Live Performance Industry in Australia

2023 Ticket Attendance and Revenue Report

Live Performance Australia

Reliance Restricted

11 October 2024

Photo: *Listen Out Perth 2023 – HBF Arena*, Fuzzy
Photo Credit: Jordan Munns

Building a better working world

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Ernst & Young (“EY”) was engaged on the instructions of Live Performance Australia (“LPA”) to prepare the 2023 Live Performance Australia Ticket Attendance and Revenue Report ("Project"), in accordance with the contract dated 4 April 2024.

The results of EY’s work, including the assumptions and qualifications made in preparing the report, are set out in EY’s report dated 11 October 2024 ("Report"). Insights contained within this report were provided by LPA and the collection of data was facilitated by LPA. The Report should be read in its entirety including the transmittal letter, the applicable scope of the work (see slide 21) and any limitations (see slide 22). A reference to the Report includes any part of the Report. No further work has been undertaken by EY since the date of the Report to update it.

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11 October 2024

2023 Live Performance Australia Ticket Attendance and Revenue Report

Dear Kim,

In accordance with our Engagement Agreement dated 4 April 2024 ("Agreement"), Ernst & Young ("we" or "EY") has been engaged by Live Performance Australia ("you", "LPA" or the "Client") to prepare the 2023 Live Performance Australia Ticket Attendance and Revenue Report ("Report"). The enclosed report sets out the outcomes of our work. Insights contained within the Report were provided by LPA and the collection of data was facilitated by LPA. You should read the Report in its entirety. A reference to the Report includes any part of the Report.

Purpose of our Report and restrictions on its use

We understand that the deliverable by EY will be used for the purpose of understanding the ticket attendance and revenue in the Live Performance Industry in Australia in 2023 ("Purpose"). This Report was prepared on the specific instructions of LPA solely for the Purpose and should not be used or relied upon for any other purpose. This Report and its contents may not be quoted, referred to or shown to any other parties except as provided in the Agreement. We accept no responsibility or liability to any person other than to LPA or to such party to whom we have agreed in writing to accept a duty of care in respect of this Report, and accordingly if such other persons choose to rely upon any of the contents of this Report they do so at their own risk.

Nature and scope of our work

The scope of our work, including the basis and limitations, are detailed in our Agreement and in this Report on slides 21 and 22, respectively. Our work commenced on 4 April 2024 and was completed on 11 October 2024. Therefore, our Report does not take account of events or circumstances arising after 11 October 2024 and we have no responsibility to update the Report for such events or circumstances.

We highlight that our analysis and Report do not constitute investment advice or a recommendation to you on a future course of action. Neither EY nor any member or employee thereof undertakes responsibility in any way whatsoever to any person in respect of errors in this Report arising from incorrect information provided by LPA, related stakeholders or other information sources used. This letter should be read in conjunction with our Report, which is attached.

Thank you for the opportunity to work on this project.

Yours sincerely,

Matthew Lumb
Associate Partner
Infrastructure Advisory

Table of contents

1 Executive Summary — Page 5

2 Key Findings — Page 7

3 Introduction — Page 20

4 State Analysis — Page 23

5 Category Analysis — Page 50

6 Regional Data Providers — Page 90

7 Appendices — Page 93

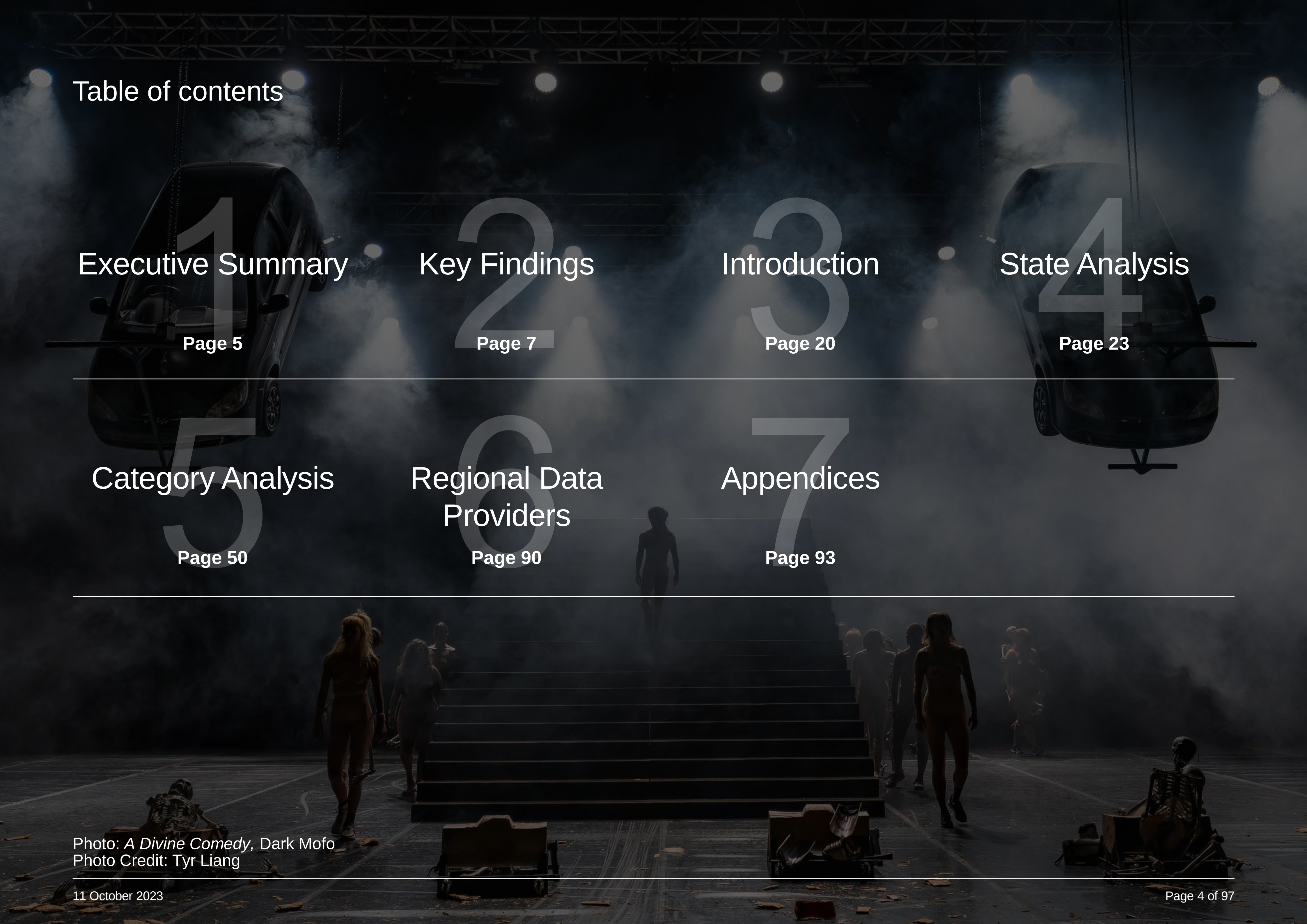


Photo: *A Divine Comedy,* Dark Mofo
Photo Credit: Tyr Liang

1 Executive Summary

Photo: *ZOOOM*, Patch Theatre
Photo Credit: Tony Lewis

1 Executive Summary

In 2023, the Australian live performance industry surpassed pre-pandemic levels, by recording the highest** revenue and attendance figures to date. 2023 was the first full year post-pandemic in which live performances could return to stages without restrictions. With international borders open again, there was a surge of international acts and tours (particularly in the contemporary music sector) as the industry fully reactivated. A strong line up of events and performances across all categories contributed to the industry's strong outcomes in 2023, albeit against a backdrop of significantly rising costs.

In 2023, the Australian live performance industry generated $3.1b in revenue, a 56.3% year over year (y-o-y) increase on 2022. Attendance also grew by 24.2% to 30.1m.

NSW and VIC remain Australia's leading live performance markets, followed by QLD. Collectively, NSW and VIC represent 64.7% of total revenue and 61.2% of total attendance. WA led the states for overall y-o-y growth, with a 94.7% increase in revenue and 45.1% in attendance.

All live performance categories except Special Events recorded y-o-y revenue growth, and all categories recorded y-o-y increases in attendance. The 2023 results highlight the following trends across the sector:

Contemporary music – a driving force

Contemporary music remains the driving force in Australia's live performance industry. Together, Contemporary Music and Festivals (Contemporary Music) accounted for 58.7% of total revenue and 46.6% of total attendance. Contemporary Music alone contributed $1.5b in revenue and 12m in attendance – the highest figures ever recorded. At a state level, Contemporary Music also held the largest market share in revenue and attendance in NSW, VIC, QLD and WA. The return to a full year of international touring, alongside the increased cost of ticket prices drove revenue and attendance in Contemporary Music nationally.

A global destination for live performance

Australia is a key market for international live performance tours, and not just in contemporary music. The return of circus giant, *Cirque du Soleil*, drove a y-o-y increase in revenue of 200.6% and attendance by 113.9% for Circus and Physical Theatre.

Comedy similarly recorded a y-o-y increase in revenue and attendance of 72.9% and 35% respectively, driven by festivals and tours by international performers. Comedy had the fourth-largest market share for revenue and third-largest market share for attendance.

Slower growth for some categories

Y-o-y growth was slower among categories where international acts were less prevalent. Musical Theatre, which had the second largest market share for revenue and attendance, had the lowest y-o-y attendance growth (0.4%) and the third-lowest y-o-y revenue growth (4.5%). Musical Theatre's average ticket price increased by only 2.4% which was lower than the inflation rate. Ballet and Dance, Classical Music, and Theatre also had lower levels of growth relative to other categories.

Cost increases driving ticket prices

Against a backdrop of significantly increased operating costs, increases in ticket prices contributed to the rise in total revenue. Apart from Classical Music and Theatre, all categories saw an increase in average ticket prices. Ticket price growth was highest among Contemporary Music (47.4%), Circus and Physical Theatre (32.7%) and Comedy (25.2%). Growth in ticket prices outpaced growth in attendance in Children's/Family, Contemporary Music and Musical Theatre. Increased ticket prices reflect rising production and touring costs which are being recorded across the industry, demand for significant international acts who are commanding higher prices globally, and unfavourable exchange rates.

* Highest across all LPA Ticket Attendance and Revenue Reports

Highlights from the Live Performance Industry in 2023

Ticket Revenue

$3.1b in ticket revenue

56.3% y-o-y growth

59.7% growth from 2019

Attendance

30.1m in ticket attendance

24.2% y-o-y growth

26.0% growth from 2019

States

NSW – largest market share for revenue (33.3%)

NSW and VIC – largest market share of attendance (30.6% each)

All states and territories recorded y-o-y growth in revenue and recorded their highest ever revenue levels.

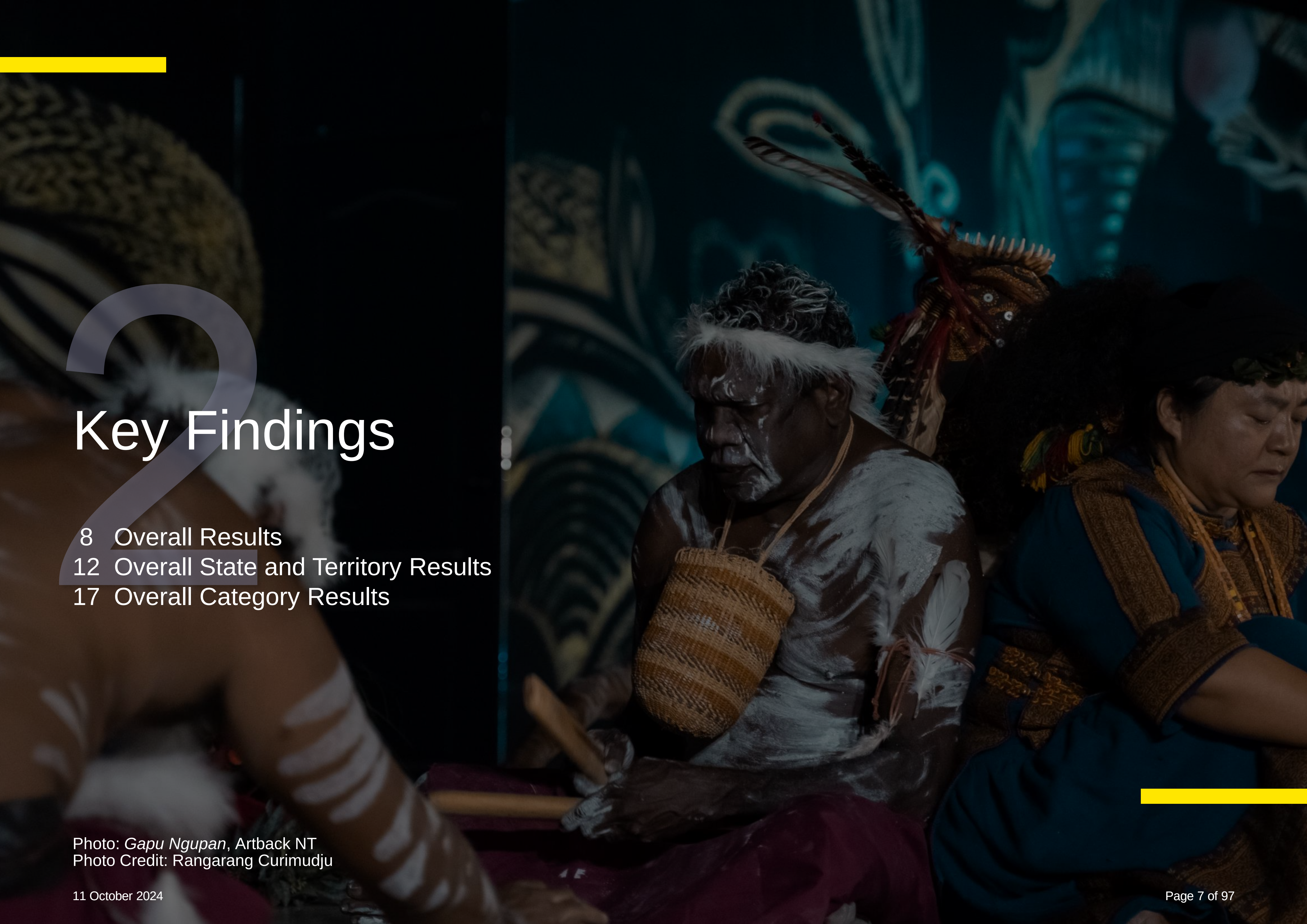
Apart from TAS and ACT, all states and territories, recorded y-o-y growth in attendance and recorded their highest ever attendance levels.

Categories

Contemporary Music – largest market share for revenue (47.4%) and attendance (39.9%)

Musical Theatre – second largest market share for revenue (17.3%) and attendance (14.3 %)

Circus and Physical Theatre – highest y-o-y growth for revenue (200.6%) and attendance (113.9%)



2 Key Findings

8 Overall Results
12 Overall State and Territory Results
17 Overall Category Results

Photo: *Gapu Ngupan*, Artback NT
Photo Credit: Rangarang Curimudju

Overall Results

In 2023, the live performance industry reached its highest levels* in both revenue and attendance. Growth in 2023 was driven by the continued return of international acts and tours after the pandemic, combined with rising ticket prices to offset higher operating costs resulting from inflationary pressures across the industry.

All states and territories recorded y-o-y growth in revenue and recorded their highest ever revenue levels. Similarly, all states and territories except ACT and TAS recorded y-o-y growth in attendance and recorded their highest ever attendance levels.

All categories recorded y-o-y growth in both revenue and attendance (except for Special Events which recorded y-o-y decline in revenue). In 2023, most categories (except Ballet and Dance, Circus and Physical Theatre, Classical Music, Opera and Special Events) recorded their highest ever revenue levels. In terms of attendance, some categories (Children's/Family, Comedy, Contemporary Music, Festivals (Contemporary Music) and Musical Theatre) also recorded their highest levels.

Key findings

- The two major markets for the live performance industry were NSW and VIC. They collectively accounted for 64.7% of Australia's live performance revenue and 61.2% of attendance in 2023.
- WA and QLD recorded the highest y-o-y growth in revenue and attendance.
- Circus and Physical Theatre recorded the highest y-o-y growth in revenue (200.6%) and attendance (113.9%) among all categories. This growth was largely attributable to the return of *Cirque du Soleil*.
- Contemporary Music and Musical Theatre were the two largest categories, generating 47.4% and 17.3% of revenue respectively, and 39.9% and 14.3% of attendance respectively.
- Combined, Contemporary Music and Festivals (Contemporary Music) contributed 58.7% of nationwide revenue and 46.7% of nationwide attendance.

Ticket Sales Revenue – $3.1bn

In 2023, the Australian live performance industry generated total ticket sales revenue of **$3.1b**, a **56.3%** increase from 2022 and a **59.7%** increase from 2019 (pre-COVID-19).

The y-o-y growth in revenue was attributable to an increase in the total number of paid tickets and an increase in the average ticket price.

Attendance – 30.1m

In 2023, **30.1m** tickets were issued, a **24.2%** increase from 2022 and a **26.0%** increase from 2019.

Of the total tickets issued, 28.1m were paid tickets (an increase from 22.1m tickets in 2022). The remaining 1.9m were complimentary, sponsor allocated or zero priced tickets.

Average Ticket Price – $111.48

The average ticket price increased by 22.6% from $90.96 in 2022 to $111.48 in 2023. This is the highest ever recorded for the industry.

Contemporary Music recorded the highest y-o-y increase in the average ticket price (by 47.4% to $128.21), driven by major international tours. Conversely, Classical Music recorded a y-o-y decline of 8.2% to $84.79.

* Highest across all LPA Ticket Attendance and Revenue Reports

Overall Results

Total attendance and ticket revenue 2009 – 2023

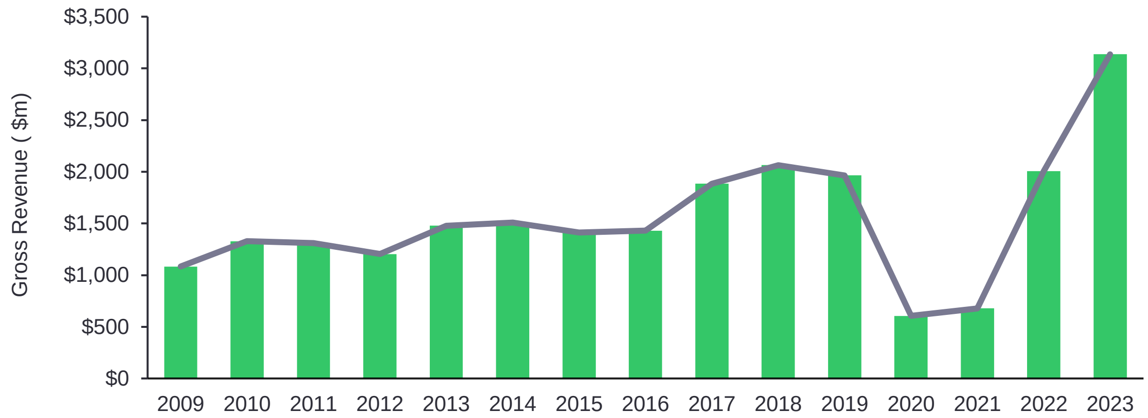
	Revenue		Attendance		Ticket Price	
Year	Ticket Revenue ($)	Growth (%)	Total Attendance*	Growth (%)	Average Ticket Price ($)**	Growth (%)
2009	$1,083,329,949	2.1%	15,196,773	(4.0%)	$80.57	5.2%
2010	$1,327,805,816	22.6%	17,241,139	13.5%	$86.43	7.3%
2011	$1,309,187,150	(1.4%)	17,345,720	0.6%	$85.99	(0.5%)
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%)
2021	$678,784,958	12.0%	10,877,839	40.1%	$69.02	(20.8%)
2022	$2,007,368,540	195.7%	24,227,035	122.7%	$90.96	31.8%
2023	$3,136,588,666	56.3%	30,079,028	24.2%	$111.48	22.6%

An analysis of longer-term trends (see page 11) provides an indication of how the industry has performed in recent years. This trend analysis has only been performed on data from 2009 to 2023 and does not account for the inclusion of new data providers over time.

*Based on both paid and unpaid tickets ** Average Ticket Price is 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 identified by LPA
*** 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

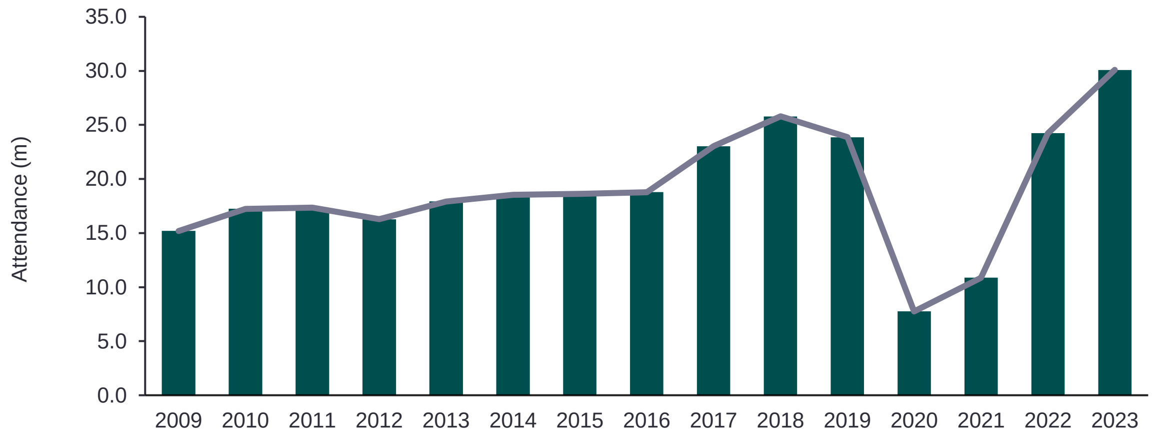
Gross Revenue ("Ticket Revenue") 2009 – 2023



Key Revenue Insights

- The variances in revenue reflect the demand for live events and the number of major international tours in any given year.
- Total revenue increased y-o-y by 56.3% from $2.0b in 2022 to a record high of $3.1b in 2023.
- Revenue has grown at a compound annual growth rate (CAGR) of 7.9% from 2009 to 2023.
- Circus and Physical Theatre recorded the highest y-o-y increase in revenue (200.6%) among all categories, followed by Contemporary Music (110.6%).
- All states and territories recorded a y-o-y increase in revenue and achieved their highest ever revenue totals.
- WA recorded the highest y-o-y growth in revenue (by 94.7% to $312.6m), followed by QLD (by 78.0% to $539.3m).
- NSW and VIC recorded y-o-y growth in revenue of 54.4% to $1.0b and of 43.9% to $984.7m respectively.

Attendance 2009 – 2023

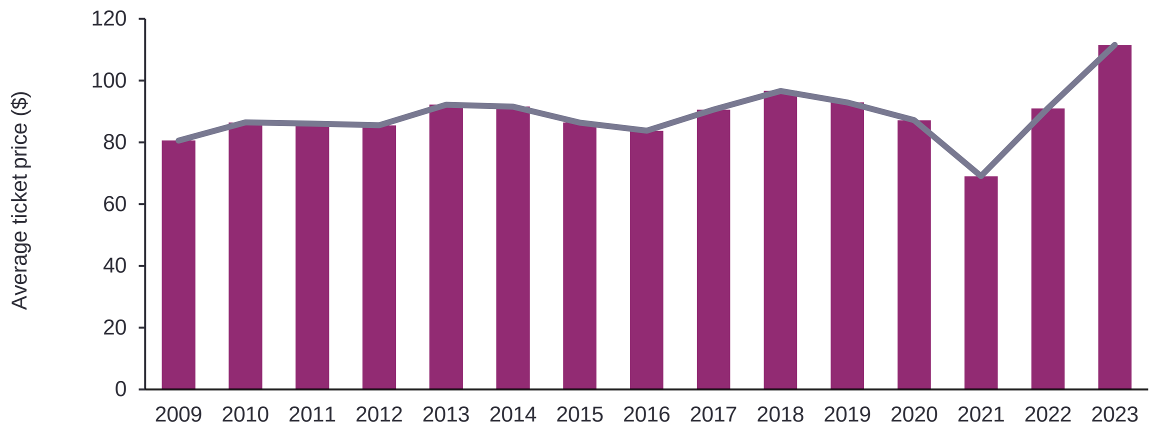


Key Attendance Insights

- From year to year, attendance at live events varies depending on the shows in market, particularly major international touring acts.
- Total attendance increased y-o-y by 24.2% from 24.2m in 2022 to a record high of 30.1m in 2023.
- Attendance has grown at a CAGR of 5.0% from 2009 to 2023.
- All states and territories, except ACT and TAS, recorded y-o-y growth in attendance and recorded their highest ever attendance levels.
- TAS recorded a y-o-y decline of 7.4%, while ACT recorded a decline of 2.7%.
- WA recorded the highest y-o-y growth in attendance (45.1%), followed by QLD (32.4%).
- In 2023, the Circus and Physical Theatre category recorded the highest y-o-y increase in attendance (113.9%) among all categories, followed by Opera (42.6%).

Overall Results

Average ticket price 2009 – 2023



Key Average Ticket Price Insights

- The variability in average ticket price reflects the shows in market in any given year. Major international acts are typically able to command a higher ticket price.
- The average ticket price increased by 22.6% y-o-y from $90.96 in 2022 to $111.48 in 2023.
- Increased operating costs across the live performance industry have contributed to rising ticket prices.
- The average ticket price has grown at a CAGR of 2.3% from 2009 to 2023.
- In 2023, Contemporary Music recorded the highest y-o-y growth in average ticket price, with an increase of 47.4% from $87.01 in 2022 to $128.21 in 2023.
- Ballet and Dance, Festivals (Contemporary Music) and Musical Theatre recorded their highest ever average ticket prices in 2023, at $101.03, $190.54 and $131.10 respectively.

Overall State and Territory Results

New South Wales (NSW) achieved the highest market share in revenue amongst all states and territories in Australia.

- **NSW** recorded the third-highest growth in revenue (by 54.4% to $1.0b) and attendance (by 26.6% to 9.2m) between 2022 and 2023.
- All categories except **Musical Theatre** recorded a y-o-y increase in revenue, and all categories recorded a y-o-y increase in attendance in 2023.
- The growth in revenue was primarily driven by significant increases in revenue in **Circus and Physical Theatre** (341.6%), **Contemporary Music** (137.6%), **Comedy** (83.5%), **Special Events** (68.0%), **Opera** (58.2%) and **Theatre** (47.9%). **Musical Theatre** recorded a marginal decline in revenue in 2023 (5.9%).
- **Circus and Physical Theatre** recorded significant growth in revenue due to an increase in attendance of 228.1% and an increase in the average ticket price. Top events included *Cirque du Soleil*, *Circus 1903* and *Velvet Rewired*.
- **Contemporary Music** revenue increased primarily due to an increase in attendance of 43.0% and an increase in the average ticket price. Top events included performances by Ed Sheeran, Harry Styles and Paul McCartney.
- **Comedy** revenue increased primarily due to an increase in attendance of 26.6%. Top events included performances by Dave Chappelle, Kevin Hart and Michael McIntyre.
- **Special Events** revenue increased primarily due to an increase in attendance of 44.7%. Top events included *Christmas Spectacular*, *RuPaul's Drag Race* and *Rockwiz Salutes Mushroom*.
- The growth in revenue in **Opera** and **Theatre** was primarily due to increases in attendance and the average ticket price. **Musical Theatre** revenue declined despite an increase in attendance by 5.4%. This was primarily due to a decrease in the average ticket price.

See p. 32

Victoria (VIC) achieved second-highest market share in revenue amongst all the states and territories in Australia.

- **VIC** recorded strong growth in revenue (by 43.9% to $984.7m) and attendance (by 17.1% to 9.2m) between 2022 and 2023.
- The growth in revenue was primarily driven by significant increases in revenue in **Circus and Physical Theatre** (176.3%)**, Festivals (Contemporary Music)** (115.6%), **Contemporary Music** (107.2%) and **Comedy** (45.4%). The revenue growth was partially offset by the y-o-y decline in **Opera** (20.7%), **Musical Theatre** (14.8%), **Theatre** (14.7%), **Special Events** (4.5%), **Festivals (Multi-Category)** (2.6%) and **Ballet and Dance** (0.5%).
- **Circus and Physical Theatre** recorded significant growth in revenue due to an increase in attendance of 126.8% and an increase in the average ticket price. Top events included *Cirque Du Soleil*, *Oracle* and *Cosentino*.
- **Festivals (Contemporary Music)** revenue increased primarily due to an increase in attendance of 45.9%, driven by festivals such as Beyond The Valley, Pitch Music & Arts and Spilt Milk Ballarat 2023.
- **Contemporary Music** revenue increased primarily due to an increase in attendance of 42.8%. Top events included performances by Ed Sheeran, Elton John and Paul McCartney.
- **Comedy** revenue increased due to an increase in attendance of 28.1%, primarily driven by the Melbourne International Comedy Festival.
- **Opera**, **Musical Theatre**, **Theatre**, **Special Events**, and **Festivals (Multi-Category)** recorded a decline in revenue, primarily due to decreased attendance.
- Despite increased attendance, **Ballet and Dance** revenue declined due to a decrease in the average ticket price.

See p. 35

Overall State and Territory Results

Home 1 Executive Summary 7 Appendices
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers

In 2023, Queensland (QLD) recorded the second-highest y-o-y growth in both revenue and attendance compared to other states and territories.

- **QLD** recorded the second-highest growth in revenue (by 78.0% to $539.3m) and attendance (by 32.4% to 4.9m) between 2022 and 2023.
- Revenue growth was driven by significant increases in revenue in **Opera** (978.9%), **Contemporary Music** (107.2%), **Comedy** (98.1%), **Festivals (Contemporary Music)** (67.0%) and **Musical Theatre** (62.5%).The revenue growth was partially offset by the y-o-y decline in **Special Events** (97.4%) and **Classical Music** (23.5%).
- **Opera** revenue increased due to an increase in attendance of 306.7% and an increase in the average ticket price. Top events included *The Ring Cycle* and *Aida.*
- **Contemporary Music** revenue increased primarily due to an increase in attendance of 39.5% and an increase in the average ticket price. Major events included performances by Ed Sheeran, Elton John and Red Hot Chili Peppers.
- **Comedy** revenue increased due to an increase in attendance of 57.1% and an increase in the average ticket price. Top events included performances by Dave Chappelle, Kevin Hart and Brisbane Comedy Festival.
- **Festivals (Contemporary Music)** revenue increased due to an increase in attendance of 50.5% and an increase in the average ticket price. Major festivals included CMC Rocks, Spilt Milk and Wildlands Brisbane.
- **Musical Theatre** revenue increased primarily due to an increase in attendance of 24.8% and an increase in the average ticket price. Major events included *Hamilton*, *Moulin Rouge! The Musical* and *Mamma Mia! The Musical*.
- **Special Events** and **Classical Music** recorded a decline in revenue, primarily due to decreased attendance.

See p. 38

In 2023, Western Australia (WA) recorded the highest y-o-y growth in both revenue and attendance of all states and territories.

- **WA** recorded the highest growth in revenue (by 94.7% to $312.6m) and in attendance (by 45.1% to 3.2m) between 2022 and 2023.
- Revenue growth was driven by significant increases in revenue in **Circus and Physical Theatre** (4270.5%), **Children's/Family** (329.9%), **Comedy** (172.4%), **Contemporary Music** (103.1%), **Festivals (Contemporary Music)** (100.9%), **Musical Theatre** (82.8%) and **Festivals (Multi-Category)** (67.4%). The growth in revenue was partially offset by the y-o-y decline in **Classical Music** (32.2%), **Special Events** (19.2%), **Opera** (11.4%) and **Ballet and Dance** (9.2%).
- **Circus and Physical Theatre** recorded a significant increase in revenue driven by growth in attendance of 1369.0% and an increase in the average ticket price. Top events included *Cirque Du Soleil*, *Cosentino* and *Oracle*.
- **Children's/Family** revenue increased primarily due to an increase in attendance of 101.9% and an increase in the average ticket price. Top events included *Disney On Ice*, *Madagascar – The Musical* and The Wiggles.
- **Comedy** revenue increased due to an increase in attendance of 72.5% and an increase in the average ticket price. Top events included performances by Dave Chappelle, Michael McIntyre and Kevin Hart.
- **Contemporary Music** revenue increased due to a 41.2% increase in attendance and an increase in the average ticket price. Top events included performances by Coldplay, Ed Sheeran and Red Hot Chili Peppers.
- The growth in revenue in **Festivals (Contemporary Music)**, **Festivals (Multi-Category)** and **Musical Theatre** was due to increases in attendance and average ticket prices.
- **Classical Music**, **Opera** and **Ballet and Dance** revenues declined due to decreased attendance, whilst **Special Events** recorded a decline in revenue despite an increase in attendance.

See p. 41

Overall State and Territory Results

South Australia (SA) recorded y-o-y growth in revenue and in attendance in 2023.

- **SA** revenue grew by 53.8% (to $181.5m) and attendance (by 19.7% to 2.5m) between 2022 and 2023.
- These results were primarily driven by the increases in revenue in **Circus and Physical Theatre** (1954.7%), **Theatre** (144.2%), **Children's/Family** (90.0%), **Opera** (71.0%), **Contemporary Music** (68.4%) and **Festivals (Contemporary Music)** (65.7%). The growth in revenue was partially offset by the y-o-y decline in **Special Events** (50.8%).
- **Circus and Physical Theatre** revenue increased due to an increase in attendance of 570.3% and an increase in the average ticket price. Top events included *Cirque Du Soleil, Matador*, *Cosentino* and *Celtic Illusion*.
- **Theatre** revenue increased primarily due to an increase in attendance by 64.4%. Top events included *The Mousetrap, The Dictionary of Lost Words and The Goat or Who is Sylvia?.*
- **Children's/Family** revenue increased due to an increase in attendance of 52.1% and an increase in the average ticket price. Top events included *Disney On Ice* and *The Gruffalo's Child*.
- **Opera** revenue increased due to an increase in attendance by 45.1% and an increase in the average ticket price. Top events included *Pirates of Penzance* and *The Marriage of Figaro*.
- **Contemporary Music** revenue increased due to an 11.9% increase in attendance and an increase in the average ticket price. Top events included performances by Ed Sheeran, Foo Fighters and Paul McCartney.
- **Festivals (Contemporary Music)** revenue increased primarily due to an increase in attendance of 57.4%. Top festivals included WOMADelaide, Harvest Rock and Heaps Good.
- **Special events** revenue declined, primarily due to a decline in attendance in 2023.

See p. 44

Due to their population size, Australian Capital Territory (ACT), Tasmania and Northern Territory (NT) contributed the least to overall live performance revenue and attendance in Australia in 2023.

