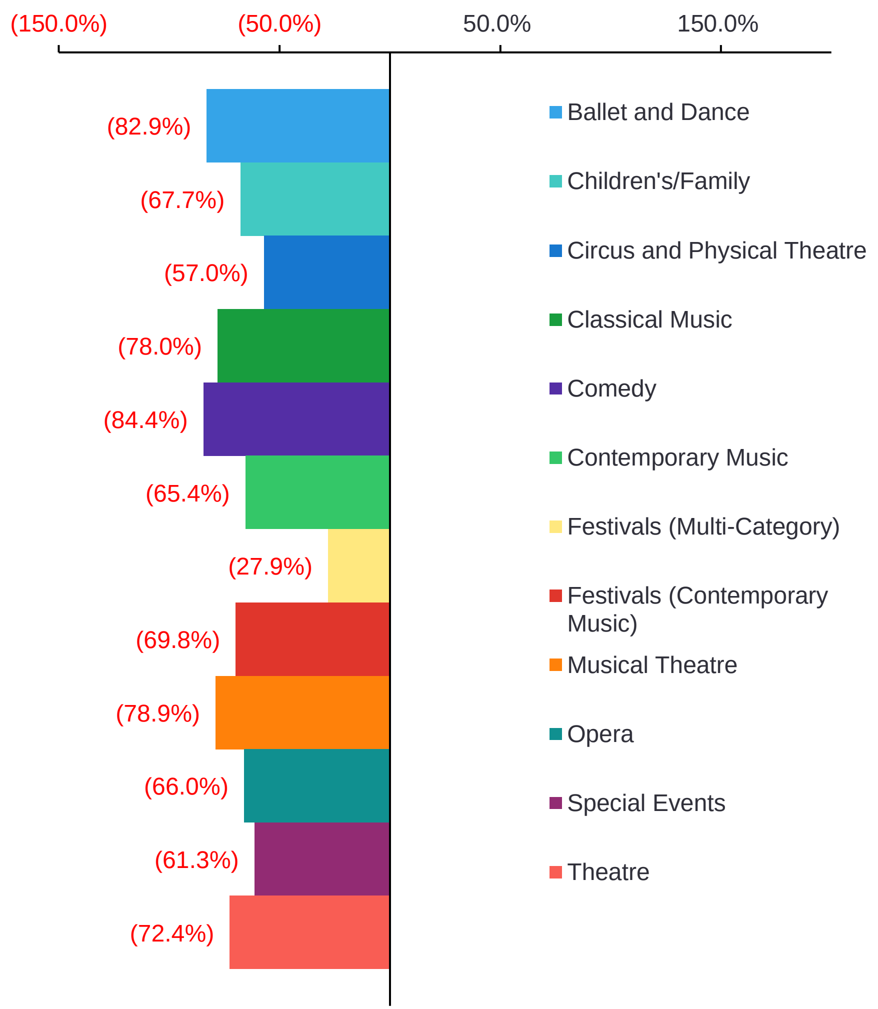


Total Revenue and Attendance by Category

Percentage Movement in Revenue by Category 2019 → 20



Percentage Movement in Attendance by Category 2019 → 20



Ballet and Dance

National Overview

- Ballet and Dance experienced a moderate growth in revenue by 3.4% (from $64.0m in 2018 to $66.2m in 2019) and a slight growth in attendance by 0.3% (to 0.8m in 2019). The increase in the average ticket price by 1.5% (from $90.81 in 2018 to $92.17 in 2019) contributed to the growth in revenue. The revenue in Ballet and Dance was primarily driven by major performances such as *The Nutcracker*, *Alice's Adventures in Wonderland*, *Giselle* and *Sylvia*.
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions resulted in a significant decline in revenue (by 88.6% to $7.5m) and a decline in attendance (by 82.9% to 0.1m) in 2020. The decline was also attributed to a decline in the average ticket price by 35.3% (to $59.64). The top events in this category in 2020 were *The Happy Prince*, *Volt, Shen Yun* and *The Nutcracker.*
- In 2019, 69.8% of revenue and 70.6% of attendance in Ballet and Dance was generated through performances by AMPAG / NPAP companies, such as The Australian Ballet, Sydney Dance Company, Bangarra Dance Theatre, Queensland Ballet and the West Australian Ballet. In 2020, 57.1% of revenue and 69.8% of attendance in Ballet and Dance was generated through performances by AMPAG / NPAP companies.
- In 2019, NSW, Victoria and Queensland generated the most revenue and attendance in this category, accounting for a combined 85.7% of overall revenue and 78.7% of attendance. In 2020, NSW, WA and QLD generated the most revenue and attendance, accounting for a combined 88.0% of overall revenue and 88.1% of attendance.
- In 2019, NT experienced the highest y-o-y growth in revenue (38.5%), despite a moderate decline in attendance (3.1%), driven by major performances such as *Bennelong*, *Celtic Illusion* and *30 Years of Sixty Five Thousand*.
- QLD experienced the second highest y-o-y growth in revenue (36.3%) and attendance (28.5%), driven by major performances including *Bolshoi Ballet: Spartacus*, *Romeo & Juliet* and *Alice's Adventures in Wonderland.*
- In 2020, all states experienced a significant decline in revenue and attendance in this category, due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies.

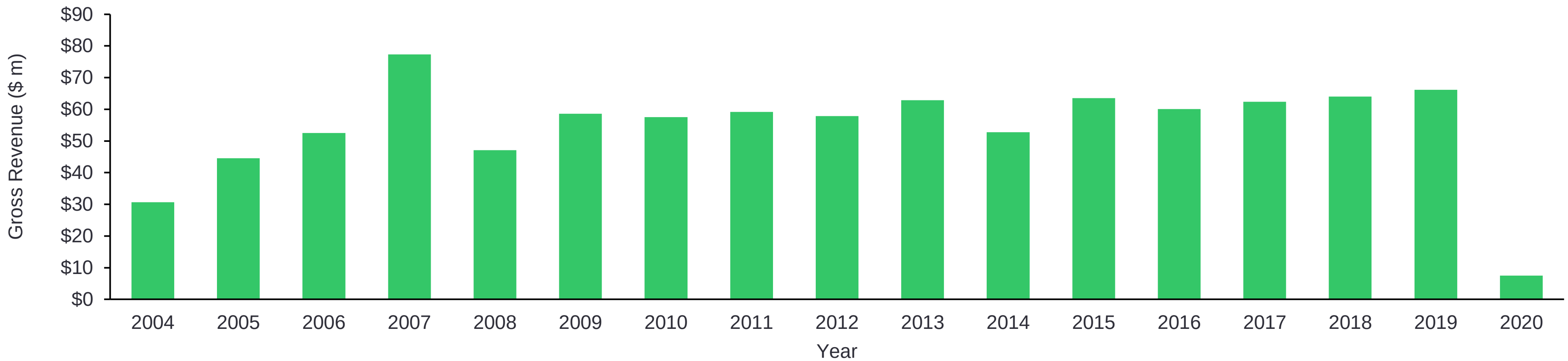
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$30,664,060	-	682,755	-	$50.07	-
2005	$44,563,085	45.3%	930,639	36.3%	$52.76	5.4%
2006	$52,523,644	17.9%	1,113,849	19.7%	$50.52	(4.2%)
2007	$77,287,071	47.1%	1,457,306	30.8%	$57.39	13.6%
2008	$47,051,946	(39.1%)	934,533	(35.9%)	$60.67	5.7%
2009	$58,570,704	24.5%	1,050,763	12.4%	$63.33	4.4%
2010	$57,509,401	(1.8%)	1,023,077	(2.6%)	$64.86	2.4%
2011	$59,164,135	2.9%	947,846	(7.4%)	$71.93	10.9%
2012	$57,865,897	(2.2%)	920,193	(2.9%)	$77.93	8.3%
2013	$62,832,992	8.6%	976,336	6.1%	$74.69	(4.2%)
2014	$52,771,905	(16.0%)	767,890	(21.3%)	$80.82	8.2%
2015	$63,522,318	20.4%	859,095	11.9%	$84.36	4.4%
2016	$60,079,595	(5.4%)	815,458	(5.1%)	$82.59	(2.1%)
2017	$62,339,482	3.8%	810,483	(0.6%)	$85.57	3.6%
2018	$63,988,882	2.6%	800,781	(1.2%)	$90.81	6.1%
2019	$66,158,598	3.4%	803,472	0.3%	$92.17	1.5%
2020	$7,534,678	(88.6%)	137,389	(82.9%)	$59.64	(35.3%)

Ballet and Dance

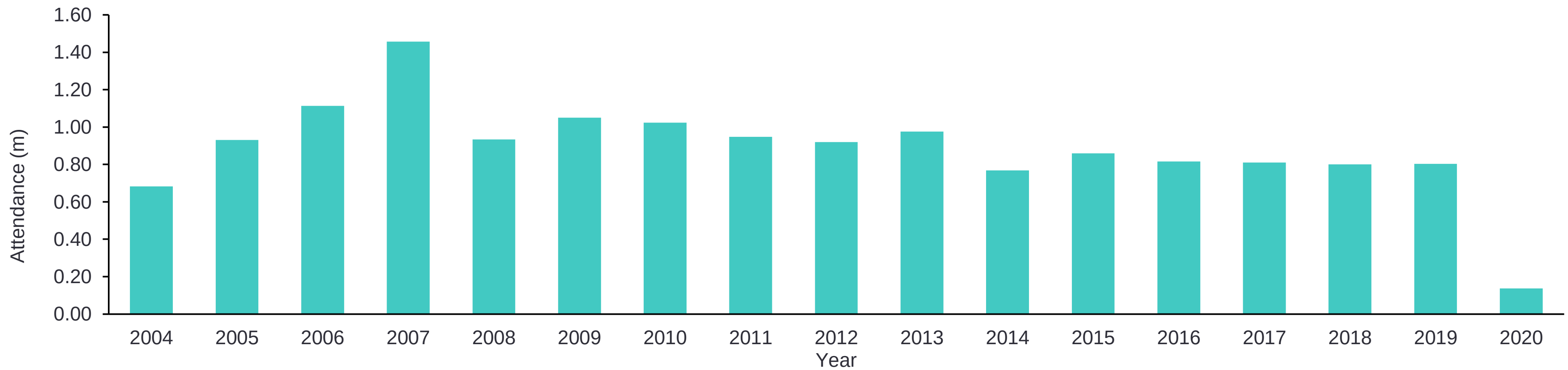
Revenue

2004 → 2020



Total Attendance

2004 → 2020



Ballet and Dance

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2018 (%)
NSW	$22,786,223	34.4%	(3.0%)
VIC	$19,779,095	29.9%	(0.5%)
QLD	$14,143,231	21.4%	5.2%
WA	$5,147,800	7.8%	(1.2%)
SA	$2,255,621	3.4%	(0.1%)
ACT	$1,168,750	1.8%	(0.6%)
TAS	$450,389	0.7%	0.1%
NT	$427,489	0.6%	0.2%
Total	**$66,158,598**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$2,756,508	36.6%	2.1%
VIC	$514,577	6.8%	(23.1%)
QLD	$1,320,607	17.5%	(3.9%)
WA	$2,550,044	33.8%	26.1%
SA	$195,718	2.6%	(0.8%)
ACT	$163,202	2.2%	0.4%
TAS	$0	0.0%	(0.7%)
NT	$34,022	0.5%	(0.2%)
Total	**$7,534,678**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	228,472	28.4%	(3.5%)
VIC	204,390	25.4%	(1.5%)
QLD	199,784	24.9%	5.4%
WA	99,041	12.3%	(1.2%)
SA	31,397	3.9%	(0.0%)
ACT	22,245	2.8%	0.3%
TAS	8,954	1.1%	0.4%
NT	9,189	1.1%	(0.0%)
Total	**803,472**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	34,637	25.2%	(3.2%)
VIC	6,063	4.4%	(21.0%)
QLD	28,965	21.1%	(3.8%)
WA	57,452	41.8%	29.5%
SA	4,882	3.6%	(0.4%)
ACT	4,235	3.1%	0.3%
TAS	-	0.0%	(1.1%)
NT	1,155	0.8%	(0.3%)
Total	**$137,389**	**100.0%**	

Children's/Family

National Overview

- Children's/Family events experienced a y-o-y decline in revenue by 27.0% (from $59.8m in 2018 to $43.6m in 2019) and a decline in attendance by 29.0% (from 1.7m in 2018 to 1.2m in 2019).
- The decline was partially offset by a 1.1% increase in the average ticket price (from $40.63 in 2018 to $41.08 in 2019). The revenue in this category was primarily driven by national tours of major events that attracted large audiences including *Disney on Ice* and *The Wiggles*.
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions resulted in a decline in revenue (by 76.2% to $10.4m) and a decline in attendance (by 67.7% to 0.4m) in 2020. Additionally, a decline in the average ticket price (by 26.2% to $30.33) further contributed to the decline in revenue. Top events in this category in 2020 were *The 91 Storey Treehouse*, *Bluey's Big Play*, *The Midnight Gang* and *Operation Ouch*.
- In 2019, NSW and Victoria generated the most revenue and attendance in this category, with a national market share of approximately 31.5% and 30.1% respectively in revenue and 31.5% and 28.2% respectively in attendance.
- In 2020, NSW and QLD generated the most revenue and attendance in this category, with a national market share of approximately 27.7% and 19.6% respectively in revenue and 34.9% and 16.2% respectively in attendance.
- In 2019, all states showed a y-o-y decline in revenue except ACT and all states except ACT and QLD showed a y-o-y decline in attendance. ACT experienced the most significant y-o-y growth in revenue (62.3%) and attendance (27.1%), driven by major performances such as *Disney On Ice*, *The Wiggles* and *Deadly 60 Down Under*.
- In 2020, all states showed a y-o-y decline in revenue and attendance except TAS. TAS experienced the most significant y-o-y growth in revenue (506.0%) and attendance (148.3%) in this category, driven by major performances such as *Operation Ouch Live!*, *The Wiggles* and *Sesame Street Circus*, which were all presented prior to COVID-19 restrictions.

