Ticket Attendance & Revenue Survey 2013

Executive Summary

Photo: Waiting for Godot - Sydney Theatre Company, Lisa Tomasetti

The Ticket Attendance and Revenue Survey is proudly sponsored by

Prepared by

Background

This report presents the findings of ticket attendances and revenues for the Live Performance Industry for the 2013 calendar year. This follows on from the previous annual ticketing studies published by LPA since 2004, and by LPA in partnership with Ernst & Young (EY) since 2006. The Live Performance Industry encompasses performances, productions, previews or concerts that are performed in front of a live audience. Our analysis in this report groups events into 12 distinct categories based on the type of art form.

The full Ticket Attendance and Revenue Survey Report 2013 can be found at reports.liveperformance.com.au.

Photo: Happy as Larry, Shaun Parker & Company, Prudence Upton

Overall Results

There were significant gains made in 2013, in what was overall a strong year for the Live Performance Industry. Approximately 17.93 million tickets were issued to live entertainment events in Australia in 2013. This represents an increase of 10.2% on 2012 where 16.27 million tickets were issued to events.

Ticket sales in 2013 generated total revenue of $1.479 billion, up 22.7% on 2012, when ticket sales totalled $1.205 billion. This increase in revenue is a result of an increase in both the total number of paid tickets and the average ticket price.

These gains were largely driven by significantly higher revenue and patronage in the Contemporary Music and Circus and Physical Theatre categories. The Theatre, Festival (Multi-Category) and Special Events categories also performed well, with gains to both revenues and attendances while, the Musical Theatre, Comedy, Opera and Children's/Family categories experienced declines in both revenue and attendance. A summary of the results by category are provided in Table ES1.

An analysis of longer term trends in the table below provides an indication of how the Industry has performed in recent times. However, given the limitations outlined in Section 1.3, our trend analysis has only been performed on data from 2008 to 2012.

The compound annual growth rates (CAGRs) for revenue and average ticket price between 2008 and 2012 were 6.9% and 3.8% respectively while the CAGR for attendance for the same period was 2.5%. In particular, average ticket price changes since 2008 have slightly outpaced the consumer price index (CPI) of 2 to 3%.

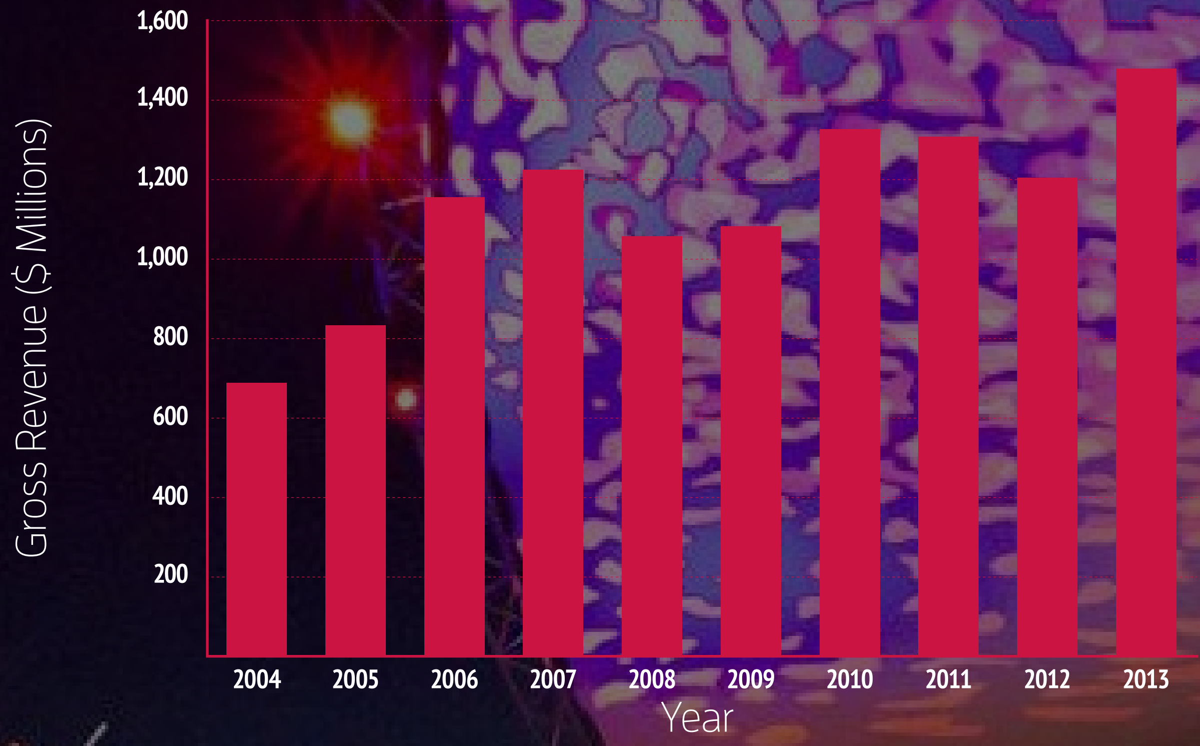
Total Revenue, Attendance and Average Ticket Price (2004–2013)