- **Tasmania** recorded a 15.1% y-o-y growth in revenue (to $29.1m) and a 7.4% y-o-y decline in attendance (to 0.5m), between 2022 and 2023.
- **Tasmanian** revenue growth was driven by revenue growth in **Circus and Physical Theatre**, **Musical Theatre**, **Festivals (Contemporary Music)** and **Comedy**.
- **ACT** recorded y-o-y growth in revenue (by 11.1% to $36.7m) but a y-o-y a decline in attendance (by 2.7% to 0.4m) between 2022 and 2023.
- **ACT** revenue growth was largely driven by revenue growth in **Festivals (Multi-Category)**, **Circus and Physical Theatre**, **Theatre** and **Children's/Family**.
- **NT** recorded a 26.8% y-o-y growth in revenue (to $8.8m) and a 5.2% y-o-y growth in attendance (to 0.1m) between 2022 and 2023.
- **NT** revenue growth was primarily driven by revenue growth in **Festivals (Multi-Category)**, **Classical Music**, **Comedy** and **Festivals (Contemporary Music)**.

See p. 47

Overall State and Territory Results

As the two most populated states, NSW and VIC combined generated the largest share of revenue and attendance.

- **NSW** represented the largest market share of revenue among all states and territories in Australia, accounting for 33.3% of the national market share in 2023, followed by **VIC** at 31.4%.
- **NSW** and **VIC** had the equal highest market share of attendance in 2023, each accounting for 30.6% of the national total.
- Combined, **NSW** and **VIC** generated approximately 64.7% of Australia’s live performance revenue and 61.2% of attendance in 2023.
- National spend per capita in 2023 was $116.33. **VIC** and **NSW** held the top positions in spend per capita in 2023, with $142.58 (22.6% higher than national spend per capita) and $123.76 (6.4% higher than national spend per capita), respectively.

See p. 32, p. 35, p. 24, p. 25

Historically **NSW** and **VIC** have accounted for the largest market share of revenue and attendance across most categories. Notable exceptions to this in 2023 included:

- **Festivals (Multi-Category)**, where **SA** and **WA** jointly accounted for 51.1% of the national market share of revenue and 61.3% of the national market share of attendance. Major annual festivals held in **SA** and **WA** included Adelaide Fringe, Adelaide Festival, Fringe World Festival and Perth Festival.
- **Opera**, where **NSW** and **QLD** jointly accounted for 80.4% of the national market share of revenue and 73.2% of the national market share of attendance. Major events in **NSW** and **QLD** included *Madama Butterfly*, *La Bohème*, *The Ring Cycle* and *Aida*.
- **Special Events**, where **QLD** and **WA** jointly accounted for 69.7% of the national market share of attendance. Major events in **QLD** and **WA** included *All's Nell that Ends Nell*, *Sing Sing Sing*, *RuPaul's Drag Race* and *Rockwiz Salutes Mushroom*.

2023 Analysis of Top 5 Categories and Top 3 Biggest Changes

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

Home 1 Executive Summary 7 Appendices
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers

Top 5 Categories – Revenue and Attendance 2023

Revenue 2023		
Category	Total Revenue	Industry Share
Contemporary Music	$1,486,395,321	47.4%
Musical Theatre	$542,171,614	17.3%
Festivals (Contemporary Music)	$355,083,125	11.3%
Comedy	$198,785,138	6.3%
Theatre	$121,774,292	3.9%

Attendance 2023		
Category	Total Attendance	Industry Share
Contemporary music	12,006,177	39.9%
Musical Theatre	4,288,743	14.3%
Comedy	2,879,792	9.6%
Festivals (Multi-Category)	2,411,385	8.0%
Festivals (Contemporary Music)	2,030,130	6.7%

Top 5 Changes by Category 2022 – 2023

Biggest Increase in Revenue	
Category	Increase from 2022
Circus and Physical Theatre	200.6%
Contemporary music	110.6%
Comedy	72.9%

Biggest Decline in Revenue	
Category	Decrease from 2022
Special Events	(34.8%)

Biggest Increase in Attendance	
Category	Increase from 2022
Circus and Physical Theatre	113.9%
Opera	42.6%
Contemporary music	38.0%

Biggest Decline in Attendance	
Category	Decrease from 2022
No decline	

Overall Category Results

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

In 2023, the live performance industry reached new highs in both revenue and attendance. Most categories recorded significant growth in revenue and attendance, surpassing pre-COVID-19 levels of activity.

In 2023, all categories except Special Events recorded y-o-y growth in revenue, and all categories recorded y-o-y increases in attendance. **Contemporary Music, Musical Theatre, Festivals (Contemporary Music),** and **Comedy** were significant contributors to the live performance industry, whilst **Circus and Physical Theatre** recorded the highest year-over-year growth in both revenue and attendance. An increase in ticket prices was common and largely attributable to increased operating costs across the live performance industry.

- **Circus and Physical Theatre** recorded the highest growth in revenue (by 200.6% to $68.3m) and the highest growth in attendance (by 113.9% to 0.7m) amongst all categories in 2023. The increase in the average ticket price (by 32.7% to $102.34) further contributed to the growth in revenue. These revenue and attendance results surpassed pre-pandemic levels but remained below the peak levels recorded in 2013 and 2017 for this category. Growth in this category fluctuates annually due to international touring. 2023 growth was primarily attributed to the return of *Cirque du Soleil's* national tour in 2023. Other top events in 2023 included *Circus 1903*, *Velvet Rewired* ,*The Mirror* and *Cosentino.* Despite this growth, Circus and Physical Theatre accounts for a small portion of the total revenue market share (2.2%). See p. 60
- **Contemporary Music** recorded the second-highest growth in revenue (by 110.6% to $1.5b) and the third-highest growth in attendance (38.0% to 12m) amongst all categories in 2023. The increase in the average ticket price (by 47.4% to $128.21) further contributed to the growth in revenue. These results have surpassed pre-pandemic levels and are the highest recorded for this category. **Contemporary Music** accounted for the largest market share in revenue (47.4%) and attendance (39.9%). Between 2009 and 2023, revenue in **Contemporary Music** has increased by 222.8% and attendance has increased by 156.4%. The growth in **Contemporary Music** in 2023 was primarily driven by an increase in international tours. Due to border restriction uncertainty, there was not full year of international tours in 2022. Significant international tours in 2023 included Ed Sheeran, Harry Styles, Coldplay, Paul McCartney, Red Hot Chili Peppers and Elton John. See p. 69
- **Musical Theatre** recorded a marginal y-o-y growth in revenue (by 4.5% to $542.2m) and attendance (by 0.4% to 4.3m) in 2023. The increase in the average ticket price (by 2.4% to $131.10) further contributed to the growth in revenue. This is the highest recorded revenue, attendance and average ticket price for **Musical Theatre**. **Musical Theatre** accounted for the second-largest market share in revenue (17.3%) and attendance (14.3%) among all categories in 2023. Between 2009 and 2023, revenue in **Musical Theatre** has increased by 152.2% and attendance has increased by 74.5%. The growth in 2023 was primarily attributed to musicals such as *Moulin Rouge! The Musical*, *Beauty And The Beast*, *TINA - The Tina Turner Musical* and *Hamilton*. See p. 78
- **Festivals (Contemporary Music)** recorded significant growth in revenue (by 51.5% to $355.1m) and attendance (by 32.1% to 2.0m) in 2023. These results are the highest ever recorded for this category. 2023 marked an audience return to contemporary music festivals following the pandemic. Attendance increased alongside the average ticket price (by 12.4% to $190.54), with both contributing to the significant growth in revenue. Between 2009 and 2023, revenue in the **Festivals (Contemporary Music)** category has increased by 542.4% and attendance has increased by 153.7% (partly due to the incremental inclusion of new data providers over time). Major festivals which contributed to the growth in revenue in 2023 were Beyond The Valley, Splendour in the Grass, CMC Rocks, Spilt Milk, Byron Bay Bluesfest and WOMADelaide. See p. 72
- **Comedy** recorded significant growth in revenue (by 72.9% to $198.8m) and attendance (by 35.0% to 2.9m) in 2023. This is the highest ever recorded revenue and attendance for **Comedy**. The increase in the average ticket price (by 25.2% to $72.51) contributed to the growth in revenue. The top events in this category in 2023 were the Melbourne International Comedy Festival, Brisbane Comedy Festival and significant tours by renowned comedians such as Dave Chappelle, Kevin Hart, Michael McIntyre and Jimmy Carr. Between 2009 and 2023, revenue in the **Comedy** category has increased by 402.4% and attendance has increased by 274.5%. See p. 66

Overall Category Results

Children's/Family, Festivals (Multi-Category) and Theatre recorded an increase in revenue driven by growth in attendance and average ticket price.

Classical Music recorded an increase in revenue driven by growth in attendance, partially offset by a decline in the average ticket price.

- **Children's/Family** recorded strong increases in revenue (by 41.1% to $67.8m) and attendance (by 14.9% to 1.7m) in 2023. The increase in the average ticket price (by 22.1% to $42.79) further contributed to the growth in revenue in 2023. The revenue and attendance results are the highest ever recorded for this category. Top events in this category in 2023 included *Disney On Ice*, *Madagascar – The Musical*, The Wiggles and *Storytime Ballet: Cinderella*. Between 2009 and 2023, revenue and attendance in the **Children's/Family** category increased by 112.6% and 58.8%, respectively. See p. 57
- **Festivals (Multi-Category)** recorded an increase in revenue (by 31.8% to $92.4m) and attendance (by 13.5% to 2.4m) in 2023. The average ticket price also increased (by 6.9% to $44.23). This is the highest recorded revenue and second-highest recorded attendance for **Festivals (Multi-Category)**. The growth in 2023 was primarily driven by festivals such as Adelaide Fringe, Fringe World Festival (Perth), Dark Mofo, World Pride and Perth Festival. Between 2009 and 2023, revenue and attendance in the **Festivals (Multi-Category)** category increased by 768.4% and 459.4% respectively. See p. 75
- **Theatre** recorded an increase in revenue (by 9.3% to $121.8m) and attendance (by 5.4% to 1.4m) in 2023, whilst the average ticket price remained consistent (from $91.13 in 2022 to $91.16 in 2023). The growth in revenue was primarily driven by productions such as *Harry Potter and the Cursed Child*, *Amadeus*, *Death of a Salesman* and *The Mousetrap*. Between 2009 and 2023, **Theatre** revenue has increased by 89.0%. See p. 87
- **Classical Music** recorded an increase in revenue (by 1.6% to $90.4m) and attendance (by 10.0% to 1.3m) in 2023. The growth in revenue was partially offset by the decline in the average ticket price (by 8.2% to $84.79). The top events in this category in 2023 were *Star Wars: Empire Strikes Back*, *Harry Potter and the Deathly Hallows: Part 2* and performances by the London Symphony Orchestra and Jazz at Lincoln Center Orchestra. Between 2009 and 2023, **Classical Music** revenue has increased by 26.8% and attendance increased by 15.5%. See p. 63

Ballet and Dance and Opera recorded revenue and attendance increases.

Special Events recorded a decline in revenue despite an increase in attendance.

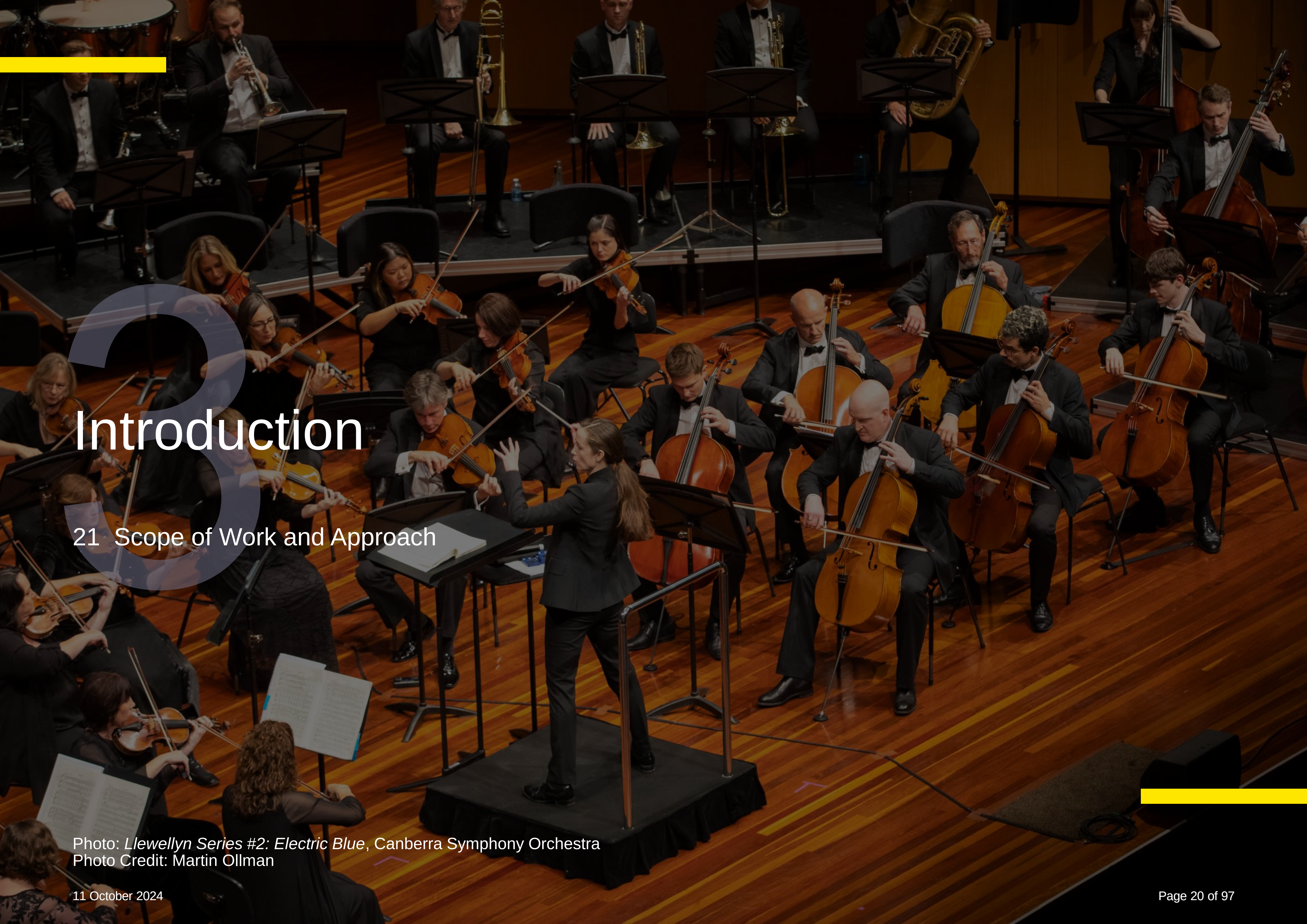
- **Ballet and Dance** recorded moderate growth in revenue (by 11.1% to $70.4m) and attendance (by 9.1% to 0.8m) in 2023. The increase in the average ticket price (by 6.5% to $101.03) partially contributed to the growth in revenue. The top events in **Ballet and Dance** category in 2023 were *Swan Lake*, *Don Quixote*, *The Dream/ Marguerite and Armand* and *Shen Yun*. Between 2009 and 2023, **Ballet and Dance** revenue increased by 20.1%, despite a decrease in attendance by 23.1%. This was due to an increase in the average ticket price of 59.5%. See p. 54
- **Opera** recorded significant growth in revenue (by 68.8% to $39.9m) and attendance (by 42.6% to 0.3m) in 2023, and strong growth in the average ticket price (by 17.6% to $141.27). However, **Opera** revenue and attendance have not yet returned to pre-pandemic levels. The top **Opera** events in 2023 were *Madama Butterfly*, *La Bohème, The Ring Cycle* and *Aida*. Between 2009 and 2023, **Opera** revenue and attendance declined by 9.3% and 28.3% respectively. The average ticket price increased by 26.6% during this time. See p. 81
- **Special Events** recorded a decline in revenue (by 34.8% to $3.2m), despite increases in attendance (by 36.2% to 0.2m) and the average ticket price (by 1.7% to $40.03) in 2023. This decline was primarily attributed to a significant portion of zero-price tickets. The top events in this category in 2023 were *NYE Gala Concert*, *RuPaul's Drag Race* and *Christmas Spectacular*. The **Special Events** category is highly variable as it is dependent on whether events and performances can be classified into other categories. See p. 84

Overall Category Results

Contemporary Music and Musical Theatre continue to be the top contributors to the overall live performance market in 2023.

- The top 5 categories were **Contemporary Music, Musical Theatre, Festivals (Contemporary Music), Comedy** and **Theatre**. These categories jointly accounted for 86.2% of industry revenue and 75.3% of attendance in 2023.
- Consistent with previous years, **Contemporary Music** and **Musical Theatre** had the largest market shares of all categories with respect to both revenue and attendance. In 2023, these two categories jointly accounted for 64.7% of revenue and 54.2% of attendance across Australia's live performance industry.

See p. 51



3 Introduction

21 Scope of Work and Approach

Photo: *Llewellyn Series #2: Electric Blue*, Canberra Symphony Orchestra
Photo Credit: Martin Ollman

Scope of Work and Approach

Defining tasks performed and our approach

Scope of Work

EY was engaged by LPA to prepare the 2023 Live Performance Australia Ticket Attendance and Revenue Report (The Report). For the purposes of this report, the live performance industry encompasses performances, productions, previews and concerts that are performed in front of a live and/or virtual audience.

The scope of our work included:

- Data collected from Data Providers on the number of ticket sales and associated revenue for the live performance industry in Australia ("2023 national data"). LPA helped to facilitate the data collection process.
- Analysis of the 2023 national data on an overall basis, in comparison to previous years, by states and territories and by event categories.
- Incorporation of the data from a selection of larger regional venues into the report.

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

Approach

EY has compiled data from ticketing companies, self-ticketing venues, event promoters and National Performing Arts Partnership (NPAP) companies (collectively referred to in this study as the “Data Providers”). A list of the Data Providers is provided in Appendix A of this Report.

Based on the guidelines established by LPA, the Data Providers assigned their ticketing data to defined event categories. These event categories are described in Appendix B of this report.

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 NPAP companies. This was to avoid double counting of revenue and attendance data.

EY received data directly from Data Providers. EY and Data Providers 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.

Whilst EY’s 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 by EY and corrected as part of the data analysis in consultation with LPA. Examples of such anomalies included:

- Events which were wrongly classified and required reallocation. For example, music festivals reallocated to Festivals (Contemporary Music).
- Exclusion of 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.
- Exclusion of amateur events such as school performances, dance academy concerts and other community group performances.

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 Data Providers as outlined in Appendix A 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 Data Providers. Whilst national in reach, the coverage of this Report excludes events in some regional venues as well as contract-fee performances by 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 included 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 and Moshtix (which includes data from festivals) and directly from festival promoters addresses some previous under-reporting in the festivals 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 also only documents paid tickets and does not include the substantial unpaid and/or non-ticketed 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 covered in the Report are not included in the results. However, data from Oztix, Ticketek, Ticketmaster and Moshtix helps to decrease the level of under-reporting, as these ticketing agencies include smaller performances at certain bars and hotels. 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 2023 data was compared against historical data sourced directly from Live Performance Australia's Live Performance Industry in Australia 2009 – 2022 Reports.

Changes in the report compared to previous years

- In 2016, the term Festivals (Single-Category) was renamed Festivals (Contemporary Music) (by LPA) and is currently referred to as Festivals (Contemporary Music).
- New Data Providers in 2023 were Canberra International Music Festival, Pinchgut Opera, Untitled Group, Meredith Music Festival, Port Fairy Folk Festival, Trafalgar Entertainment (Theatre Royal Sydney) and Circus Oz.

4 State Analysis

24 2023 Revenue and Attendance by State/Territory
25 2023 Population and Per Capita Results
26 2023 Revenue and Attendance Breakdown
27 2023 Revenue by Category and State/Territory
28 2023 Attendance by Category and State/Territory
29 State/Territory Revenue and Attendance
32 NSW Analysis
35 VIC Analysis
38 QLD Analysis
41 WA Analysis
44 SA Analysis
47 ACT/TAS/NT Analysis

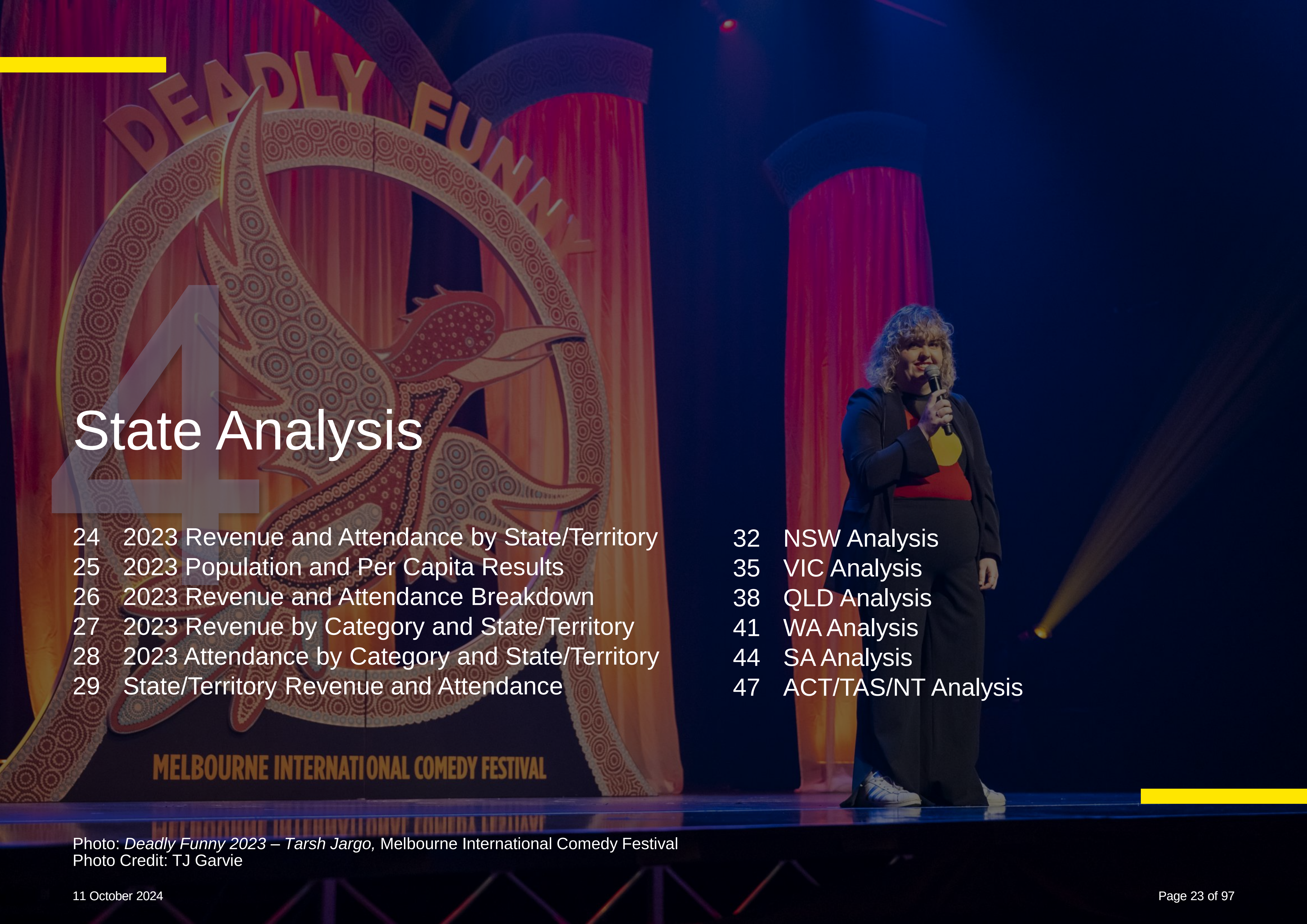


Photo: *Deadly Funny 2023 – Tarsh Jargo,* Melbourne International Comedy Festival
Photo Credit: TJ Garvie

2023 Revenue and Attendance by State/Territory

Revenue and Attendance by State/Territory

2022 and 2023

	Revenue				Attendance			
State/Territory	Revenue	Share of Industry (2023)	Share of Industry (2022)	Change in Revenue from 2022	Tickets	Share of Industry (2023)	Share of Industry (2022)	Change in Attendance from 2022
New South Wales	$1,043,883,264	33.3%	33.7%	54.4%	9,195,572	30.6%	30.0%	26.6%
Victoria	$984,651,772	31.4%	34.1%	43.9%	9,198,916	30.6%	32.4%	17.1%
Queensland	$539,301,164	17.2%	15.1%	78.0%	4,938,028	16.4%	15.4%	32.4%
Western Australia	$312,624,434	10.0%	8.0%	94.7%	3,223,569	10.7%	9.2%	45.1%
South Australia	$181,482,228	5.8%	5.9%	53.8%	2,494,348	8.3%	8.6%	19.7%
Australian Capital Territory	$36,717,982	1.2%	1.6%	11.1%	385,827	1.3%	1.6%	(2.7%)
Tasmania	$29,136,092	0.9%	1.3%	15.1%	497,830	1.7%	2.2%	(7.4%)
Northern Territory	$8,791,730	0.3%	0.3%	26.8%	144,938	0.5%	0.6%	5.2%
Total	**$3,136,588,666**	**100.0%**	**100.0%**	**56.3%**	**30,079,028**	**100.0%**	**100.0%**	**24.2%**

Analysis

- In 2023, the live performance industry across Australia recorded a y-o-y increase in both revenue (56.3%) and attendance (24.2%).
- NSW had the highest industry share of revenue (33.3%) and shared the lead with Victoria for the highest share of attendance (30.6%) in Australia.

2023 Population and Per Capita Results

Per Capita Results 2023

State/Territory	Population (2023) (m) *as per Australian Bureau of Statistics*	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	8.43	31.3%	33.3%	30.6%	$123.76
Victoria	6.91	25.6%	31.4%	30.6%	$142.58
Queensland	5.53	20.5%	17.2%	16.4%	$97.55
Western Australia	2.93	10.9%	10.0%	10.7%	$106.77
South Australia	1.87	6.9%	5.8%	8.3%	$97.24
Australian Capital Territory	0.47	1.7%	1.2%	1.3%	$78.09
Tasmania	0.57	2.1%	0.9%	1.7%	$50.70
Northern Territory	0.25	0.9%	0.3%	0.5%	$34.67
Total	**26.96**	**100.0%**	**100.0%**	**100.0%**	**$116.33**

Per capita results

A comparison of each state and territory's share of the live performance industry against population provides insight into spend per capita, as well as the concentration of the industry relative to where people live. The above table shows that NSW and VIC command a larger share of revenue compared to their share of Australia's population.

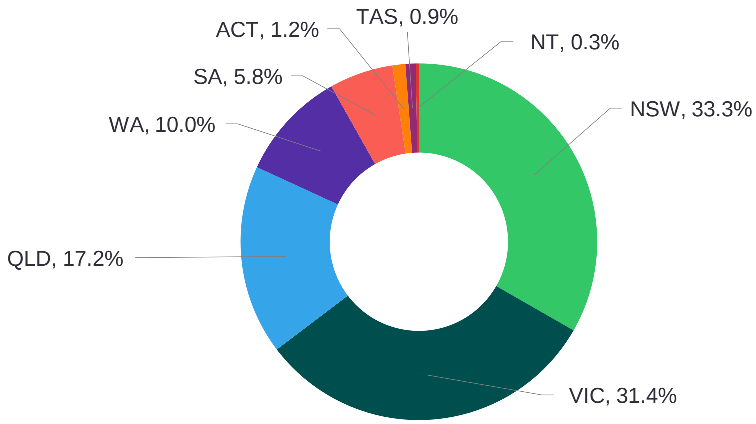
Comments

- 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. As such, the revenue and attendance of the performance are fully attributed to the state in which the performance is held. This is particularly relevant for categories such as Musical Theatre where musicals open their season in a particular state and often attract significant audience visitation from outside that state.
- NSW and VIC 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 VIC and hold 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 major events markets and have been successful in attracting major live performance events to these states.
- VIC ($142.58) and NSW ($123.76) hold top positions in per capita spend amongst all states and territories in 2023. VIC and NSW are the only states that are above the national per capita spend ($116.33).

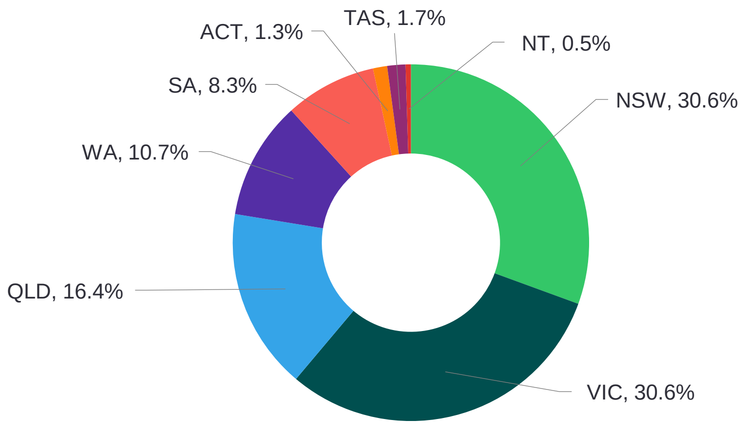
2023 Revenue and Attendance Breakdown

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

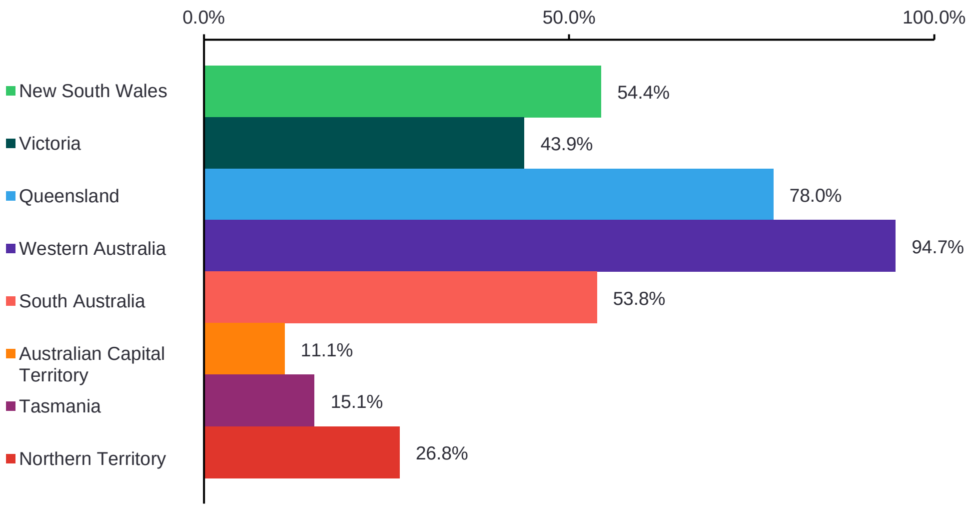
Market Share (Revenue) by State/Territory 2023



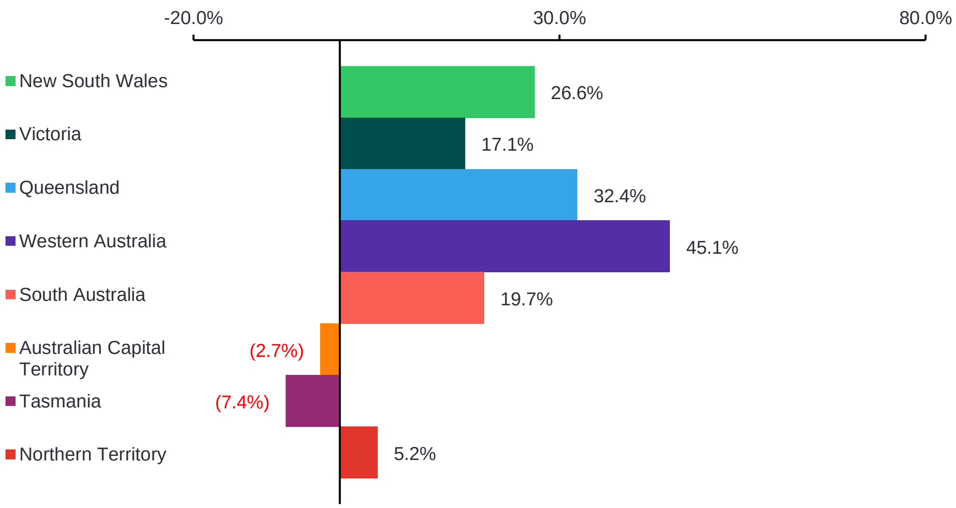
Market Share (Attendance) by State/Territory 2023



Percentage Movement in Revenue by State/Territory 2022 → 23



Percentage Movement in Attendance by State/Territory 2022 → 23



2023 Revenue by Category and State/Territory

Revenue by Category and State/Territory 2023

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$28,090,419	$19,979,603	$11,796,109	$5,107,772	$3,250,797	$1,304,539	$703,309	$132,076	**$70,364,624**
Children's/Family	$21,038,468	$17,957,024	$9,721,512	$10,782,369	$5,340,930	$1,700,384	$1,049,632	$229,246	**$67,819,564**
Circus and Physical Theatre	$21,938,118	$14,999,080	$14,680,820	$11,253,564	$4,022,239	$748,071	$477,266	$184,295	**$68,303,452**
Classical Music	$37,394,560	$27,451,096	$9,066,535	$8,467,385	$4,424,763	$1,889,884	$1,476,401	$195,626	**$90,366,251**
Comedy	$53,451,840	$68,966,440	$32,922,193	$25,880,955	$8,767,193	$4,433,970	$3,283,623	$1,078,924	**$198,785,138**
Contemporary Music	$516,970,672	$483,867,315	$262,012,198	$144,307,701	$64,241,490	$6,685,263	$7,537,711	$772,971	**$1,486,395,321**
Festivals (Contemporary Music)	$89,036,030	$98,371,896	$84,894,750	$33,159,938	$29,489,433	$11,328,151	$6,093,785	$2,709,141	**$355,083,125**
Festivals (Multi-Category)	$17,128,614	$10,631,246	$6,653,889	$17,644,506	$29,587,346	$327,240	$7,370,526	$3,078,721	**$92,422,087**
Musical Theatre	$190,994,104	$177,543,223	$91,768,883	$51,105,749	$25,017,964	$4,514,727	$905,902	$321,062	**$542,171,614**
Opera	$23,543,984	$3,723,139	$8,560,674	$1,276,244	$2,676,390	$87,560	$31,497	$44,985	**$39,944,472**
Special Events	$1,077,212	$1,292,414	$31,852	$367,223	$165,796	$190,901	$33,329	-	**$3,158,726**
Theatre	$43,219,244	$59,869,295	$7,191,749	$3,271,028	$4,497,888	$3,507,292	$173,112	$44,684	**$121,774,292**
Total	**$1,043,883,264**	**$984,651,772**	**$539,301,164**	**$312,624,434**	**$181,482,228**	**$36,717,982**	**$29,136,092**	**$8,791,730**	**$3,136,588,666**

Analysis

- In 2023, Contemporary Music and Musical Theatre were the two largest categories in the industry, generating 47.4% and 17.3% of the overall revenue, respectively. Circus and Physical Theatre and Contemporary Music recorded the highest y-o-y growth in revenue, with increases of 200.6% and 110.6% respectively. Special Events was the only category to witness a y-o-y decline in revenue, falling by 34.8%.