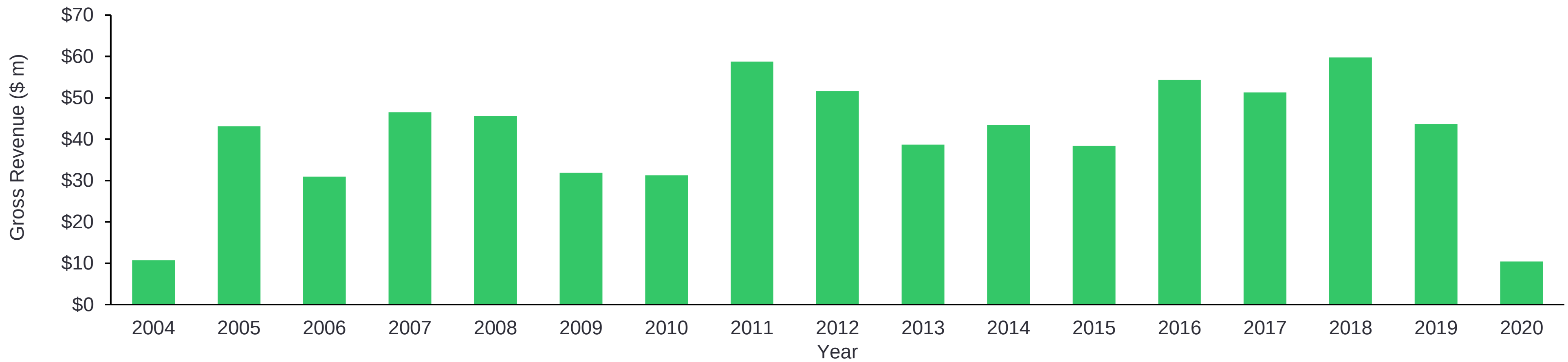
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$10,737,662	-	515,276	-	$21.25	-
2005	$43,108,863	301.5%	1,271,239	146.7%	$35.52	67.1%
2006	$30,944,086	(28.2%)	1,114,427	(12.3%)	$28.96	(18.5%)
2007	$46,535,403	50.4%	1,393,942	25.1%	$36.49	26.0%
2008	$45,647,441	(1.9%)	1,455,400	4.4%	$34.24	(6.2%)
2009	$31,904,974	(30.1%)	1,076,332	(26.0%)	$32.38	(5.4%)
2010	$31,247,780	(2.1%)	974,624	(9.4%)	$34.23	5.7%
2011	$58,777,398	88.1%	1,453,012	49.1%	$43.87	28.1%
2012	$51,587,317	(12.2%)	1,300,334	(10.5%)	$43.17	(1.6%)
2013	$38,684,410	(25.0%)	1,090,598	(16.1%)	$38.17	(11.6%)
2014	$43,431,918	12.3%	1,214,273	11.3%	$38.27	0.3%
2015	$38,368,367	(11.7%)	1,081,003	(11.0%)	$39.15	2.3%
2016	$54,316,058	41.6%	1,376,254	27.3%	$42.87	9.5%
2017	$51,308,258	(5.5%)	1,305,672	(5.1%)	$42.35	(1.2%)
2018	$59,777,596	16.5%	1,650,955	26.4%	$40.63	(4.1%)
2019	$43,649,235	(27.0%)	1,172,129	(29.0%)	$41.08	1.1%
2020	$10,396,875	(76.2%)	378,053	(67.7%)	$30.33	(26.2%)

Children's/Family

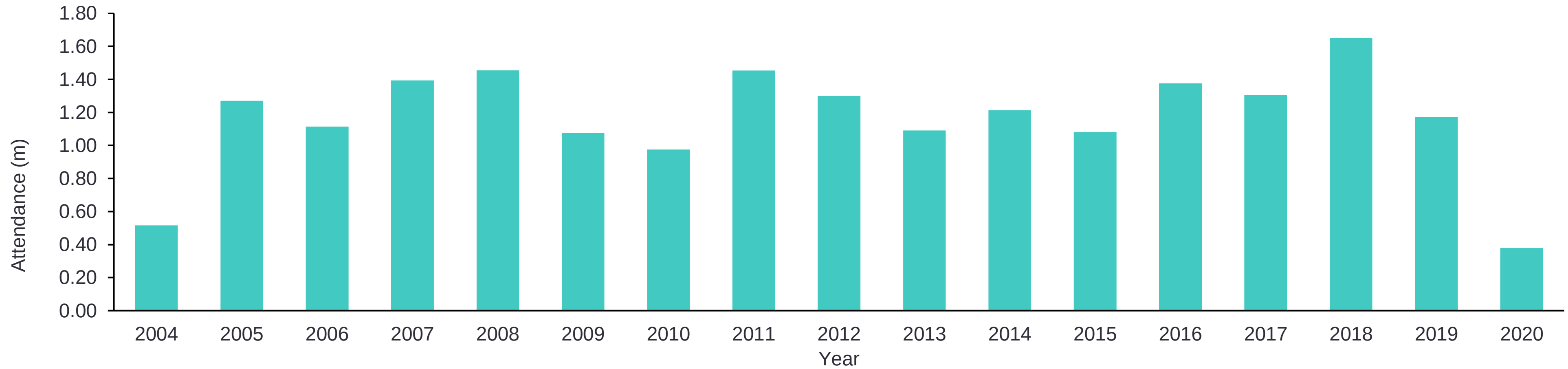
Revenue

2004 → 2020



Total Attendance

2004 → 2020



Children's/Family

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$13,762,638	31.5%	(5.2%)
VIC	$13,123,726	30.1%	3.7%
QLD	$6,537,285	15.0%	2.2%
WA	$4,466,019	10.2%	(2.6%)
SA	$2,898,656	6.6%	(0.7%)
ACT	$2,393,743	5.5%	3.0%
TAS	$242,960	0.6%	(0.2%)
NT	$224,209	0.5%	(0.2%)
Total	**$43,649,235**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$2,881,279	27.7%	(3.8%)
VIC	$1,655,562	15.9%	(14.1%)
QLD	$2,036,087	19.6%	4.6%
WA	$1,280,547	12.3%	2.1%
SA	$513,197	4.9%	(1.7%)
ACT	$395,949	3.8%	(1.7%)
TAS	$1,472,428	14.2%	13.6%
NT	$161,827	1.6%	1.0%
Total	**$10,396,875**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	369,020	31.5%	(9.8%)
VIC	330,193	28.2%	3.0%
QLD	184,469	15.7%	4.7%
WA	128,025	10.9%	0.1%
SA	77,579	6.6%	0.2%
ACT	59,280	5.1%	2.2%
TAS	15,432	1.3%	(0.1%)
NT	8,131	0.7%	(0.3%)
Total	**1,172,129**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	131,937	34.9%	3.4%
VIC	50,666	13.4%	(14.8%)
QLD	61,431	16.2%	0.5%
WA	45,403	12.0%	1.1%
SA	28,606	7.6%	0.9%
ACT	14,500	3.8%	(1.2%)
TAS	38,320	10.1%	8.8%
NT	7,190	1.9%	1.2%
Total	**378,053**	**100.0%**	

Circus and Physical Theatre

National Overview

- Circus and Physical Theatre experienced the highest growth in revenue and the third highest growth in attendance amongst all categories, experiencing a growth of 102.7% in revenue (from $23.4m in 2018 to $47.4m in 2019) and 41.9% growth in attendance (from 0.5m in 2018 to 0.6m in 2019). The growth was primarily attributed to the Cirque du Soleil tours in 2019.
- The average ticket price increased by 31.4% (from $60.96 in 2018 to $80.08), which further contributed to the growth in revenue.
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions resulted in a significant decline in revenue (by 52.2% to $22.7m from 2019) and attendance (by 57.0% to 0.3m) in 2020. The decline in revenue was partially offset by an 11.7% increase in the average ticket price (to $89.48).
- This category can be variable depending on the presence or absence of major tours by international companies in any given year, particularly Cirque du Soleil.
- Major events in this category in 2019 included performances by *Blanc de Blanc Encore*, *Cirque Stratosphere*, *The Illusionists* and *Kurios* by Cirque du Soleil. Major events in this category in 2020 included *Cirque Stratosphere* and *Kurios* by Cirque du Soleil.
- In 2019, SA witnessed a y-o-y increase in revenue by 463.8% and growth in attendance by 887.0%. The major event in this category in SA was Circus Rio. NSW witnessed a y-o-y increase in revenue by 222.9% and a growth in attendance by 118.3%. The major events in this category in NSW were *Blanc de Blanc Encore*, *Cirque Stratosphere* and *Kurios* by Cirque du Soleil.
- In 2020, all states showed a y-o-y decline in revenue and attendance except QLD. QLD witnessed a y-o-y increase in revenue by 216.7% and a growth in attendance by 107.2%. The major event in this category in QLD was *Kurios* by Cirque du Soleil. The remainder of Cirque du Soleil's Australian tour was cancelled following the introduction of COVID-19 restrictions in March 2020.

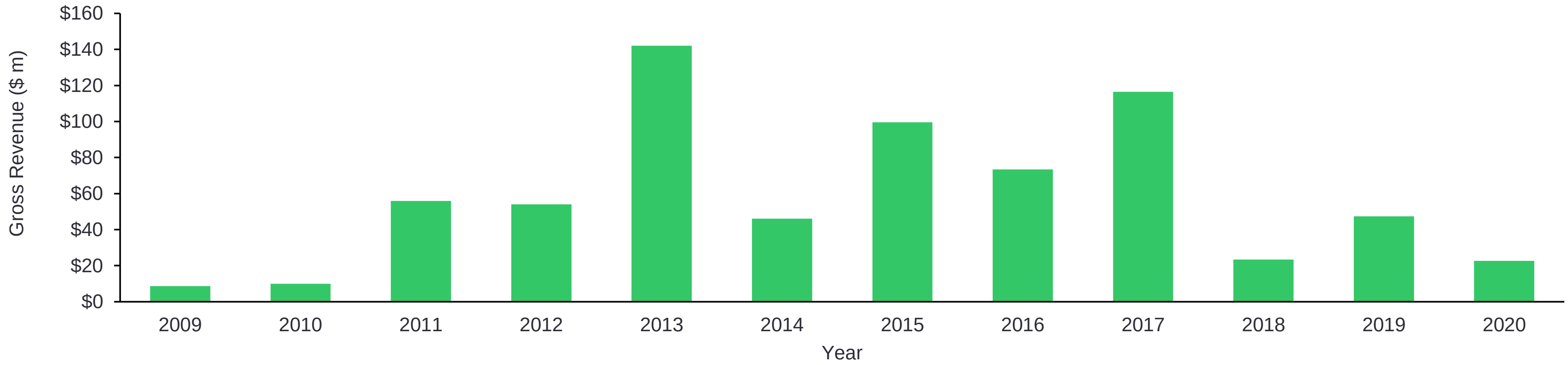
Revenue and Attendance 2009 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2009	$8,601,990	-	198,274	-	$47.98	-
2010	$9,900,116	15.1%	265,837	34.1%	$43.03	(10.3%)
2011	$55,865,945	464.3%	728,799	174.2%	$86.81	101.8%
2012	$54,042,789	(3.3%)	555,506	(23.8%)	$103.67	19.4%
2013	$142,033,217	162.8%	1,285,991	131.5%	$118.91	14.7%
2014	$46,094,984	(67.5%)	564,676	(56.1%)	$88.60	(25.5%)
2015	$99,558,819	116.0%	974,645	72.6%	$109.41	23.5%
2016	$73,439,491	(26.2%)	838,980	(13.9%)	$96.56	(11.7%)
2017	$116,542,574	58.7%	1,165,111	38.9%	$109.04	12.9%
2018	$23,410,423	(79.9%)	450,446	(61.3%)	$60.96	(44.1%)
2019	$47,447,405	102.7%	639,135	41.9%	$80.08	31.4%
2020	$22,693,371	(52.2%)	274,977	(57.0%)	$89.48	11.7%

Circus and Physical Theatre

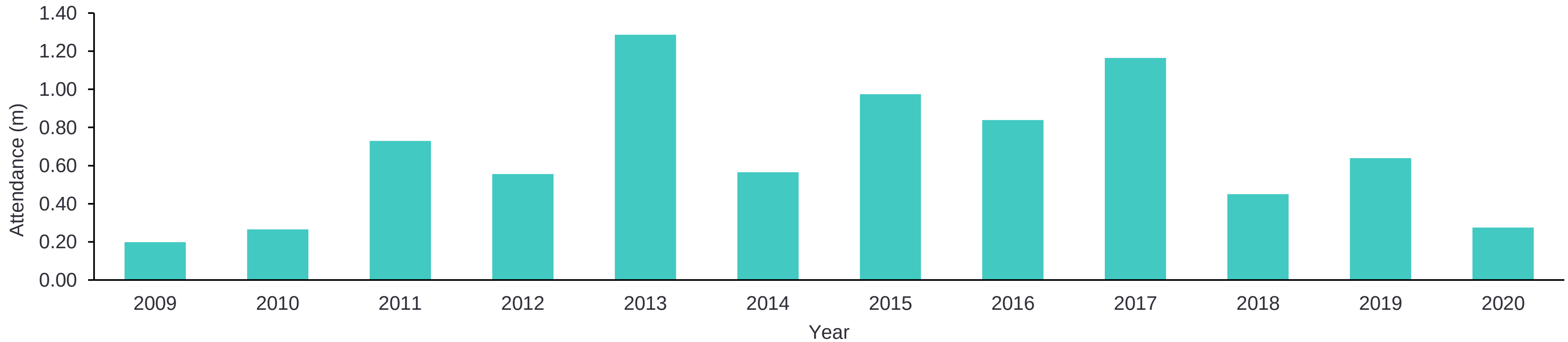
Revenue

2009 → 2020



Total Attendance

2009 → 2020



Circus and Physical Theatre

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$33,954,223	71.6%	26.6%
VIC	$4,395,934	9.3%	(7.0%)
QLD	$5,773,161	12.2%	(13.8%)
WA	$555,572	1.2%	(4.8%)
SA	$1,338,500	2.8%	1.8%
ACT	$1,201,391	2.5%	(2.1%)
TAS	$118,385	0.2%	0.1%
NT	$110,240	0.2%	(0.9%)
Total	**$47,447,405**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$892,459	3.9%	(67.6%)
VIC	$2,660,357	11.7%	2.5%
QLD	$18,285,666	80.6%	68.4%
WA	$394,756	1.7%	0.6%
SA	$2,478	0.0%	(2.8%)
ACT	$456,605	2.0%	(0.5%)
TAS	$0	0.0%	(0.2%)
NT	$1,050	0.0%	(0.2%)
Total	**$22,693,371**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	375,310	58.7%	20.6%
VIC	104,422	16.3%	(9.5%)
QLD	87,366	13.7%	(11.1%)
WA	15,993	2.5%	(2.4%)
SA	28,298	4.4%	3.8%
ACT	17,125	2.7%	(1.4%)
TAS	3,699	0.6%	0.0%
NT	6,922	1.1%	0.1%
Total	**639,135**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	19,298	7.0%	(51.7%)
VIC	43,876	16.0%	(0.4%)
QLD	180,993	65.8%	52.2%
WA	15,574	5.7%	3.2%
SA	82	0.0%	(4.4%)
ACT	15,112	5.5%	2.8%
TAS	-	0.0%	(0.6%)
NT	44	0.0%	(1.1%)
Total	**274,977**	**100.0%**	

Classical Music

National Overview

- Classical Music experienced a growth in revenue by 9.9% (from $79.5m in 2018 to $87.3m in 2019) and a growth in attendance by 4.3% (to 1.3m in 2019). The average ticket price increased by 2.8% (from $79.13 in 2018 to $81.35 in 2019), which additionally contributed to the growth in revenue.
- In 2019, the category recorded the second highest revenue (2008 being the highest) and the fourth highest attendance (after 2006, 2008 and 2017) in the Classical Music category. 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*.
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions resulted in a significant decline in revenue (by 79.3% to $18.1m) and a decline in attendance (by 78.0% to 0.3m) in 2020. However, the average ticket price slightly increased by 0.5% (to $81.75). The top events in this category in 2020 were *Music from the Studio Ghibli Films of Hayao Miyazaki* and *Vivaldi's Venice*.
- Similar to previous years, the majority of revenue (68.2% in 2019, 64.9% in 2020) and attendance (70.2% in 2019, 66.3% in 2020) in this category was generated through performances by AMPAG / NPAP companies. This includes the Adelaide Symphony Orchestra, Australian Brandenburg Orchestra, Australian Chamber Orchestra, Melbourne Symphony Orchestra, Musica Viva Australia, Queensland Symphony Orchestra, Sydney Symphony Orchestra, The Australian Ballet and Orchestra, Tasmanian Symphony Orchestra and West Australian Symphony Orchestra.
- In 2019, NT experienced the highest y-o-y increase in revenue (128.7%) and the second highest y-o-y increase in attendance (57.7%) in Australia. However, its impact was minimal as it represented only 0.2% in revenue and 0.4% in attendance of the overall market share in the Classical Music category. Top performances included those by Soweto Gospel Choir and Darwin Symphony Orchestra.
- In 2020, all states experienced a significant y-o-y decline in revenue and attendance, due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies.