	REVENUE ($)	GROWTH (%)	TOTAL TICKETS*	GROWTH (%)	AVERAGE TICKET PRICE ($)**	GROWTH (%)
2004	$689,599,070		13,477,231		$55.13	
2005	$834,337,206	21.0%	15,808,790	17.3%	$60.62	10.0%
2006	$1,158,064,526	38.8%	19,835,756	25.5%	$64.08	5.7%
2007	$1,228,658,664	6.1%	20,887,365	5.3%	$66.03	3.1%
2008	$1,061,273,304	-13.6%	15,823,705	-24.2%	$76.60	16.0%
2009	$1,083,329,949	2.1%	15,196,773	-4.0%	$80.57	5.2%
2010	$1,327,805,816	22.6%	17,241,139	13.5%	$86.43	7.3%
2011	$1,309,187,150	-1.4%	17,345,720	0.6%	$85.99	-0.5%
2012	$1,204,883,551	-8.0%	16,273,730	-6.2%	$85.46	-0.6%
2013	$1,478,976,893	22.7%	17,926,626	10.2%	$92.16	7.8%

**Based on both paid and unpaid tickets*

*** Average ticket prices are calculated based only on paid tickets.*

Total Revenue (2004–2013)



Total Attendances (2004–2013)

Photo: Symphony in The City, West Australian Symphony Orchestra, Emma Van Dordrecht

Average Ticket Price (2004–2013)

Photo: Bluesfest Festival, Bluesfest, Roger Cotgreave

Result by State

Between 2012 and 2013, New South Wales and Victoria experienced gains in terms of revenue and attendance. The two states had combined revenue of $970.98 million, or approximately two-thirds of the entire Australian Live Performance Industry.

Despite the overall gains in New South Wales, the State experienced declines in terms of industry share, as growth in other states outpaced that in New South Wales. Revenue in Victoria increased more strongly (by 37.5%) and that state increased its share of the industry. Revenue growth in Victoria was largely driven by growth in the Circus and Physical Theatre, Contemporary Music and Musical Theatre categories.

On the other hand, the Australian Capital Territory experienced a fall in revenue despite higher attendances.

Most other states and territories had a stronger year, with gains to revenues and attendances. In particular, Western Australia experienced significant revenue growth (44.9%) with gains in all event categories other than Theatre, and particularly strong growth in Circus and Physical Theatre. South Australia also performed well, although this was in part due to the inclusion of Adelaide Fringe for the first time in 2013 which attracted high attendance.

TABLE ES1

Total Revenue and Attendances by State/Territory (2012–2013)

STATE/ TERRITORY	REVENUE	CHANGE IN REVENUE FROM 2012	SHARE OF INDUSTRY (2013)	SHARE OF INDUSTRY (2012)	TICKETS	CHANGE IN ATTENDANCE FROM 2012	SHARE OF INDUSTRY (2013)	SHARE OF INDUSTRY (2012)
NSW	$497,463,659	11.5%	33.6%	37.0%	5,865,914	1.2%	32.7%	35.6%
VIC	$473,516,913	37.5%	32.0%	28.6%	5,607,475	14.1%	31.3%	30.2%
QLD	$200,178,524	8.9%	13.5%	15.3%	2,318,207	0.7%	12.9%	14.1%
WA	$194,312,089	44.9%	13.1%	11.1%	2,153,483	20.2%	12.0%	11.0%
SA	$93,864,893	27.6%	6.3%	6.1%	1,497,204	42.1%	8.4%	6.5%
ACT	$15,104,224	-12.7%	1.0%	1.4%	351,242	29.4%	2.0%	1.7%
TAS	$2,402,818	-43.1%	0.2%	0.4%	75,115	-23.3%	0.4%	0.6%
NT	$2,133,774	44.9%	0.1%	0.1%	57,986	32.8%	0.3%	0.3%
TOTAL	$1,478,976,893	22.7%	100.0%	100.0%	17,926,626	10.2%	100.0%	100.0%

A comparison of each state and territory's share of the Live Performance Industry against their population provides insight into spend per capita as well as the concentration of the industry relative to where people live.