2023 Attendance by Category and State/Territory

Attendance by Category and State/Territory — 2023

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	283,830	218,881	157,191	88,236	33,559	13,715	10,581	2,184	**808,177**
Children's/Family	562,204	404,594	265,549	238,714	132,850	43,806	48,047	13,536	**1,709,300**
Circus and Physical Theatre	227,270	176,324	161,786	82,515	29,205	11,067	7,139	2,805	**698,111**
Classical Music	467,920	449,488	116,533	143,972	60,933	21,789	28,322	4,284	**1,293,241**
Comedy	566,411	1,350,365	461,956	277,994	99,742	65,284	41,293	16,747	**2,879,792**
Contemporary Music	3,932,479	3,851,829	2,216,357	1,214,931	572,886	88,534	116,482	12,679	**12,006,177**
Festivals (Contemporary Music)	533,607	495,534	493,260	188,912	187,942	64,794	42,884	23,197	**2,030,130**
Festivals (Multi-Category)	294,134	206,857	195,764	415,913	1,062,605	6,089	165,841	64,182	**2,411,385**
Musical Theatre	1,572,148	1,379,726	653,872	414,306	220,417	33,289	11,062	3,923	**4,288,743**
Opera	188,610	41,031	46,584	16,817	26,826	509	479	621	**321,477**
Special Events	20,250	14,170	50,833	84,839	1,693	1,680	21,243	-	**194,708**
Theatre	546,709	610,117	118,343	56,420	65,690	35,271	4,457	780	**1,437,787**
Total	**9,195,572**	**9,198,916**	**4,938,028**	**3,223,569**	**2,494,348**	**385,827**	**497,830**	**144,938**	**30,079,028**

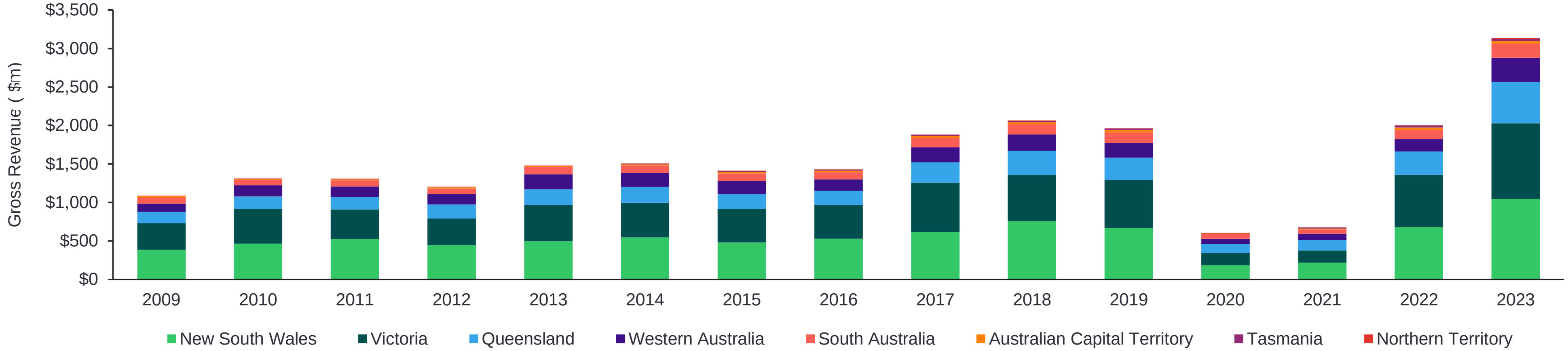
Analysis

- In 2023, Contemporary Music and Musical Theatre were the two largest categories, accounting for 39.9% and 14.3% of the total industry attendance respectively. Circus and Physical Theatre recorded the highest y-o-y increase in attendance (113.9%), followed by Opera (42.6%).

State/Territory Revenue and Attendance

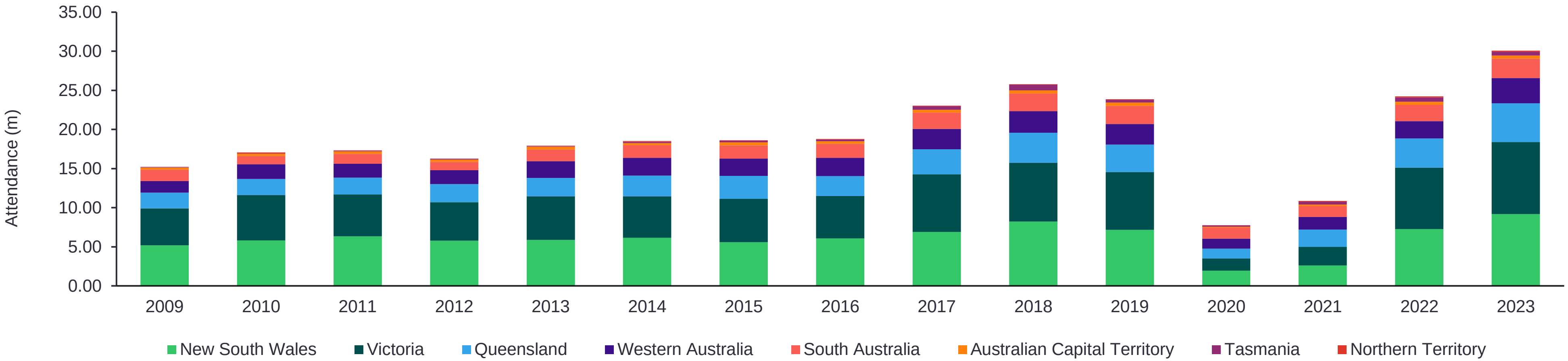
Revenue by State/Territory

2009 → 2023



Attendance by State/Territory

2009 → 2023



State/Territory Revenue and Attendance

Revenue by State/Territory

2009 → 2023

Year	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	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**
2021	$217,159,216	$157,935,937	$132,908,255	$84,984,114	$54,221,032	$12,112,793	$14,216,098	$5,247,513	**$678,784,958**
2022	$676,123,998	$684,355,036	$303,028,944	$160,568,169	$117,992,021	$33,063,416	$25,303,434	$6,933,522	**$2,007,368,540**
2023	$1,043,883,264	$984,651,772	$539,301,164	$312,624,434	$181,482,228	$36,717,982	$29,136,092	$8,791,730	**$3,136,588,666**

Analysis

- In 2023, NSW had the highest market share of revenue among all the states and territories in Australia, accounting for 33.3% of the national market share.

* The 2015 LPA Ticket and Revenue Survey (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.

** This figure has been updated since the 2018 Report release to account for an error in the data received.

State/Territory Revenue and Attendance

Attendance by State/Territory

2009 → 2023

Year	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	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**
2021	2,608,375	2,371,989	2,213,863	1,630,414	1,365,079	212,210	351,977	123,932	**10,877,839**
2022	7,264,274	7,856,954	3,728,420	2,221,876	2,083,672	396,477	537,534	137,828	**24,227,035**
2023	9,195,572	9,198,916	4,938,028	3,223,569	2,494,348	385,827	497,830	144,938	**30,079,028**

Analysis

- In 2023, NSW and VIC held the highest market share of attendance among all the states and territories in Australia, with each accounting for 30.6% of the national market share.

* 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.

** This figure has been updated since the 2018 Report release to account for an error in the data received.

NSW Analysis

NSW Revenue and Attendance

- In 2023, NSW generated $1.0b in total ticket revenue and 9.2m in total attendance. These results are the highest ever recorded in NSW.
- In 2023, NSW accounted for the largest market share of total revenue (33.3%) and the largest market share of attendance (tied with VIC at 30.6%). NSW's contribution to total revenue is higher than its share of the national population.
- NSW achieved the third-highest y-o-y growth in revenue (54.4%) and attendance (26.6%) among all states and territories.
- NSW spend per capita in 2023 was $123.76. This was the second-highest among all states and territories in Australia and higher than the national average.
- Contemporary Music contributed the highest share of revenue (49.5%) and attendance (42.8%) among all the live performance categories in NSW.
- The y-o-y increase in revenue and attendance was driven primarily by the following categories:
  - Circus and Physical Theatre recorded significant revenue growth of 341.6%. This was driven by an increase in attendance of 228.1% and an increase in the average ticket price. Top events included *Cirque du Soleil, Circus 1903* and *Velvet Rewired.*
  - Contemporary Music revenue increased by 137.6%. This was driven by an increase in attendance of 43.0% and an increase in the average ticket price. Top events included performances by Ed Sheeran, Harry Styles, Paul McCartney and Jay Chou.
  - Comedy recorded an 83.5% increase in revenue and a 26.6% increase in attendance. Top events included performances by Dave Chappelle, Kevin Hart and Michael McIntyre.
  - Special Events recorded a 68.0% increase in revenue and a 44.7% increase in attendance. Top events included *Christmas Spectacular*, *RuPaul's Drag Race* and *Rockwiz Salutes Mushroom.*

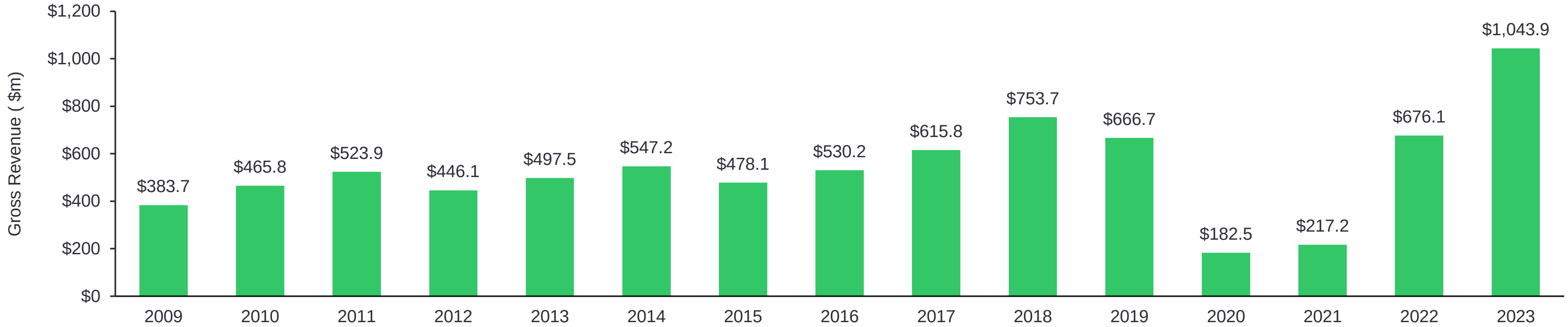
	Revenue		Attendance	
Year	Total Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$383,713,353	-	5,176,385	-
2010	$465,761,849	21.4%	5,818,163	12.4%
2011	$523,903,477	12.5%	6,331,001	8.8%
2012	$446,063,403	(14.9%)	5,795,757	(8.5%)
2013	$497,463,659	11.5%	5,865,914	1.2%
2014	$547,173,799	10.0%	6,132,827	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%)
2021	$217,159,216	19.0%	2,608,375	33.0%
2022	$676,123,998	211.3%	7,264,274	178.5%
2023	$1,043,883,264	54.4%	9,195,572	26.6%

NSW Analysis

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

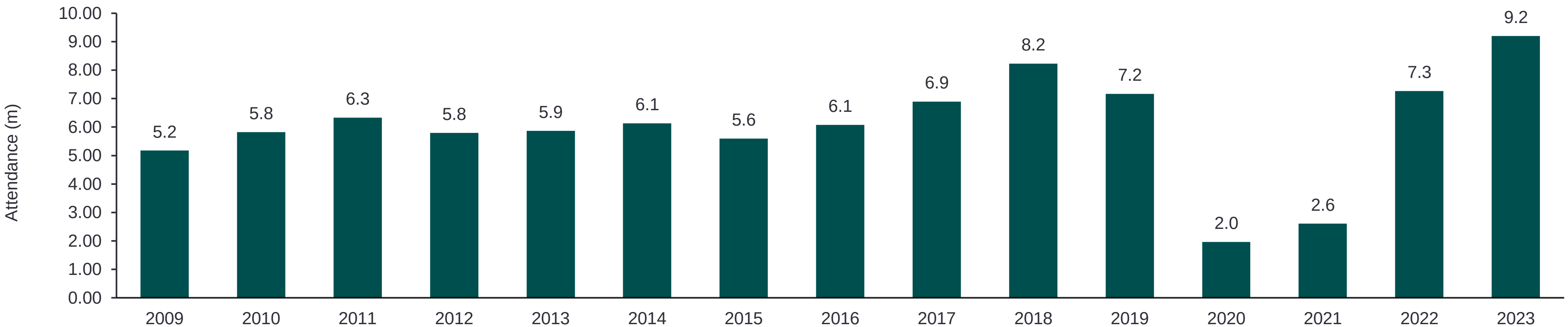
Revenue – NSW

2009 → 2023



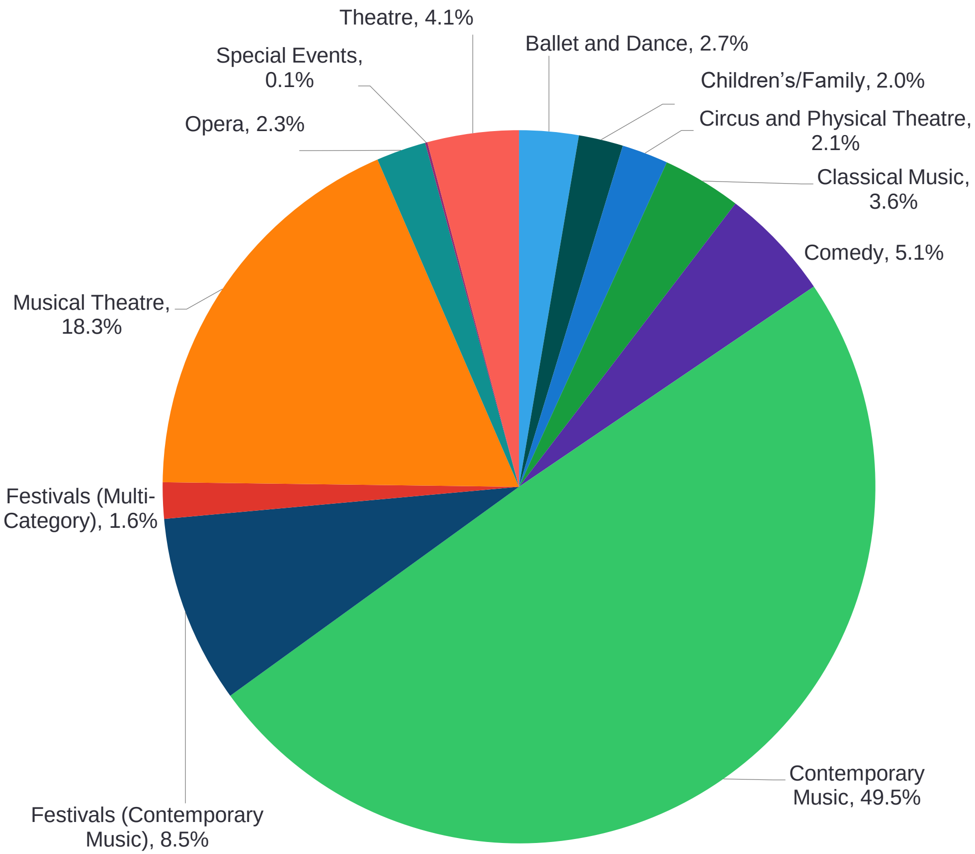
Attendance – NSW

2009 → 2023

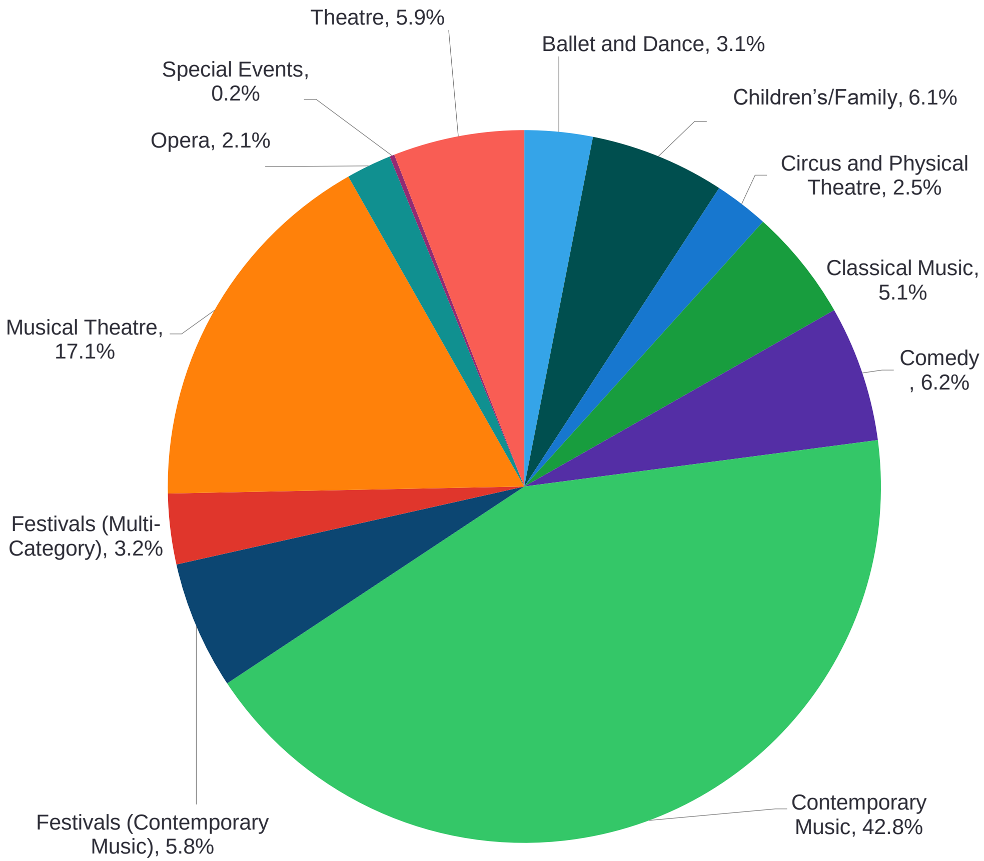


NSW Analysis

NSW Revenue by Category 2023



NSW Attendance by Category 2023



VIC Analysis

VIC Revenue and Attendance

- In 2023, VIC generated $984.7m in total ticket revenue and 9.2m in total attendance, reflecting a 43.9% y-o-y increase in revenue and a 17.1% y-o-y increase in attendance. This is the highest ever recorded revenue and attendance for the state, surpassing pre-pandemic levels.
- In 2023, VIC accounted for the second-largest market share of industry revenue (31.4%) and the largest market share of attendance (tied with NSW at 30.6%). VIC's contributions to total revenue and attendance are greater than its share of the national population.
- VIC spend per capita in 2023 was $142.58. This was the highest among all states and territories in Australia and higher than the national average.
- Contemporary Music contributed the highest share to VIC’s overall revenue and attendance, 49.1% and 41.9% respectively.
- The y-o-y increase in revenue and attendance was driven primarily by the following categories:
    - Circus and Physical Theatre recorded a significant growth in revenue by 176.3%. This was driven by an increase in attendance of 126.8% and an increase in the average ticket price. This growth was largely attributable to the return of *Cirque du Soleil's* national tour in 2023. Other top events included *Oracle* and *Cosentino*.
    - Festivals (Contemporary Music) recorded an increase in revenue by 115.6%. This was driven by an increase in attendance of 45.9% and an increase in the average ticket price. Major festivals included Beyond The Valley, Pitch Music and Arts Festival, Spilt Milk and Good Things Festival.
    - Contemporary Music recorded a 107.2% increase in revenue and a 42.8% increase in attendance. Top events included performances by Ed Sheeran, Elton John and Paul McCartney.
    - Comedy recorded a 45.4% growth in revenue and a 28.1% increase in attendance. This was primarily driven by the Melbourne International Comedy Festival.
- Several categories recorded a y-o-y decline in total ticket revenue. These included Opera (20.7%), Musical Theatre (14.8%), Theatre (14.7%), Special Events (4.5%), Festivals (Multi-Category) (2.6%) and Ballet and Dance (0.5%).

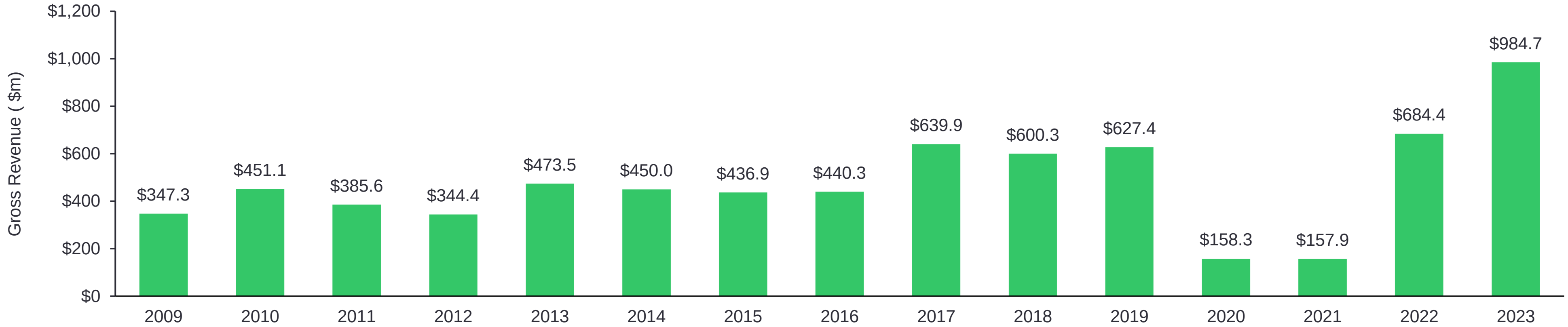
	Revenue		Attendance	
Year	Total Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$347,305,100	-	4,744,449	-
2010	$451,053,035	29.9%	5,820,603	22.7%
2011	$385,643,996	(14.5%)	5,359,749	(7.9%)
2012	$344,389,414	(10.7%)	4,916,559	(8.3%)
2013	$473,516,913	37.5%	5,607,475	14.1%
2014	$450,034,039	(5.0%)	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%)
2021	$157,935,937	(0.2%)	2,371,989	53.3%
2022	$684,355,036	333.3%	7,856,954	231.2%
2023	$984,651,772	43.9%	9,198,916	17.1%

^ This figure has been updated since the 2018 report release to account for an error in the data received.

VIC Analysis

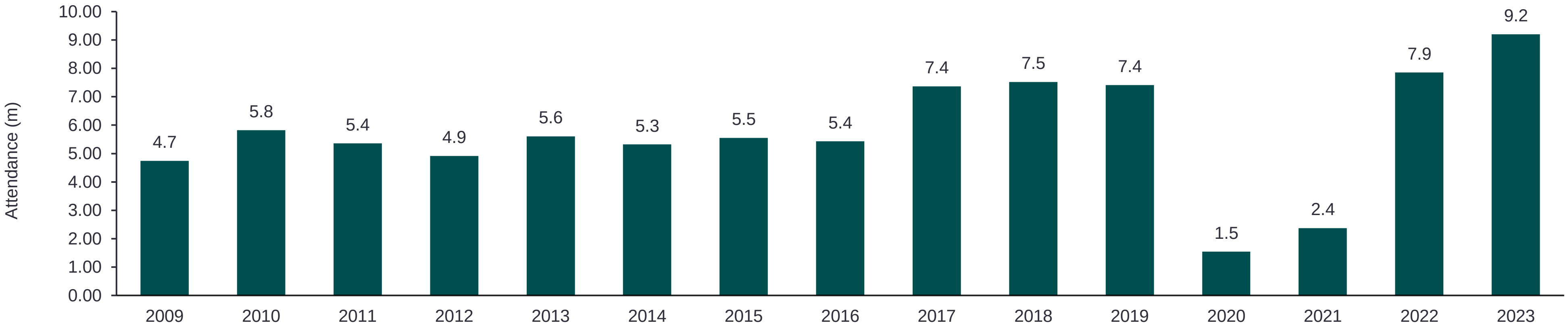
Revenue – VIC

2009 → 2023



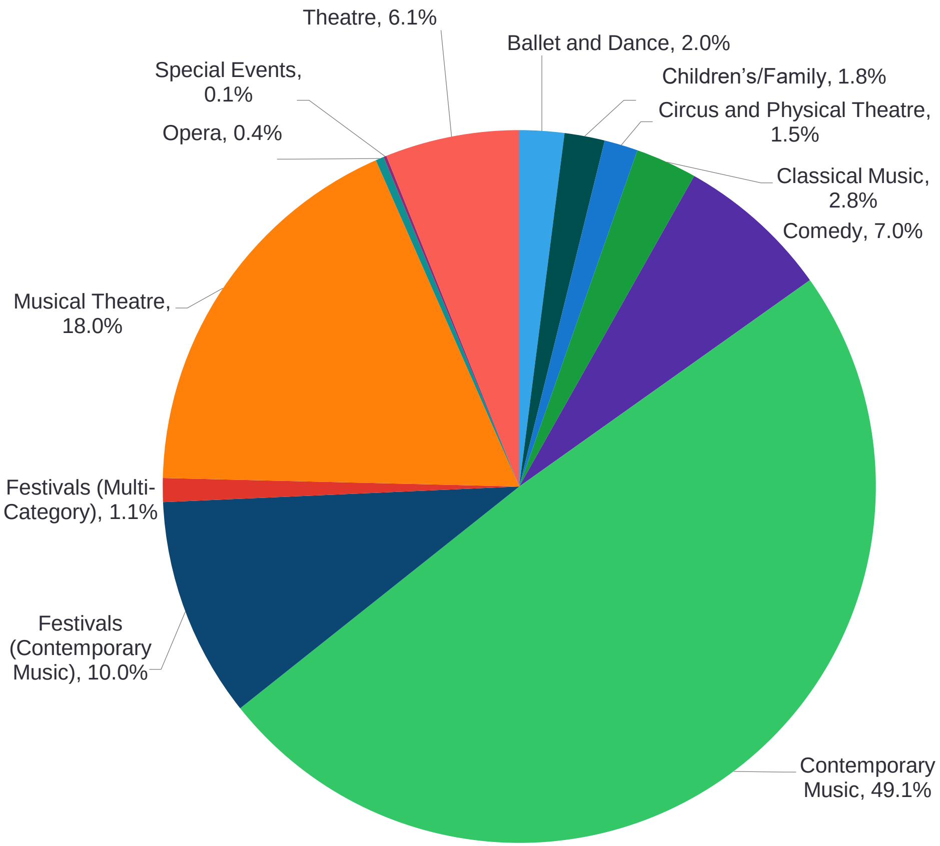
Attendance – VIC

2009 → 2023

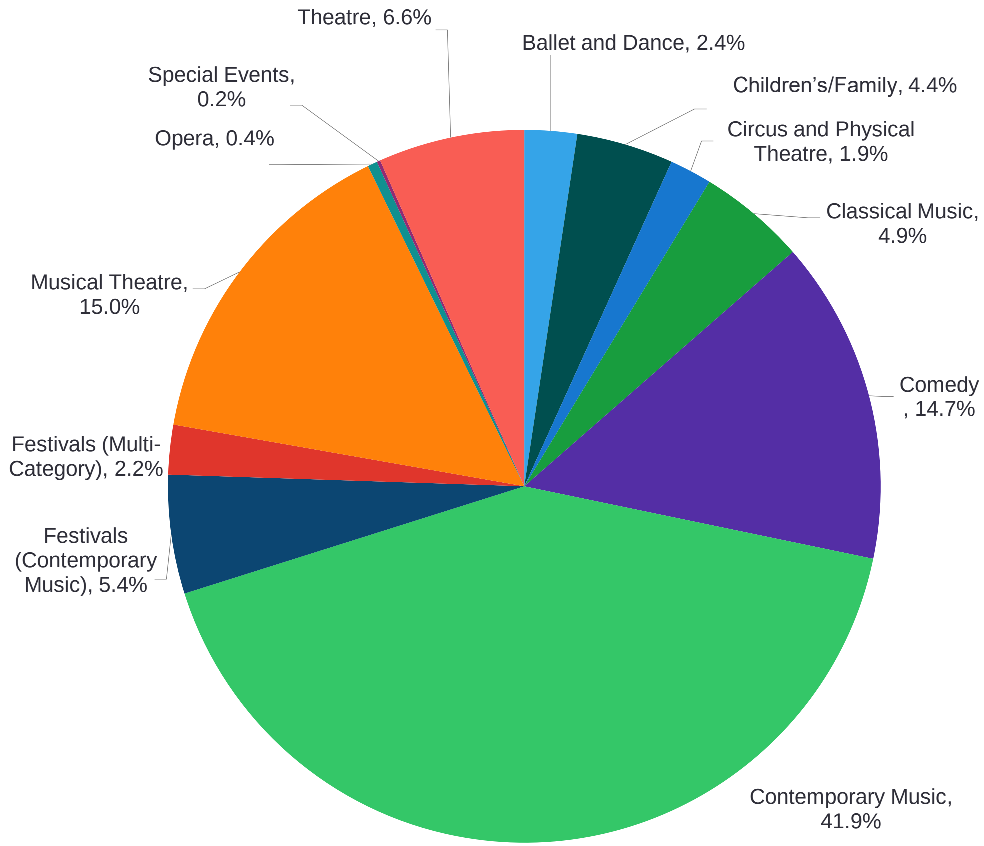


VIC Analysis

VIC Revenue by Category 2023



VIC Attendance by Category 2023



QLD Analysis

QLD Revenue and Attendance

- In 2023, QLD generated $539.3m in revenue and recorded 4.9m in attendance. This is the highest ever recorded revenue and attendance for the state, surpassing pre-pandemic levels.
- QLD accounted for the third-largest share of total revenue (17.2%) and attendance (16.4%) among the states and territories in Australia in 2023. QLD achieved the second-highest y-o-y growth in revenue (78.0%) and attendance (32.4%) among all states and territories.
- QLD spend per capita was $97.55. This was the fourth-highest among all states and territories in Australia but lower than the national average.
- Contemporary Music contributed the highest share of QLD's total revenue (48.6%) and total attendance (44.9%) in 2023.
- The y-o-y increase in revenue and attendance was driven primarily by the following categories:
  - Opera recorded a significant increase in revenue (978.9%). This was driven by a significant increase in attendance (306.7%) and an increase in the average ticket price. Major events included *The Ring Cycle* and *Aida*.
  - Contemporary Music recorded an increase in revenue of 107.2%. This was driven by an increase in attendance (39.5%) and average ticket price. Major events included performances by Ed Sheeran, Elton John, Red Hot Chili Peppers and Paul McCartney.
  - Comedy recorded a 98.1% increase in revenue and a 57.1% increase in attendance. Major events included Brisbane Comedy Festival and performances by Dave Chappelle, Kevin Hart and Carl Barron.
  - Festivals (Contemporary Music) recorded a 67.0% increase in revenue and a 50.5% increase in attendance. Major festivals included CMC Rocks, Spilt Milk, Wildlands Brisbane and Listen Out Brisbane.
  - Musical Theatre recorded a 62.5% increase in revenue and a 24.8% increase in attendance. Major events included *Hamilton*, *Moulin Rouge! The Musical* and *MAMMA MIA! The Musical*.
  - Special Events and Classical Music recorded y-o-y declines in total revenue of 97.4% and 23.5%, respectively.