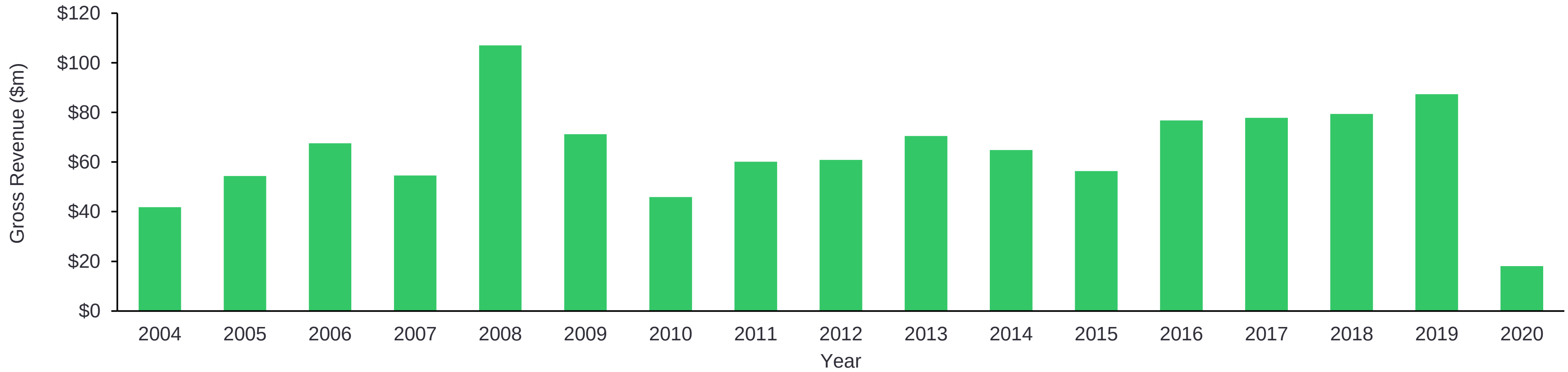
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$41,875,659	-	1,062,071	-	$43.21	-
2005	$54,395,768	29.9%	1,154,340	8.7%	$52.95	22.5%
2006	$67,568,915	24.2%	1,571,748	36.2%	$46.93	(11.4%)
2007	$54,615,181	(19.2%)	1,104,146	(29.8%)	$55.85	19.0%
2008	$107,050,440	96.0%	1,478,281	33.9%	$84.81	51.9%
2009	$71,273,338	(33.4%)	1,120,002	(24.2%)	$74.01	(12.7%)
2010	$45,882,050	(35.6%)	962,132	(14.1%)	$60.43	(18.3%)
2011	$60,096,039	31.0%	1,048,115	8.9%	$68.82	13.9%
2012	$60,884,219	1.3%	1,254,963	19.7%	$60.34	(12.3%)
2013	$70,481,841	15.8%	1,169,643	(6.8%)	$73.18	21.3%
2014	$64,870,493	(8.0%)	1,015,122	(13.2%)	$75.05	2.6%
2015	$56,395,824	(13.1%)	993,906	(2.1%)	$71.50	(4.7%)
2016	$76,764,404	36.1%	1,219,293	22.7%	$78.43	9.7%
2017	$77,883,209	1.5%	1,318,421	8.1%	$77.12	(1.7%)
2018	$79,456,707	2.0%	1,261,565	(4.3%)	$79.13	2.6%
2019	$87,333,188	9.9%	1,316,235	4.3%	$81.35	2.8%
2020	$18,111,125	(79.3%)	289,888	(78.0%)	$81.75	0.5%

Classical Music

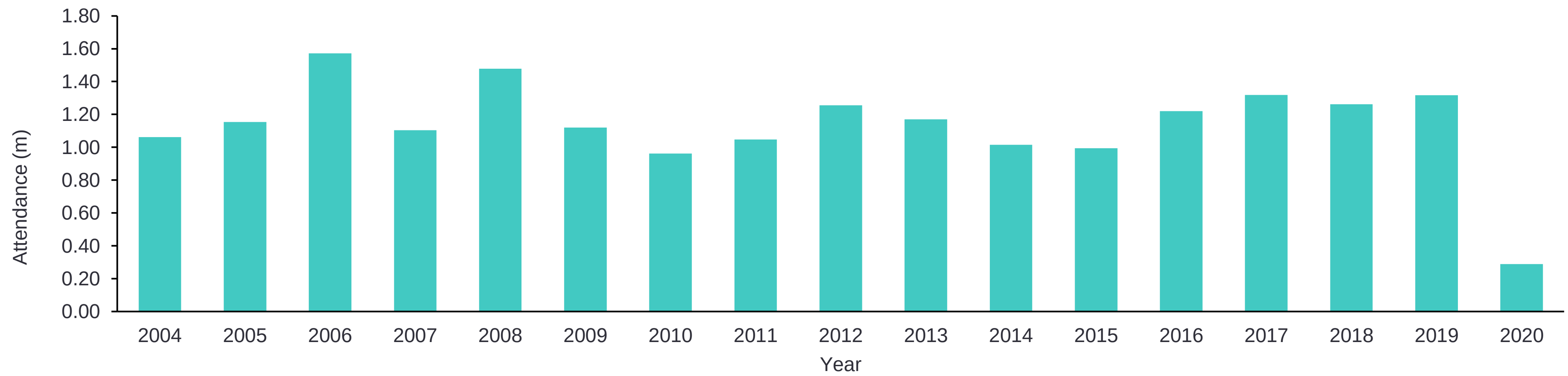
Revenue

2004 → 2020



Total Attendance

2004 → 2020



Classical Music

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$35,231,367	40.3%	1.2%
VIC	$27,518,400	31.5%	1.8%
QLD	$8,450,021	9.7%	(0.9%)
WA	$7,988,118	9.1%	(3.3%)
SA	$4,946,438	5.7%	1.6%
ACT	$1,557,300	1.8%	(0.1%)
TAS	$1,424,856	1.6%	(0.4%)
NT	$216,688	0.2%	0.1%
Total	**$87,333,188**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$4,419,484	24.4%	(15.9%)
VIC	$6,432,427	35.5%	4.0%
QLD	$2,160,863	11.9%	2.3%
WA	$3,434,580	19.0%	9.8%
SA	$1,116,150	6.2%	0.5%
ACT	$255,906	1.4%	(0.4%)
TAS	$201,332	1.1%	(0.5%)
NT	$90,384	0.5%	0.3%
Total	**$18,111,125**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	456,001	34.6%	1.9%
VIC	425,547	32.3%	0.2%
QLD	140,222	10.7%	(0.7%)
WA	153,231	11.6%	(3.2%)
SA	76,055	5.8%	2.0%
ACT	24,091	1.8%	(0.2%)
TAS	35,561	2.7%	(0.3%)
NT	5,527	0.4%	0.1%
Total	**1,316,235**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	68,505	23.6%	(11.0%)
VIC	96,672	33.3%	1.0%
QLD	32,166	11.1%	0.4%
WA	54,985	19.0%	7.3%
SA	20,244	7.0%	1.2%
ACT	3,274	1.1%	(0.7%)
TAS	11,438	3.9%	1.2%
NT	2,604	0.9%	0.5%
Total	**289,888**	**100.0%**	

Comedy

National Overview

- Comedy witnessed a decline in revenue by 17.3% (from $124.7m in 2018 to $103.2m in 2019) and a decline in attendance by 11.6% (from 2.5m in 2018 to 2.2m in 2019). 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 average ticket price declined by 53.9% (from $114.2 in 2018 to $52.62 in 2019), which further contributed to the decline in revenue. 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.
- This was the second highest recorded revenue and attendance for Comedy (2018 being the highest), since the introduction of this category in the Report in 2009.
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions resulted in a decline in revenue (by 79.2% to $21.5m) and a decline in attendance (by 84.4% to 0.3m) in 2020. However, the average ticket price increased by 30.9% (to $68.88). 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 2019, Victoria accounted for the highest share in Comedy, both in revenue and in attendance, representing 44.4% of the market share in revenue and 56.1% of the total attendance.
- In 2020, NSW accounted for the highest share of revenue in Comedy, representing 27.3% of the market share. QLD accounted for the highest share of attendance in Comedy, representing 34.5% of the market share.
- In 2019, all states experienced a y-o-y decline in revenue and attendance, except Victoria and ACT. ACT witnessed the highest y-o-y growth in revenue (9.2%) and in attendance (21.2%). The major events were performances by the comedians Dame Edna and Dylan Moran. However, the impact of these performances was minimal as it represented only 3.1% in revenue and 2.5% in attendance of the overall market share in the Comedy category.
- In 2020, all states experienced a significant y-o-y decline in revenue and attendance. This was largely due to COVID-19 leading to the cancellation of the Melbourne International Comedy Festival, Perth Comedy Festival and headline tours of major high-profile international comedians.

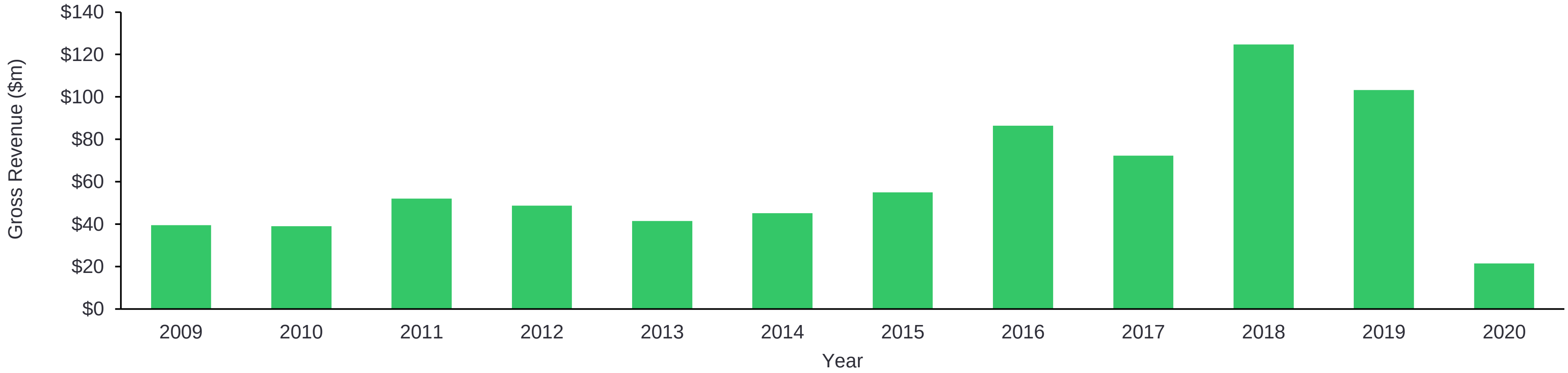
Revenue and Attendance 2009 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2009	$39,570,117	-	769,058	-	$44.07	-
2010	$39,048,164	(1.3%)	792,713	3.1%	$51.53	16.9%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	(6.4%)	981,035	(3.0%)	$53.55	(2.8%)
2013	$41,473,321	(14.8%)	912,609	(7.0%)	$48.82	(8.8%)
2014	$45,154,726	8.9%	963,108	5.5%	$50.55	3.5%
2015	$54,924,280	21.6%	992,399	3.0%	$60.11	18.9%
2016	$86,382,773	57.3%	1,409,299	42.0%	$65.54	9.0%
2017	$72,306,243	(16.3%)	1,238,460	(12.1%)	$62.32	(4.9%)
2018	$124,742,437	72.5%	2,458,198	98.5%	$114.20	83.3%
2019	$103,216,361	(17.3%)	2,172,296	(11.6%)	$52.62	(53.9%)
2020	$21,489,790	(79.2%)	338,448	(84.4%)	$68.88	30.9%

Comedy

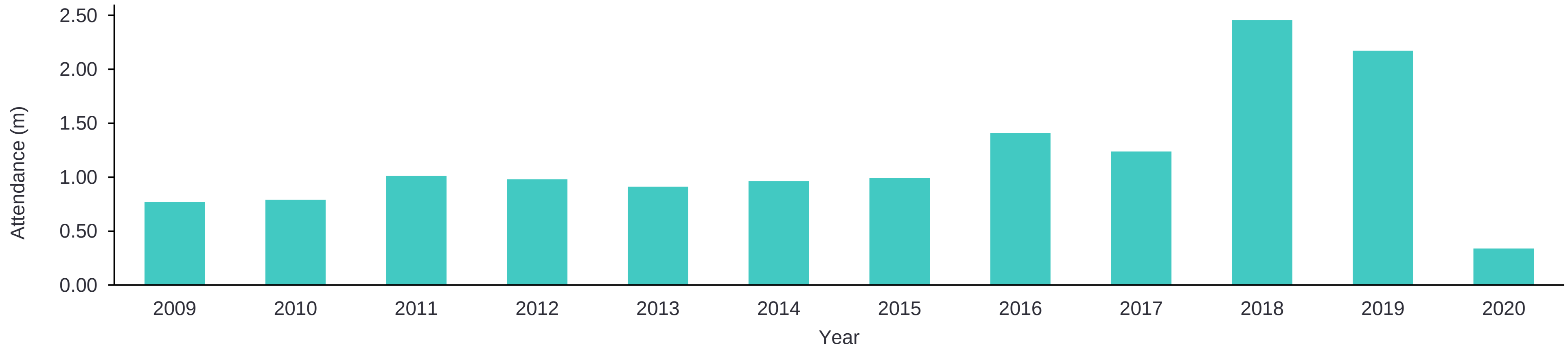
Revenue

2009 → 2020



Total Attendance

2009 → 2020



Comedy

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$23,726,443	23.0%	(3.4%)
VIC	$45,830,840	44.4%	9.7%
QLD	$14,023,989	13.6%	(4.3%)
WA	$11,062,762	10.7%	(2.0%)
SA	$4,006,482	3.9%	(0.6%)
ACT	$3,173,533	3.1%	0.7%
TAS	$999,340	1.0%	(0.1%)
NT	$392,973	0.4%	0.0%
Total	**$103,216,361**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$5,875,001	27.3%	4.4%
VIC	$4,846,775	22.6%	(21.8%)
QLD	$5,726,641	26.6%	13.1%
WA	$2,187,811	10.2%	(0.5%)
SA	$1,320,116	6.1%	2.3%
ACT	$1,262,085	5.9%	2.8%
TAS	$151,667	0.7%	(0.3%)
NT	$119,693	0.6%	0.2%
Total	**$21,489,790**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	375,044	17.3%	(4.6%)
VIC	1,219,562	56.1%	12.0%
QLD	280,197	12.9%	(5.0%)
WA	161,690	7.4%	(2.6%)
SA	55,888	2.6%	(0.4%)
ACT	54,392	2.5%	0.7%
TAS	17,659	0.8%	(0.1%)
NT	7,864	0.4%	(0.0%)
Total	**2,172,296**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	81,683	24.1%	6.9%
VIC	68,808	20.3%	(35.8%)
QLD	116,907	34.5%	21.6%
WA	29,005	8.6%	1.1%
SA	18,331	5.4%	2.8%
ACT	17,872	5.3%	2.8%
TAS	3,151	0.9%	0.1%
NT	2,691	0.8%	0.4%
Total	**338,448**	**100.0%**	

Contemporary Music

National Overview

- Contemporary Music experienced a decline in revenue by 15.9% (from $993.7m in 2018 to $835.5m in 2019) and a decline in attendance by 13.7% (from 9.6m in 2018 to 8.3m in 2019). The average ticket price declined by 3.0% (from $112.91 in 2018 to $109.54 in 2019), which further contributed to the decline in revenue.
- Major events in this category in 2019 were performances from U2, Eminem, Elton John and Fleetwood Mac.
- In 2020, the category experienced a decline in revenue (by 63.0% to $309.2m) and a decline in attendance (by 65.4% to 2.9m) due to COVID-19 restrictions and limited national and international touring activity. The decline was partially offset by the increase in the average ticket price by 5.7% (to $115.82).
- Major events in this category in 2020 were Fire Fight Australia and performances from Queen + Adam Lambert, Elton John and Michael Bublé.
- Contemporary Music continued to be the top contributor to the live performance market share. In 2019, Contemporary Music generated around 42.5% of revenue and approximately 34.7% of attendance of the overall live performance market. In 2020, the category generated more than 51.0% in revenue and 37.0% in attendance. This is the highest recorded market share in revenue and third highest market share in attendance (2010 and 2018 being the top two) for Contemporary Music since 2004.
- The annual variability of this category strongly reflects the number of high-profile international artists that tour in any given year, particularly the number of stadium tours that attract large audiences. 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 generated the largest market share in revenue (32.5% in 2019, 34.8% in 2020) and attendance (31.4% in 2019, 32.4% in 2020) in this category.
- NSW and Victoria combined generated 62.8% of the market share in revenue and 60.7% of the market share in attendance in 2019, followed by a 61.3% market share in revenue and 57.4% market share in attendance in 2020.

Note: These figures do not include music festivals, which are categorised under Festivals (Contemporary Music).