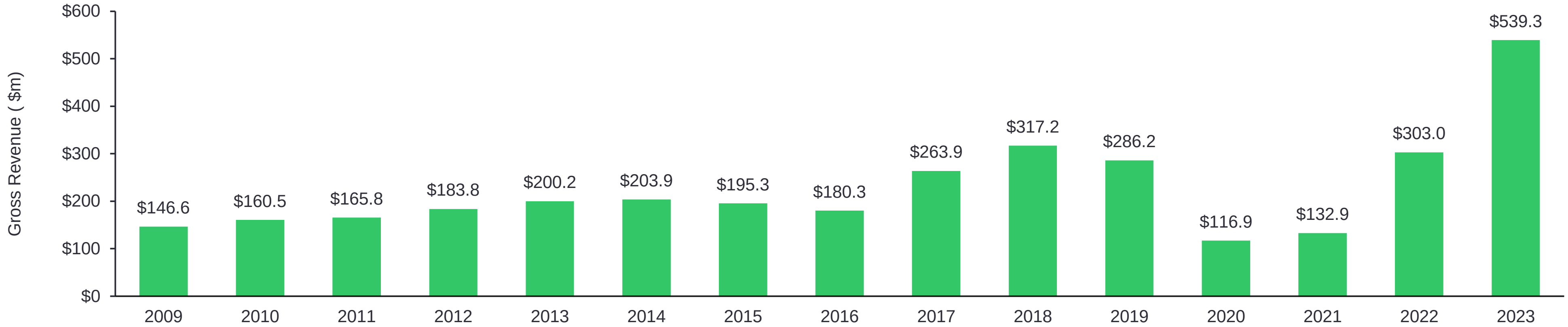
	Revenue		Attendance	
Year	Total Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$146,567,867	-	2,006,608	-
2010	$160,520,942	9.5%	2,043,327	1.8%
2011	$165,840,931	3.3%	2,150,329	5.2%
2012	$183,775,420	10.8%	2,302,462	7.1%
2013	$200,178,524	8.9%	2,318,207	0.7%
2014	$203,918,468	1.9%	2,661,632	14.8%
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%)
2021	$132,908,255	13.7%	2,213,863	75.6%
2022	$303,028,944	128.0%	3,728,420	68.4%
2023	$539,301,164	78.0%	4,938,028	32.4%

QLD Analysis

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

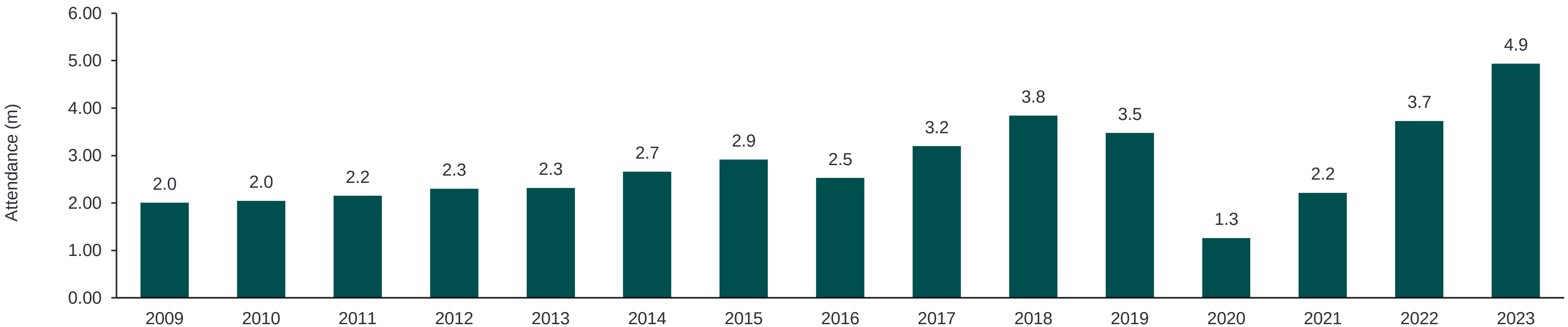
Revenue – QLD

2009 → 2023



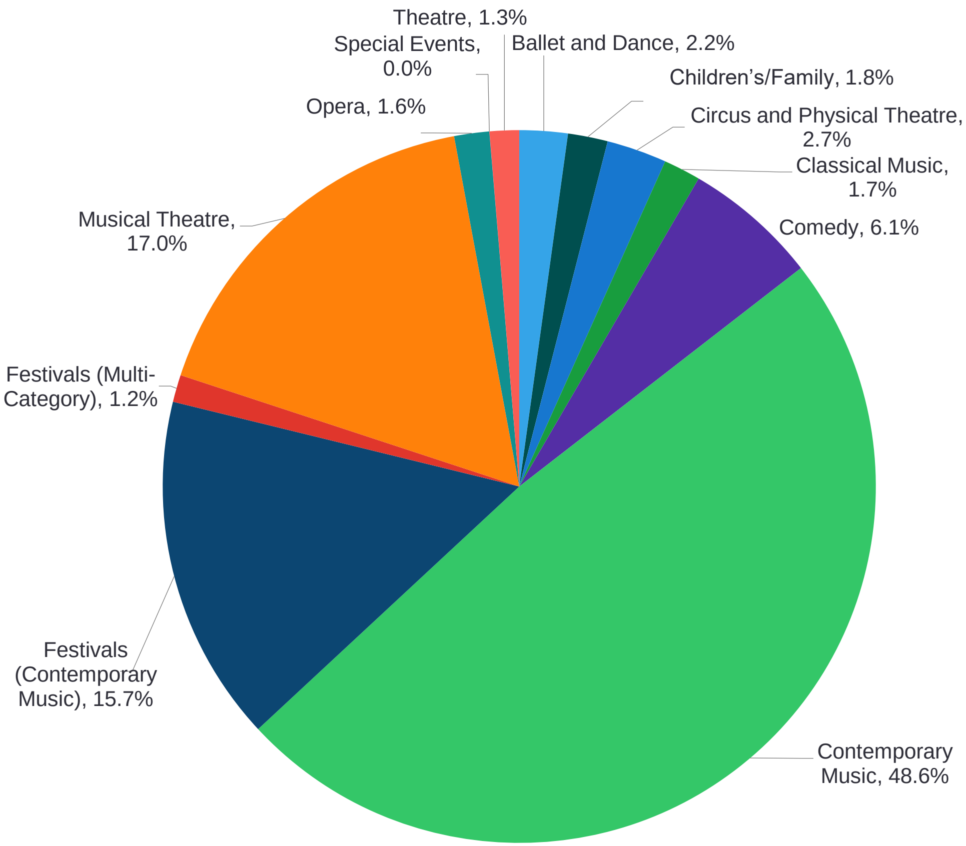
Attendance – QLD

2009 → 2023

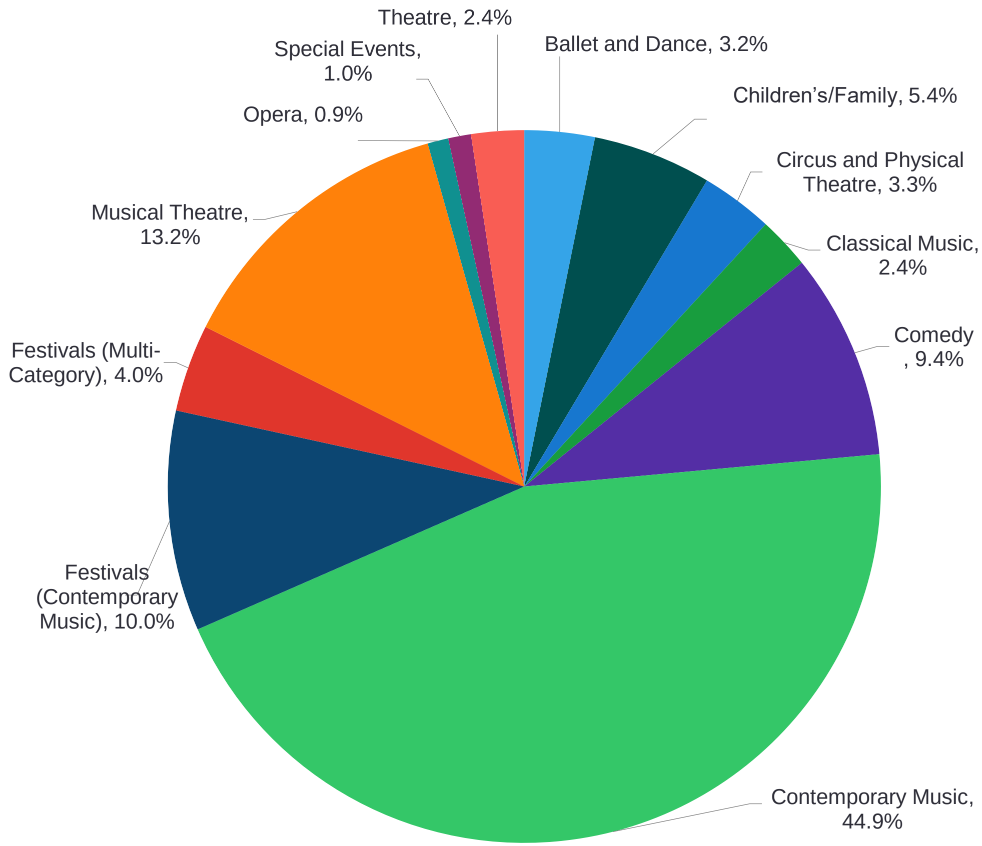


QLD Analysis

QLD Revenue by Category 2023



QLD Attendance by Category 2023



WA Analysis

WA Revenue and Attendance

- In 2023, WA generated $312.6m in total ticket revenue and 3.2m in total attendance. This is the highest ever recorded revenue and attendance for the state, surpassing pre-pandemic levels.
- WA accounted for 10.0% of the industry's total revenue share and 10.7% of the industry's total attendance share in 2023.
- WA spend per capita was $106.77, the third-highest among all states and territories in Australia, but lower than the national average.
- Contemporary Music contributed the highest share of WA's total revenue (46.2%) and total attendance (37.7%) in 2023.
- In 2023, WA recorded the highest y-o-y growth in revenue (94.7%) and attendance (45.1%) among states and territories. The growth was primarily driven by the following categories:
  - Circus and Physical Theatre recorded a significant increase in revenue (4270.5%) and attendance (1369.0%). This growth was largely attributable to the return of *Cirque du Soleil's* national tour in 2023. Other top events included *Cosentino* and *Oracle.*
  - Children's/Family recorded significant growth of 329.9% in revenue, driven by a 101.9% in attendance and an increase in the average ticket price. Major events included *Disney on Ice*, The Wiggles and *Madagascar – The Musical.*
  - Comedy recorded a 172.4% increase in revenue and a 72.5% increase in attendance. Major events included performances by Dave Chappelle, Michael McIntyre and Kevin Hart.
  - Contemporary Music recorded a 103.1% increase in revenue and a 41.2% increase in attendance. Major events included performances by Coldplay, Ed Sheeran and Red Hot Chili Peppers.
  - Festivals (Multi-Category) recorded a 67.4% growth in revenue and a 35.9% increase in attendance. Similarly, Festivals (Contemporary Music) recorded a 100.9% increase in revenue and a 60.1% increase in attendance. Major festivals included Fringe World Festival, Perth Festival, Spilt Milk, Falls Fremantle and Listen Out Perth.
  - Musical Theatre recorded an 82.8% increase in revenue and a 36.6% increase in attendance.

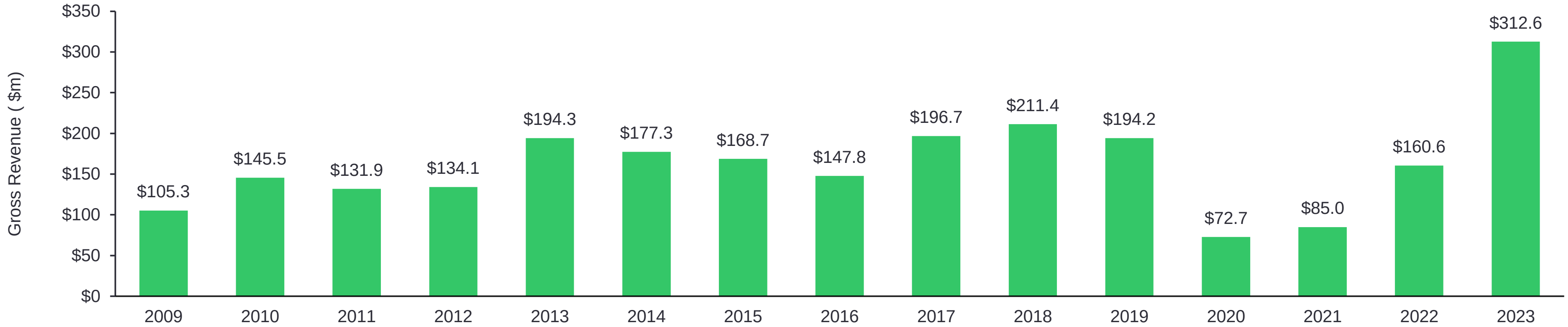
	Revenue		Attendance	
Year	Total Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$105,312,778	-	1,468,882	-
2010	$145,479,374	38.1%	1,879,408	27.9%
2011	$131,936,782	(9.3%)	1,788,262	(4.8%)
2012	$134,131,622	1.7%	1,791,795	0.2%
2013	$194,312,089	44.9%	2,153,483	20.2%
2014	$177,326,653	(8.7%)	2,266,435	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%)
2021	$84,984,114	16.8%	1,630,414	26.6%
2022	$160,568,169	88.9%	2,221,876	36.3%
2023	$312,624,434	94.7%	3,223,569	45.1%

** 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.*

WA Analysis

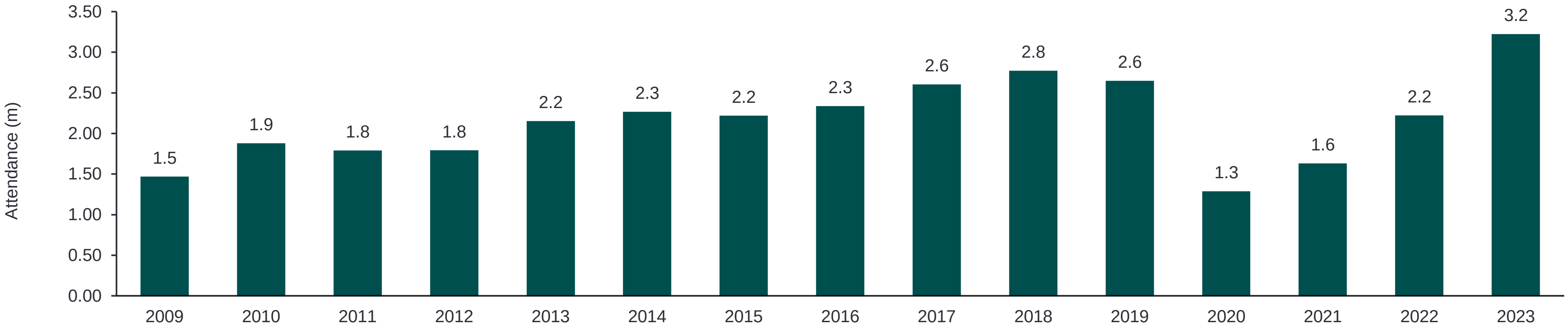
Revenue – WA

2009 → 2023



Attendance – WA

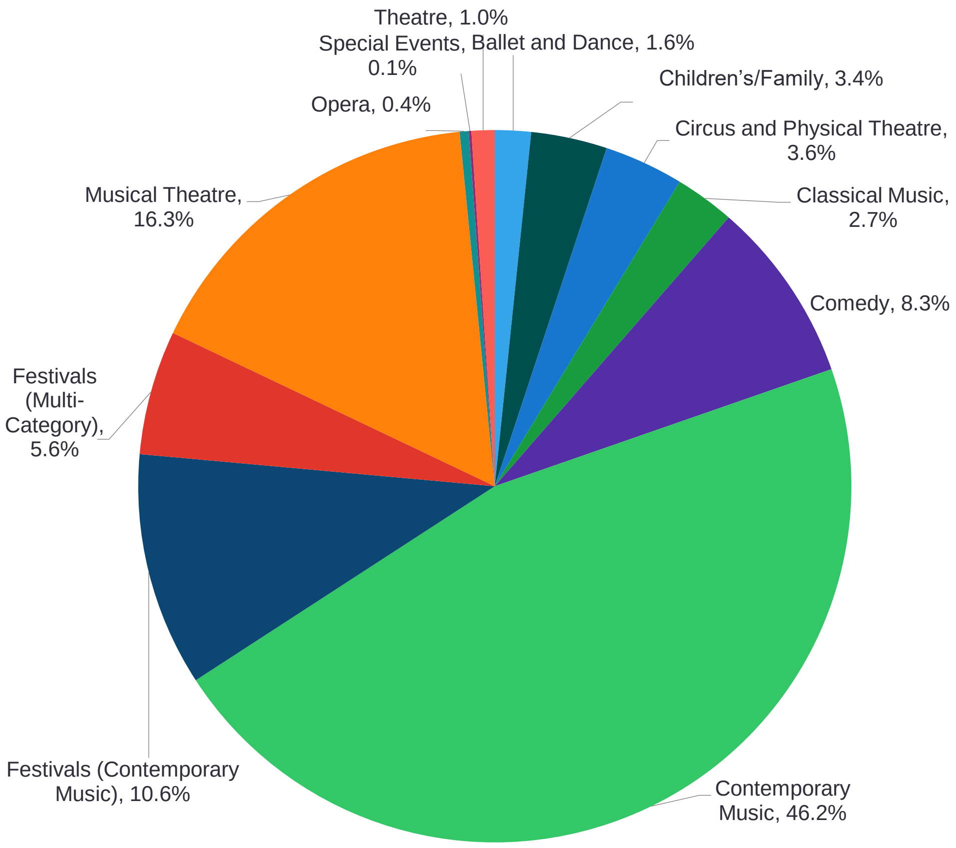
2009 → 2023



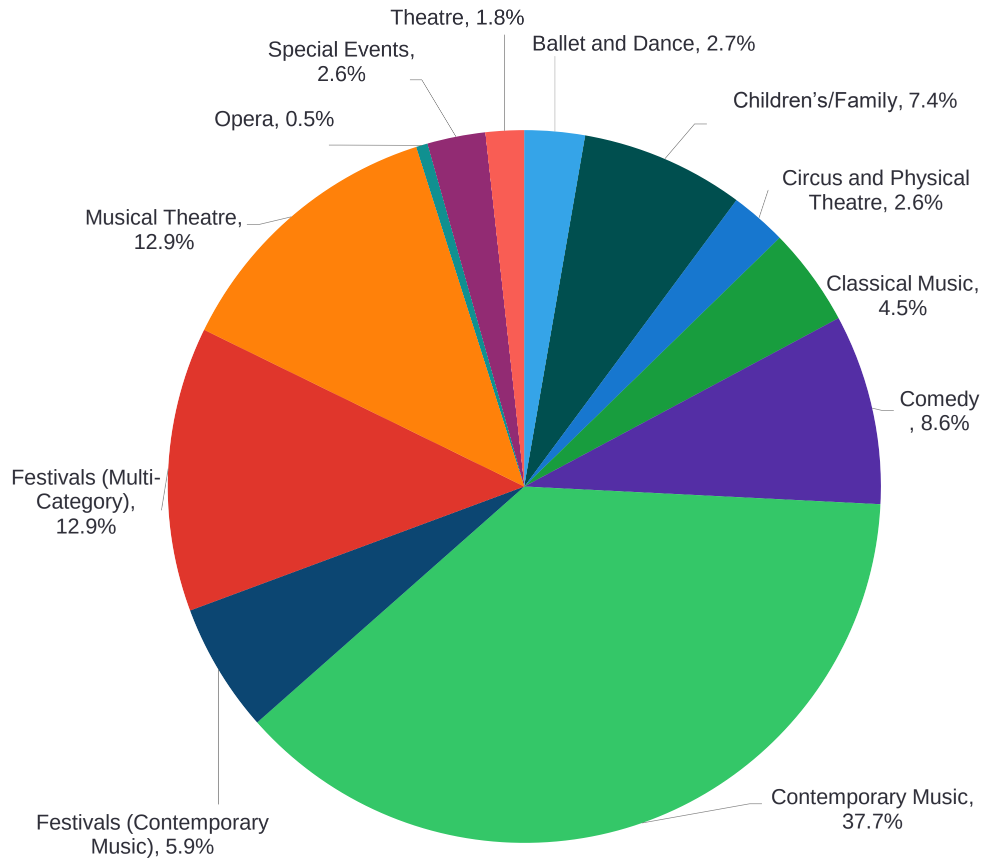
WA Analysis

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

WA Revenue by Category 2023



WA Attendance by Category 2023



SA Analysis

SA Revenue and Attendance

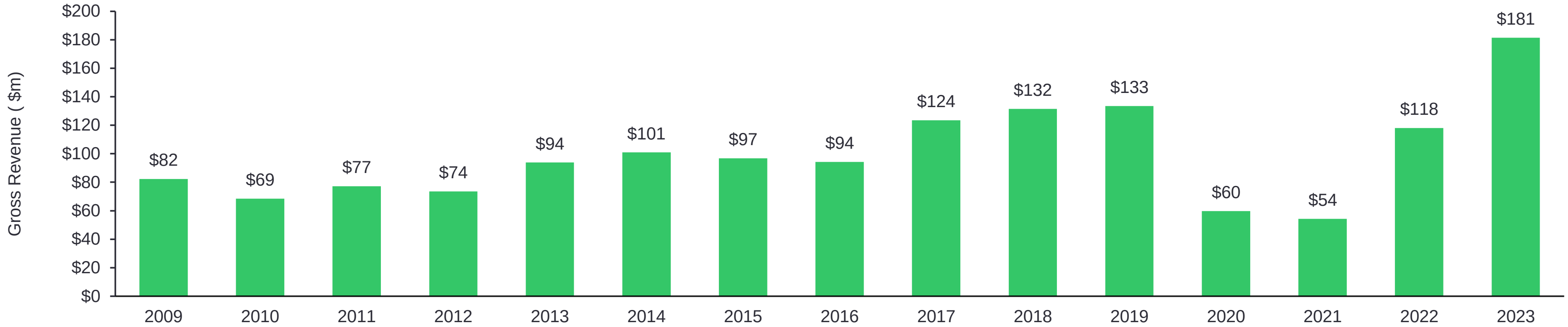
- In 2023, SA generated $181.5m in revenue and recorded 2.5m in attendance. This is the highest ever recorded revenue and attendance for the state, surpassing pre-pandemic levels.
- SA accounted for 5.8% of the industry's total revenue share and 8.3% of the industry's total attendance share in 2023.
- In 2023, SA spend per capita was $97.24. This was the fifth-highest among all states and territories in Australia but lower than the national average.
- Contemporary Music contributed the highest share of SA's total revenue (35.4%). Festivals (Multi-Category) contributed the highest share of SA's total attendance (42.6%).
- In 2023, SA recorded a y-o-y increase in revenue and attendance of 53.8% and 19.7% respectively. This growth was primarily driven by the following categories:
  - Circus and Physical Theatre recorded a significant increase in revenue (1954.7%) and attendance (570.3%). This growth was largely attributable to the return of *Cirque du Soleil's* national tour in 2023. Other top events included *Matador*, *Cosentino* and *Celtic Illusion*.
  - Theatre recorded a 144.2% increase in revenue and a 64.4% increase in attendance. Major events included *The Mousetrap, The Dictionary of Lost Words* and *The Goat or Who is Sylvia?.*
  - Children's/Family recorded a 90.0% increase in revenue and a 52.1% increase in attendance. Major events included *Disney on Ice, The Gruffalo's Child,* The Wiggles and *Storytime Ballet: The Sleeping Beauty.*
  - Opera recorded a 71.0% increase in revenue and a 45.1% increase in attendance. Major events included *Pirates of Penzance* and *The Marriage of Figaro.*
  - Contemporary Music recorded a 68.4% increase in revenue and an 11.9% increase in attendance. Major events included performances by Ed Sheeran, Foo Fighters and Paul McCartney.
  - Festivals (Contemporary Music) recorded a 65.7% increase in revenue and a 57.4% increase in attendance. Top festivals included WOMADelaide, Harvest Rock and Heaps Good.
- Special Events recorded a y-o-y decline in total revenue of 50.8%.

	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%)
2021	$54,221,032	(9.2%)	1,365,079	(2.0%)
2022	$117,992,021	117.6%	2,083,672	52.6%
2023	$181,482,228	53.8%	2,494,348	19.7%

SA Analysis

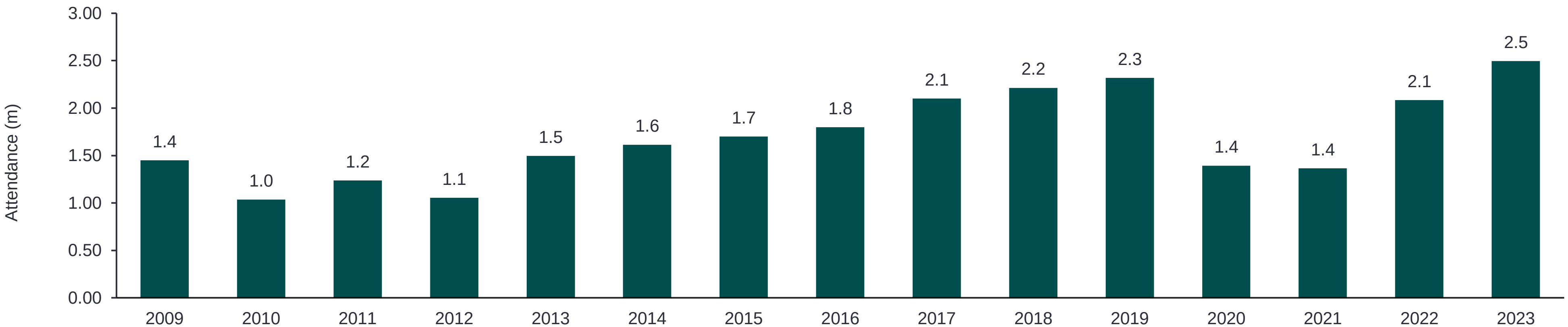
Revenue – SA

2009 → 2023



Attendance – SA

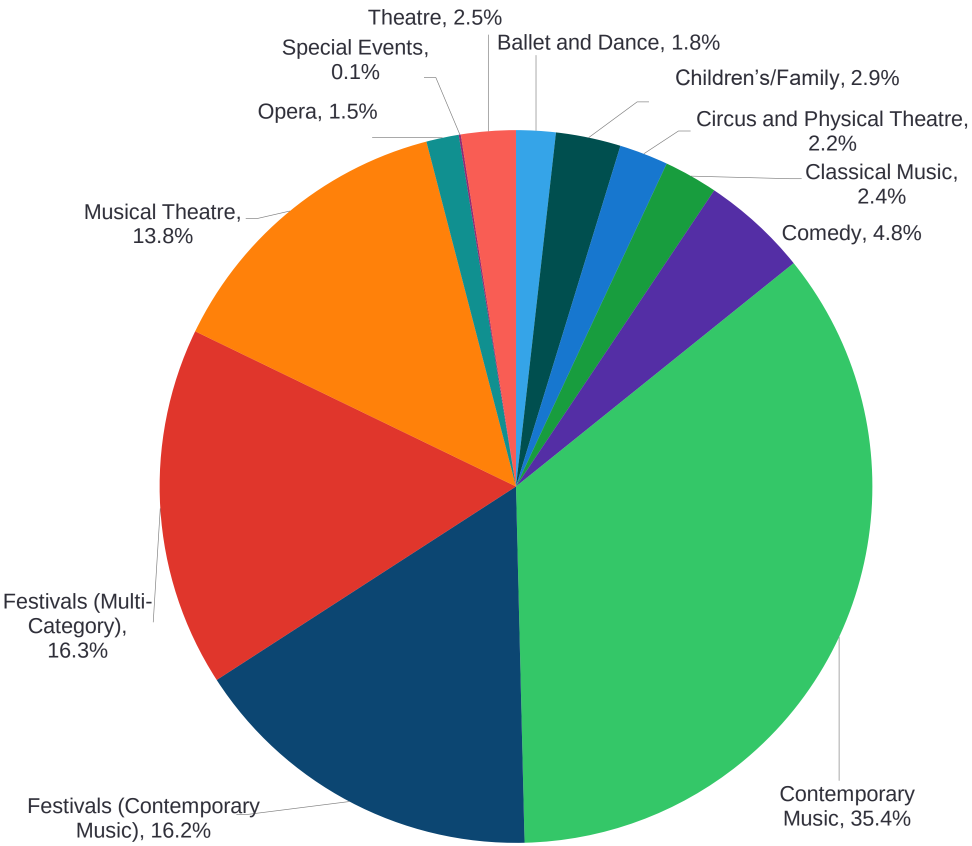
2009 → 2023



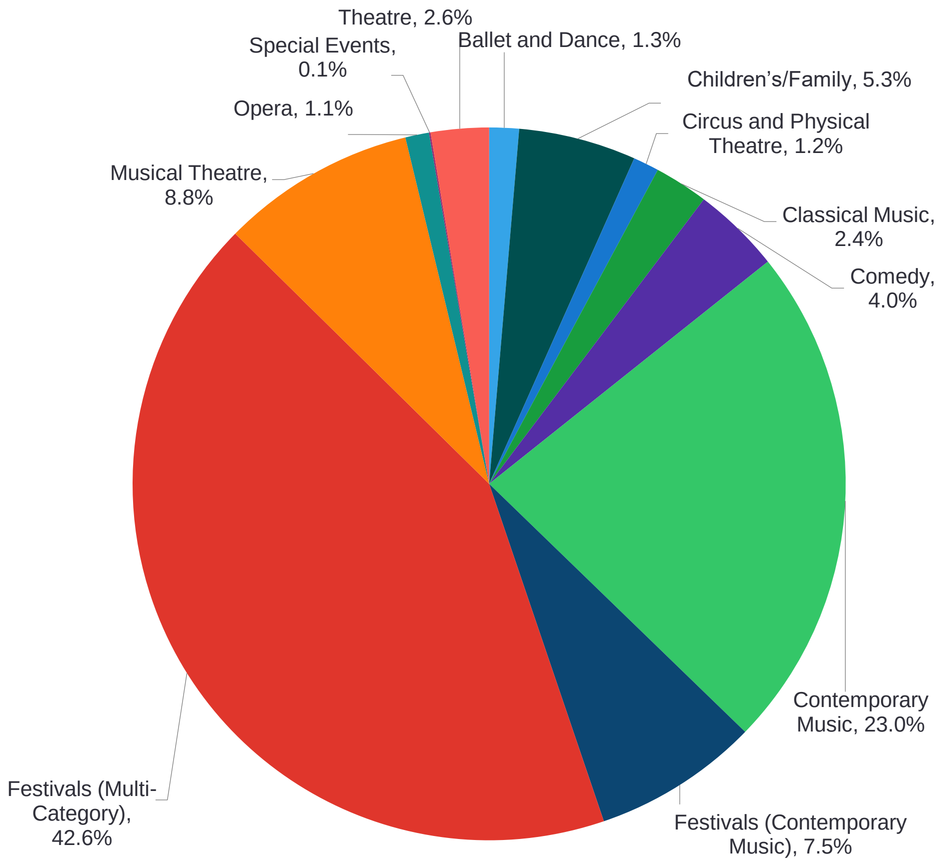
SA Analysis

Home
1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

SA Revenue by Category 2023



SA Attendance by Category 2023



ACT/TAS/NT Analysis

ACT/TAS/NT Revenue and Attendance

- In 2023, ACT/TAS/NT recorded a combined increase in revenue of 14.3% to $74.7m but a combined decrease in attendance by 4.0% to 1.0m.
- Together, ACT/TAS/NT contributed 2.4% of industry share of revenue and 3.4% of industry share of attendance in 2023. Festivals (Contemporary Music) was the highest contributor to the revenue (27.0%), whilst Festivals (Multi-Category) contributed the most to attendance (23.0%).
- In 2023, ACT recorded an 11.1% increase in revenue to $36.7m and a 2.7% decrease in attendance to 0.4m, with spend per capita of $78.09.
  - The growth in revenue was primarily driven by a y-o-y growth in revenue in the Circus and Physical Theatre, Festivals (Multi-Category), Theatre, and Children's/Family categories.
  - Top events included Spilt Milk Canberra, *Come From Away* and Groovin The Moo.
- TAS recorded a 15.1% y-o-y growth in revenue to $29.1m and a 7.4% decline in attendance to 0.5m, with per capita spend of $50.70 in 2023.
  - The growth in revenue was primarily driven by a y-o-y growth in Circus and Physical Theatre, Comedy, Musical Theatre and Festivals (Contemporary Music).
  - The decline in attendance was primarily driven by Children's/Family, Contemporary Music, Opera and Theatre.
  - Top events included Dark Mofo, Party in the Paddock and Mona Foma.
- NT recorded a 26.8% y-o-y growth in revenue (to $8.8m) and a 5.2% y-o-y growth in attendance (to 0.1m) in 2023.
  - NT had the lowest per capita spend of $34.67 in 2023.
  - The growth in revenue and attendance was primarily driven by Festivals (Multi-Category), Classical Music, Comedy and Festivals (Contemporary Music).
  - Top events included Darwin Festival, BASSINTHEGRASS Music Festival and the 2023 Red Hot Summer Tour.

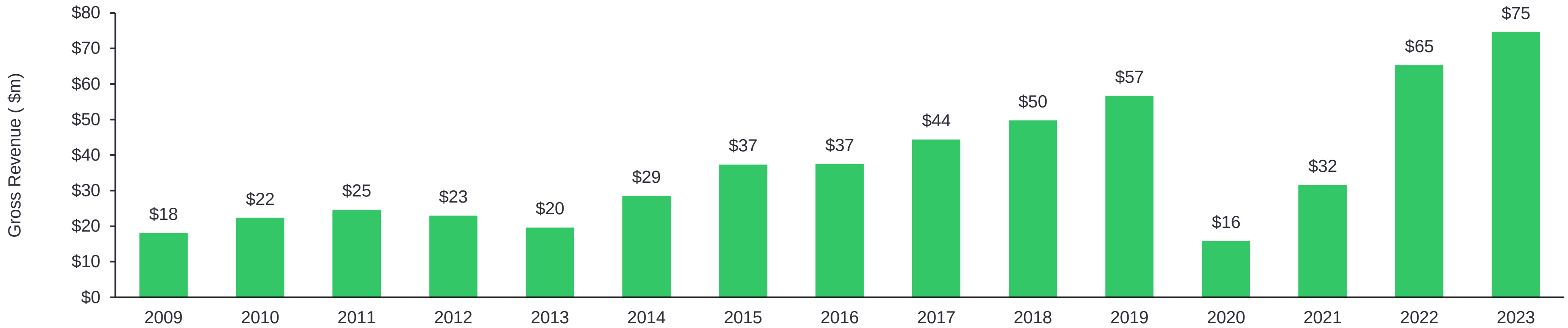
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$18,103,869	-	351,189	-
2010	$22,345,107	23.4%	460,793	31.2%
2011	$24,646,007	10.3%	478,993	3.9%
2012	$22,986,999	(6.7%)	413,160	(13.7%)
2013	$19,640,815	(14.6%)	484,343	17.2%
2014	$28,566,945	45.4%	542,736	12.1%
2015	$37,367,387	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%)
2021	$31,576,404	99.2%	688,119	120.4%
2022	$65,300,372	106.8%	1,071,839	55.8%
2023	$74,645,804	14.3%	1,028,595	(4.0%)

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

ACT/TAS/NT Analysis

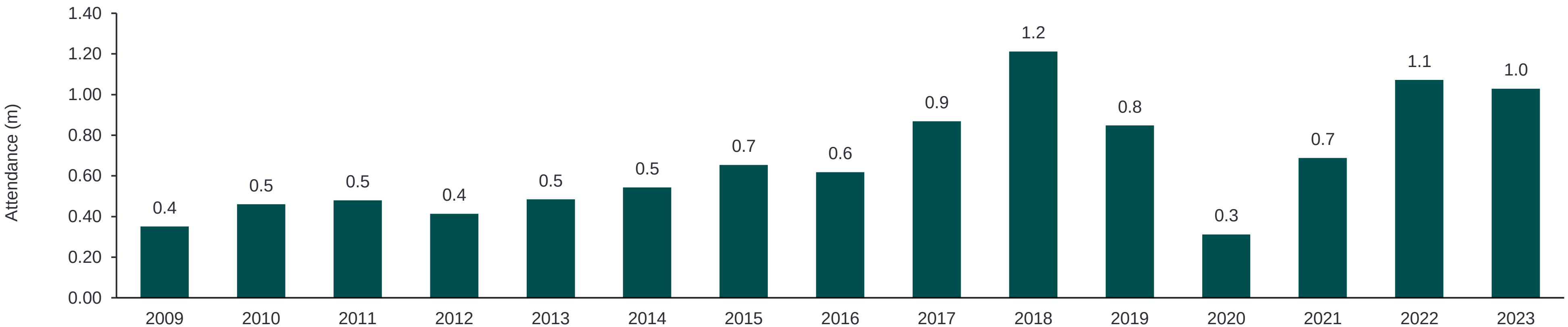
Revenue – ACT/TAS/NT

2009 → 2023



Attendance – ACT/TAS/NT

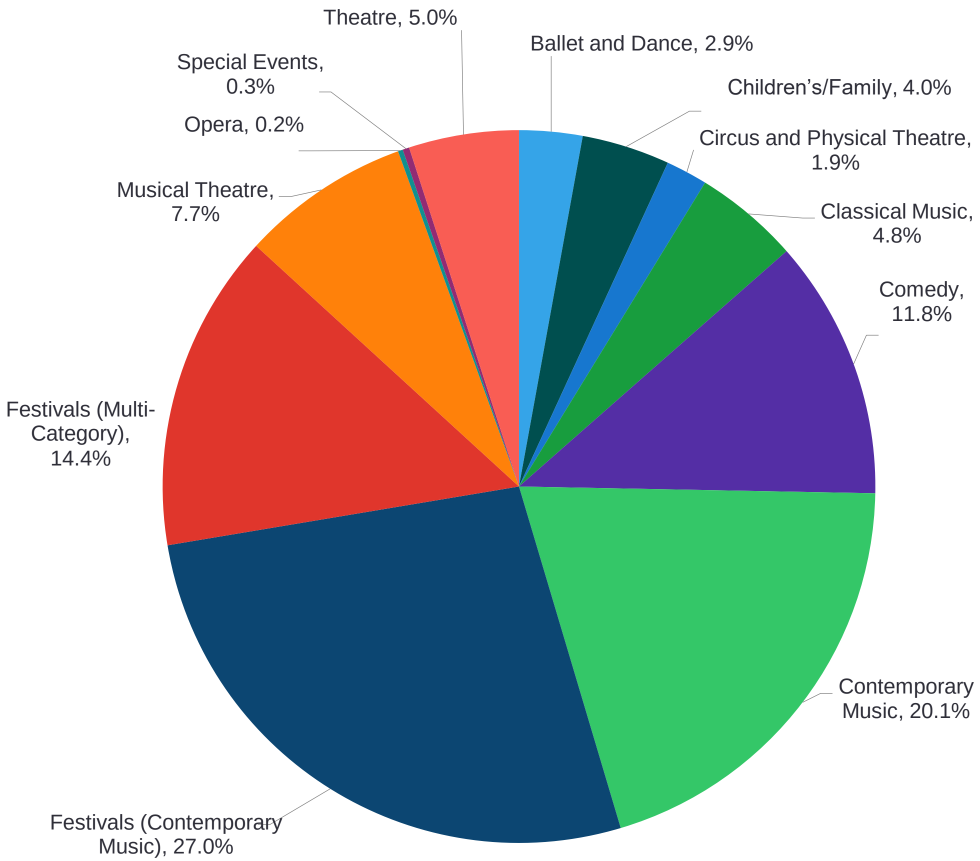
2009 → 2023



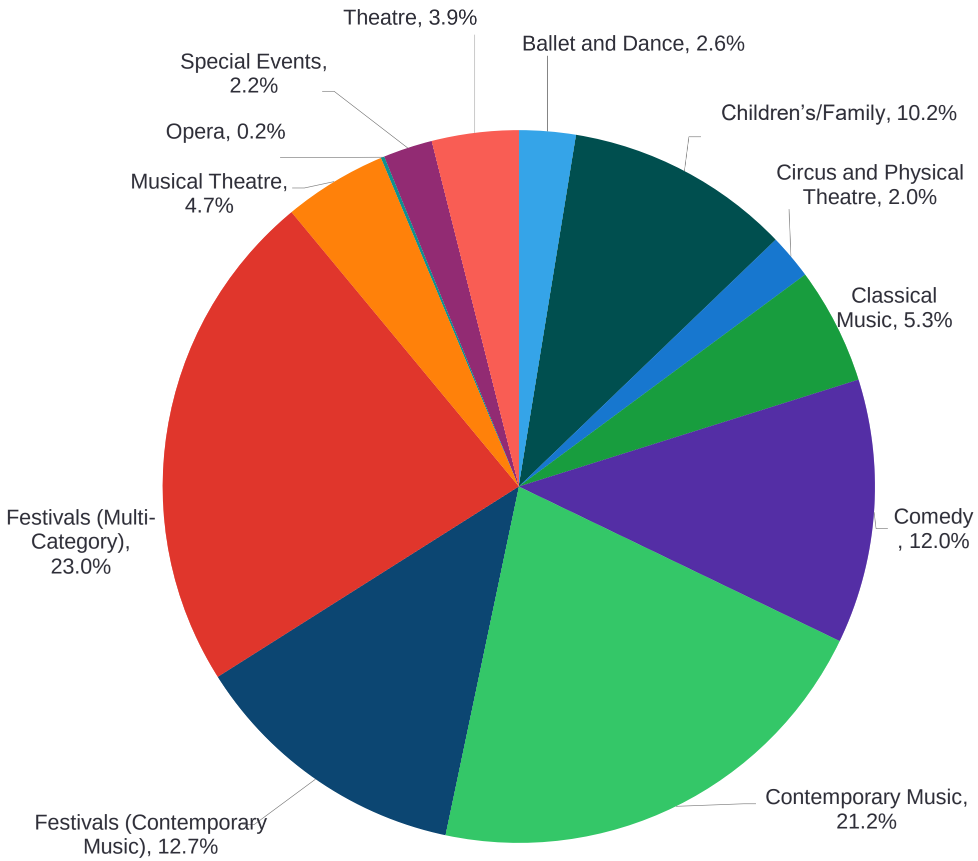
ACT/TAS/NT Analysis

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

ACT/TAS/NT Revenue by Category 2023



ACT/TAS/NT Attendance by Category 2023



5 Category Analysis

51 Total Revenue and Attendance by Category
54 Ballet and Dance
57 Children's/Family
60 Circus and Physical Theatre
63 Classical Music
66 Comedy
69 Contemporary Music
72 Festivals (Contemporary Music)
75 Festivals (Multi-Category)
78 Musical Theatre
81 Opera
84 Special Events
87 Theatre

Photo: *CosÌ Fan Tutte,* Opera Queensland
Photo Credit: Murray Summerville

Total Revenue and Attendance by Category

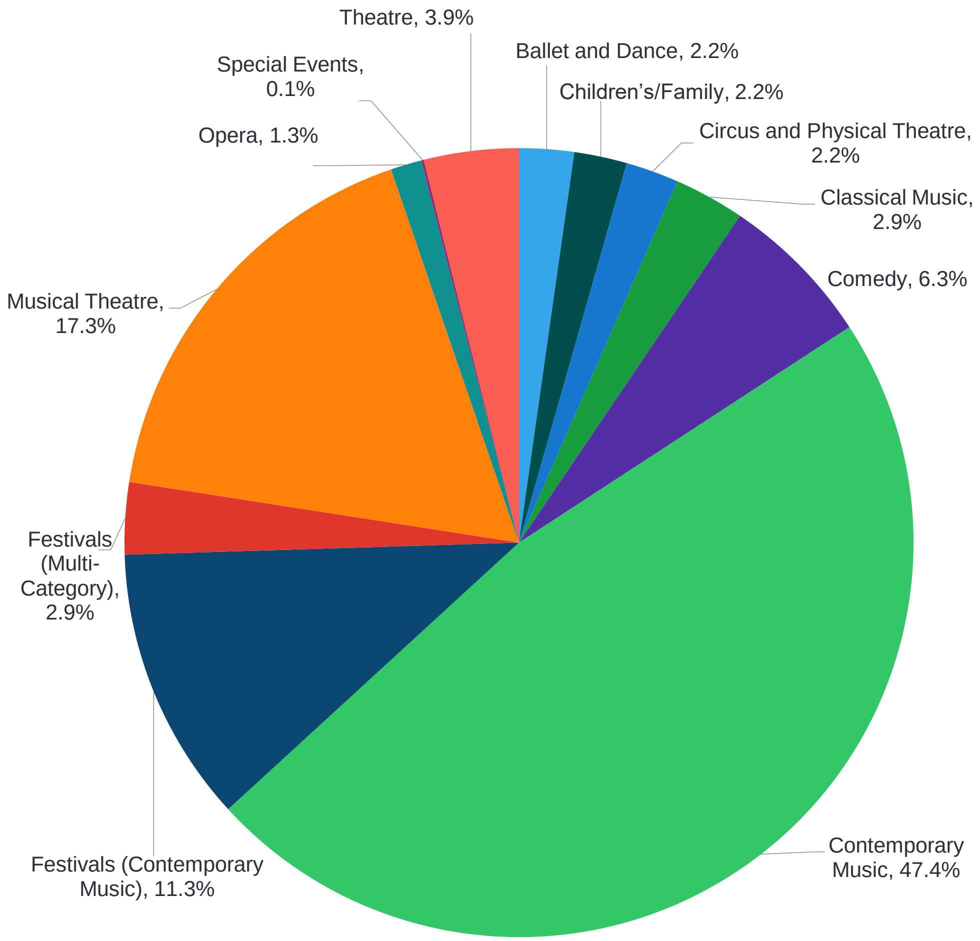
Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

Revenue and Attendance by Category 2023

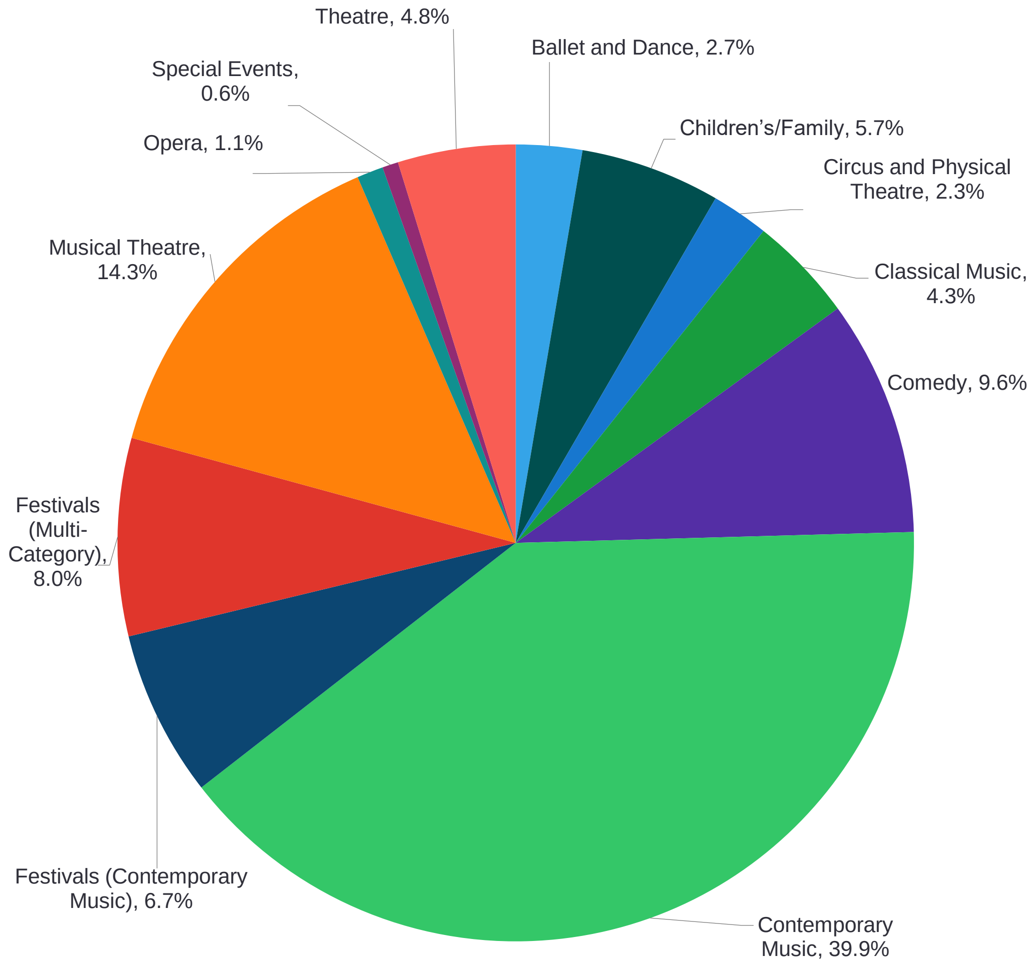
	Revenue			Attendance		
Category	Revenue	% Change in Revenue (from 2022)	Share of Industry	Tickets	% Change in Attendance (from 2022)	Share of Industry
Ballet and Dance	$70,364,624	11.1%	2.2%	808,177	9.1%	2.7%
Children's/Family	$67,819,564	41.1%	2.2%	1,709,300	14.9%	5.7%
Circus and Physical Theatre	$68,303,452	200.6%	2.2%	698,111	113.9%	2.3%
Classical Music	$90,366,251	1.6%	2.9%	1,293,241	10.0%	4.3%
Comedy	$198,785,138	72.9%	6.3%	2,879,792	35.0%	9.6%
Contemporary Music	$1,486,395,321	110.6%	47.4%	12,006,177	38.0%	39.9%
Festivals (Contemporary Music)	$355,083,125	51.5%	11.3%	2,030,130	32.1%	6.7%
Festivals (Multi-Category)	$92,422,087	31.8%	2.9%	2,411,385	13.5%	8.0%
Musical Theatre	$542,171,614	4.5%	17.3%	4,288,743	0.4%	14.3%
Opera	$39,944,472	68.8%	1.3%	321,477	42.6%	1.1%
Special Events	$3,158,726	(34.8%)	0.1%	194,708	36.2%	0.6%
Theatre	$121,774,292	9.3%	3.9%	1,437,787	5.4%	4.8%
Total	**$3,136,588,666**	**56.3%**	**100.0%**	**30,079,028**	**24.2%**	**100.0%**

Total Revenue and Attendance by Category

Revenue by Category 2023

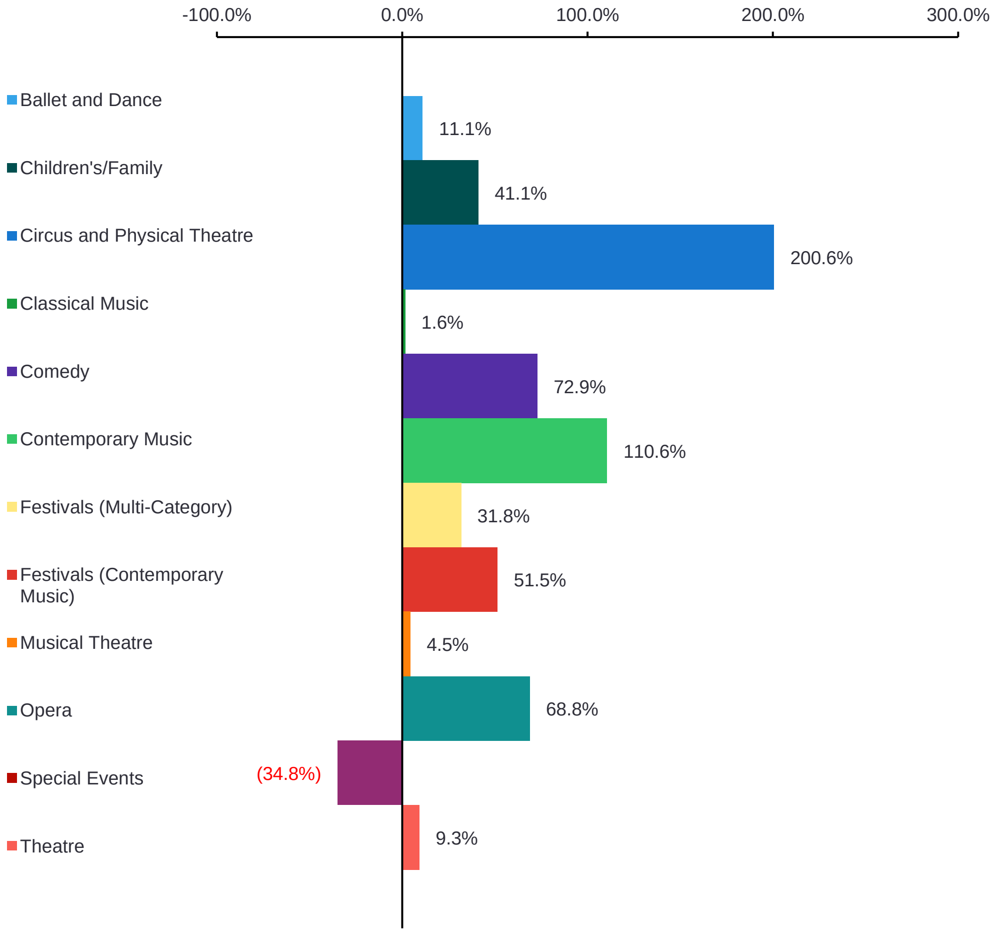


Attendance by Category 2023

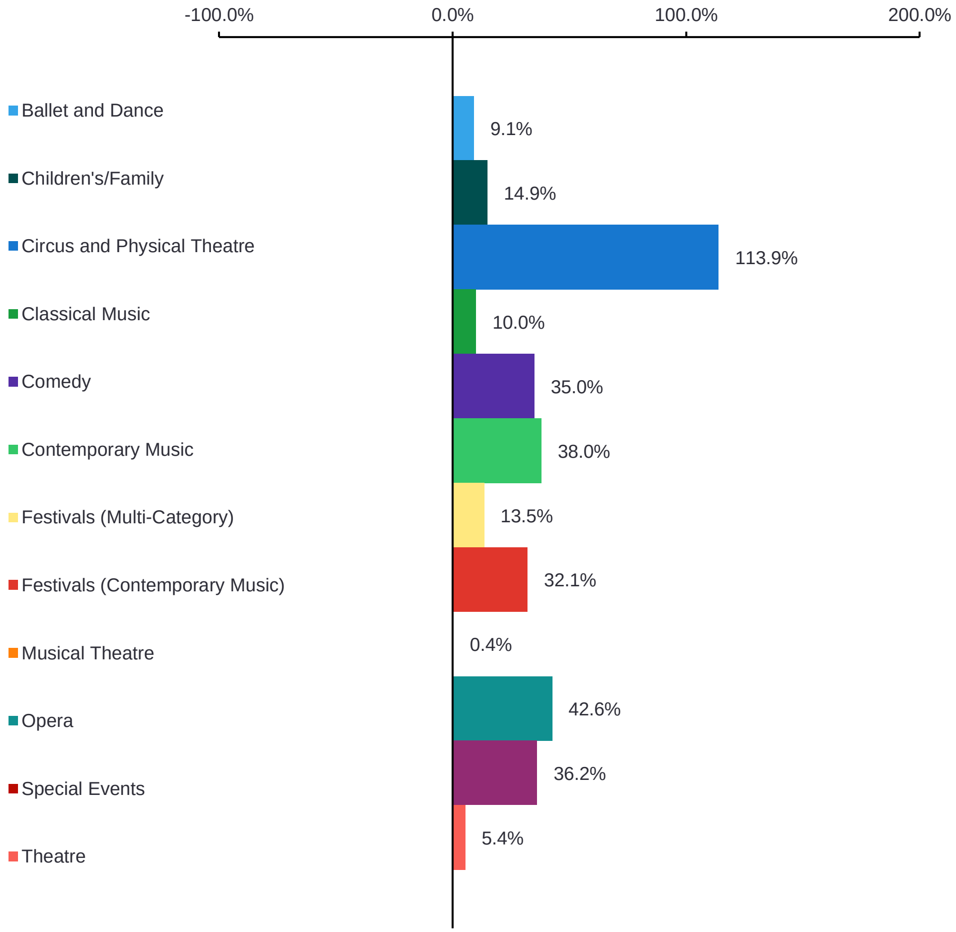


Total Revenue and Attendance by Category

Percentage Movement in Revenue by Category 2022 → 23



Percentage Movement in Attendance by Category 2022 → 23



Ballet and Dance

National Overview

- In 2023, Ballet and Dance recorded $70.4m in revenue and over 808,000 attendances, surpassing pre-pandemic levels. This was the second-highest revenue recorded for this category (with the highest revenue recorded in 2007).
- Ballet and Dance recorded a y-o-y growth in revenue by 11.1% (from $63.3m in 2022 to $70.4m in 2023) and a y-o-y growth in attendance by 9.1% (from 0.7m in 2022 to 0.8m in 2023). An increase in the average ticket price by 6.5% y-o-y (from $94.86 in 2022 to $101.03 in 2023) also contributed to the growth in revenue.
- The revenue in Ballet and Dance was primarily driven by major performances such as *Swan Lake*, *Don Quixote*, *The Dream / Marguerite and Armand* and *Shen Yun*.
- In 2023, 68.2% of revenue and 59.3% of attendance in Ballet and Dance was generated through performances by NPAP companies, such as The Australian Ballet, Sydney Dance Company, Bangarra Dance Theatre, Queensland Ballet and West Australian Ballet. NPAP Ballet and Dance category companies recorded an increase in revenue by 10.3% and attendance by 4.0% in 2023 compared to 2022.
- In 2023, NSW and VIC generated the most revenue and attendance in this category. NSW and VIC held a national market share of approximately 39.9% and 28.4% respectively in revenue and 35.1% and 27.1% respectively in attendance. These two states together generated 68.3% of national Ballet and Dance revenue and 62.2% attendance in 2023.
- In 2023, all states and territories except VIC, WA and NT showed a y-o-y growth in revenue and all states and territories except WA, SA and NT showed a y-o-y growth in attendance.
- QLD recorded the highest y-o-y growth in revenue (44.7%) and in attendance (56.6%) in Ballet and Dance, driven by performances such as *Strictly Gershwin*, *The Nutcracker*, *Swan Lake* and *Giselle*.
- TAS recorded the second-highest y-o-y growth in revenue (43.6%) and attendance (16.0%). The growth in revenue was driven by major performances including *Sleeping Beauty* and *Forest Song & Don Quixote*.
- SA recorded the third-highest y-o-y growth in revenue (34.0%), despite a y-o-y decline in attendance (29.6%). The growth in revenue was driven by performances such as *Swan Lake, Shen Yun* and *The Nutcracker*.

Revenue and Attendance 2009 → 2023

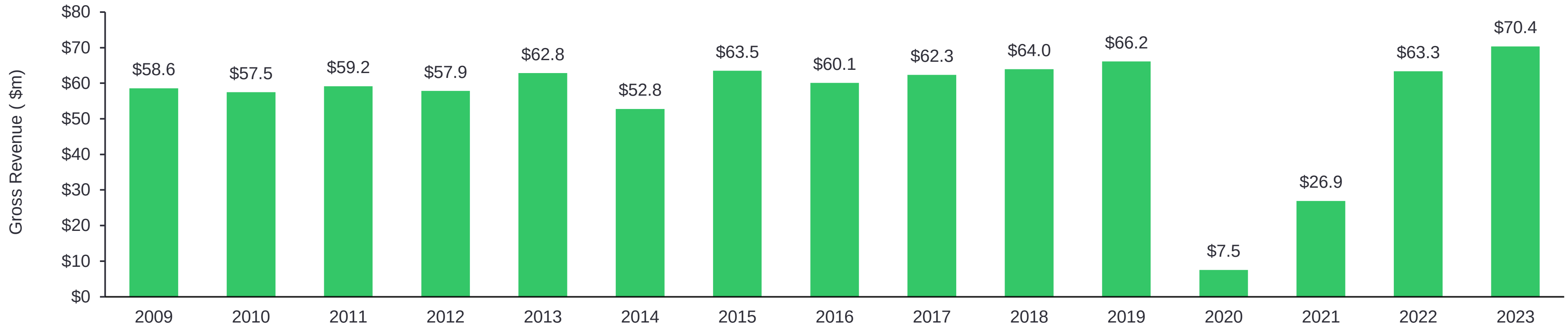
	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2009	$58,570,704	24.5%	1,050,763	12.4%	$63.33	4.4%
2010	$57,509,401	(1.8%)	1,023,077	(2.6%)	$64.86	2.4%
2011	$59,164,135	2.9%	947,846	(7.4%)	$71.93	10.9%
2012	$57,865,897	(2.2%)	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%)
2021	$26,942,483	257.6%	363,505	164.6%	$86.08	44.3%
2022	$63,343,674	135.1%	740,572	103.7%	$94.86	10.2%
2023	$70,364,624	11.1%	808,177	9.1%	$101.03	6.5%

Ballet and Dance

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

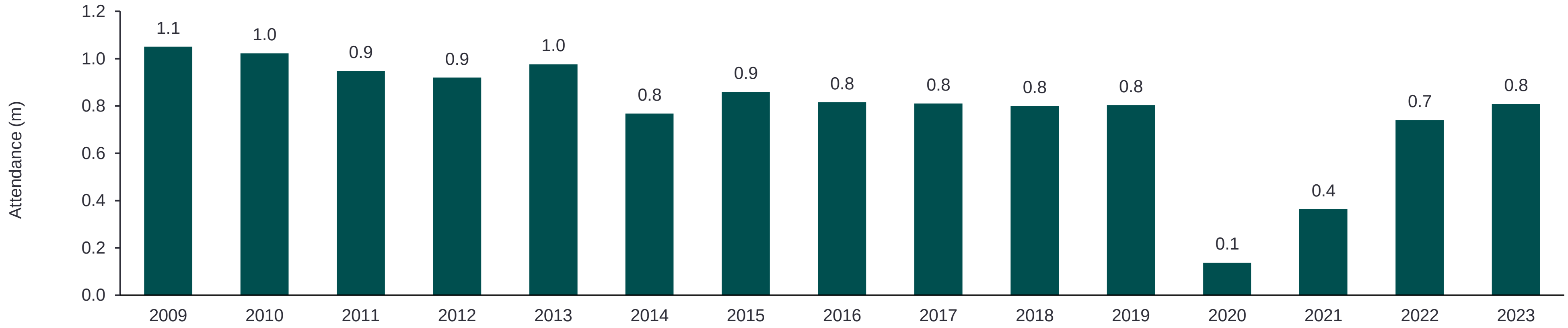
Ballet and Dance – Revenue

2009 → 2023



Ballet and Dance – Total Attendance

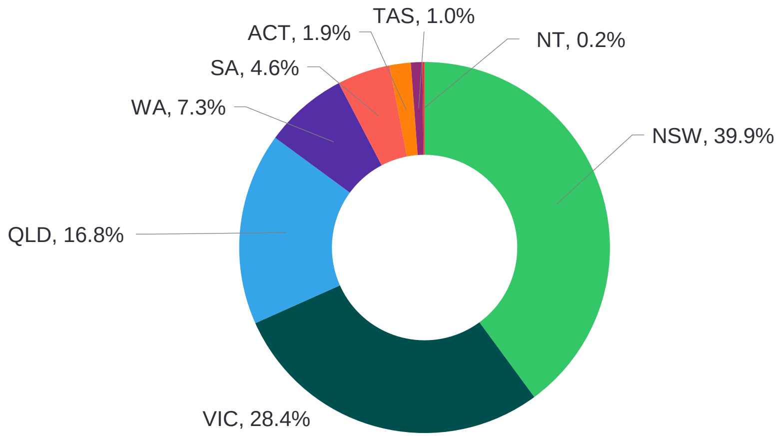
2009 → 2023



Ballet and Dance

Revenue by State/Territory

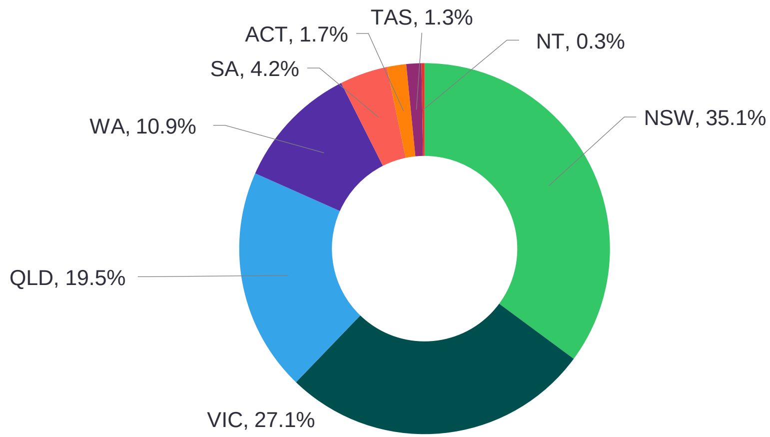
2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$28,090,419	39.9%	0.2%
VIC	$19,979,603	28.4%	(3.3%)
QLD	$11,796,109	16.8%	3.9%
WA	$5,107,772	7.3%	(1.6%)
SA	$3,250,797	4.6%	0.8%
ACT	$1,304,539	1.9%	0.3%
TAS	$703,309	1.0%	0.2%
NT	$132,076	0.2%	(0.4%)
Total	**$70,364,624**	**100.0%**	

Attendance by State/Territory

2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	283,830	35.1%	1.8%
VIC	218,881	27.1%	(1.5%)
QLD	157,191	19.5%	5.9%
WA	88,236	10.9%	(3.0%)
SA	33,559	4.2%	(2.3%)
ACT	13,715	1.7%	(0.1%)
TAS	10,581	1.3%	0.1%
NT	2,184	0.3%	(1.0%)
Total	**808,177**	**100.0%**	

Children's/Family

National Overview

- Children's/Family recorded $67.8m in revenue and over 1.7m attendances. These results are the highest ever recorded for this category.
- Children's/Family recorded a y-o-y growth in revenue by 41.1% (from $48.1m in 2022 to $67.8m in 2023) and a y-o-y growth in attendance by 14.9% (from 1.5m in 2022 to 1.7m in 2023).
- An increase in the average ticket price by 22.1% y-o-y (from $35.05 in 2022 to $42.79 in 2023) also contributed to the growth in revenue.
- The revenue in this category was primarily driven by events such as *Disney on Ice*, *Madagascar – The Musical*, The Wiggles and *Storytime Ballet: Cinderella*.
- In 2023, NSW and VIC together generated the most revenue and attendance in this category, with a national market share of approximately 31.0% and 26.5% respectively in revenue and 32.9% and 23.7% respectively in attendance. These two states combined generated 57.5% of national Children's/Family category revenue and 56.6% of attendance in 2023.
- In 2023, TAS recorded a y-o-y decline in revenue and attendance, while NT recorded a y-o-y decline in revenue in this category.
- WA recorded the highest y-o-y growth in revenue (329.9%) and attendance (101.9%). The growth in revenue was driven by major performances such as *Disney on Ice, Madagascar – The Musical* and The Wiggles.
- SA recorded the second-highest y-o-y growth in revenue (90.0%) and attendance (52.1%), driven by major performances such as *Disney on Ice*, *The Gruffalo's Child* and The Wiggles.
- ACT recorded the third-highest y-o-y growth in revenue (76.0%) and attendance (35.3%). The growth in revenue was driven by major performances such as The Wiggles and *Storytime Ballet: Cinderella*.