Revenue and Attendance 2004 → 2020

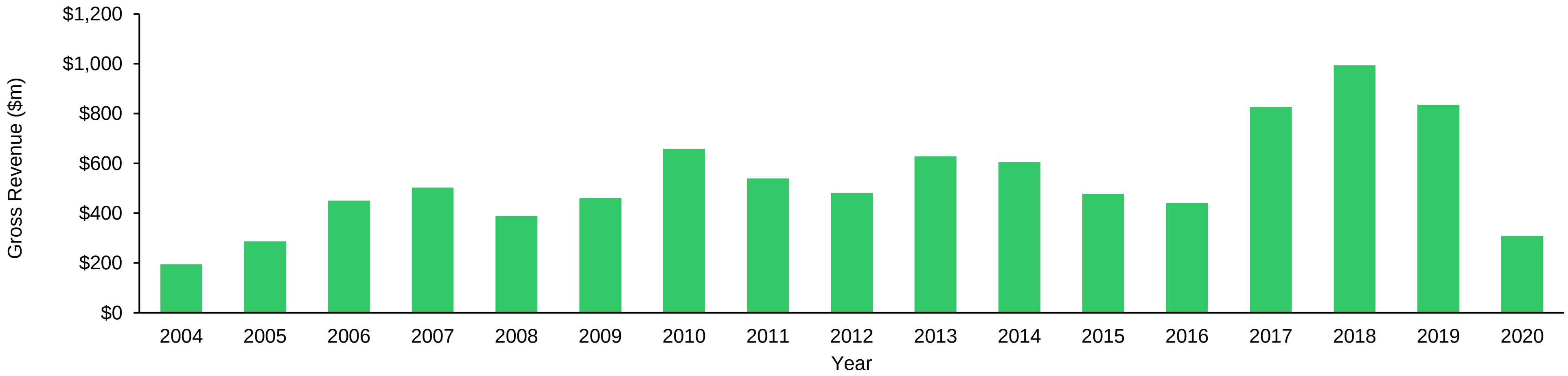
	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$195,058,791	-	2,737,873	-	$77.09	-
2005	$287,201,319	47.2%	3,924,276	43.3%	$83.37	8.1%
2006	$450,855,531	57.0%	5,295,988	35.0%	$92.78	11.3%
2007	$503,240,419	11.6%	5,975,561	12.8%	$90.49	(2.5%)
2008	$389,160,746	(22.7%)	4,330,620	(27.5%)	$101.35	12.0%
2009	$460,443,027	18.3%	4,682,805	8.1%	$108.61	7.2%
2010	$659,102,048	43.1%	7,028,235	50.1%	$102.78	(5.4%)
2011	$539,274,481	(18.2%)	5,939,618	(15.5%)	$103.45	0.6%
2012	$482,180,550	(10.6%)	5,484,257	(7.7%)	$100.27	(3.1%)
2013	$628,130,146	30.3%	6,266,137	14.3%	$110.50	10.2%
2014	$604,963,041	(3.7%)	6,386,058	1.9%	$107.60	(2.6%)
2015	$477,904,944	(21.0%)	5,554,811	(13.0%)	$96.38	(10.4%)
2016	$440,083,629	(7.9%)	5,658,753	1.9%	$85.35	(11.4%)
2017	$826,050,167	87.7%	8,464,739	49.6%	$105.73	23.9%
2018^	$993,736,022	20.3%	9,608,089	13.5%	$112.91	6.8%
2019	$835,544,629	(15.9%)	8,290,100	(13.7%)	$109.54	(3.0%)
2020	$309,203,112	(63.0%)	2,872,206	(65.4%)	$115.82	5.7%

^ This figure has been updated since the previous Report release to account for an error in the data received

Contemporary Music

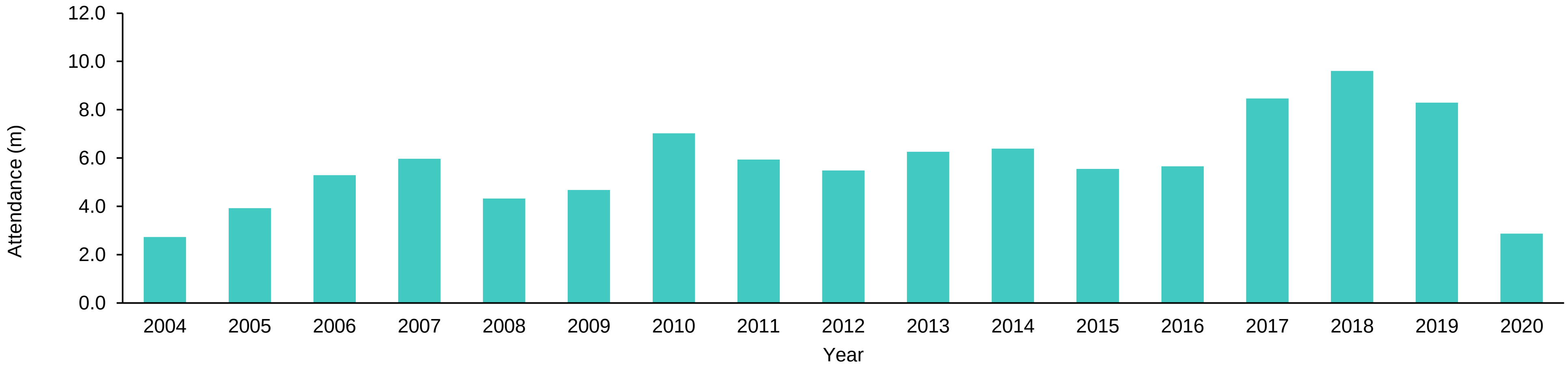
Contemporary Music – Revenue

2004 → 2020



Contemporary Music – Total Attendance

2004 → 2020



Contemporary Music

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$271,400,452	32.5%	(1.8%)
VIC	$253,518,264	30.3%	(0.7%)
QLD	$138,353,363	16.6%	0.7%
WA	$109,680,915	13.1%	2.0%
SA	$46,525,068	5.6%	(0.8%)
ACT	$7,832,370	0.9%	0.3%
TAS	$7,397,231	0.9%	0.4%
NT	$836,966	0.1%	0.0%
Total	**$835,544,629**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$107,705,408	34.8%	2.4%
VIC	$81,695,994	26.4%	(3.9%)
QLD	$64,465,380	20.8%	4.3%
WA	$31,260,191	10.1%	(3.0%)
SA	$17,835,208	5.8%	0.2%
ACT	$2,542,749	0.8%	(0.1%)
TAS	$3,300,383	1.1%	0.2%
NT	$397,799	0.1%	0.0%
Total	**$309,203,112**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	2,601,539	31.4%	(1.9%)
VIC	2,433,473	29.4%	(0.5%)
QLD	1,436,560	17.3%	0.4%
WA	1,042,420	12.6%	1.6%
SA	525,062	6.3%	(0.5%)
ACT	115,609	1.4%	0.3%
TAS	116,648	1.4%	0.6%
NT	18,789	0.2%	0.1%
Total	**8,290,100**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	931,553	32.4%	1.1%
VIC	716,436	24.9%	(4.4%)
QLD	566,416	19.7%	2.4%
WA	396,613	13.8%	1.2%
SA	166,330	5.8%	(0.5%)
ACT	33,287	1.2%	(0.2%)
TAS	52,101	1.8%	0.4%
NT	9,470	0.3%	0.1%
Total	**2,872,206**	**100.0%**	

Festivals (Multi-Category)

National Overview

- Festivals (Multi-Category) experienced a decline in revenue by 20.3% from $69.0m in 2018 to $55.0m in 2019) and a decline in attendance by 15.7% (from 2.6m in 2018 to 2.2m in 2019). The average ticket price declined by 17.8% (from $40.52 in 2018 to $33.31 in 2019), which further contributed to the decline in revenue.
- In 2019, the major contributing events in this category were Adelaide Fringe, Fringe World Festival and Dark Mofo Festival.
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions resulted in a decline in revenue (by 28.2% to $39.5m from 2019) and a decline in attendance (by 27.9% to 1.6m) in 2020. Additionally, a decline in the average ticket price by 14.0% (to $28.66) further contributed to the decline in revenue. The major contributing events in this category in 2020 were Adelaide Fringe, Fringe World Festival and Adelaide Festival.
- Festivals (Multi-Category) contributed 2.8% of the total share in revenue and 9.1% of the total share in attendance in 2019, followed by 6.5% of the total share in revenue and 20.2% of the total share in attendance in 2020.
- In 2019, SA and WA generated the majority of the revenue (a combined 63.9% market share), while SA and VIC generated the majority of the attendance (a combined 68.6% market share).
- In 2020, SA and WA generated the majority of revenue and attendance in this category, with a combined 91.4% market share of revenue and 91.7% of attendance.
- In 2019, all states experienced a decline in revenue, while all states except Victoria, SA and WA experienced a decline in attendance in this category.
- In 2020, all states except SA experienced a decline in revenue, while all states except WA experienced a decline in attendance in this category. SA witnessed a 12.3% y-o-y increase in revenue, despite a moderate decline in attendance by 0.5%. Major events in SA in this category included Adelaide Fringe and Adelaide Festival, which were substantially presented prior to COVID-19 restrictions.

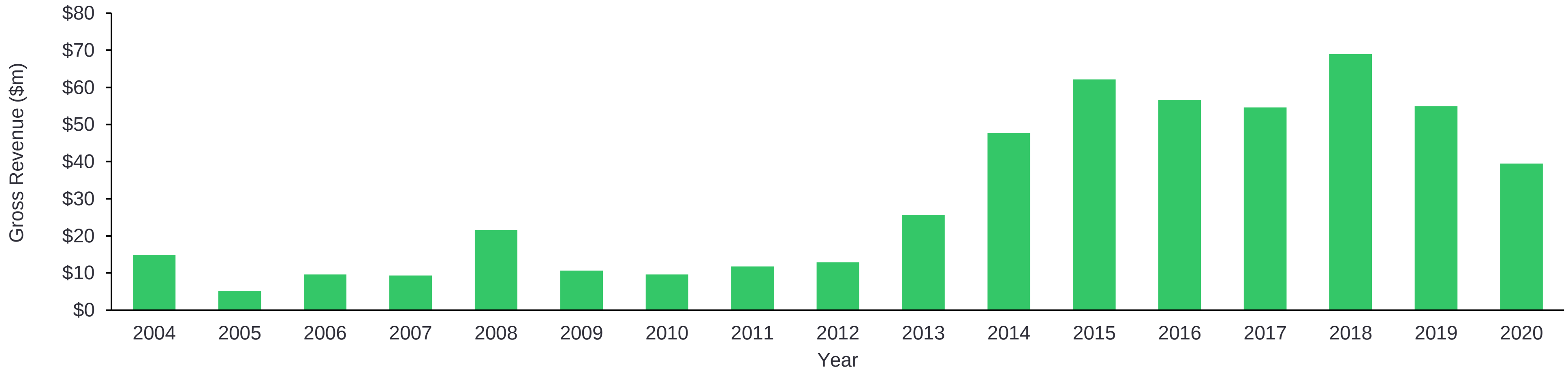
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$14,842,476	-	483,858	-	$32.26	-
2005	$5,170,934	(65.2%)	157,228	(67.5%)	$39.13	21.3%
2006	$9,633,454	86.3%	201,711	28.3%	$56.72	44.9%
2007	$9,318,441	(3.3%)	294,296	45.9%	$44.09	(22.3%)
2008	$21,615,824	132.0%	551,810	87.5%	$52.11	18.2%
2009	$10,642,917	(50.8%)	431,061	(21.9%)	$33.60	(35.5%)
2010	$9,570,915	(10.1%)	263,464	(38.9%)	$43.12	28.3%
2011	$11,777,244	23.1%	242,222	(8.1%)	$57.02	32.2%
2012	$12,916,787	9.7%	260,623	7.6%	$59.58	4.5%
2013	$25,622,029	98.4%	786,530	201.8%	$34.59	(41.9%)
2014	$47,805,136	86.6%	1,059,806	34.7%	$48.41	39.9%
2015	$62,162,178	30.0%	1,486,599	40.3%	$50.32	3.9%
2016	$56,641,751	(8.9%)	1,549,007	4.2%	$39.57	(21.4%)
2017	$54,635,677	(3.5%)	1,866,148	20.5%	$36.62	(7.5%)
2018	$68,972,653	26.2%	2,577,932	38.1%	$40.52	10.7%
2019	$54,984,915	(20.3%)	2,174,359	(15.7%)	$33.31	(17.8%)
2020	$39,493,105	(28.2%)	1,567,551	(27.9%)	$28.66	(14.0%)

Festivals (Multi-Category)

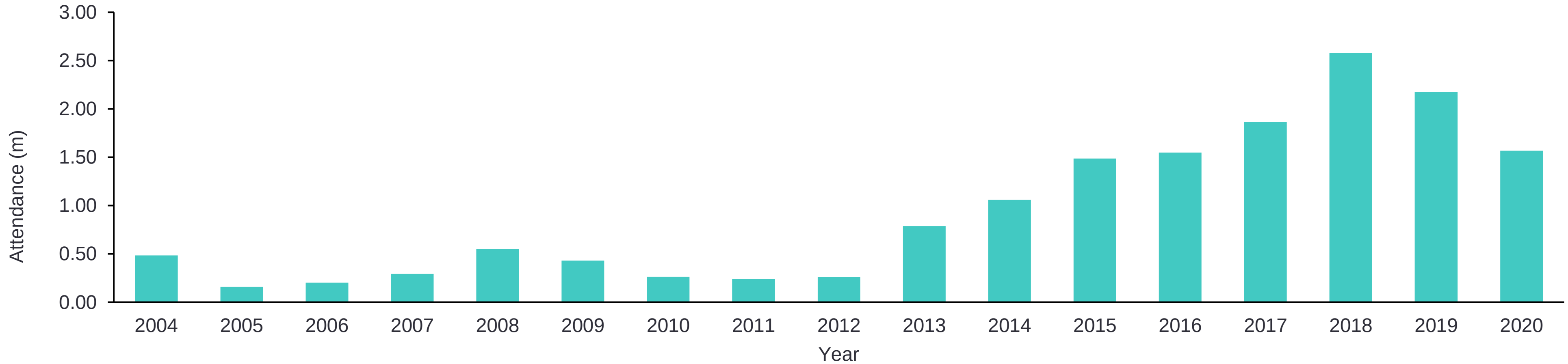
Festivals (Multi-Category) – Revenue

2004 → 2020



Festivals (Multi-Category) – Total Attendance

2004 → 2020



Festivals (Multi-Category)

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$5,979,561	10.9%	(3.7%)
VIC	$6,902,138	12.6%	2.2%
QLD	$3,046,057	5.5%	(0.4%)
WA	$13,713,445	24.9%	2.6%
SA	$21,410,277	38.9%	4.7%
ACT	$0	0.0%	(1.0%)
TAS	$3,933,437	7.2%	(4.1%)
NT	$0	0.0%	(0.2%)
Total	**$54,984,915**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$1,098,967	2.8%	(8.1%)
VIC	$1,308,410	3.3%	(9.2%)
QLD	$380,919	1.0%	(4.6%)
WA	$12,049,000	30.5%	5.6%
SA	$24,037,633	60.9%	21.9%
ACT	$0	0.0%	0.0%
TAS	$618,176	1.6%	(5.6%)
NT	$0	0.0%	0.0%
Total	**$39,493,105**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	67,418	3.1%	0.2%
VIC	505,139	23.2%	7.2%
QLD	91,787	4.2%	(1.8%)
WA	451,236	20.8%	3.3%
SA	987,541	45.4%	8.8%
ACT	-	0.0%	(0.5%)
TAS	71,238	3.3%	(17.2%)
NT	-	0.0%	(0.1%)
Total	**2,174,359**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	33,109	2.1%	(1.0%)
VIC	48,929	3.1%	(20.1%)
QLD	11,141	0.7%	(3.5%)
WA	454,454	29.0%	8.2%
SA	982,912	62.7%	17.3%
ACT	-	0.0%	0.0%
TAS	37,006	2.4%	(0.9%)
NT	-	0.0%	0.0%
Total	**1,567,551**	**100.0%**	

Festivals (Contemporary Music)

National Overview

- Festivals (Contemporary Music) experienced the third highest growth in revenue and the second highest growth in attendance amongst all categories in 2019, increasing by 77.3% in revenue (from $102.0m in 2018 to $180.9m in 2019) and 48.5% in attendance (from 1.0m in 2018 to 1.4m in 2019).
- The average ticket price increased by 12.4% (from $131.58 in 2018 to $147.86 in 2019), which further contributed to the growth in revenue. This is the highest recorded revenue, attendance and average ticket price in this category since 2004.
- Major events in this category in 2019 were Splendour in the Grass, Bluesfest, CMC Rocks QLD, and Festival X.
- 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 (by 70.0% to $54.2m from 2019) and a decline in attendance (by 69.8% to 0.4m). A decline in the average ticket price by 3.7% (to $142.33) further contributed to the decline in revenue. Major festivals in this category in 2020 were Falls Downtown, WOMADelaide and St. Jerome's Laneway Festival.
- NSW accounted for the highest market share in revenue (41.3% in 2019, 22.9% in 2020) and highest market share in attendance (38.4% in 2019, 25.5% in 2020) in this category. Major events in 2019 included Splendour in the Grass, Bluesfest, Festival X and Falls Festival. Major events in 2020 included St. Jerome's Laneway Festival, Field Day and FOMO festival.
- QLD accounted for the second highest market share in revenue (20.0% in 2019, 19.5% in 2020) and second highest market share in attendance (20.4% in 2019, 19.1% in 2020) in this category. The major event in 2019 was CMC Rocks QLD. The major event in 2020 was St. Jerome's Laneway Festival.
- In 2019, TAS experienced the highest y-o-y increase in revenue (362.4%) and the highest increase in attendance (279.9%) in Australia. SA experienced the second highest y-o-y increase in revenue (236.4%) and second highest increase in attendance (115.4%) in Australia.
- In 2020, all states and territories experienced a decline in revenue and attendance, due to COVID-19 restrictions prohibiting the majority of major annual music festivals from proceeding.