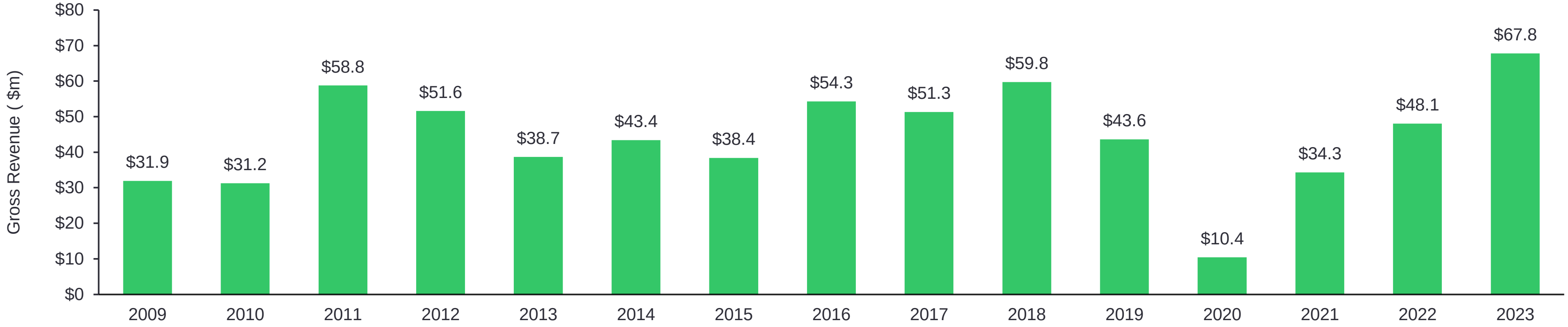
Revenue and Attendance 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%)
2021	$34,298,281	229.9%	1,050,643	177.9%	$36.10	19.0%
2022	$48,054,479	40.1%	1,487,898	41.6%	$35.05	(2.9%)
2023	$67,819,564	41.1%	1,709,300	14.9%	$42.79	22.1%

Children's/Family

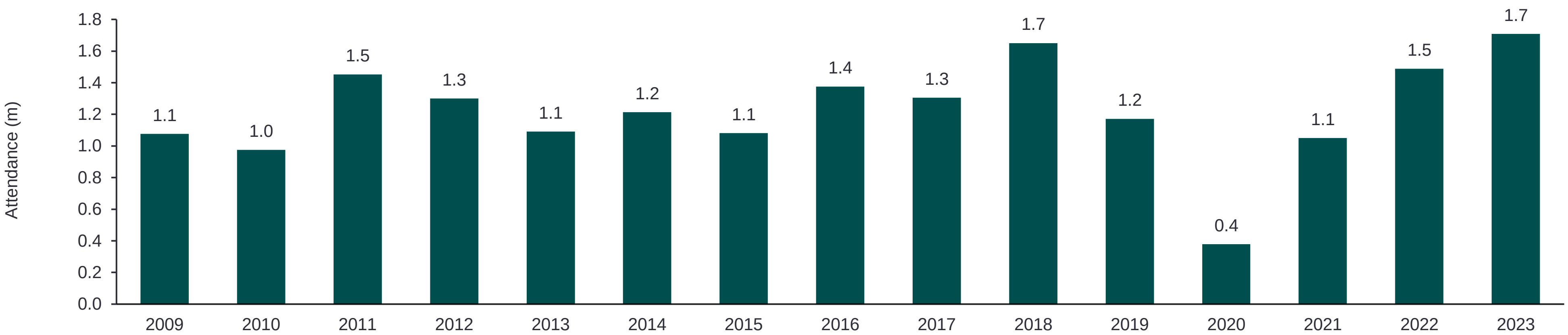
Children's/Family – Revenue

2009 → 2023



Children's/Family – Total Attendance

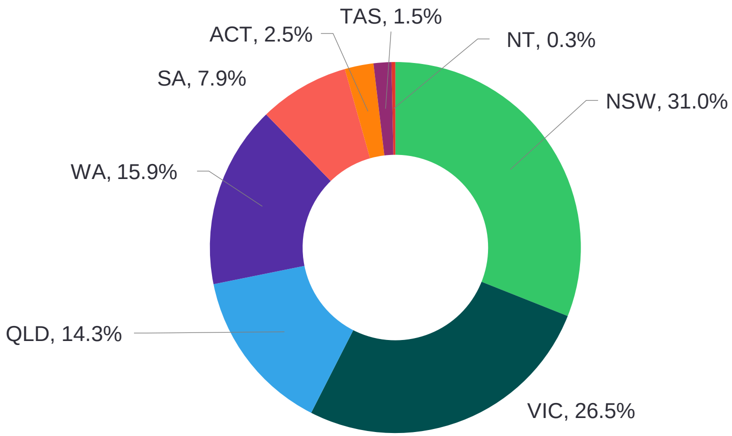
2009 → 2023



Children's/Family

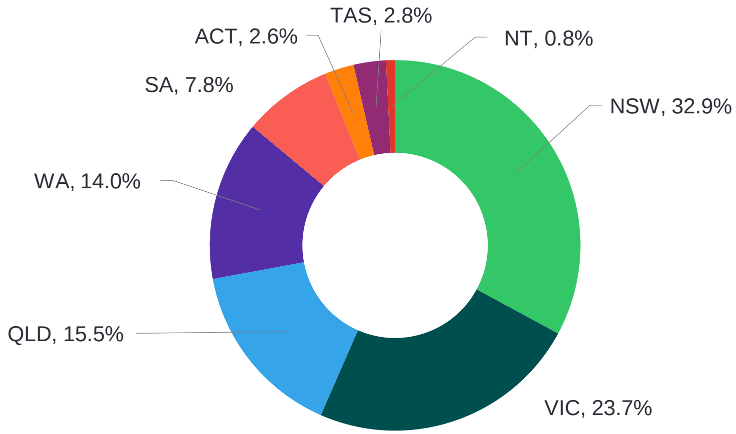
Home 1 Executive Summary 7 Appendices
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers

Revenue by State/Territory 2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$21,038,468	31.0%	(6.7%)
VIC	$17,957,024	26.5%	(0.1%)
QLD	$9,721,512	14.3%	(3.8%)
WA	$10,782,369	15.9%	10.7%
SA	$5,340,930	7.9%	2.0%
ACT	$1,700,384	2.5%	0.5%
TAS	$1,049,632	1.5%	(2.5%)
NT	$229,246	0.3%	(0.2%)
Total	$67,819,564	100.0%	

Attendance by State/Territory 2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	562,204	32.9%	(3.6%)
VIC	404,594	23.7%	(3.0%)
QLD	265,549	15.5%	(0.5%)
WA	238,714	14.0%	6.0%
SA	132,850	7.8%	1.9%
ACT	43,806	2.6%	0.4%
TAS	48,047	2.8%	(1.3%)
NT	13,536	0.8%	0.1%
Total	**1,709,300**	100.0%	

Circus and Physical Theatre

National Overview

- In 2023, Circus and Physical Theatre recorded $68.3m in revenue and almost 0.7m attendances. These results surpassed pre-pandemic levels but were still lower than the peak levels recorded between 2013 and 2017 in this category.
- In 2023, Circus and Physical Theatre recorded the highest y-o-y growth in revenue by 200.6% (from $22.7m in 2022 to $68.3m in 2023) and attendance by 113.9% (from 0.3m in 2022 to 0.7m in 2023).
- The y-o-y growth in average ticket price by 32.7% (from $77.15 in 2022 to $102.34 in 2023) also contributed to the growth in revenue.
- Circus and Physical Theatre contributed 2.2% to the total industry share of revenue and 2.3% of total attendance in 2023.
- 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*.
- The significant growth in this category was primarily driven by the return of *Cirque du Soleil's* national tour in 2023. Other top events included *Circus 1903*, *Velvet Rewired*, *The Mirror* and *Cosentino*.
- In 2023, NSW, VIC, and QLD together generated the most revenue and attendance in this category. They represented a national market share of approximately 32.1%, 22.0%, and 21.5% in revenue, and 32.6%, 25.3%, and 23.2% in attendance respectively. These three states combined generated 75.6% of national Circus and Physical Theatre category revenue and 81.0% of attendance in 2023.
- In 2023, WA and SA recorded the highest and second-highest y-o-y increases in revenue and attendance respectively. Top events in WA and SA included *Cirque du Soleil, Cosentino* and *Matador*.
- NSW recorded the third-highest y-o-y increase in both revenue and attendance, driven by performances such as *Cirque du Soleil, Circus 1903, Velvet Rewired* and *The Mirror.*
- VIC recorded a significant y-o-y increase in revenue and attendance, driven by performances such as *Cirque du Soleil, Oracle* and *Cosentino.*

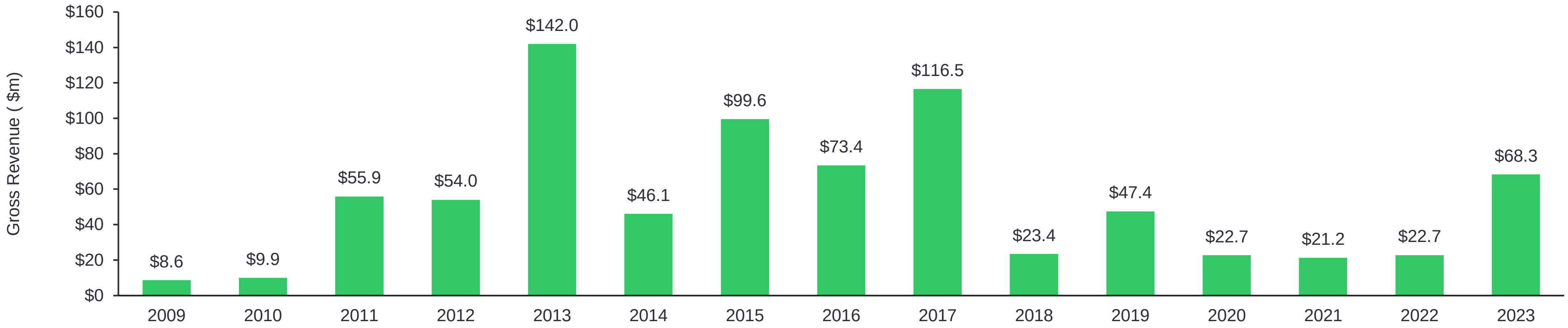
Revenue and Attendance — 2009 → 2023

	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%
2021	$21,220,702	(6.5%)	272,413	(0.9%)	$85.78	(4.1%)
2022	$22,723,700	7.1%	326,315	19.8%	$77.15	(10.1%)
2023	$68,303,452	200.6%	698,111	113.9%	$102.34	32.7%

Circus and Physical Theatre

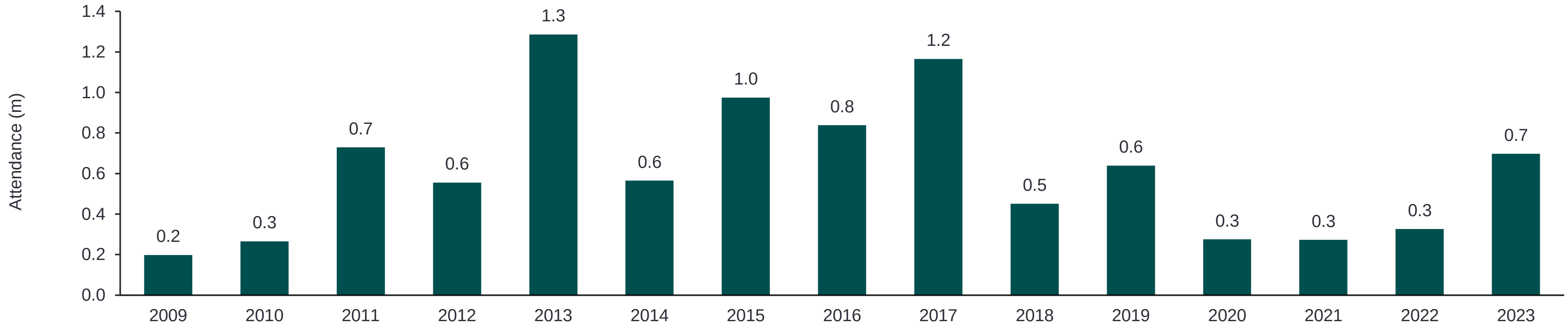
Circus and Physical Theatre – Revenue

2009 → 2023



Circus and Physical Theatre – Total Attendance

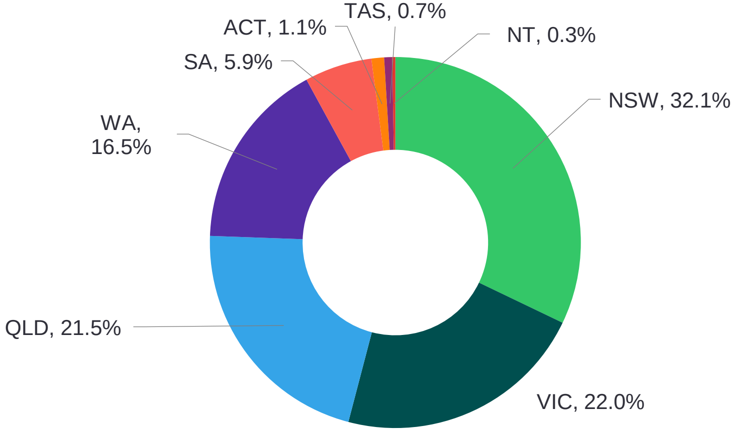
2009 → 2023



Circus and Physical Theatre

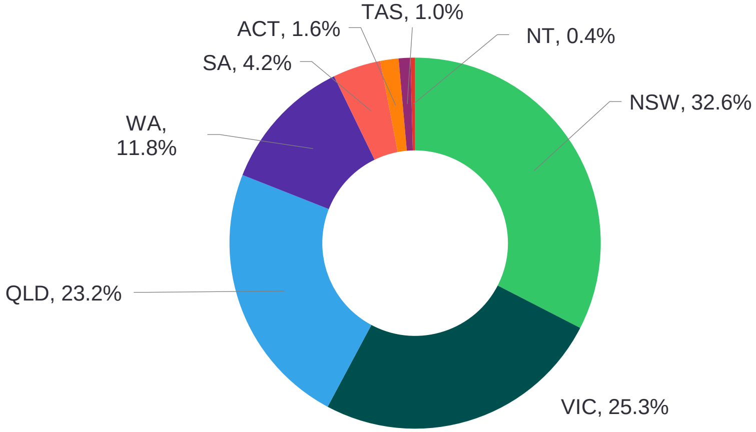
Home 1 Executive Summary 7 Appendices
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers

Revenue by State/Territory 2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$21,938,118	32.1%	10.3%
VIC	$14,999,080	22.0%	(1.9%)
QLD	$14,680,820	21.5%	(24.7%)
WA	$11,253,564	16.5%	15.3%
SA	$4,022,239	5.9%	5.0%
ACT	$748,071	1.1%	(0.6%)
TAS	$477,266	0.7%	(0.1%)
NT	$184,295	0.3%	(3.3%)
Total	**$68,303,452**	**100.0%**	

Attendance by State/Territory 2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	227,270	32.6%	11.3%
VIC	176,324	25.3%	1.4%
QLD	161,786	23.2%	(22.4%)
WA	82,515	11.8%	10.1%
SA	29,205	4.2%	2.8%
ACT	11,067	1.6%	(0.3%)
TAS	7,139	1.0%	(0.4%)
NT	2,805	0.4%	(2.6%)
Total	**698,111**	**100.0%**	

Classical Music

National Overview

- Classical Music generated $90.4m in revenue and 1.3m attendances. The revenue result is the highest recorded for this category in the past fifteen years, however the attendance result has not quite returned to pre-pandemic levels.
- Classical Music recorded a y-o-y increase in revenue by 1.6% (from $88.9m in 2022 to $90.4m in 2023) and a y-o-y increase in attendance by 10.0% (from 1.2m in 2022 to 1.3m in 2023). The growth in revenue was partially offset by the y-o-y decline in average ticket price by 8.2% (from $92.41 in 2022 to $84.79 in 2023).
- The revenue in this category was primarily driven by events such as *Star Wars: Empire Strikes Back*, *Harry Potter and the Deathly Hallows: Part 2* and performances by the London Symphony Orchestra and Jazz at Lincoln Center Orchestra.
- Similar to previous years, performances by NPAP companies contributed significantly to the revenue (65.4%) and attendance (66.3%) in this category in 2023. NPAP companies include Adelaide Symphony Orchestra, Australian Brandenburg Orchestra, Australian Chamber Orchestra, Melbourne Symphony Orchestra, Musica Viva Australia, Orchestra Victoria, Queensland Symphony Orchestra, Sydney Symphony Orchestra, Tasmanian Symphony Orchestra and West Australian Symphony Orchestra.
- In 2023, NSW and VIC generated the most revenue and attendance in this category, with a national market share of approximately 41.4% and 30.4% respectively in revenue and 36.2% and 34.8% respectively in attendance. These two states combined generated 71.8% of the overall revenue and 70.9% of the overall attendance in this category.
- Top events in NSW and VIC included performances by the London Symphony Orchestra, Jazz at Lincoln Center Orchestra and events such as *Harry Potter and the Deathly Hallows in Concert:* Parts 1 and 2 and *Disney 100: The Concert*.
- In 2023, all states and territories except for QLD, WA and SA recorded y-o-y growth in revenue. Further, all states and territories except for QLD, WA, SA and ACT recorded y-o-y growth in attendance in this category.
- NT recorded the highest y-o-y growth in both revenue (137.4%) and attendance (104.7%) in 2023. However, its impact remains minimal, as it contributes the least to the Classical Music category, accounting for only 0.2% of revenue and 0.3% of attendance.

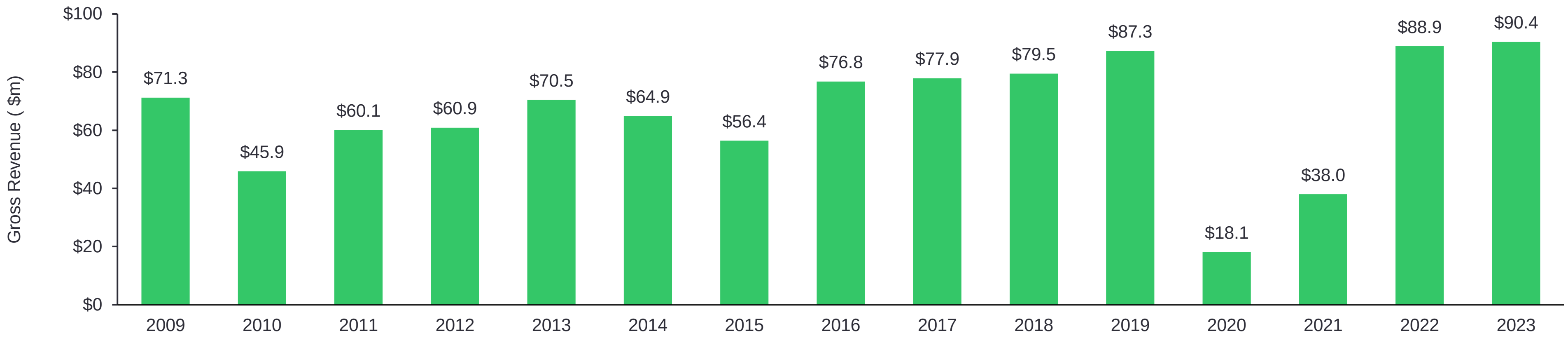
Revenue and Attendance — 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%
2021	$37,973,064	109.7%	595,349	105.4%	$76.26	(6.7%)
2022	$88,922,485	134.2%	1,175,646	97.5%	$92.41	21.2%
2023	$90,366,251	1.6%	1,293,241	10.0%	$84.79	(8.2%)

Classical Music

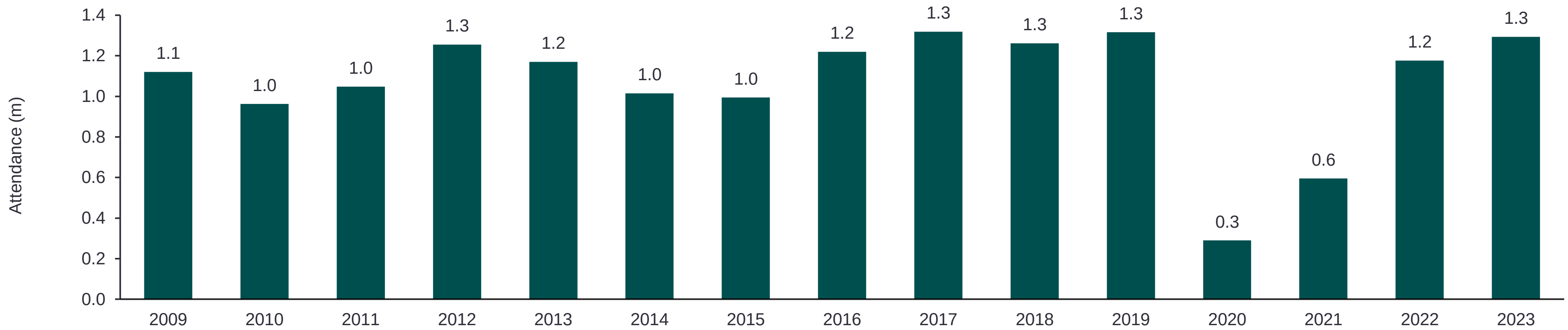
Classical Music – Revenue

2009 → 2023



Classical Music – Total Attendance

2009 → 2023

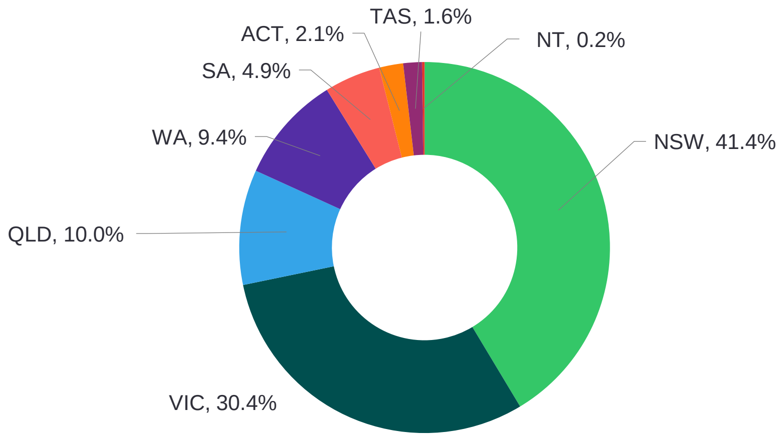


Classical Music

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

Revenue by State/Territory

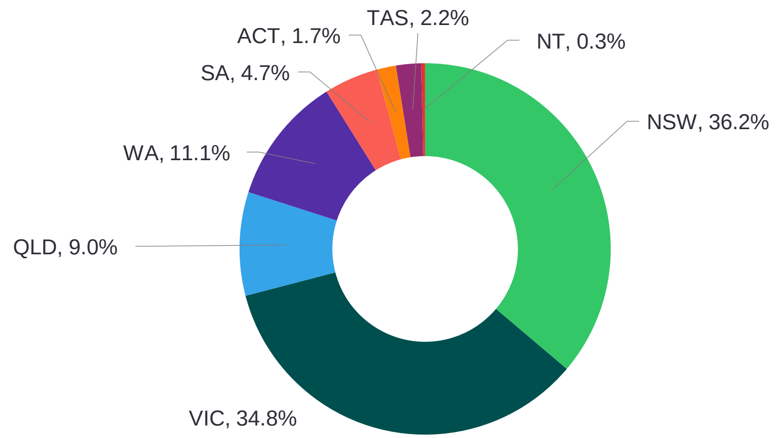
2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$37,394,560	41.4%	4.0%
VIC	$27,451,096	30.4%	3.5%
QLD	$9,066,535	10.0%	(3.3%)
WA	$8,467,385	9.4%	(4.7%)
SA	$4,424,763	4.9%	(0.1%)
ACT	$1,889,884	2.1%	0.1%
TAS	$1,476,401	1.6%	0.3%
NT	$195,626	0.2%	0.1%
Total	**$90,366,251**	**100.0%**	

Attendance by State/Territory

2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	467,920	36.2%	5.6%
VIC	449,488	34.8%	2.9%
QLD	116,533	9.0%	(4.0%)
WA	143,972	11.1%	(3.5%)
SA	60,933	4.7%	(1.0%)
ACT	21,789	1.7%	(0.2%)
TAS	28,322	2.2%	0.1%
NT	4,284	0.3%	0.2%
Total	**1,293,241**	**100.0%**	

Comedy

National Overview

- Comedy recorded $198.8m in revenue and almost 2.9m attendances. These results have surpassed pre-pandemic levels and are the highest ever recorded for this category.
- The growth was primarily driven by the Melbourne International Comedy Festival, Brisbane Comedy Festival and performances by renowned international comedians such as Dave Chappelle, Kevin Hart, Michael McIntyre and Jimmy Carr.
- Comedy recorded y-o-y growth in revenue of 72.9% (from $115.0m in 2022 to $198.8m in 2023) and y-o-y growth in attendance of 35.0% (from 2.1m in 2022 to 2.9m in 2023).
- The average ticket price increased by 25.2% (from $57.92 in 2022 to $72.51 in 2023), which further contributed to the growth in revenue.
- Comedy generated 6.3% of the overall live performance revenue and 9.6% of the overall live performance attendance in 2023.
- In 2023, VIC and NSW generated the most revenue and attendance in this category, with a national market share of approximately 34.7% and 26.9% respectively in revenue and 46.9% and 19.7% respectively in attendance. These two states combined generated 61.6% of the overall revenue and 66.6% of the overall attendance in this category.
- In 2023, all states and territories recorded y-o-y growth in revenue and attendance in this category.
- WA recorded the highest y-o-y growth in revenue (172.4%) and attendance (72.5%) in 2023. The growth in WA revenue was driven by performances by renowned comedians such as Dave Chappelle, Michael McIntyre, Kevin Hart, Carl Barron and Jimmy Carr.
- QLD recorded the second-highest y-o-y increase in revenue (98.1%) and attendance (57.1%). Top events included Brisbane Comedy Festival and performances by renowned comedians such as Dave Chappelle, Kevin Hart, Carl Barron, Gabriel Iglesias and Jimmy Carr.

Revenue and Attendance 2009 → 2023

	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%
2021	$50,301,163	134.1%	1,171,696	246.2%	$45.20	(34.4%)
2022	$114,965,234	128.6%	2,132,551	82.0%	$57.92	28.1%
2023	$198,785,138	72.9%	2,879,792	35.0%	$72.51	25.2%

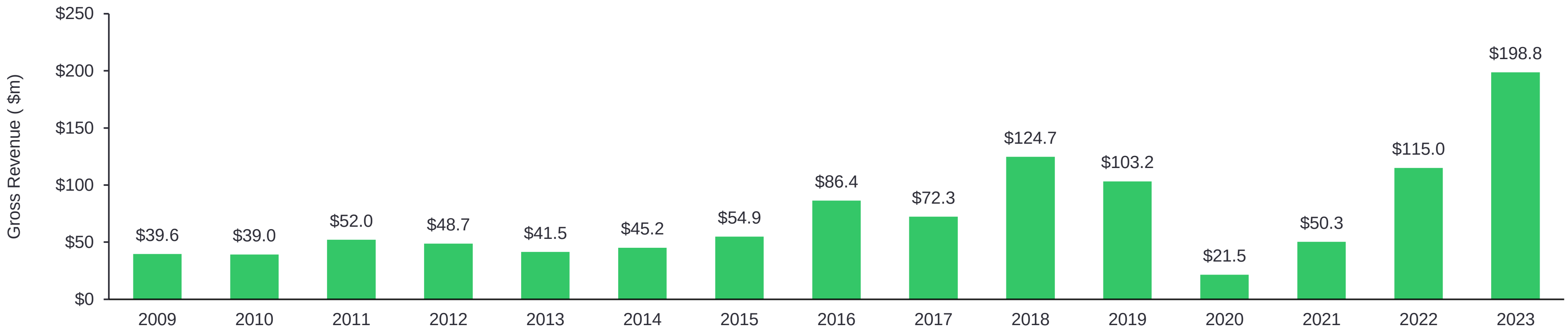
Note: Comedy category was only introduced in the 2009 Survey. Prior to 2009, such events were included in the Theatre or former Festivals (Single-Category) genre.

Comedy

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

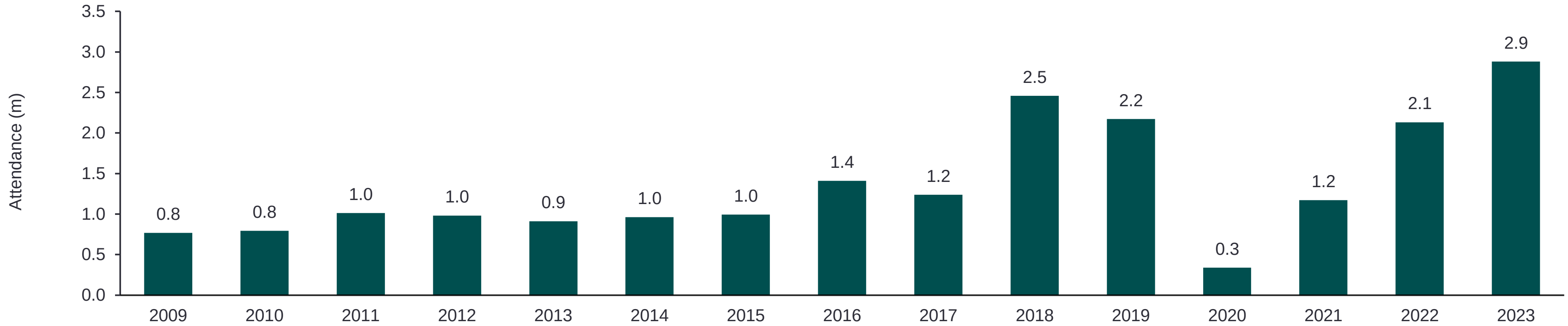
Comedy – Revenue

2009 → 2023



Comedy – Total Attendance

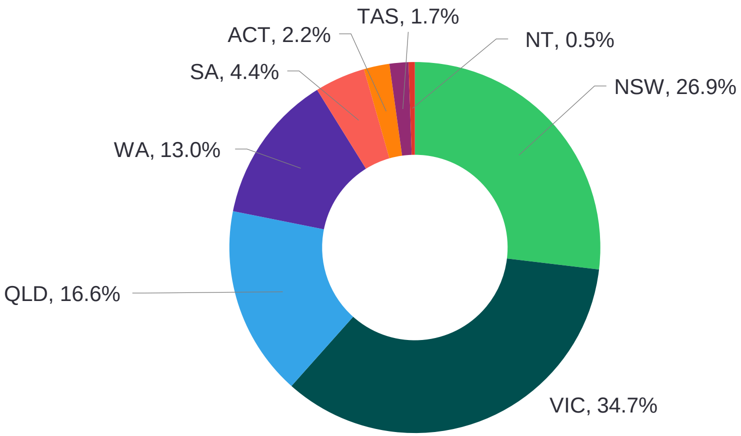
2009 → 2023



Comedy

Revenue by State/Territory

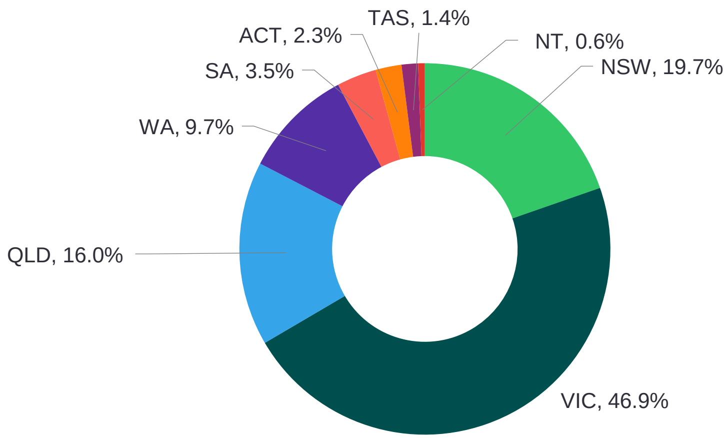
2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$53,451,840	26.9%	1.6%
VIC	$68,966,440	34.7%	(6.6%)
QLD	$32,922,193	16.6%	2.1%
WA	$25,880,955	13.0%	4.8%
SA	$8,767,193	4.4%	(0.7%)
ACT	$4,433,970	2.2%	(1.0%)
TAS	$3,283,623	1.7%	0.0%
NT	$1,078,924	0.5%	(0.2%)
Total	**$198,785,138**	**100.0%**	

Attendance by State/Territory

2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	566,411	19.7%	(1.3%)
VIC	1,350,365	46.9%	(2.5%)
QLD	461,956	16.0%	2.3%
WA	277,994	9.7%	2.1%
SA	99,742	3.5%	0.0%
ACT	65,284	2.3%	(0.5%)
TAS	41,293	1.4%	0.1%
NT	16,747	0.6%	(0.1%)
Total	**2,879,792**	**100.0%**	

Contemporary Music

National Overview

- Contemporary Music recorded $1.5b in revenue and over 12.0m attendances in 2023. These results have surpassed pre-pandemic levels and are the highest recorded for this category. This is attributable to a full year of international tours returning to Australian shores. These included Ed Sheeran, Harry Styles, Coldplay, Paul McCartney, Red Hot Chili Peppers and Elton John.
- Contemporary Music accounted for the largest market share in both revenue (47.4%) and attendance (39.9%) within the live performance industry in 2023.
- Contemporary Music recorded the second-highest y-o-y increase in revenue by 110.6% (from $706.0m in 2022 to $1.5b in 2023) and the third-highest y-o-y increase in attendance by 38.0% (from 8.7m in 2022 to 12.0m in 2023) among all the categories in 2023.
- The average ticket price has increased by 47.4% (from $87.01 in 2022 to $128.21 in 2023), which further contributed to the growth in revenue.
- In 2023, NSW and VIC generated the most revenue and attendance in this category, with a national market share of approximately 34.8% and 32.6% respectively in revenue and 32.8% and 32.1% respectively in attendance. These two states generated 67.3% of overall revenue and 64.8% of attendance in this category in 2023.
- In 2023, all states and territories except ACT, TAS and NT recorded y-o-y growth in revenue and attendance in this category.
- In 2023, NSW recorded the highest y-o-y growth in revenue (137.6%) and in attendance (43.0%), driven by performances by major artists such as Ed Sheeran, Harry Styles, Paul McCartney, Red Hot Chili Peppers and Elton John.
- VIC, QLD, and WA also recorded significant growth in this category, more than doubling their revenue in 2023 compared to 2022. This increase was driven by significant growth in attendance and average ticket prices.
- 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.