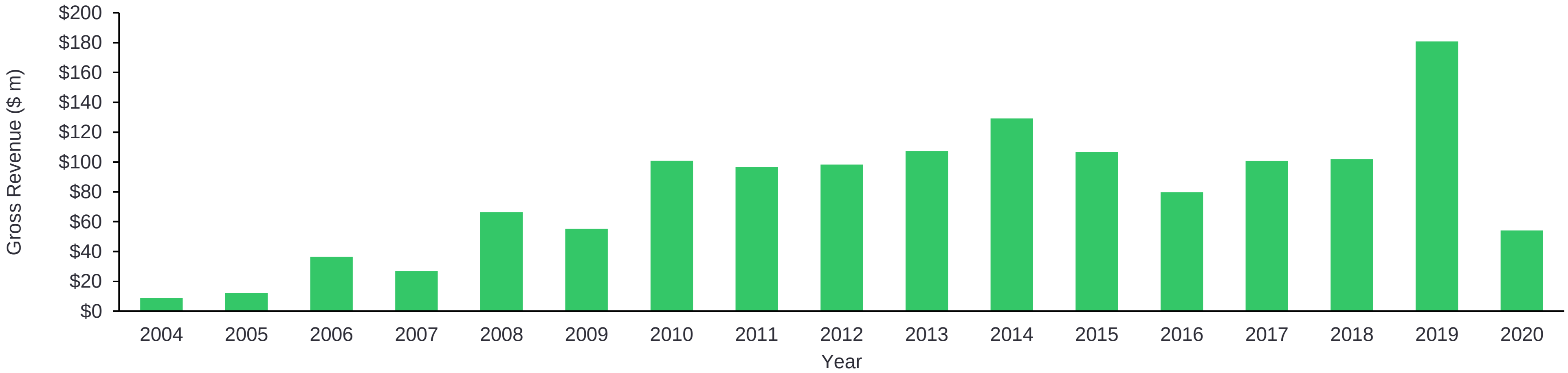
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$9,015,128	-	190,260	-	$54.69	-
2005	$12,128,384	34.5%	269,208	41.5%	$63.05	15.3%
2006	$36,576,877	201.6%	761,920	183.0%	$50.93	(19.2%)
2007	$26,972,082	(26.3%)	753,247	(1.1%)	$39.00	(23.4%)
2008	$66,429,106	146.3%	1,221,972	62.2%	$60.91	56.2%
2009	$55,275,589	(16.8%)	800,145	(34.5%)	$81.19	33.3%
2010	$100,918,020	82.6%	1,028,170	28.5%	$119.39	47.1%
2011	$96,453,486	(4.4%)	984,946	(4.2%)	$138.97	16.4%
2012	$98,365,490	2.0%	1,169,233	18.7%	$128.71	(7.4%)
2013	$107,367,780	9.2%	1,053,419	(9.9%)	$130.46	1.4%
2014	$129,210,058	20.3%	1,281,339	21.6%	$136.91	4.9%
2015	$106,825,241	(17.3%)	1,300,025	1.5%	$117.72	(14.0%)
2016	$79,865,326	(25.2%)	672,771	(48.2%)	$125.60	6.7%
2017	$100,657,080	26.0%	852,628	26.7%	$126.68	0.9%
2018	$102,015,922	1.3%	975,233	14.4%	$131.58	3.9%
2019	$180,852,859	77.3%	1,447,836	48.5%	$147.86	12.4%
2020	$54,174,572	(70.0%)	437,472	(69.8%)	$142.33	(3.7%)

Festivals (Contemporary Music)

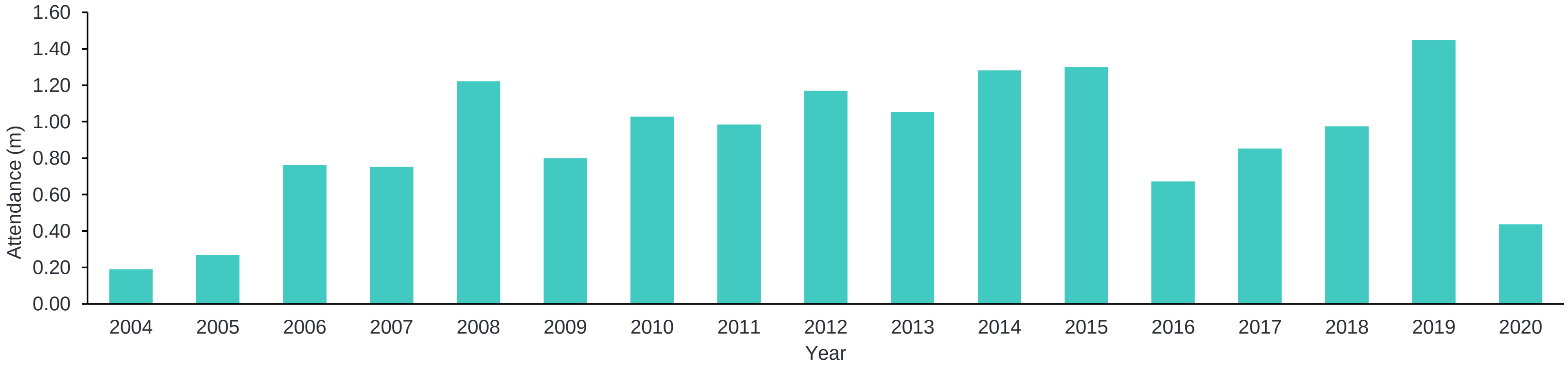
Revenue

2004 → 2020



Total Attendance

2004 → 2020



Festivals (Contemporary Music)

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$74,734,834	41.3%	(9.9%)
VIC	$27,756,015	15.3%	3.5%
QLD	$36,216,689	20.0%	0.8%
WA	$11,882,068	6.6%	0.9%
SA	$14,405,212	8.0%	3.8%
ACT	$8,760,182	4.8%	(1.6%)
TAS	$7,048,488	3.9%	2.4%
NT	$49,371	0.0%	0.0%
Total	**$180,852,859**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$12,403,570	22.9%	(18.4%)
VIC	$9,742,243	18.0%	2.6%
QLD	$10,582,508	19.5%	(0.5%)
WA	$9,811,401	18.1%	11.5%
SA	$8,932,876	16.5%	8.5%
ACT	$69	0.0%	(4.8%)
TAS	$2,701,404	5.0%	1.1%
NT	$500	0.0%	(0.0%)
Total	**$54,174,572**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	556,447	38.4%	(4.4%)
VIC	239,275	16.5%	1.3%
QLD	295,383	20.4%	(0.6%)
WA	108,362	7.5%	0.3%
SA	128,267	8.9%	2.8%
ACT	63,050	4.4%	(1.8%)
TAS	55,888	3.9%	2.4%
NT	1,164	0.1%	0.1%
Total	**1,447,836**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	111,608	25.5%	(12.9%)
VIC	77,397	17.7%	1.2%
QLD	83,609	19.1%	(1.3%)
WA	71,771	16.4%	8.9%
SA	61,910	14.2%	5.3%
ACT	6	0.0%	(4.4%)
TAS	31,153	7.1%	3.3%
NT	18	0.0%	(0.1%)
Total	**437,472**	**100.0%**	

Musical Theatre

National Overview

- Musical Theatre experienced a decline in revenue by 15.7% (from $400.2m in 2018 to $337.3m in 2019) and a decline in attendance by 11.9% (from 3.9m in 2018 to 3.5m in 2019). Additionally, a decline in the average ticket price by 4.2% (from $108.85 in 2018 to $104.33 in 2019) further contributed to the decline in revenue. Top events in this category in 2019 were *The Book of Mormon*, *West Side Story*, *Charlie and the Chocolate Factory* and *Aladdin.*
- In 2020, the category experienced a decline in revenue (by 80.1% to $67.1m from 2019) and a decline in attendance (by 78.9% to 0.7m), due to the industry shutdown from March to November 2020. The average ticket price declined by 5.0% (to $99.07), which further contributed to the decline in revenue. Top events in this category in 2020 were *The Book of Mormon*, *Billy Elliot the Musical*, *Shrek the Musical*, *Chicago* and *Six the Musical*.
- Musical Theatre was the second largest category in 2019, generating 17.2% of revenue and 14.5% of attendance within the overall live performance industry. Musical Theatre was also the second largest category in revenue in 2020, generating 11.1% of total revenue and was the third largest category in attendance, generating 9.4% of total attendance.
- VIC and NSW accounted for the majority share of revenue (68.6% in 2019, 71.1% in 2020) and attendance (67.2% in 2019, 68.1% in 2020) in this category. In 2019, VIC had the highest market share of revenue (35.0%) and attendance (33.2%), followed by NSW (33.6% and 33.9% market share of revenue and attendance respectively). In 2020, VIC had the highest market share of revenue (37.2%) and second highest market share of attendance (32.5%) while NSW had the second highest market share of revenue (34.0%) and highest share of attendance (35.7%). In 2019, NSW experienced a y-o-y decline of 26.2% in revenue and a 17.7% y-o-y decline in attendance, which may be explained by the movement of *The Book of Mormon* to Queensland and South Australia. In 2019, VIC experienced a y-o-y decline of 9.4% in revenue and a 12.4% y-o-y decline in attendance.
- COVID-19 restrictions and limited touring activity resulted in a decline in attendance and revenue in Musical Theatre. In 2020, NSW experienced a y-o-y decline of 79.9% in revenue and a 77.8% y-o-y decline in attendance. In 2020, VIC experienced a y-o-y decline of 78.9% in revenue and a 79.4% y-o-y decline in attendance.
- In 2019, SA experienced a significant y-o-y growth of 50.7% in revenue and a 45.5% growth in attendance from 2018. The top event in this category was *Aladdin*. In 2020, TAS witnessed a significant y-o-y growth of 90.8% in revenue and a 16.1% growth in attendance. The top event in this category was *Mamma Mia*.

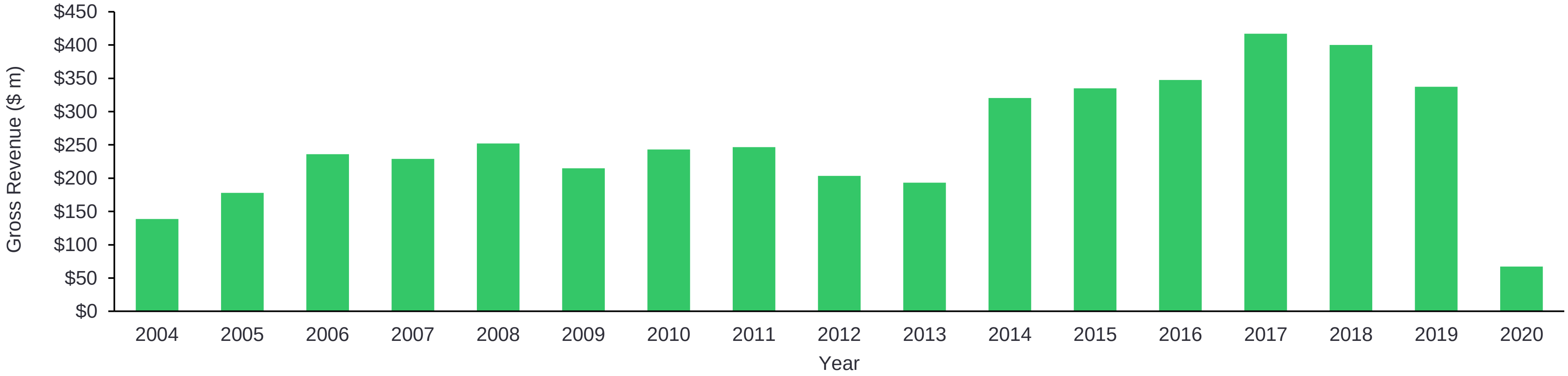
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$138,718,880	-	1,847,505	-	$76.34	-
2005	$178,032,172	28.3%	2,460,314	33.2%	$76.01	(0.4%)
2006	$235,922,584	32.5%	2,806,153	14.1%	$86.18	13.4%
2007	$228,854,618	(3.0%)	3,358,727	19.7%	$70.50	(18.2%)
2008	$252,199,267	10.2%	3,129,729	(6.8%)	$89.23	26.6%
2009	$214,959,848	(14.8%)	2,458,212	(21.5%)	$93.54	4.8%
2010	$242,897,364	13.0%	2,612,507	6.3%	$98.84	5.7%
2011	$246,792,376	1.6%	2,799,918	7.2%	$92.79	(6.1%)
2012	$203,278,606	(17.6%)	2,224,068	(20.6%)	$97.08	4.6%
2013	$193,389,763	(4.9%)	2,085,131	(6.2%)	$100.94	4.0%
2014	$320,342,329	65.6%	3,182,478	52.6%	$105.70	4.7%
2015	$334,869,038	4.5%	3,258,734	2.4%	$108.13	2.3%
2016	$347,684,296	3.8%	3,298,051	1.2%	$111.21	2.9%
2017	$416,802,525	19.9%	4,041,827	22.6%	$109.66	(1.4%)
2018	$400,199,798	(4.0%)	3,917,532	(3.1%)	$108.85	(0.7%)
2019	$337,338,257	(15.7%)	3,451,543	(11.9%)	$104.33	(4.2%)
2020	$67,051,689	(80.1%)	729,099	(78.9%)	$99.07	(5.0%)