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

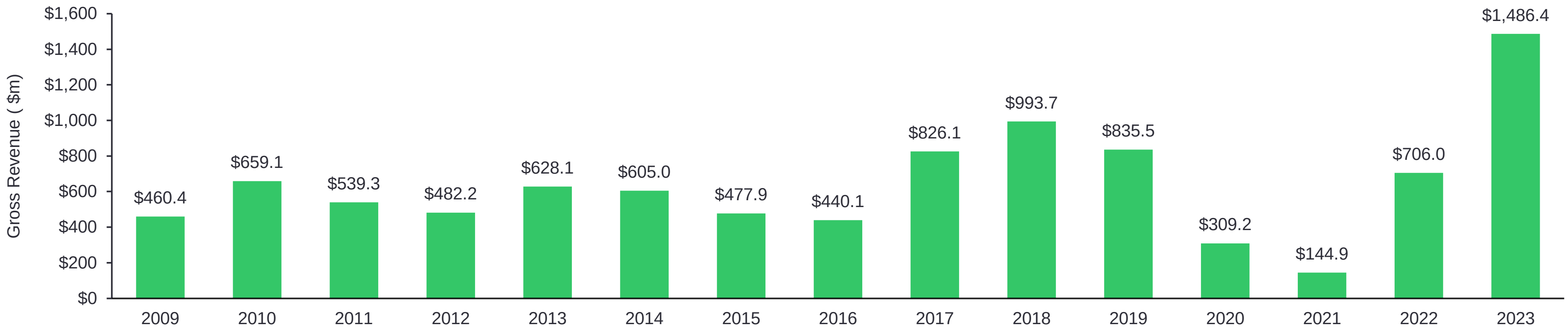
Revenue and Attendance 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%
2021	$144,938,333	(53.1%)	2,731,661	(4.9%)	$56.81	(51.0%)
2022	$705,953,566	387.1%	8,699,785	218.5%	$87.01	53.2%
2023	$1,486,395,321	110.6%	12,006,177	38.0%	$128.21	47.4%

Contemporary Music

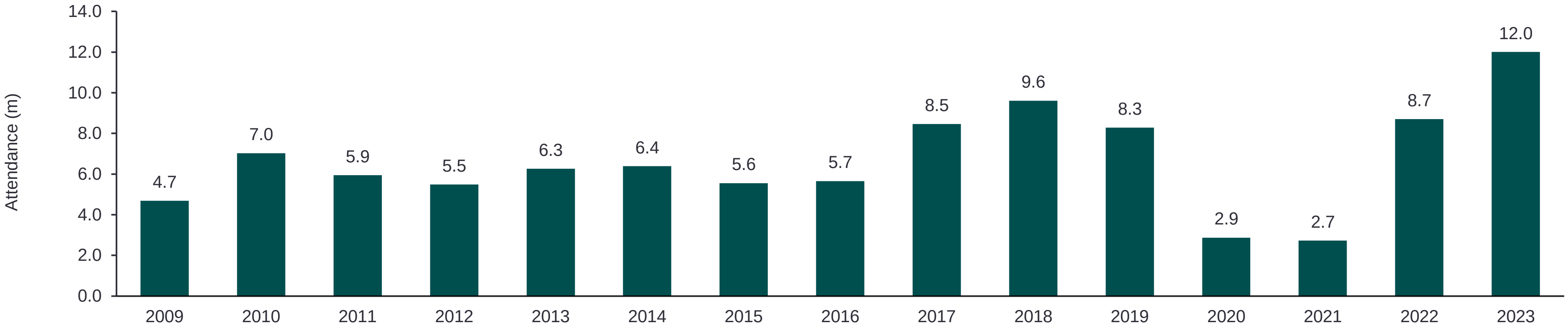
Contemporary Music – Revenue

2009 → 2023



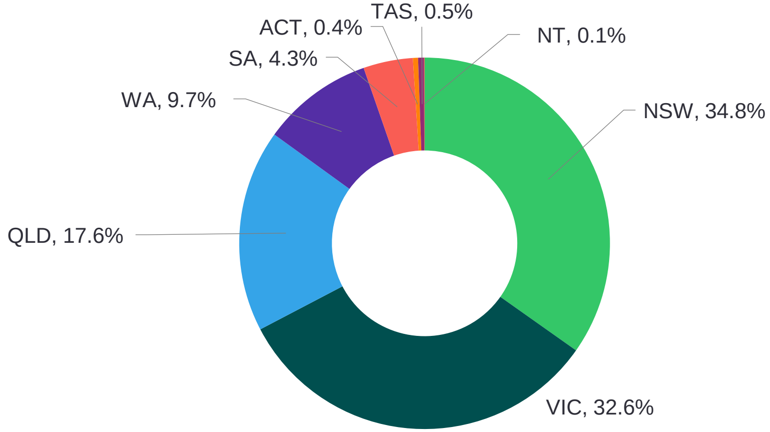
Contemporary Music – Total Attendance

2009 → 2023



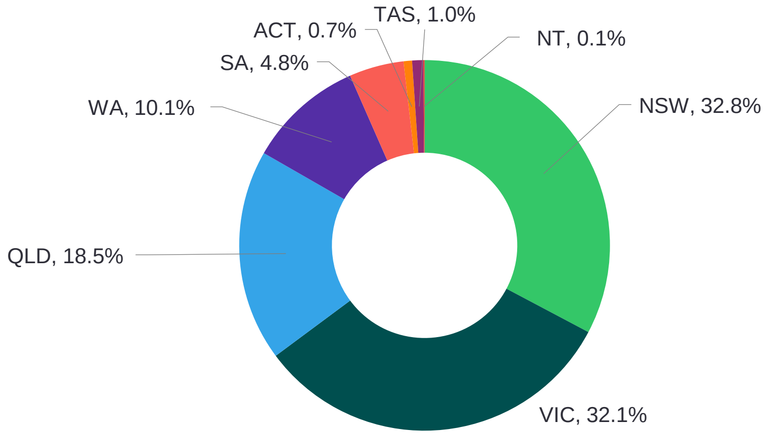
Contemporary Music

Revenue by State/Territory 2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$516,970,672	34.8%	4.0%
VIC	$483,867,315	32.6%	(0.5%)
QLD	$262,012,198	17.6%	(0.3%)
WA	$144,307,701	9.7%	(0.4%)
SA	$64,241,490	4.3%	(1.1%)
ACT	$6,685,263	0.4%	(0.7%)
TAS	$7,537,711	0.5%	(0.8%)
NT	$772,971	0.1%	(0.2%)
Total	**$1,486,395,321**	**100.0%**	

Attendance by State/Territory 2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	3,932,479	32.8%	1.1%
VIC	3,851,829	32.1%	1.1%
QLD	2,216,357	18.5%	0.2%
WA	1,214,931	10.1%	0.2%
SA	572,886	4.8%	(1.1%)
ACT	88,534	0.7%	(0.6%)
TAS	116,482	1.0%	(0.8%)
NT	12,679	0.1%	(0.2%)
Total	**12,006,177**	**100.0%**	

Festivals (Contemporary Music)

National Overview

- Festivals (Contemporary Music) recorded $355.1m in revenue and over 2.0m attendances. These results have surpassed pre-pandemic levels and are the highest ever recorded for this category.
- Festivals (Contemporary Music) recorded a y-o-y increase in revenue by 51.5% (from $234.4m in 2022 to $355.1m in 2023) and a y-o-y increase in attendance by 32.1% (from 1.5m in 2022 to 2.0m in 2023). New data providers partially explain the growth in this category.
- The average ticket price has increased by 12.4% (from $169.53 in 2022 to $190.54 in 2023), which further contributed to the growth in revenue.
- Festivals (Contemporary Music) contributed 11.3% to the total industry share of revenue and 6.7% to the total attendance in 2023. The revenue was primarily driven by festivals such as Beyond The Valley, Splendour in the Grass, CMC Rocks, Spilt Milk, Bluesfest and WOMADelaide.
- In 2023, VIC, NSW and QLD generated the most revenue and attendance in this category, with a national market share of approximately 27.7%, 25.1% and 23.9% respectively in revenue and 24.4%, 26.3% and 24.3% respectively in attendance. These three states generated 76.7% of overall revenue and 75.0% of attendance in this category in 2023.
- Major festivals that took place in VIC were Beyond The Valley, Spilt Milk, Pitch Music and Arts Festival and Good Things Festival. Major festivals that took place in NSW were Splendour in the Grass, Bluesfest and Knotfest. Major festivals that took place in QLD were CMC Rocks, Spilt Milk and Wildlands Brisbane.
- All states and territories recorded a y-o-y increase in revenue and all states and territories except ACT recorded a y-o-y increase in attendance in 2023.
- VIC recorded the highest y-o-y increase in revenue (115.6%) and fifth-highest y-o-y increase in attendance (45.9%) in 2023.
- WA recorded the second-highest y-o-y increase in revenue (100.9%) and highest y-o-y increase in attendance (60.1%) in 2023. Top events in WA included Spilt Milk, Falls Fremantle, Listen Out and Groovin The Moo.

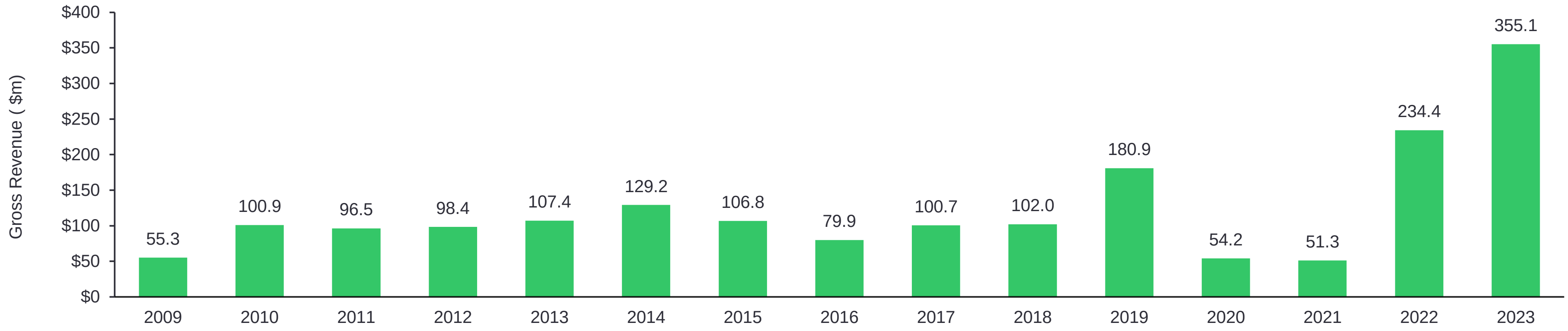
Revenue and Attendance 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%)
2021	$51,279,951	(5.3%)	461,949	5.6%	$124.16	(12.8%)
2022	$234,410,442	357.1%	1,537,353	232.8%	$169.53	36.5%
2023	$355,083,125	51.5%	2,030,130	32.1%	$190.54	12.4%

Festivals (Contemporary Music)

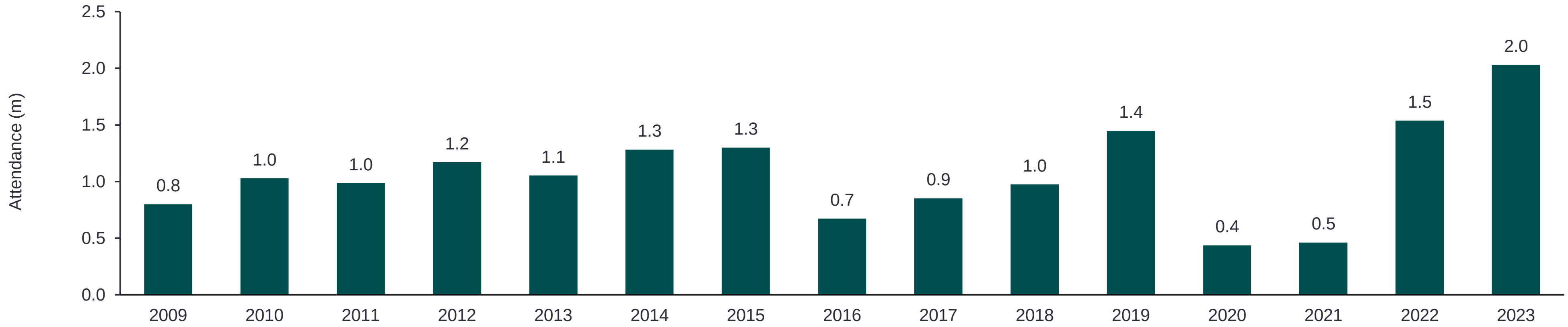
Festivals (Contemporary Music) – Revenue

2009 → 2023



Festivals (Contemporary Music) – Total Attendance

2009 → 2023

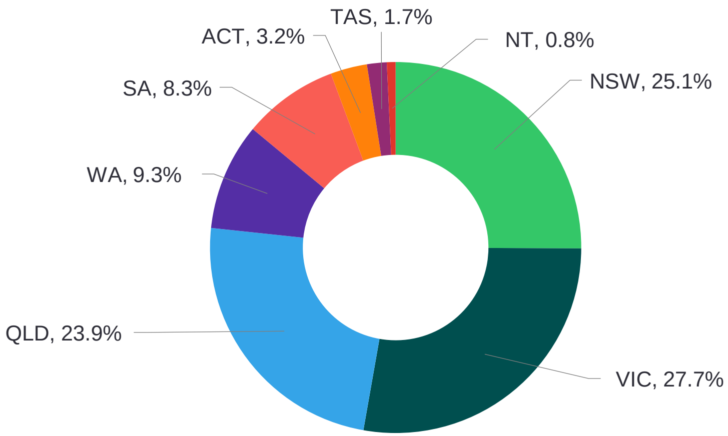


Festivals (Contemporary Music)

Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

Revenue by State/Territory

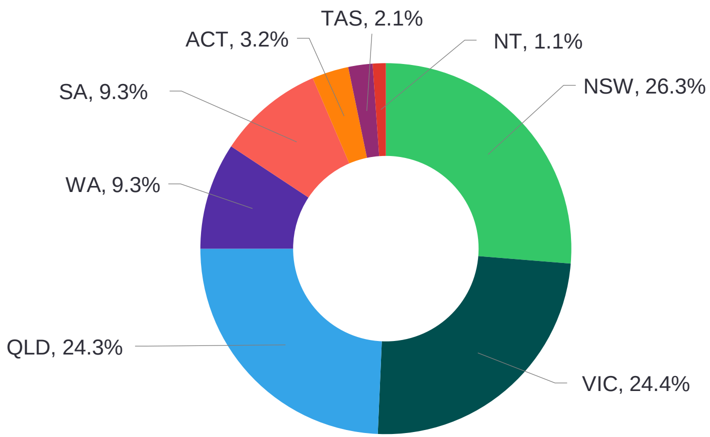
2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$89,036,030	25.1%	(12.2%)
VIC	$98,371,896	27.7%	8.2%
QLD	$84,894,750	23.9%	2.2%
WA	$33,159,938	9.3%	2.3%
SA	$29,489,433	8.3%	0.7%
ACT	$11,328,151	3.2%	(1.4%)
TAS	$6,093,785	1.7%	0.3%
NT	$2,709,141	0.8%	(0.1%)
Total	**$355,083,125**	**100.0%**	

Attendance by State/Territory

2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	533,607	26.3%	(6.9%)
VIC	495,534	24.4%	2.3%
QLD	493,260	24.3%	3.0%
WA	188,912	9.3%	1.6%
SA	187,942	9.3%	1.5%
ACT	64,794	3.2%	(1.7%)
TAS	42,884	2.1%	0.3%
NT	23,197	1.1%	(0.2%)
Total	**2,030,130**	**100.0%**	

Festivals (Multi-Category)

National Overview

- Festivals (Multi-Category) recorded $92.4m in revenue and over 2.4m attendances. These results have surpassed pre-pandemic levels. The revenue result is the highest recorded for this category and the attendance result is the second-highest recorded for this category (with 2018 being the highest).
- Festivals (Multi-Category) recorded a y-o-y increase in revenue by 31.8% (from $70.1m in 2022 to $92.4m in 2023) and a y-o-y increase in attendance by 13.5% (from 2.1m in 2022 to 2.4m in 2023).
- The average ticket price has increased by 6.9% (from $41.37 in 2022 to $44.23 in 2023), which further contributed to the growth in revenue.
- In 2023, the major contributing events in this category were Adelaide Fringe, Fringe World Festival (Perth), Dark Mofo, World Pride and Perth Festival.
- Festivals (Multi-Category) contributed 2.9% of the total share in revenue and 8.0% of the total share in attendance in 2023.
- In 2023, SA, WA and NSW generated the most revenue and attendance in this category, with a national market share of approximately 32.0%, 19.1% and 18.5% respectively in revenue and 44.1%, 17.2% and 12.2% respectively in attendance. These three states generated 69.6% of overall revenue and 73.5% of attendance in this category in 2023.
- Major festivals in SA, WA and NSW included Adelaide Fringe, Fringe World Festival (Perth), Perth Festival, World Pride and Sydney Fringe Festival.
- NT recorded the highest y-o-y increase in revenue (982.2%) and the second-highest y-o-y increase in attendance (62.2%) in 2023. This is primarily attributed to Darwin Festival.
- ACT recorded the second-highest y-o-y increase in revenue (368.7%) and the highest y-o-y increase in attendance (250.5%). However, its impact is minimal, as ACT contributes only 0.4% of overall revenue and 0.3% of attendance in this category in 2023.
- In 2023, all states and territories except VIC recorded y-o-y increases in revenue, while all states and territories except VIC and TAS recorded y-o-y increases in attendance.

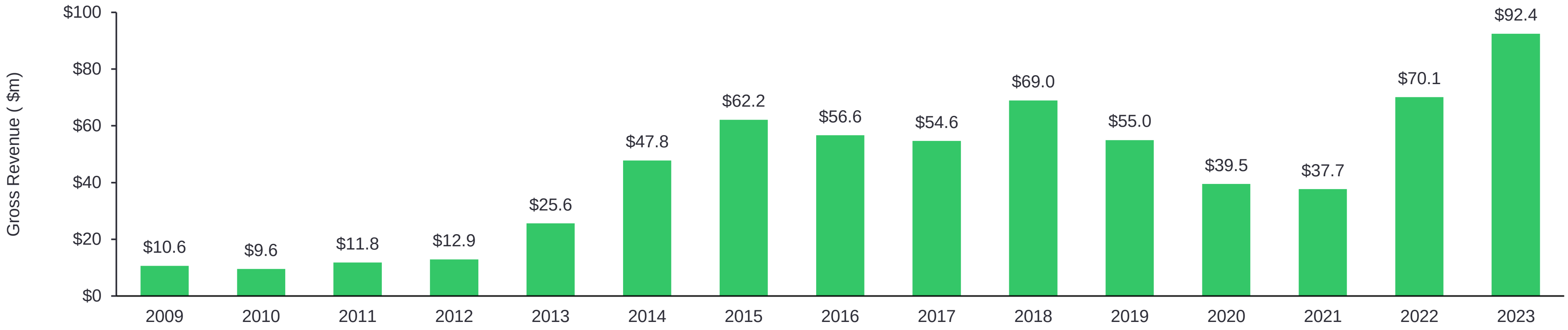
Revenue and Attendance 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%)
2021	$37,673,034	(4.6%)	1,554,151	(0.9%)	$30.20	5.4%
2022	$70,102,136	86.1%	2,124,802	36.7%	$41.37	37.0%
2023	$92,422,087	31.8%	2,411,385	13.5%	$44.23	6.9%

Festivals (Multi-Category)

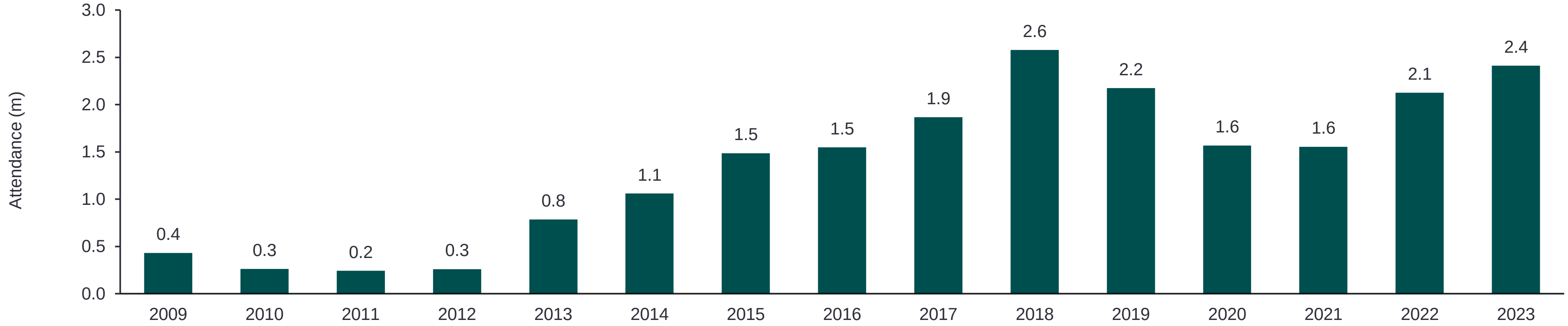
Festivals (Multi-Category) – Revenue

2009 → 2023



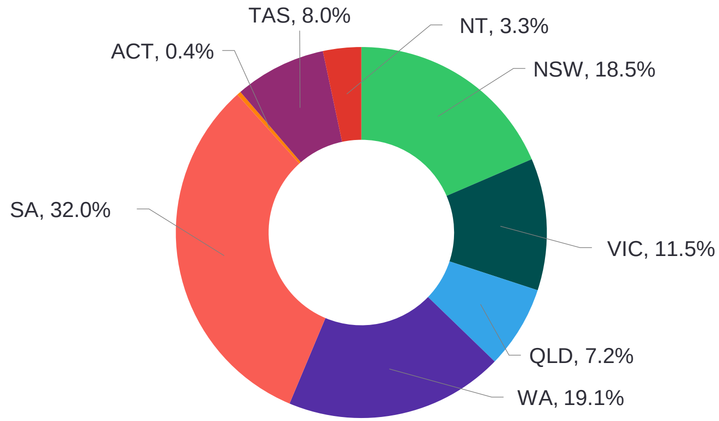
Festivals (Multi-Category) – Total Attendance

2009 → 2023



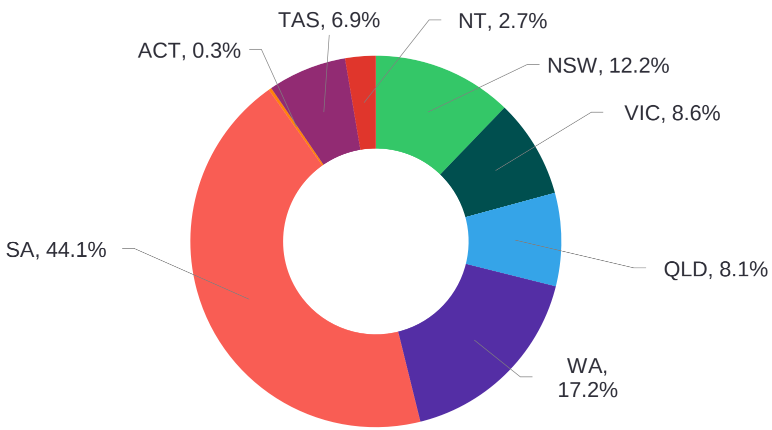
Festivals (Multi-Category)

Revenue by State/Territory — 2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$17,128,614	18.5%	0.1%
VIC	$10,631,246	11.5%	(4.1%)
QLD	$6,653,889	7.2%	(1.5%)
WA	$17,644,506	19.1%	4.1%
SA	$29,587,346	32.0%	(1.9%)
ACT	$327,240	0.4%	0.3%
TAS	$7,370,526	8.0%	0.02%
NT	$3,078,721	3.3%	2.9%
Total	**$92,422,087**	**100.0%**	

Attendance by State/Territory — 2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	294,134	12.2%	1.6%
VIC	206,857	8.6%	(5.3%)
QLD	195,764	8.1%	(0.3%)
WA	415,913	17.2%	2.8%
SA	1,062,605	44.1%	2.1%
ACT	6,089	0.3%	0.2%
TAS	165,841	6.9%	(2.0%)
NT	64,182	2.7%	0.8%
Total	**2,411,385**	**100.0%**	

Musical Theatre

National Overview

- Musical Theatre recorded $542.2m in revenue and nearly 4.3m attendances. These results are the highest recorded for this category.
- Musical Theatre recorded a marginal y-o-y growth in revenue by 4.5% (from $519.0m in 2022 to $542.2m in 2023) and in attendance by 0.4%. The average ticket price increased by 2.4% (from $128.02 in 2022 to $131.10 in 2023), which further contributed to the growth in revenue.
- Musical Theatre accounted for the second-largest market share in both revenue (17.3%) and attendance (14.3%) within the live performance industry in 2023. Top events in this category in 2023 were *Moulin Rouge! The Musical, Beauty and The Beast, TINA - The Tina Turner Musical* and *Hamilton.*
- NSW and VIC accounted for the major revenue and attendance in this category, commanding a market share of 35.2% and 32.7% in revenue and 36.7% and 32.2% in attendance respectively. Combined they generated 68.0% market share of revenue and a 68.8% market share of attendance in 2023.
- Major events in NSW included *Beauty and The Beast, TINA - The Tina Turner Musical* and *Wicked.*
- Major events in VIC included *Moulin Rouge! The Musical*, *& Juliet*, *Mary Poppins* and *The Phantom of the Opera.*
- In 2023, TAS recorded the highest y-o-y increase in revenue (88.0%) and attendance (55.4%). However, its overall impact remains minimal, contributing only 0.2% to the total revenue and 0.3% to the total attendance in this category.
- WA recorded the second-highest y-o-y increase in revenue (82.8%) and in attendance (36.6%). Major events in WA included *Moulin Rouge!* and *Mary Poppins*.
- All states and territories except NSW and VIC recorded a y-o-y growth in revenue and all states and territories except VIC, ACT and NT recorded a y-o-y growth in attendance in 2023.

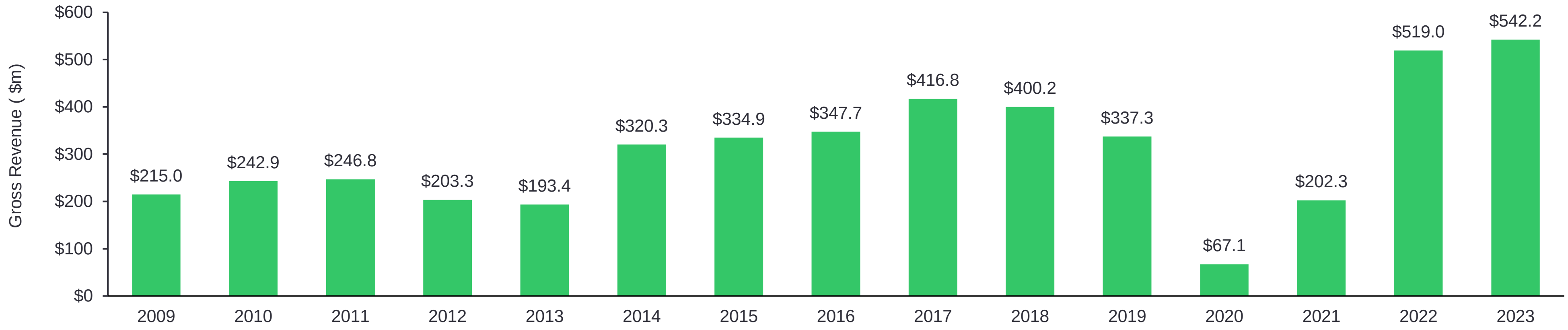
Revenue and Attendance 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%)
2021	$202,342,943	201.8%	1,784,772	144.8%	$118.88	20.0%
2022	$519,021,175	156.5%	4,269,750	139.2%	$128.02	7.7%
2023	$542,171,614	4.5%	4,288,743	0.4%	$131.10	2.4%

Musical Theatre

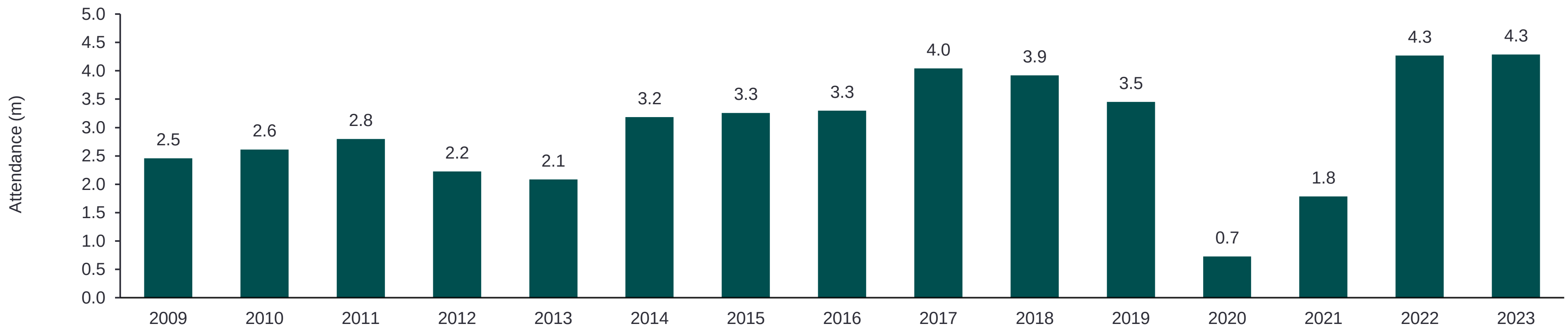
Musical Theatre – Revenue

2009 → 2023



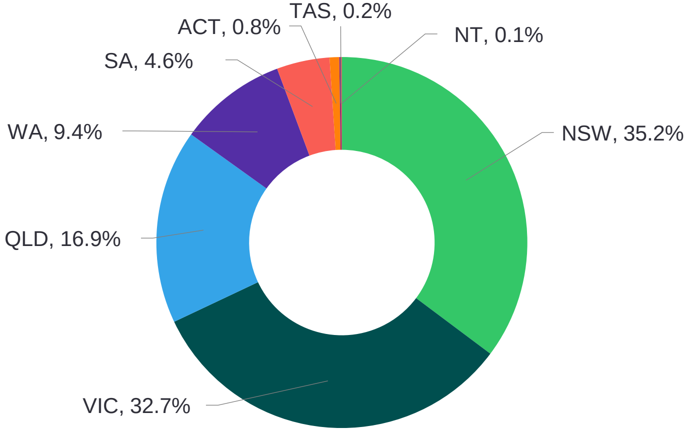
Musical Theatre – Total Attendance

2009 → 2023



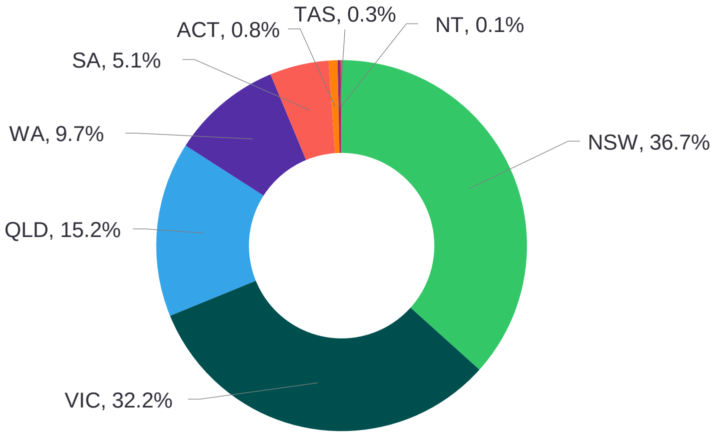
Musical Theatre

Revenue by State/Territory 2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$190,994,104	35.2%	(3.9%)
VIC	$177,543,223	32.7%	(7.4%)
QLD	$91,768,883	16.9%	6.0%
WA	$51,105,749	9.4%	4.0%
SA	$25,017,964	4.6%	1.0%
ACT	$4,514,727	0.8%	0.1%
TAS	$905,902	0.2%	0.1%
NT	$321,062	0.1%	(0.002%)
Total	**$542,171,614**	**100.0%**	

Attendance by State/Territory 2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	1,572,148	36.7%	1.7%
VIC	1,379,726	32.2%	(7.4%)
QLD	653,872	15.2%	3.0%
WA	414,306	9.7%	2.6%
SA	220,417	5.1%	0.1%
ACT	33,289	0.8%	(0.04%)
TAS	11,062	0.3%	0.1%
NT	3,923	0.1%	(0.03%)
Total	**4,288,743**	**100.0%**	

Opera

National Overview

- Opera recorded a y-o-y increase in revenue by 68.8% (from $23.7m in 2022 to $39.9m in 2023) and a y-o-y increase in attendance by 42.6% (from 0.2m in 2022 to 0.3m in 2023). The average ticket price increased y-o-y by 17.6% (from $120.17 in 2022 to $141.27 in 2023).
- Despite a significant increase in 2023, Opera revenue and attendance have not quite returned to pre-pandemic levels.
- Major Opera performances in 2023 included *Madama Butterfly*, *La Bohème, Aida* and *The Ring Cycle*.
- Similar to previous years, performances by NPAP companies including Opera Australia, Opera Queensland, West Australian Opera, Victorian Opera and State Opera South Australia contributed the majority to the overall revenue (85.1%) and attendance (84.5%) in this category in 2023.
- In 2023, NSW and QLD generated the most revenue and attendance in this category, with a national market share of approximately 58.9% and 21.4% respectively in revenue and 58.7% and 14.5% respectively in attendance. These two states generated 80.4% of overall revenue and 73.2% of attendance in this category in 2023.
- In 2023, QLD recorded the highest y-o-y growth in revenue (978.9%) and in attendance (306.7%). Major Opera performances in QLD included *The Ring Cycle* and *Aida*.
- SA recorded the second-highest y-o-y growth in revenue (71.0%) and the third-highest y-o-y growth in attendance (45.1%). Major Opera performances in SA included *Pirates of Penzance* and *The Marriage of Figaro.*
- NSW recorded a y-o-y increase in revenue (58.2%) and in attendance (46.9%). The top events were *Madama Butterfly*, *La Bohème* and *Aida*.
- VIC, WA, ACT and TAS recorded y-o-y declines in revenue and attendance in 2023.

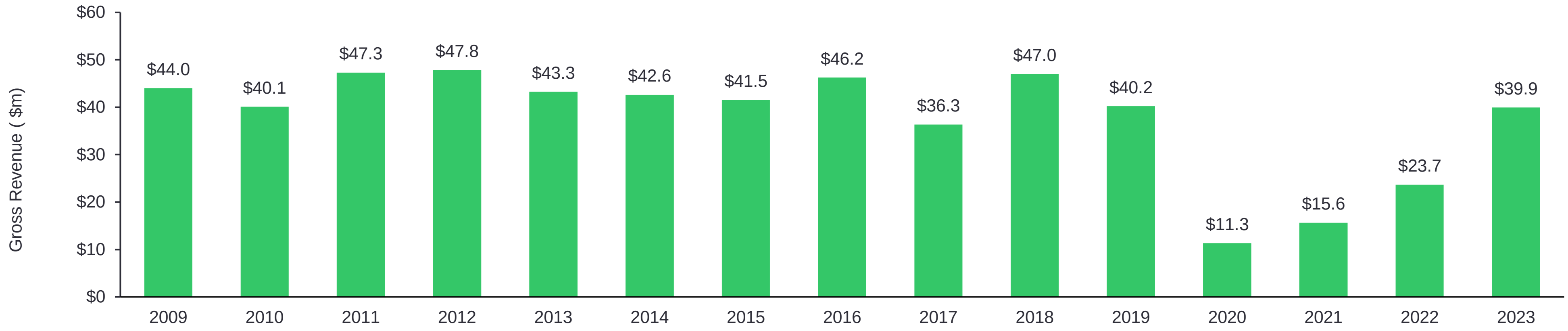
Revenue and Attendance 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%)
2021	$15,649,421	38.3%	151,299	2.2%	$118.94	36.0%
2022	$23,662,092	51.2%	225,486	49.0%	$120.17	1.0%
2023	$39,944,472	68.8%	321,477	42.6%	$141.27	17.6%

Opera

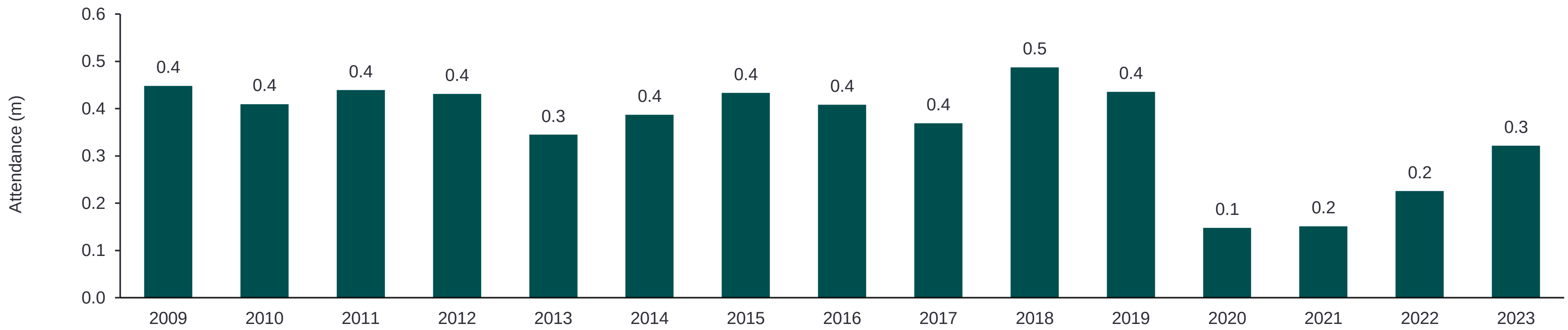
Opera – Revenue

2009 → 2023



Opera – Total Attendance

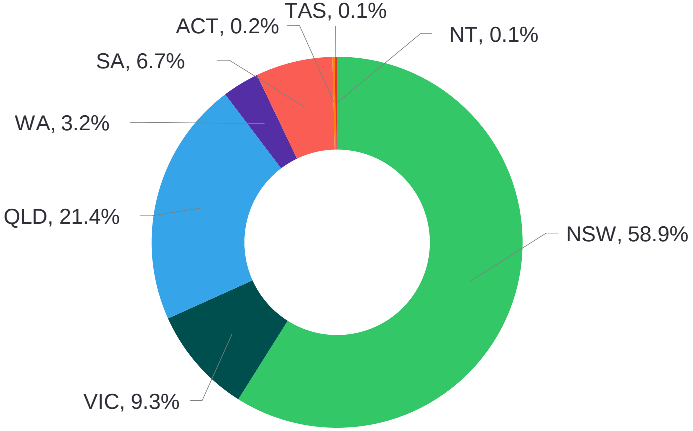
2009 → 2023



Opera

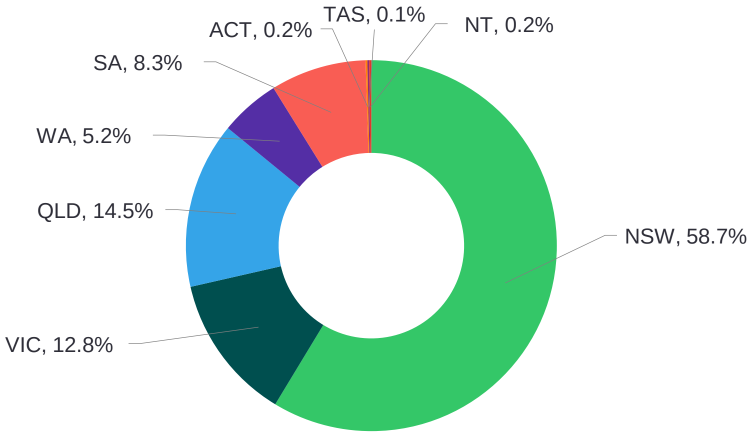
Home 1 Executive Summary
2 Key Findings
3 Introduction
4 State Analysis
5 Category Analysis
6 Regional Data Providers
7 Appendices

Revenue by State/Territory — 2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$23,543,984	58.9%	(3.9%)
VIC	$3,723,139	9.3%	(10.5%)
QLD	$8,560,674	21.4%	18.1%
WA	$1,276,244	3.2%	(2.9%)
SA	$2,676,390	6.7%	0.1%
ACT	$87,560	0.2%	(0.5%)
TAS	$31,497	0.1%	(0.4%)
NT	$44,985	0.1%	0.1%
Total	**$39,944,472**	**100.0%**	

Attendance by State/Territory — 2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	188,610	58.7%	1.7%
VIC	41,031	12.8%	(6.9%)
QLD	46,584	14.5%	9.4%
WA	16,817	5.2%	(3.2%)
SA	26,826	8.3%	0.1%
ACT	509	0.2%	(0.7%)
TAS	479	0.1%	(0.8%)
NT	621	0.2%	0.2%
Total	**321,477**	**100.0%**	

Special Events

National Overview

- Special Events recorded a y-o-y decline in revenue by 34.8% (from $4.8m in 2022 to $3.2m in 2023) despite a 36.2% y-o-y increase in attendance (from 0.1m in 2022 to 0.2m in 2023) and a 1.7% y-o-y increase in the average ticket price (from $39.35 in 2022 to $40.03 in 2023). This is primarily attributed to a significant portion of zero-price tickets, which diluted the overall revenue impact.
- The top events in this category in 2023 were *NYE Gala Concert, RuPaul's Drag Race* and *Christmas Spectacular.*
- In 2023, VIC and NSW generated the highest revenue in this category, with national market shares of approximately 40.9% and 34.1% respectively, together accounting for 75.0% of the overall revenue. Meanwhile, WA and QLD led in attendance, capturing national market shares of approximately 43.6% and 26.1% respectively, together contributing 69.7% of the overall attendance in this category.
- The top events in NSW included *Christmas Spectacular* and *RuPaul's Drag Race*. The top events in VIC included *NYE Gala Concert* and *RuPaul's Drag Race*.
- In 2023, all states and territories except NSW recorded a y-o-y decline in revenue and all states and territories except NSW, WA and TAS recorded a y-o-y decline in attendance.
- In 2023, NSW recorded the highest y-o-y growth in revenue (68.0%) and third-highest y-o-y growth in attendance (44.7%). There were no events held in NT in this category in 2023.
- The Special Events category was highly variable as it is dependent on whether events can be classified into other categories or not.