Musical Theatre

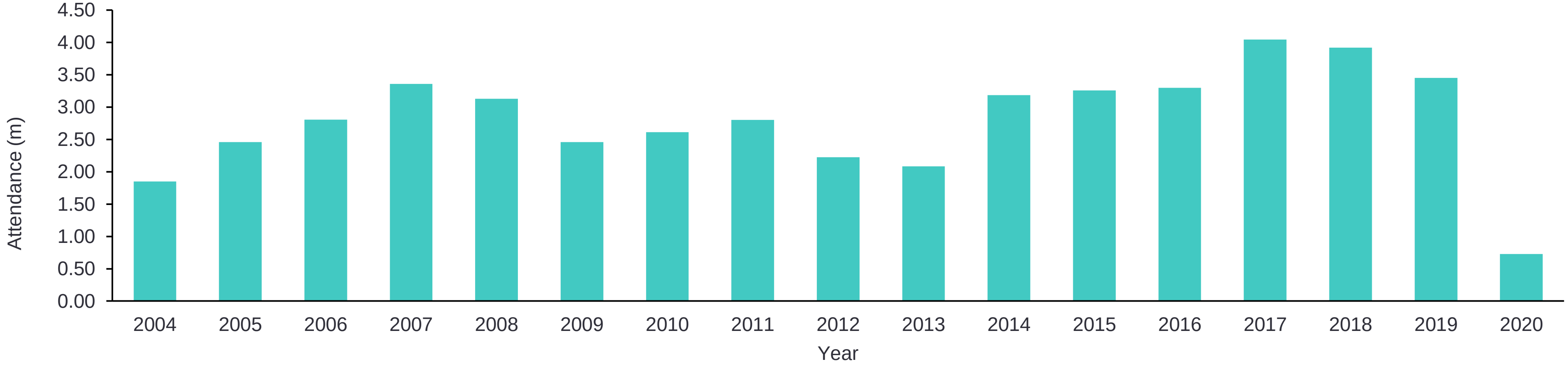
Revenue

2004 → 2020



Total Attendance

2004 → 2020



Musical Theatre

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$113,278,749	33.6%	(4.8%)
VIC	$118,129,761	35.0%	2.4%
QLD	$51,247,823	15.2%	0.4%
WA	$21,167,106	6.3%	(2.2%)
SA	$30,078,081	8.9%	3.9%
ACT	$2,964,798	0.9%	0.3%
TAS	$337,881	0.1%	(0.0%)
NT	$134,057	0.0%	(0.1%)
Total	**$337,338,257**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$22,721,210	33.9%	0.3%
VIC	$24,948,721	37.2%	2.2%
QLD	$7,624,319	11.4%	(3.8%)
WA	$6,497,132	9.7%	3.4%
SA	$4,405,311	6.6%	(2.3%)
ACT	$210,379	0.3%	(0.6%)
TAS	$644,617	1.0%	0.9%
NT	$0	0.0%	(0.0%)
Total	**$67,051,689**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	1,171,614	33.9%	(2.4%)
VIC	1,147,613	33.2%	(0.2%)
QLD	540,430	15.7%	1.1%
WA	245,996	7.1%	(2.1%)
SA	305,639	8.9%	3.5%
ACT	30,354	0.9%	0.2%
TAS	7,959	0.2%	0.0%
NT	1,938	0.1%	(0.1%)
Total	**3,451,543**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	260,059	35.7%	1.7%
VIC	236,733	32.5%	(0.8%)
QLD	91,093	12.5%	(3.2%)
WA	85,624	11.7%	4.6%
SA	42,634	5.8%	(3.0%)
ACT	3,713	0.5%	(0.4%)
TAS	9,243	1.3%	1.0%
NT	-	0.0%	(0.1%)
Total	**729,099**	**100.0%**	

Opera

National Overview

- Opera experienced a decline in revenue by 14.4% (from $47.0m in 2018 to $40.2m in 2019) and a decline in attendance by 10.6% (from 0.5m in 2018 to 0.4m in 2019). The average ticket price declined by 8.3% (from $124.11 in 2018 to $113.83 in 2019). Major opera performances in 2019 included Opera Australia's Sydney Summer Season, Opera Australia's Sydney Winter Season and Great Opera Hits.
- In 2020, the category experienced a decline in revenue (by 71.9% to $11.3m from 2019) and a decline in attendance (by 66.0% to 0.1m), due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies.
- Additionally, a decline in the average ticket price by 23.2% (to $87.47) further contributed to the decline in revenue. Major opera performances in 2020 included *Carmen*, *La Boheme* and *Don Giovanni*.
- Similar to previous years, most of the revenue (96.1% in 2019, 95.4% in 2020) and attendance (93.2% in 2019, 92.2% in 2020) in the Opera category was generated through performances by AMPAG / NPAP companies including Opera Australia, Opera Queensland, West Australian Opera, Victorian Opera and the State Opera of South Australia.
- 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.
- 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).
- In 2019, NSW recorded a decline in revenue by 17.7% and a decline in attendance by 34.2% from 2018. In 2020, NSW recorded a decline in revenue by 62.9% and a decline in attendance by 62.3% from 2019.
- In 2019, SA witnessed the highest y-o-y growth in revenue (37.3%) and WA witnessed the highest y-o-y growth in attendance (146.1%). In 2020, all states experienced a decline in revenue, while all states except SA and ACT experienced a decline in attendance in the Opera category.

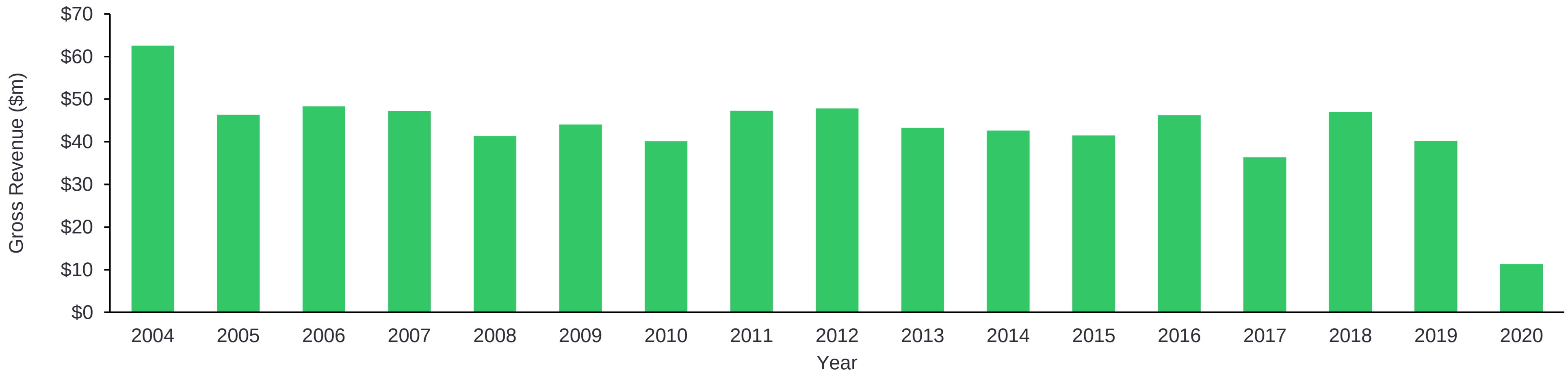
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$62,562,433	-	629,808	-	$108.88	-
2005	$46,390,544	(25.8%)	531,595	(15.6%)	$94.38	(13.3%)
2006	$48,331,324	4.2%	515,927	(2.9%)	$102.40	8.5%
2007	$47,249,031	(2.2%)	591,605	14.7%	$85.28	(16.7%)
2008	$41,316,885	(12.6%)	402,549	(32.0%)	$114.46	34.2%
2009	$44,044,808	6.6%	448,096	11.3%	$111.62	(2.5%)
2010	$40,128,943	(8.9%)	409,541	(8.6%)	$112.86	1.1%
2011	$47,305,786	17.9%	439,041	7.2%	$124.66	10.5%
2012	$47,843,971	1.1%	430,904	(1.9%)	$126.84	1.8%
2013	$43,283,705	(9.5%)	344,761	(20.0%)	$145.28	14.5%
2014	$42,620,749	(1.5%)	386,927	12.2%	$124.92	(14.0%)
2015	$41,505,346	(2.6%)	433,198	12.0%	$121.43	(2.8%)
2016	$46,247,521	11.4%	407,965	(5.8%)	$145.80	20.1%
2017	$36,349,186	(21.4%)	369,228	(9.5%)	$115.42	(20.8%)
2018	$46,965,221	29.2%	487,195	31.9%	$124.11	7.5%
2019	$40,201,835	(14.4%)	435,525	(10.6%)	$113.83	(8.3%)
2020	$11,313,725	(71.9%)	147,982	(66.0%)	$87.47	(23.2%)

Opera

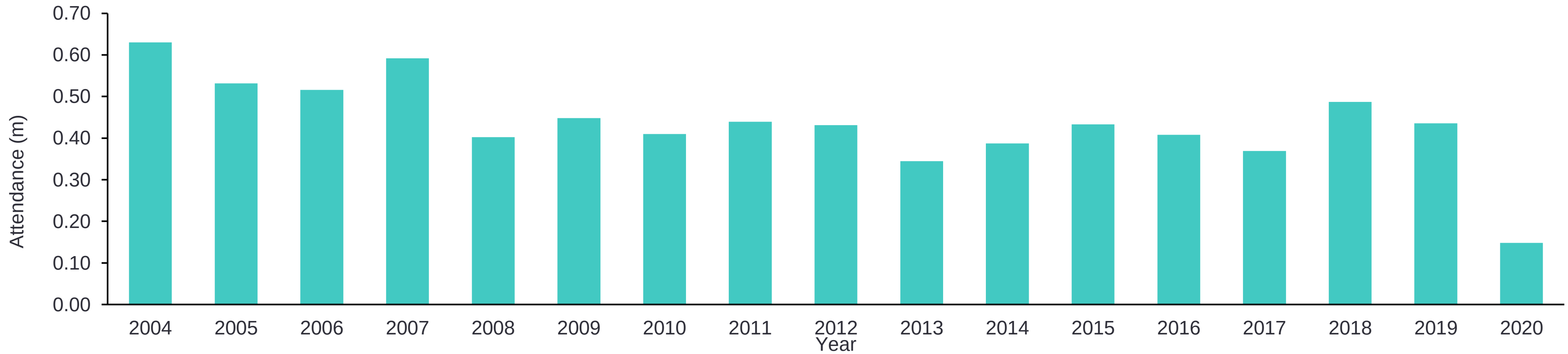
Opera – Revenue

2004 → 2020



Opera – Total Attendance

2004 → 2020



Opera

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$27,367,083	68.1%	(2.7%)
VIC	$7,872,252	19.6%	0.9%
QLD	$1,676,716	4.2%	0.6%
WA	$1,341,327	3.3%	0.3%
SA	$1,560,641	3.9%	1.5%
ACT	$38,174	0.1%	(0.6%)
TAS	$200,795	0.5%	(0.3%)
NT	$144,847	0.4%	0.4%
Total	**$40,201,835**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$10,148,117	89.7%	21.6%
VIC	$415,471	3.7%	(15.9%)
QLD	$250,389	2.2%	(2.0%)
WA	$434,799	3.8%	0.5%
SA	$32,416	0.3%	(3.6%)
ACT	$32,534	0.3%	0.2%
TAS	$0	0.0%	(0.5%)
NT	$0	0.0%	(0.4%)
Total	**$11,313,725**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	210,102	48.2%	(17.3%)
VIC	100,907	23.2%	2.5%
QLD	38,201	8.8%	4.1%
WA	56,847	13.1%	8.3%
SA	22,730	5.2%	2.5%
ACT	418	0.1%	(0.7%)
TAS	3,677	0.8%	0.1%
NT	2,643	0.6%	0.6%
Total	**435,525**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	79,270	53.6%	5.3%
VIC	7,031	4.8%	(18.4%)
QLD	8,238	5.6%	(3.2%)
WA	20,596	13.9%	0.9%
SA	32,416	21.9%	16.7%
ACT	431	0.3%	0.2%
TAS	-	0.0%	(0.8%)
NT	-	0.0%	(0.6%)
Total	**147,982**	**100.0%**	

Special Events

National Overview

- Special Events experienced a moderate decline in revenue by 3.5% (from $22.1m in 2018 to $21.3m in 2019) despite a significant growth in attendance (by 152.9% from 0.2m in 2018 to 0.4m in 2019).
- This was primarily attributed to the decline in the average ticket price by 53.1% (from $152.70 in 2018 to $71.68 in 2019) which may be explained by the special events presented as part of the Commonwealth Games in Brisbane in 2018. The top events in this category in 2019 were the *Royal Edinburgh Military Tattoo*, *Life the Show* and *Psychic Medium: John Edward.*
- Bans on mass gatherings, border closures and density limits introduced as part of COVID-19 restrictions resulted in a decline in revenue (by 78.2% to $4.6m) and a decline in attendance (by 61.3% to 0.2m) in 2020. The average ticket price declined by 22.7% (to $55.40), which further contributed to the decline in revenue. Major events in this category in 2020 were *Cuban Club*, *Fire Aid, RuPaul's Drag Race* and *Heaps Gay Planet Xtra Mardi Pardi*.
- NSW accounted for 81.2% of the overall market share in revenue and 67.3% of the overall market share in attendance in this category in 2019.
- 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.
- In 2019, NT experienced the highest y-o-y growth in revenue (223.7%) and fourth highest y-o-y growth in attendance (143.8%). However, its impact was minimal as it represented only 0.1% in revenue and 0.1% in attendance of the overall market share in this category. NSW experienced the second highest y-o-y growth in revenue (157.0%) and the highest y-o-y growth in attendance (452.9%), largely attributable to the *Royal Edinburgh Military Tattoo*, which was exclusively staged in Sydney.
- In 2020, WA experienced the highest y-o-y growth in revenue (131.5%) and the second highest y-o-y growth in attendance (80.5%), primarily due to *Fire Aid.*
- The Special Events category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.

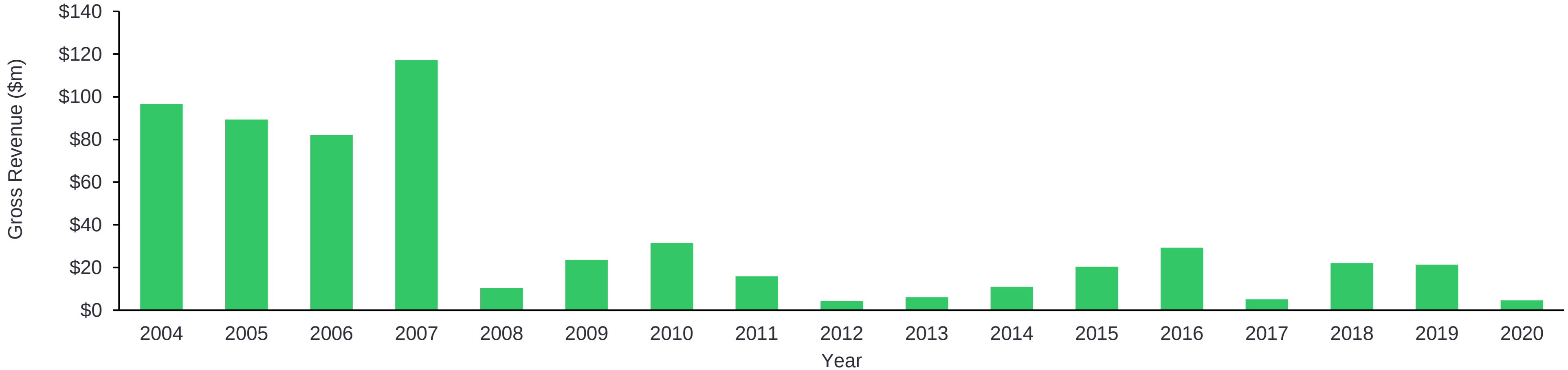
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$96,706,366	-	3,125,013	-	$45.43	-
2005	$89,357,246	(7.6%)	2,992,097	(4.3%)	$31.50	(30.7%)
2006	$82,143,879	(8.1%)	2,625,779	(12.2%)	$42.64	35.4%
2007	$117,203,892	42.7%	3,453,077	31.5%	$48.56	13.9%
2008	$10,324,979	(91.2%)	374,623	(89.2%)	$43.60	(10.2%)
2009	$23,602,096	128.6%	559,434	49.3%	$67.79	55.5%
2010	$31,449,876	33.3%	526,503	(5.9%)	$88.67	30.8%
2011	$15,799,946	(49.8%)	370,239	(29.7%)	$57.28	(35.4%)
2012	$4,250,001	(73.1%)	91,189	(75.4%)	$57.58	0.5%
2013	$6,030,274	41.9%	113,294	24.2%	$73.18	27.1%
2014	$10,984,057	82.1%	210,390	85.7%	$86.90	18.8%
2015	$20,340,607	85.2%	556,914	164.7%	$42.26	(51.4%)
2016	$29,310,579	44.1%	185,104	(66.8%)	$170.90	304.4%
2017	$5,049,945	(82.8%)	136,871	(26.1%)	$50.43	(70.5%)
2018	$22,115,160	337.9%	170,359	24.5%	$152.70	202.8%
2019	$21,352,158	(3.5%)	430,873	152.9%	$71.68	(53.1%)
2020	$4,644,130	(78.2%)	166,777	(61.3%)	$55.40	(22.7%)

Special Events

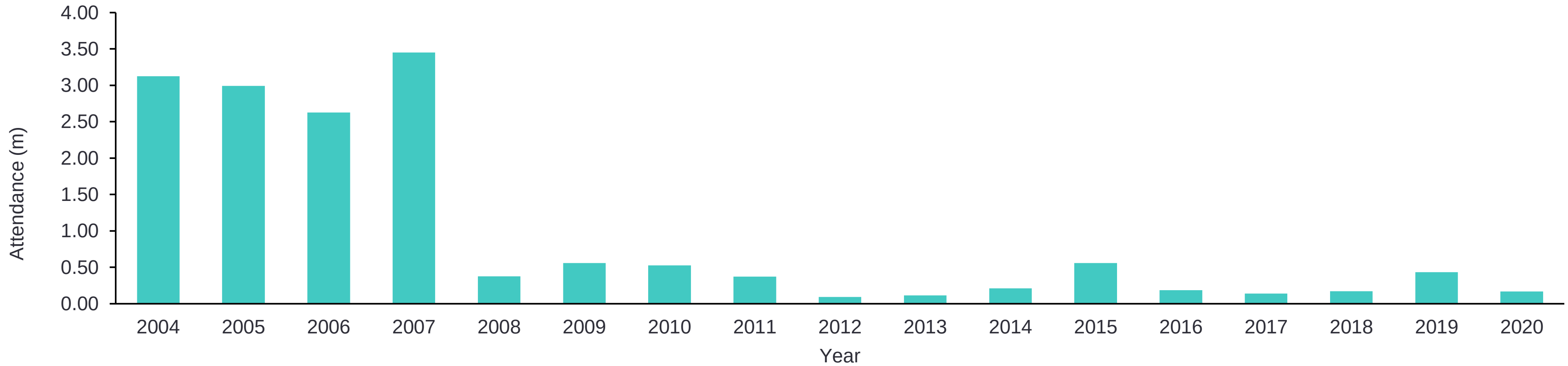
Revenue

2004 → 2020



Total Attendance

2004 → 2020



Special Events

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$17,343,039	81.2%	50.7%
VIC	$1,353,769	6.3%	0.9%
QLD	$802,999	3.8%	(52.9%)
WA	$780,476	3.7%	0.8%
SA	$530,644	2.5%	0.1%
ACT	$449,541	2.1%	0.7%
TAS	$68,174	0.3%	(0.4%)
NT	$23,515	0.1%	0.1%
Total	**$21,352,158**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$721,031	15.5%	(65.7%)
VIC	$172,325	3.7%	(2.6%)
QLD	$1,400,035	30.1%	26.4%
WA	$1,806,683	38.9%	35.2%
SA	$274,805	5.9%	3.4%
ACT	$213,236	4.6%	2.5%
TAS	$19,473	0.4%	0.1%
NT	$36,543	0.8%	0.7%
Total	**$4,644,130**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	290,002	67.3%	36.5%
VIC	43,445	10.1%	3.5%
QLD	50,479	11.7%	(35.0%)
WA	22,970	5.3%	1.2%
SA	13,394	3.1%	(3.0%)
ACT	9,222	2.1%	(1.3%)
TAS	788	0.2%	(1.9%)
NT	573	0.1%	(0.0%)
Total	**430,873**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	41,336	24.8%	(42.5%)
VIC	32,235	19.3%	9.2%
QLD	28,647	17.2%	5.5%
WA	41,452	24.9%	19.5%
SA	14,851	8.9%	5.8%
ACT	5,758	3.5%	1.3%
TAS	869	0.5%	0.3%
NT	1,629	1.0%	0.8%
Total	**166,777**	**100.0%**	

Theatre

National Overview

- Theatre experienced the second highest growth in revenue by 86.7% (from $78.5m in 2018 to $146.6m in 2019) despite a moderate growth in attendance by 7.0% (from 1.4m in 2018 to 1.5m in 2019). The growth in revenue was primarily attributed to the increase in average ticket prices by 69.1% (from $63.91 in 2018 to $108.07 in 2019). This is the highest recorded revenue and average ticket price in this category since 2004.
- Top events in this category in 2019 were *Harry Potter and the Cursed Child, The Lady in the Van*, *Cat on a Hot Tin Roof*, *Shakespeare in Love* and *The Beauty Queen of Leenane*.
- In 2020, the category experienced a significant decline in revenue (by 72.8% to $39.9m from 2019) and a decline in attendance (by 72.4% to 0.4m), due to COVID-19 restrictions and limited touring activity of AMPAG / NPAP companies. The average ticket price declined by 2.7% (to $105.14), which further contributed to the decline in revenue.
- 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*.
- 35.4% of the revenue and 60.0% of the attendance in 2019 and 35.2% of the revenue and 54.9% of the attendance in 2020 were generated through performances by AMPAG / NPAP companies: Sydney Theatre Company, Melbourne Theatre Company, Belvoir, Bell Shakespeare, Black Swan State Theatre Company, Malthouse Theatre, Queensland Theatre and the State Theatre Company of South Australia.
- Victoria and NSW accounted for the majority of revenue and attendance in 2019 and 2020. In 2019 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. In 2020 the states 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).
- In 2019, Victoria witnessed the highest y-o-y increase in revenue (287.0%), primarily due to the opening of *Harry Potter and the Cursed Child*, while WA witnessed the highest y-o-y increase in attendance (165.9%). In 2020, all states and territories witnessed a significant decline in revenue and attendance.

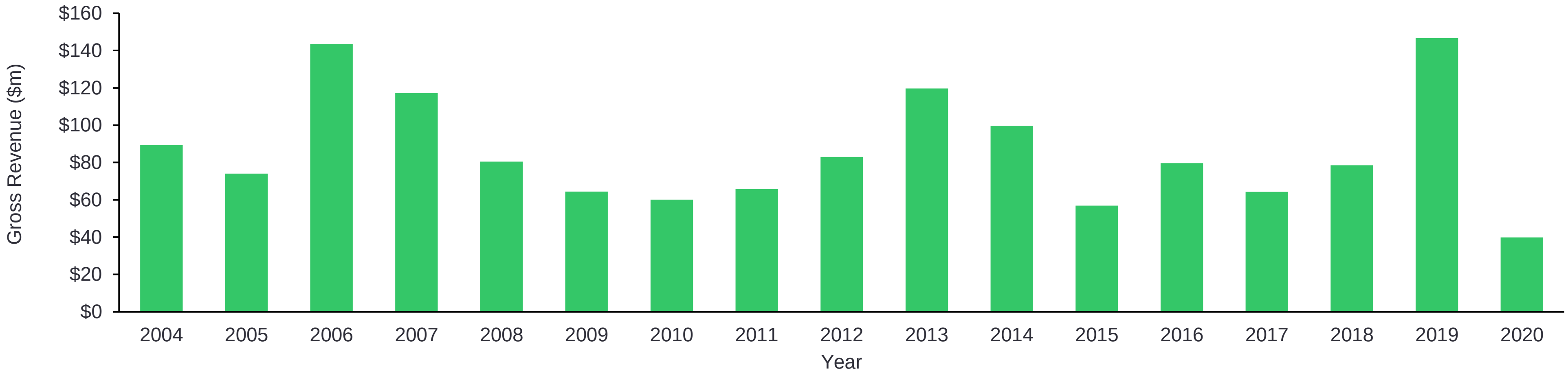
Revenue and Attendance 2004 → 2020

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$89,417,616	-	2,202,812	-	$43.87	-
2005	$73,988,892	(17.3%)	2,117,854	(3.9%)	$38.04	(13.3%)
2006	$143,564,232	94.0%	3,828,254	80.8%	$39.42	3.6%
2007	$117,382,525	(18.2%)	2,505,458	(34.6%)	$50.42	27.9%
2008	$80,476,671	(31.4%)	1,944,188	(22.4%)	$46.92	(6.9%)
2009	$64,440,541	(19.9%)	1,602,591	(17.6%)	$46.58	(0.7%)
2010	$60,151,139	(6.7%)	1,354,336	(15.5%)	$51.47	10.5%
2011	$65,880,712	9.5%	1,380,622	1.9%	$56.14	9.1%
2012	$82,973,259	25.9%	1,601,425	16.0%	$59.86	6.6%
2013	$119,647,414	44.2%	1,842,177	15.0%	$72.88	21.8%
2014	$99,714,555	(16.7%)	1,504,367	(18.3%)	$73.83	1.3%
2015	$56,831,724	(43.0%)	1,135,128	(24.5%)	$56.81	(23.0%)
2016	$79,584,271	40.0%	1,351,653	19.1%	$66.51	17.1%
2017	$64,217,536	(19.3%)	1,457,962	7.9%	$49.24	(26.0%)
2018	$78,505,052	22.2%	1,430,263	(1.9%)	$63.91	29.8%
2019	$146,562,112	86.7%	1,530,912	7.0%	$108.07	69.1%
2020	$39,867,422	(72.8%)	421,868	(72.4%)	$105.14	(2.7%)

Theatre

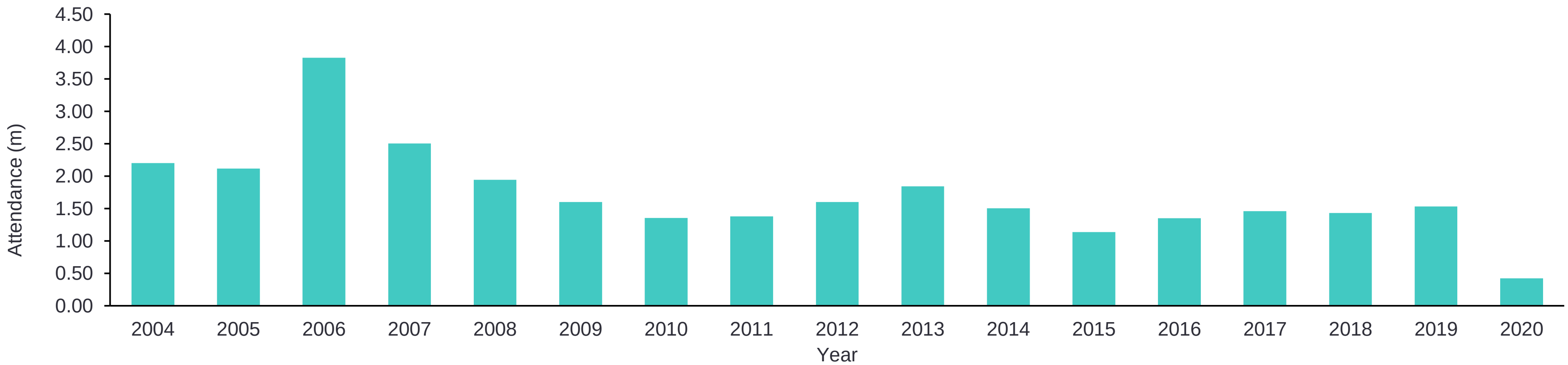
Theatre – Revenue

2004 → 2020



Theatre – Total Attendance

2004 → 2020



Theatre

Revenue by State/Territory 2019

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2018 (%)
NSW	$27,172,359	18.5%	(28.2%)
VIC	$101,198,704	69.0%	35.7%
QLD	$5,920,622	4.0%	(5.4%)
WA	$6,398,721	4.4%	0.8%
SA	$3,500,153	2.4%	(0.9%)
ACT	$1,977,649	1.3%	(1.7%)
TAS	$300,496	0.2%	(0.0%)
NT	$93,408	0.1%	(0.1%)
Total	**$146,562,112**	**100.0%**	

Revenue by State/Territory 2020

State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2019 (%)
NSW	$10,895,487	27.3%	8.8%
VIC	$23,901,160	60.0%	(9.1%)
QLD	$2,635,315	6.6%	2.6%
WA	$1,032,506	2.6%	(1.8%)
SA	$1,032,796	2.6%	0.2%
ACT	$167,394	0.4%	(0.9%)
TAS	$194,643	0.5%	0.3%
NT	$8,120	0.0%	(0.0%)
Total	**$39,867,422**	**100.0%**	

Attendance by State/Territory 2019

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2018 (%)
NSW	464,026	30.3%	(17.4%)
VIC	654,501	42.8%	12.5%
QLD	132,142	8.6%	(2.0%)
WA	162,974	10.6%	6.4%
SA	65,570	4.3%	0.2%
ACT	35,920	2.3%	(0.3%)
TAS	13,474	0.9%	0.5%
NT	2,305	0.2%	0.0%
Total	**1,530,912**	**100.0%**	

Attendance by State/Territory 2020

State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2019 (%)
NSW	167,930	39.8%	9.5%
VIC	162,113	38.4%	(4.3%)
QLD	50,830	12.0%	3.4%
WA	14,851	3.5%	(7.1%)
SA	20,148	4.8%	0.5%
ACT	2,893	0.7%	(1.7%)
TAS	2,869	0.7%	(0.2%)
NT	234	0.1%	(0.1%)
Total	**421,868**	**100.0%**	

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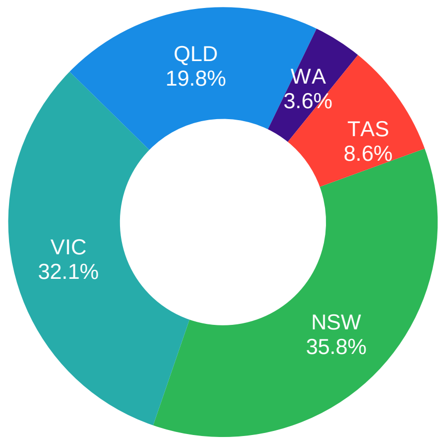
Regional Data Providers

Analysis by State - 2019

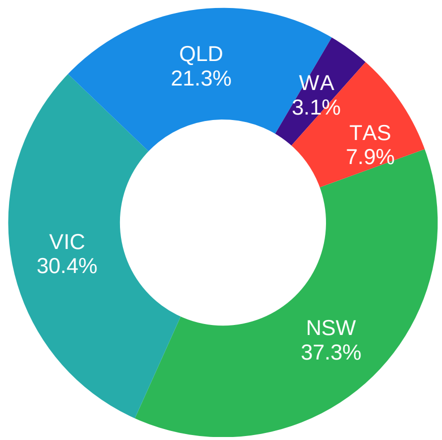
	Attendance				Revenue
Category	Paid	Zero-Priced	Comps	Total	Total Ticket Revenue
NSW	181,283	1,364	24,768	207,415	8,770,263
VIC	158,517	-	10,771	169,288	7,848,403
QLD	107,040	13	11,386	118,439	4,858,230
WA	15,577	-	1,697	17,274	892,281
TAS	41,171	-	2,678	43,849	2,109,392
Total	**503,588**	**1,377**	**51,300**	**556,265**	**24,478,568**

- In 2019, NSW had the largest market share both in terms of revenue (35.8%) and in attendance (37.3%). Revenue declined by 7.5% y-o-y (to $8.8m) and attendance declined by 31.9% y-o-y (to 0.2m). Out of the total tickets issued, 0.2m were paid tickets and the rest were complimentary and zero-priced tickets. Top events were *Mamma Mia*, *Jesus Christ Superstar* and *Leaving Jackson*.
- In 2019, Victoria recorded second highest market share in revenue (32.1%) and in attendance (30.4%). Revenue declined by 17.4% y-o-y (to $7.9m) and attendance declined by 17.9% y-o-y (to 0.2m). Top events included *The Wiggles, Hair* and *Puttin on the Ritz*.
- Combined, Victoria and NSW represent around 67.9% of the market share in revenue and 67.6% of the market share in attendance.
- QLD accounted for 19.8% of the market share in revenue and 21.3% of the market share in attendance. QLD reported $4.9m in revenue and 0.1m in attendance. TAS represented 8.6% of the market share in revenue and 7.9% of the market share in attendance. TAS reported $2.1m in revenue and 43.8k in attendance. Of the total tickets issued, 41.2k were paid tickets and the rest were complimentary tickets.
- WA represented 3.6% of the market share in revenue and 3.1% of market share in attendance. WA reported $0.9m in revenue and 17.3k in attendance. Out of the total tickets issued, 15.6k were paid tickets and the rest were complimentary tickets.