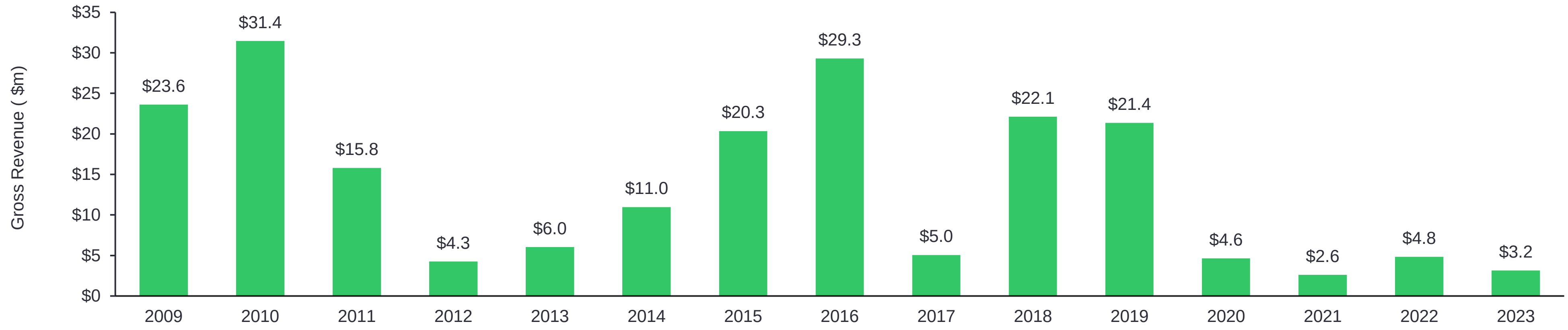
Revenue and Attendance 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%)
2021	$2,602,427	(44.0%)	78,708	(52.8%)	$41.51	(25.1%)
2022	$4,847,553	86.3%	142,951	81.6%	$39.35	(5.2%)
2023	$3,158,726	(34.8%)	194,708	36.2%	$40.03	1.7%

Special Events

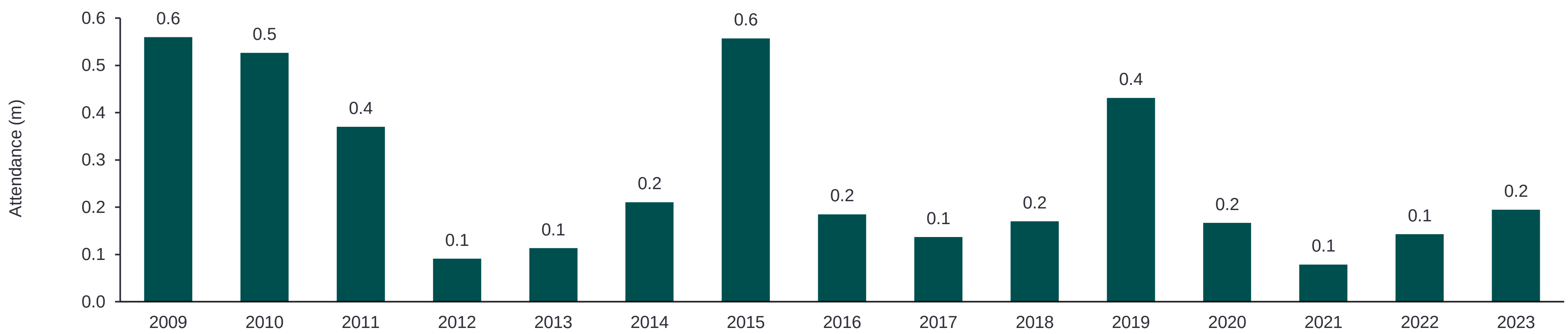
Special Events – Revenue

2009 → 2023



Special Events – Total Attendance

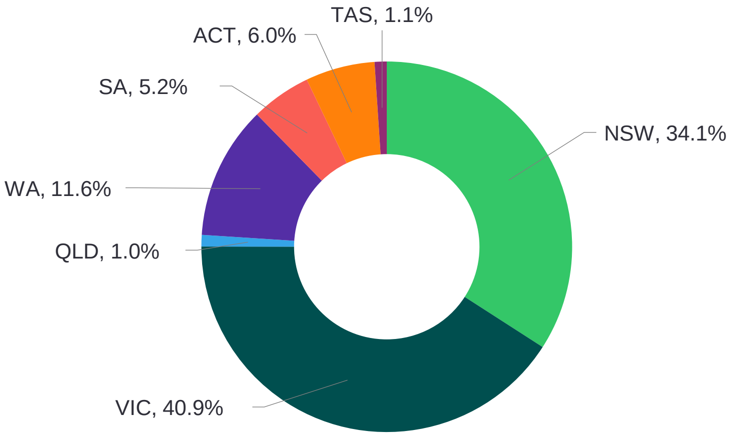
2009 → 2023



Special Events

Revenue by State/Territory

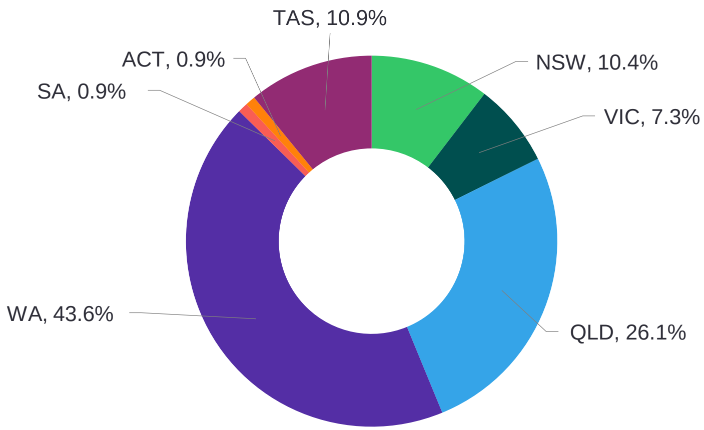
2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$1,077,212	34.1%	20.9%
VIC	$1,292,414	40.9%	13.0%
QLD	$31,852	1.0%	(24.5%)
WA	$367,223	11.6%	2.3%
SA	$165,796	5.2%	(1.7%)
ACT	$190,901	6.0%	1.0%
TAS	$33,329	1.1%	(10.6%)
NT	$0	0.0%	(0.4%)
Total	**$3,158,726**	**100.0%**	

Attendance by State/Territory

2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	20,250	10.4%	0.6%
VIC	14,170	7.3%	(13.6%)
QLD	50,833	26.1%	(25.4%)
WA	84,839	43.6%	37.2%
SA	1,693	0.9%	(3.3%)
ACT	1,680	0.9%	(0.9%)
TAS	21,243	10.9%	5.5%
NT	0	0.0%	(0.1%)
Total	**194,708**	**100.0%**	

Theatre

National Overview

- Theatre recorded marginal y-o-y growth in revenue by 9.3% (from $111.4m in 2022 to $121.8m in 2023) and attendance by 5.4%. The average ticket price remained largely unchanged (from $91.13 in 2022 to $91.16 in 2023).
- While 2023 saw Theatre revenue and attendance increase, they remained lower than their peaks in 2019 when *Harry Potter and the Cursed Child* commenced its long running season.
- The key events that contributed to Theatre's growth in 2023 included *Harry Potter and the Cursed Child, Amadeus, Death of a Salesman* and *The Mousetrap.*
- Theatre accounted for 3.9% of the overall live performance revenue and 4.8% of the total attendance in 2023.
- 38.0% of the revenue and 47.6% of the attendance in 2023 were generated through performances by NPAP companies such as Sydney Theatre Company, Melbourne Theatre Company, Belvoir, Bell Shakespeare, Black Swan State Theatre Company, Queensland Theatre and State Theatre Company South Australia. In recent years, Theatre has seen an increase in the number of commercial productions in market, shifting the market share generated by NPAP companies.
- VIC generated the highest revenue and attendance in this category, with a national market share of approximately 49.2% in revenue and 42.4% in attendance in 2023. Top events in VIC included *Harry Potter and the Cursed Child, Death of a Salesman* and *The Mousetrap.*
- NSW generated the second-highest revenue and attendance in this category, with a national market share of approximately 35.5% in revenue and 38.0% in attendance. Top events in NSW included *Amadeus, The Dictionary of Lost Words* and *Julia.*
- Combined VIC and NSW generated 84.7% of overall revenue and 80.5% of attendance in this category in 2023.
- All states and territories except VIC, TAS and NT recorded a y-o-y increase in revenue and attendance in 2023.
- SA recorded the highest y-o-y growth in revenue (144.2%) and attendance (64.4%). ACT recorded the second-highest y-o-y growth in revenue (89.0%) and the fifth-highest y-o-y growth in attendance (12.3%).

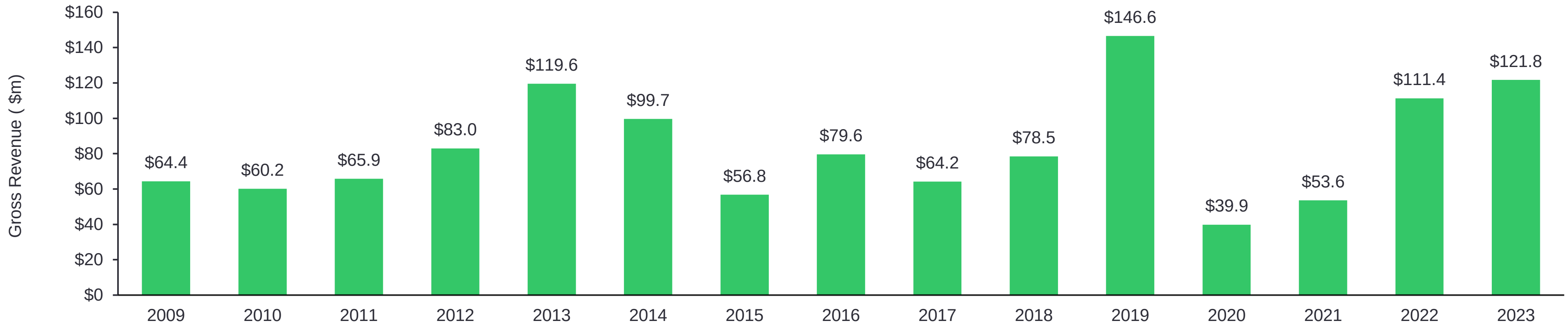
Revenue and Attendance 2009 → 2023

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
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%)
2021	$53,563,159	34.4%	661,694	56.8%	$88.56	(15.8%)
2022	$111,362,004	107.9%	1,363,926	106.1%	$91.13	2.9%
2023	$121,774,292	9.3%	1,437,787	5.4%	$91.16	0.0%

Theatre

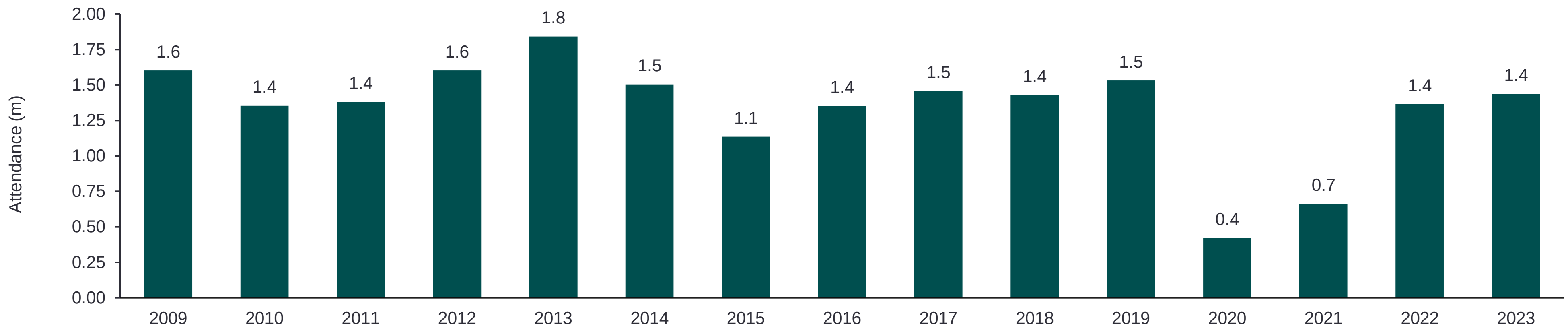
Theatre – Revenue

2009 → 2023



Theatre – Total Attendance

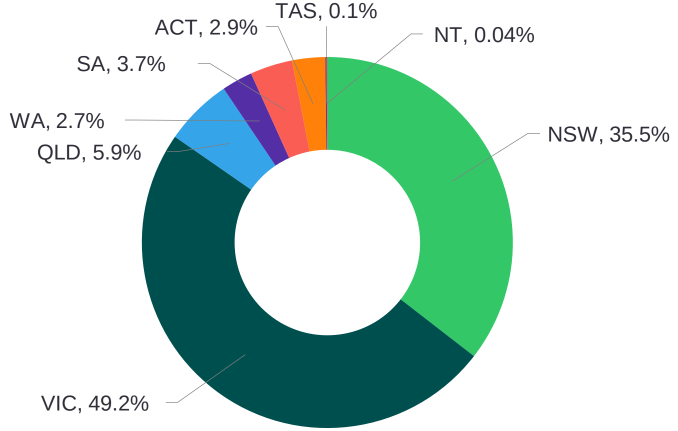
2009 → 2023



Theatre

Revenue by State/Territory

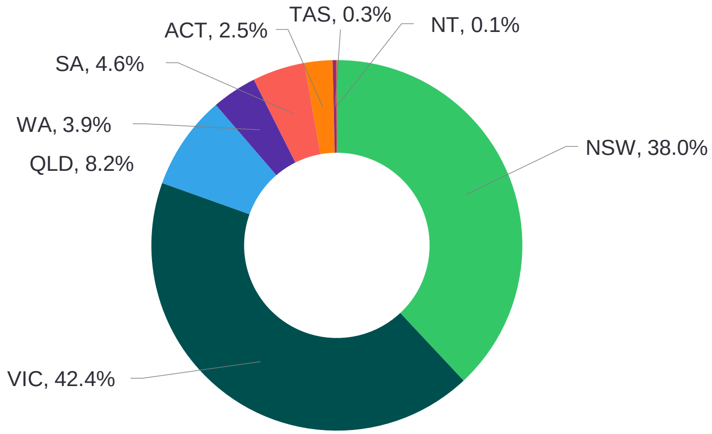
2023



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2022 (%)
NSW	$43,219,244	35.5%	9.2%
VIC	$59,869,295	49.2%	(13.8%)
QLD	$7,191,749	5.9%	1.1%
WA	$3,271,028	2.7%	0.7%
SA	$4,497,888	3.7%	2.0%
ACT	$3,507,292	2.9%	1.2%
TAS	$173,112	0.1%	(0.3%)
NT	$44,684	0.04%	(0.1%)
Total	**$121,774,292**	**100.0%**	

Attendance by State/Territory

2023



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2022 (%)
NSW	546,709	38.0%	2.8%
VIC	610,117	42.4%	(5.1%)
QLD	118,343	8.2%	1.7%
WA	56,420	3.9%	0.6%
SA	65,690	4.6%	1.6%
ACT	35,271	2.5%	0.1%
TAS	4,457	0.3%	(1.6%)
NT	780	0.1%	(0.2%)
Total	**1,437,787**	**100.0%**	

6 Regional Data Providers

91 Analysis by State - 2023
92 Analysis by Category - 2023

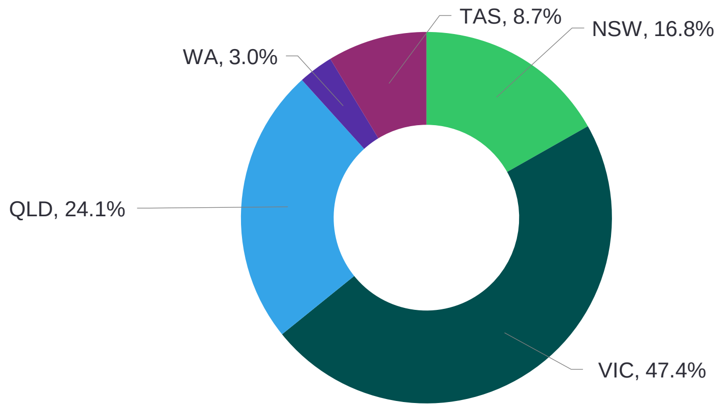
Photo: *Grad Show – Borderville Theatre,* Flying Fruit Fly Circus
Photo Credit: Ian Sutherland

Analysis by State - 2023

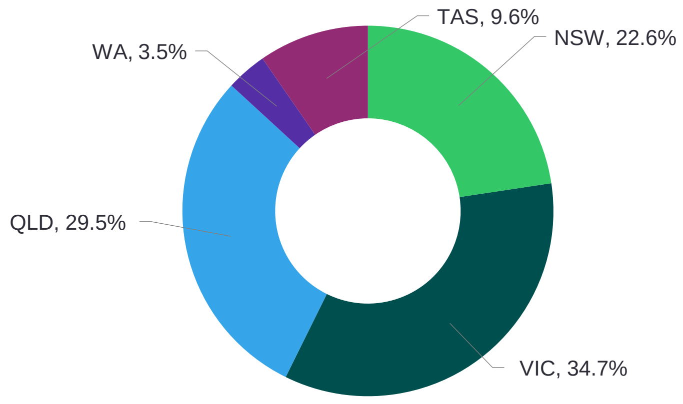
	Revenue	Attendance			
State	Total Ticket Revenue	Paid	Zero-Priced	Comps	Total
NSW	8,451,790	157,906	848	9,457	168,211
VIC	23,836,761	240,714	2,058	15,300	258,072
QLD	12,118,029	206,504	3,565	9,569	219,638
WA	1,526,170	24,853	-	1,500	26,353
TAS	4,362,186	65,157	606	5,804	71,567
Total	**50,294,936**	**695,134**	**7,077**	**41,630**	**743,841**

- In 2023, VIC accounted for the highest market share in revenue (47.4%) and in attendance (34.7%) in Australia. VIC reported $23.8m in revenue and 0.3m in attendance in 2023. Out of the total tickets issued, 93.3% were paid tickets and the rest were complimentary and zero-priced tickets. Top events included Meredith Music Festival, Golden Plains Festival and Port Fairy Folk Festival.
- QLD recorded the second-highest market share in revenue (24.1%) and attendance (29.5%) in Australia. QLD reported $12.1m in revenue and 0.2m in attendance. Out of the total tickets issued, 94.0% were paid tickets and the remaining were complimentary and zero-priced tickets. Top events included *Ministry of Sound Classical* and GC Laughs Festival.
- NSW accounted for the third-highest market share in revenue (16.8%) and in attendance (22.6%) in Australia. NSW reported $8.4m in revenue and 0.2m in attendance. 93.9% of the total tickets issued were paid tickets and the remaining were complimentary and zero-priced tickets. Top events included *The Wharf Revue: Looking for Albanese* and The Ten Tenors: *Greatest Hits.*
- TAS represented 8.7% of the market share in revenue and 9.6% of the market share in attendance. TAS reported $4.4m in revenue and 71.6k in attendance in 2023. Out of the total tickets issued, 91.0% were paid tickets and the rest were zero priced and complimentary tickets. Top events included *Dracula's - The Resurrection Tour* and *Velvet Rewired*.
- WA represented 3.0% of the market share in revenue and 3.5% of the market share in attendance. WA reported $1.5m in revenue and 26.4k in attendance in 2023. Out of the total tickets issued, 94.3% were paid tickets and the rest were zero priced and complimentary tickets.

Market Share (Revenue) by State/Territory — 2023



Market Share (Attendance) by State/Territory — 2023

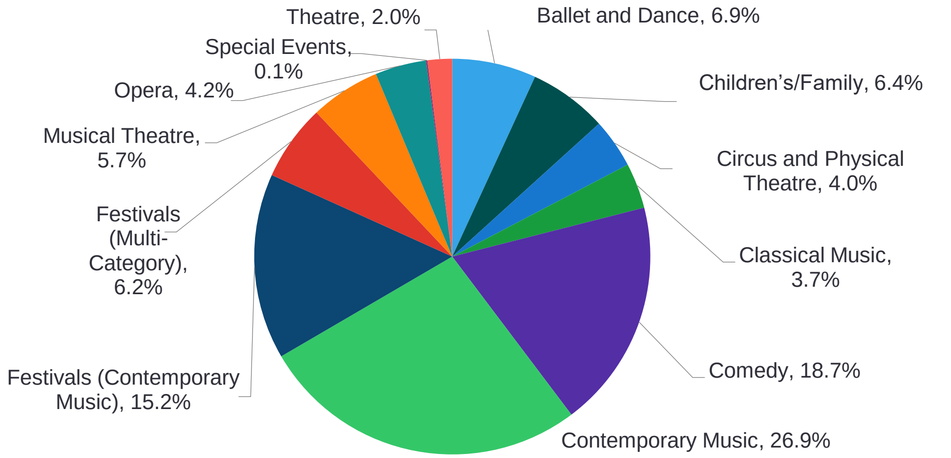


Analysis by Category - 2023

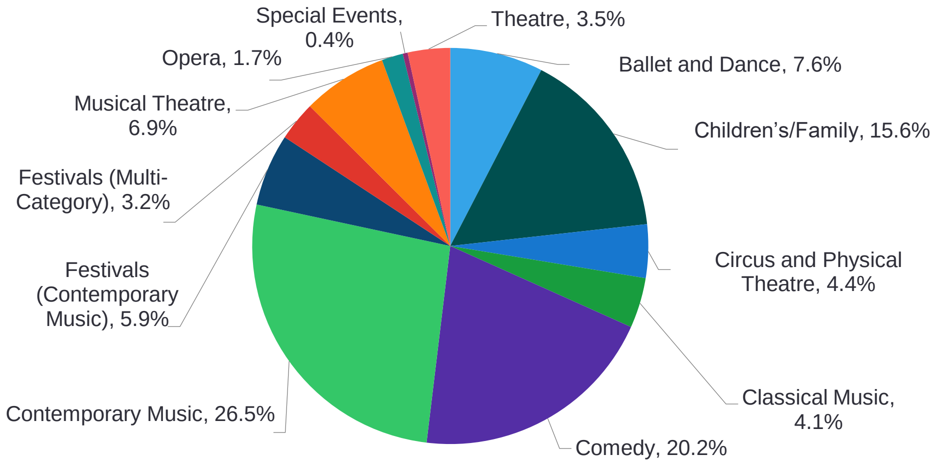
	Revenue	Attendance			
Category	**Total Ticket Revenue**	**Paid**	**Zero-Priced**	**Comps**	**Total**
Ballet and Dance	3,451,103	53,749	117	2,677	56,543
Children's/Family	3,226,002	108,241	1,207	6,851	116,299
Circus and Physical Theatre	2,029,809	30,036	541	1,879	32,456
Classical Music	1,866,506	27,402	411	2,745	30,558
Comedy	9,407,450	146,419	218	3,636	150,273
Contemporary Music	13,509,070	187,802	938	8,022	196,762
Festivals (Contemporary Music)	7,630,406	41,458	50	2,267	43,775
Festivals (Multi-Category)	3,126,789	18,879	1,658	3,387	23,924
Musical Theatre	2,880,270	47,935	1,428	2,212	51,575
Opera	2,101,872	10,126	7	2,835	12,968
Special Events	54,760	1,409	493	1,080	2,982
Theatre	1,010,899	21,678	9	4,039	25,726
Total	**50,294,936**	**695,134**	**7,077**	**41,630**	**743,841**

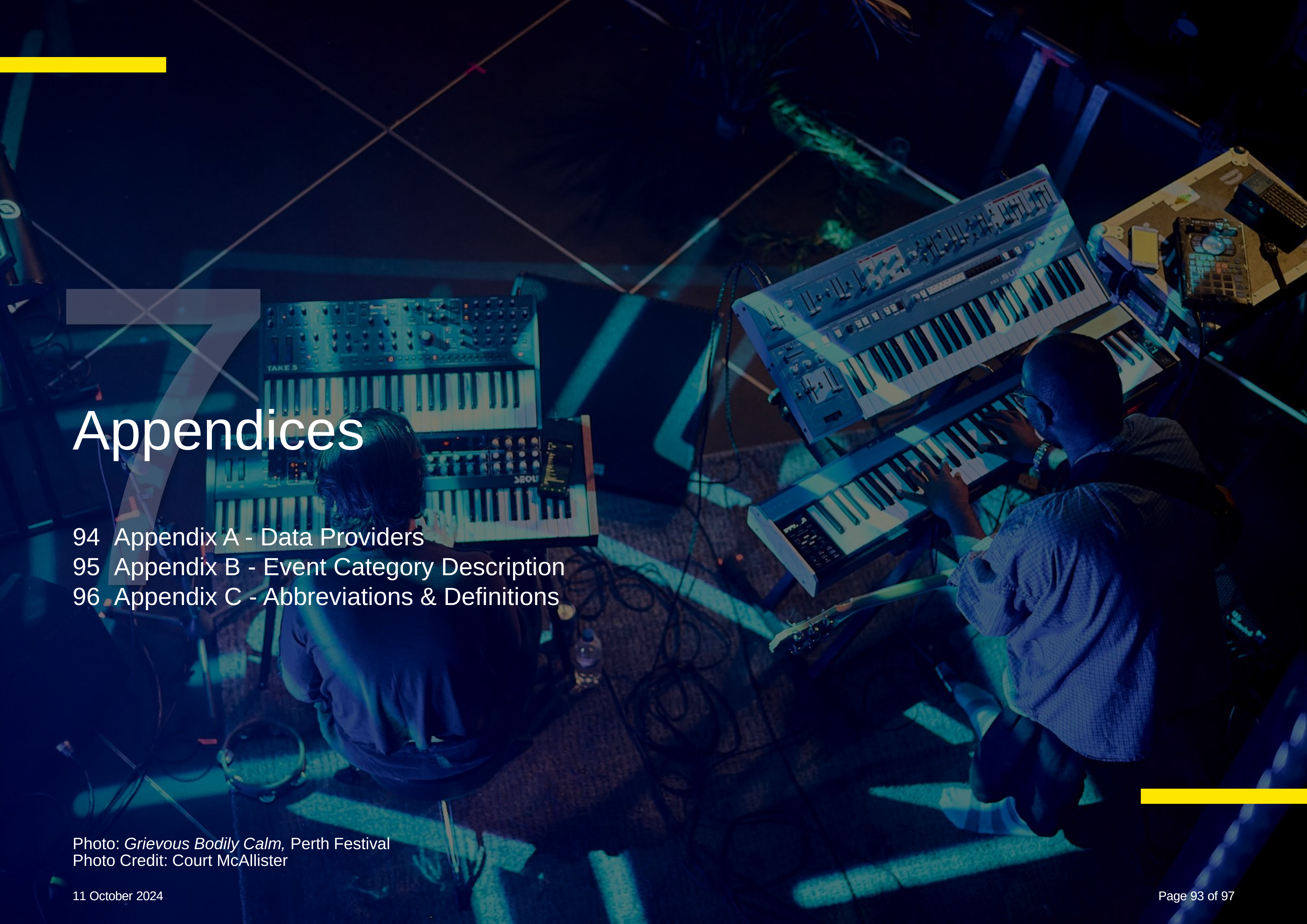
- Contemporary Music represented the highest market share in revenue (26.9%) and in attendance (26.5%). This category reported $13.5m in revenue and 0.2m in attendance. Top events included performances by *Ministry of Sound Classical* and *Disney 100: The Concert.*
- Comedy represented the second-highest market share in revenue (18.7%) and in attendance (20.2%). This category reported $9.4m in revenue and 0.2m in attendance. Top events included GC Laughs Festival and performances by Carl Barron and Jimmy Carr.
- Festivals (Contemporary Music) represented the third-highest market share in revenue (15.2%), while Children's/Family represented the third-highest market share in attendance (15.6%). Festivals (Contemporary Music) reported $7.6m in revenue and 43.8k in attendance. Children's/Family reported $3.2m in revenue and 0.1m in attendance.
- Special Events, Theatre and Classical Music categories contributed the least to revenue in 2023.

Market Share (Revenue) by Category 2023



Market Share (Attendance) by Category 2023





7 Appendices

94 Appendix A - Data Providers
95 Appendix B - Event Category Description
96 Appendix C - Abbreviations & Definitions

Photo: *Grievous Bodily Calm,* Perth Festival
Photo Credit: Court McAllister

Appendix A - Data Providers

The following companies were identified by LPA and provided both revenue and attendance data to EY relating to the live performances and events during the 2023 calendar year. Total revenue comprised of revenue sourced from paid tickets only (i.e. it excludes sponsorships), while the attendance data, provided and used in the analysis, included both paid and non-paid tickets. Average ticket price data was calculated based on paid tickets only. For NPAP companies, the revenue included both single ticket sales as well as subscription revenue.

Regular Providers

- Adelaide Fringe
- Araluen Arts Centre (NT)
- Artrage
- Arts and Culture Trust
- Arts Centre Melbourne
- Blue Room Theatre
- Brisbane Powerhouse
- Canberra International Music Festival
- Circus Oz
- Canberra Theatre Centre
- Darwin Entertainment Centre
- Darwin Festival
- Glen Street Theatre
- Hayes Theatre Co
- Melbourne Fringe Festival
- Melbourne International Arts Festival (RISING)
- Melbourne International Comedy Festival
- Melbourne Recital Centre
- Moshtix
- Museum of Old and New Art
- Oztix
- Perth Concert Hall
- Perth Festival
- Pinchgut Opera
- Queensland Performing Arts Centre
- Riverside Theatre
- Seymour Centre
- Sydney Fringe Festival
- Sydney Opera House
- Ticketek Pty Ltd (TEG Analytics)
- Ticketmaster Pty Ltd
- Trafalgar Entertainment (Theatre Royal Sydney)
- Untitled Group
- WOMADelaide

Regional Providers

- Albury Entertainment Centre
- Bathurst Memorial Entertainment Centre
- Bendigo Venues and Events
- Bunbury Regional Entertainment Centre
- Dubbo Regional Theatre and Convention Centre
- Frankston Arts Centre
- Geelong Performing Arts Centre
- Gippsland Performing Arts Centre
- Home of the Arts (HOTA)
- Ipswich City Council
- Mackay Entertainment & Convention Centre
- Meredith Music Festival
- Merrigong Theatre Company
- Midcoast Council
- Mildura Arts Centre
- Pilbeam Theatre - Rockhampton
- Port Fairy Folk Festival
- Tamworth Regional Council
- The Events Centre, Caloundra
- Theatre North
- Theatre Royal

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
- Dancenorth Australia
- Griffin Theatre Company
- Malthouse Theatre
- Marrugeku
- Melbourne Symphony Orchestra
- Melbourne Theatre Company
- Musica Viva Australia
- Opera Australia
- Opera Queensland
- Queensland Ballet
- Queensland Symphony Orchestra
- Queensland Theatre Company
- State Opera South Australia
- State Theatre Company South Australia
- Sydney Dance Company
- Sydney Symphony Orchestra
- Sydney Theatre Company
- Tasmanian Symphony Orchestra
- Terrapin Puppet Theatre
- The Australian Ballet
- Victorian Opera
- West Australian Ballet Company
- West Australian Opera
- West Australian Symphony Orchestra
- Windmill Theatre Company

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 that 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 another 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 by LPA
^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
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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