Market Share (Revenue) by State/Territory 2019



Market Share (Attendance) by State/Territory 2019

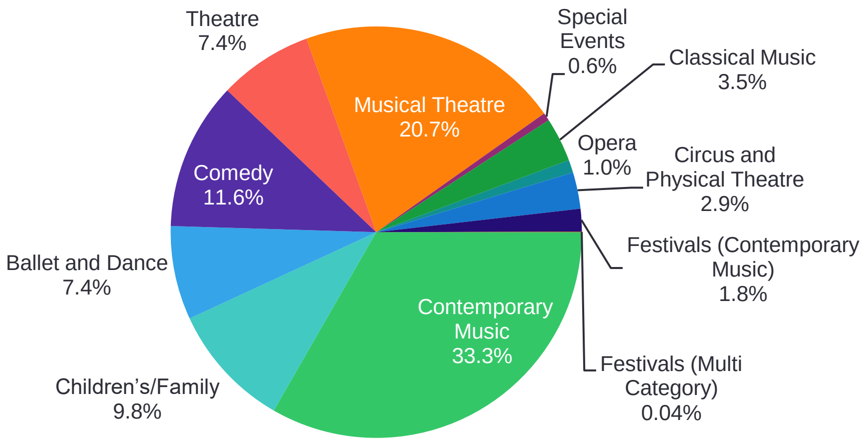


Analysis by Category - 2019

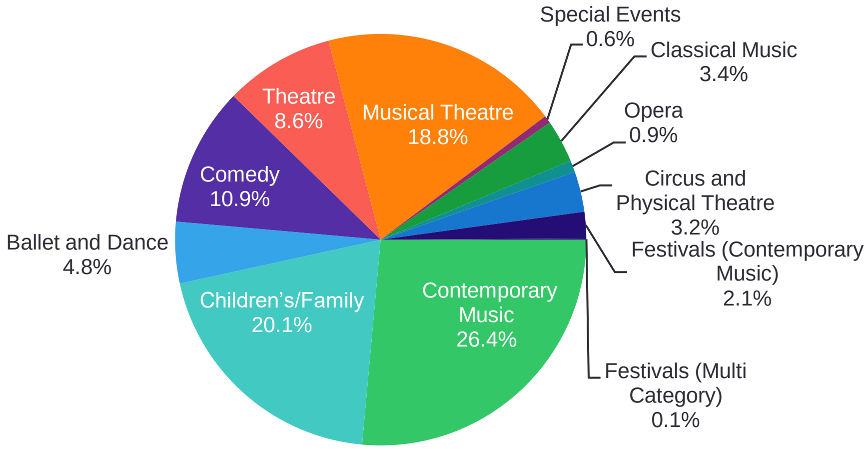
	Attendance				Revenue
Category	**Paid**	**Zero-Priced**	**Comps**	**Total**	**Total Ticket Revenue**
Contemporary Music	136,440	789	9,854	147,083	8,152,463
Children's/Family	96,522	413	15,101	112,036	2,401,302
Ballet and Dance	24,684	14	2,156	26,854	1,802,136
Comedy	57,402	13	3,162	60,577	2,845,829
Theatre	39,539	5	8,388	47,932	1,805,887
Musical Theatre	98,359	5	6,480	104,844	5,074,377
Special Events	3,188	7	148	3,343	152,333
Classical Music	16,284	33	2,436	18,753	850,011
Opera	4,757	-	355	5,112	247,262
Circus and Physical Theatre	15,638	13	1,998	17,649	700,379
Festivals (Contemporary Music)	10,319	85	1,180	11,584	435,609
Festivals (Multi Category)	456	-	42	498	10,981
Total	**503,588**	**1,377**	**51,300**	**556,265**	**24,478,568**

- Contemporary Music represented the highest market share in revenue (33.3%) and in attendance (26.4%). This category reported $8.2m in revenue and 0.1m in attendance. Top events included *Leaving Jackson, the APIA Good Times Tour* and performances from Six60 band and Jimmy Barnes.
- Musical Theatre represented the second highest market share in revenue (20.7%) and third highest market share in attendance (18.8%). This category reported $5.0m in revenue and 0.1m in attendance. Top events included *Wicked*, *Mamma Mia* and *Jesus Christ Superstar*.
- Festivals (Multi Category), Special Events and Opera categories contributed the least to revenue and attendance.

Market Share (Revenue) by Category — 2019



Market Share (Attendance) by Category — 2019

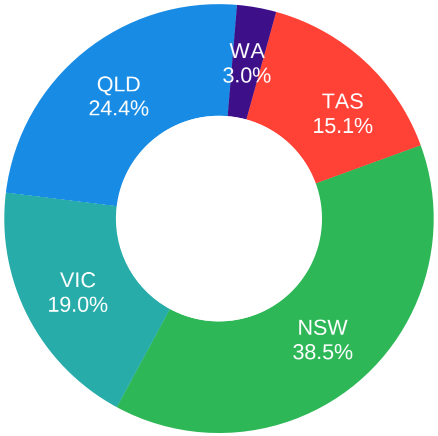


Analysis by State - 2020

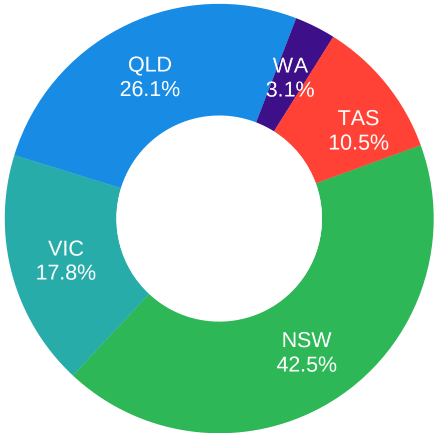
	Attendance				Revenue
Category	**Paid**	**Zero-Priced**	**Comps**	**Total**	**Total Ticket Revenue**
NSW	60,176	712	7,332	68,220	2,757,731
VIC	26,822	157	1,637	28,616	1,365,775
QLD	37,338	953	3,551	41,842	1,749,920
WA	4,601	-	339	4,940	212,491
TAS	16,035	2	848	16,885	1,086,187
Total	**144,972**	**1,824**	**13,707**	**160,503**	**7,172,103**

- In 2020, NSW had the largest market share both in terms of revenue (38.5%) and in attendance (42.5%) in Australia. NSW reported $2.8m in revenue and 68.2k in attendance. Out of the total tickets issued, 60.2k were paid tickets and the rest were complimentary and zero-priced tickets. Top events were *Legally Blonde* and *The Gospel According to Paul* .
- QLD recorded the second highest market share in revenue (24.4%) and in attendance (26.1%). QLD reported $1.7m in revenue and 41.8k in attendance. Out of the total tickets issued, 37.3k were paid tickets and the rest were complimentary and zero-priced tickets. Major events were *Skating Rink for Flies* and *Mamma Mia*.
- Victoria's market share significantly decreased in 2020, with a 19% share in revenue and a 17.8% share in attendance. Victoria reported $1.4m in revenue and 28.6k in attendance. Out of the total tickets issued, 26.8k were paid tickets and the rest were complimentary and zero-priced tickets.
- TAS represented 15.1% of the market share in revenue and 10.5% of the market share in attendance. TAS reported $1.1m in revenue and 16.9k in attendance. Out of the total tickets issued, 16.0k were paid tickets and the rest were complimentary and zero-priced tickets.
- WA represented 3.0% of the market share in revenue and 3.1% of the market share in attendance. WA reported $0.2m in revenue and 4.9k in attendance. Out of the total tickets issued, 4.6k were paid tickets and the rest were complimentary tickets.

Market Share (Revenue) by State/Territory 2020



Market Share (Attendance) by State/Territory 2020

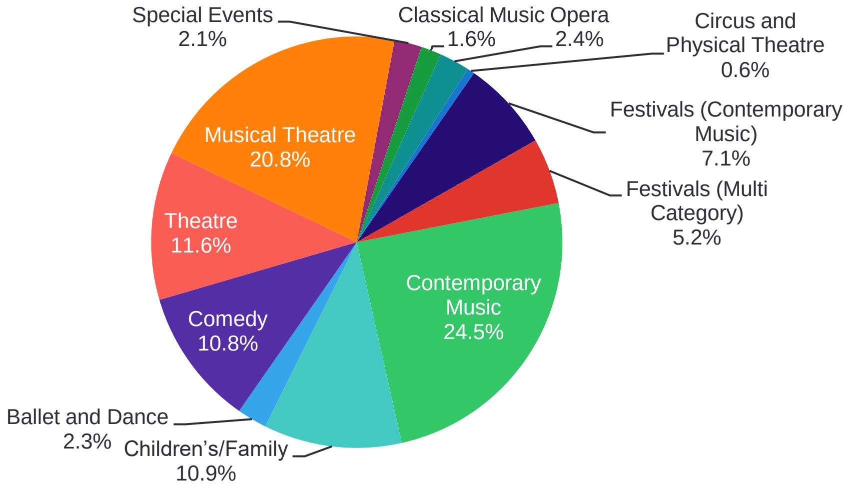


Analysis by Category - 2020

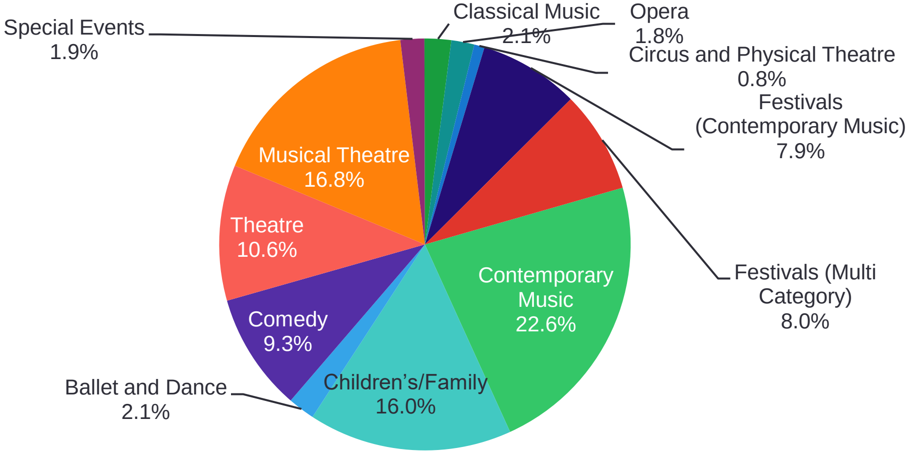
	Attendance				Revenue
Category	Paid	Zero-Priced	Comps	Total	Total Ticket Revenue
Contemporary Music	33,293	578	2,480	36,351	1,760,045
Children's/Family	24,029	553	1,095	25,677	779,321
Ballet and Dance	3,044	-	349	3,393	168,226
Comedy	13,651	2	1,245	14,898	773,251
Theatre	15,203	20	1,870	17,093	835,334
Musical Theatre	25,691	2	1,336	27,029	1,493,902
Special Events	2,915	52	41	3,008	154,056
Classical Music	2,906	2	453	3,361	113,776
Opera	2,742	-	159	2,901	171,616
Circus and Physical Theatre	854	-	453	1,307	41,401
Festivals (Contemporary Music)	10,977	215	1,424	12,616	509,719
Festivals (Multi Category)	9,667	400	2,802	12,869	371,456
Total	**144,972**	**1,824**	**13,707**	**160,503**	**7,172,103**

- Contemporary Music represented the highest market share in revenue (24.5%) and in attendance (22.6%). This category reported $1.8m in revenue and 36.4k in attendance. Major events included performances from the Linikere E Os and 10cc bands.
- Musical Theatre represented the second highest market share both in revenue (20.8%) and in attendance (16.8%). This category reported $1.5m in revenue and 27.0k in attendance. Top events included *Mamma Mia* and *Legally Blonde*.
- Circus and Physical Theatre, Classical Music, Special Events, Ballet and Dance, and Opera contributed the least to revenue and attendance.

Market Share (Revenue) by Category 2020



Market Share (Attendance) by Category 2020



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Appendices

Appendix A - Survey Participants

The following companies were identified by LPA and provided both revenue and attendance data to EY for the 2019 and 2020 calendar years.

Revenue comprised of revenue sourced from paid tickets only (i.e. it excludes sponsorships), while the attendance data provided and applied in the analysis included both paid and non-paid tickets. Average ticket price data was calculated based on paid tickets only. In regard to the Australia Council, data was limited to the Australian Major Performing Arts Group (AMPAG) / National Performing Arts Partnership (NPAP) companies. For these AMPAG / NPAP companies, the revenue includes both single ticket sales as well as subscription revenue.

Regular Providers

- Adelaide Festival Centre
- Adelaide Fringe
- Araluen Arts Centre
- Arts Centre Melbourne
- Australia Council for the Arts
- Bluesfest
- Brisbane Powerhouse
- Canberra Theatre Centre
- Cirque du Soleil
- Dark Mofo
- Darwin Entertainment Centre / Ntix
- Darwin Festival
- Fringe World Festival
- Hayes Theatre Co
- Melbourne Fringe Festival
- Melbourne International Arts Festival (Rising Festival)
- Melbourne International Comedy Festival
- Melbourne Recital Centre
- MONA (MONA FOMA Festival)
- Oztix
- Perth Concert Hall (WA Venues and Events)
- Perth Theatre Trust
- Queensland Performing Arts Centre
- Sydney Opera House
- The Blue Room Theatre
- The Ticket Group (Moshtix)
- Ticketek Pty Ltd
- Ticketmaster Pty Ltd
- WOMADelaide

Regional Providers

- Albury Entertainment Centre
- Bathurst Memorial Entertainment Centre
- Bunbury Regional Entertainment Centre
- Capital Venues and Events (Bendigo)
- Charters Towers Regional Council
- Devonport City Council
- Dubbo Regional Theatre and Convention Centre
- Frankston Arts Centre
- Geelong Performing Arts Centre
- Gippsland Performing Arts Centre
- Glen Street Theatre
- Home of the Arts (HOTA)
- Illawarra Performing Arts Centre Ltd
- Ipswich Civic Centre
- Karralyka Centre
- Mackay Entertainment & Convention Centre
- Manning Entertainment Centre
- Mildura Arts Centre
- Riverside Theatre
- Rockhampton Regional Council
- Seymour Centre
- Tamworth Regional Council
- The Events Centre, Caloundra
- Theatre North
- Theatre Royal

AMPAG / NPAP Companies

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

Appendix B - Event Category Description

Type of Events

Category	Description
Ballet and Dance	Traditional forms, Ethnic dance, Folk dance, Ballet, Ballroom, Latin dance, Liturgical dance, Modern dance, Ballet, Tap, and Breakdancing
Children's/Family	Live entertainment for children, Interactive performances for children and Workshops for children
Circus and Physical Theatre*	Physical Theatre, Circus and Burlesque
Classical Music	Any of the following in classical/contemporary art (i.e. current, but not 'pop') style: Orchestral music, Chamber music, Choirs and choral music, Recitals, and Singing/playing. All styles of the following: Sacred music and Traditional music/ethnic music/world music
Comedy*	Stand up, comedy performances (but not Comedy plays)
Contemporary Music^	All forms of the following, performed by any type of ensemble or soloist (including any ensemble/chorus/solo musicians advertising a program which is exclusively one of the following categories, e.g. 'pop' or 'jazz,' as in The Australian Jazz Orchestra): Pop, Jazz, Blues, Country, Rock, Folk, Soul, R&B, Techno, Hip hop, Rap, Heavy Metal, and Electronic Dance Music
Festivals (Multi-Category)	Festivals/events which contain a number of different types of events which fall into two or more categories (e.g. Adelaide Fringe or Perth International Arts Festival). Food and music festivals are only included if a music line up is involved.
Festivals (Contemporary Music)	Festivals/events which contain a number of events that predominately fall into the category of Contemporary Music (e.g. Bluesfest). Festivals that are not Contemporary Music but belong in one category will be allocated to their respective category (e.g. comedy, theatre and dance)
Musical Theatre	Staged productions which include music/drama/movement in popular form, primarily (but not limited to): Musicals and Cabarets in cabaret mode/style
Opera	Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style: Opera and Operetta (includes Gilbert and Sullivan)
Special Events	Unique presentations which do not fall into any other category
Theatre	Script based theatre, Drama, Comedy theatre, Mime and Plays

Note: *These categories were introduced in 2009
^This category was renamed in 2011, having been renamed "non-Classical Music" in prior years

Appendix C - Abbreviations & Definitions

Key Abbreviations

Abbreviation	Definition
$	Australian Dollar
%	Percentage
AMPAG	Australian Major Performing Arts Group
b	Billion
c.	Circa
EY	Ernst & Young
i.e.	That is
k	Thousand
LPA	Live Performance Australia
m	million
NPAP	National Performing Arts Partnership
NSW	New South Wales
VIC	Victoria
QLD	Queensland
WA	Western Australia
SA	South Australia
ACT	Australian Capital Territory
NT	Northern Territory
TAS	Tasmania
y-o-y	Year over year
CAGR	Compound Annual Growth Rate

Note: Growth / Decline, where not mentioned specifically, was calculated on a y-o-y basis.

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