Table ES2 illustrates that Victoria and Western Australia command a larger share of both Live Performance revenue and attendance compared to their share of Australia's population.

Although New South Wales' share of the industry declined in 2013, it still remained slightly above its share of the population. Across the other States and Territories, all had a smaller share of industry revenue compared to their population, although South Australia and the Australian Capital Territory had a larger share of attendance.

TABLE ES2

Population and Per Capita Results (2013)

STATE/TERRITORY	POPULATION (2013) (M)	SHARE OF POPULATION	SHARE OF INDUSTRY REVENUE	SHARE OF INDUSTRY ATTENDANCE	SPEND PER CAPITA
NSW	7.47	32.0%	33.6%	32.7%	$66.64
VIC	5.79	24.8%	32.0%	31.3%	$81.77
QLD	4.69	20.1%	13.5%	12.9%	$42.67
WA	2.55	10.9%	13.1%	12.0%	$76.17
SA	1.68	7.2%	6.3%	8.4%	$55.96
ACT	0.38	1.6%	1.0%	2.0%	$39.32
TAS	0.51	2.2%	0.2%	0.4%	$4.68
NT	0.24	1.0%	0.1%	0.3%	$8.80
TOTAL	23.32	100.0%	100.0%	100.0%	$63.42

*Note: *Population is as of December 2013 based on estimates by the Australian Bureau of Statistics (ABS), Cat. No. 3101.0*

Result by Event Category

As with previous years, the Contemporary Music and Musical Theatre categories represent the two largest categories in the industry, generating 42.5% and 13.1% of revenue, respectively. Combined, these two categories account for 55.6% of the Live Performance Industry in terms of gross revenue and 46.6% of total attendance.

The top 3 revenue categories combined, which also includes Circus and Physical Theatre, accounts for 65% of all industry revenue.

The most significant gains were experienced by the Festivals (Multi-Category) and Circus and Physical Theatre categories. The significant increases for Festivals (Multi-Category) can be largely explained by the first time inclusion of data for Adelaide Fringe and Perth's *Fringe World* festivals. The increases in the Circus and Physical Theatre category were primarily due to the number and calibre of touring performances, including two Cirque Du Soleil productions (*Ovo* and *Michael Jackson: The Immortal*), *Slava's Snowshow* and *Empire*.

On the other hand, the Children's/Family category experienced some of the larger declines in both revenue and attendances. Although a number of children's favourites returned in 2013, the *How to Train Your Dragon Arena Spectacular* which toured in 2012 was not staged in 2013, impacting revenue and attendance in the category.

In 2013 there were fewer Opera performances by the AMPAG companies, which helps to explain the decrease in revenue and attendances for the category. Notably, Opera Australia did not return to Brisbane in 2013, after performing there for the first time in 24 years in 2012. Additionally, Opera Queensland had few performances in 2013, further contributing to the large decline in that state. Opera Australia is also increasingly staging musicals as part of its regular season, and the revenue and attendance for these performances is reflected in the Musical Theatre category.

TABLE ES3

Top 5 Categories—Revenue and Attendance

	Revenue: Category	Total Revenue	Industry Share	Attendance: Category	Total Attendance	Industry Share
1	CONTEMPORARY MUSIC	$628,130,146	42.5%	CONTEMPORARY MUSIC	6,266,137	35.0%
2	MUSICAL THEATRE	$193,389,763	13.1%	MUSICAL THEATRE	2,085,131	11.6%
3	CIRCUS AND PHYSICAL THEATRE	$142,033,217	9.6%	THEATRE	1,842,177	10.3%
4	THEATRE	$119,647,414	8.1%	CIRCUS AND PHYSICAL THEATRE	1,285,991	7.2%
5	FESTIVALS (SINGLE-CATEGORY)	$107,367,780	7.3%	CLASSICAL MUSIC	1,169,643	6.5%

TABLE ES4

Top 3 Biggest Changes in Revenue by Category

	Biggest Increase: Category	Increase from 2012	Biggest Decline: Category	Decrease from 2012
1	CIRCUS AND PHYSICAL THEATRE	162.8%	CHILDREN'S/FAMILY	25.0%
2	FESTIVALS (MULTI-CATEGORY)	98.4%	COMEDY	14.8%
3	THEATRE	44.2%	OPERA	9.5%

TABLE ES5

Top 3 Biggest Changes in Attendance by Category

	Biggest Increase: Category	Increase from 2012	Biggest Decline: Category	Decrease from 2012
1	FESTIVALS (MULTI-CATEGORY)	201.8%	OPERA	20.0%
2	CIRCUS AND PHYSICAL THEATRE	131.5%	CHILDREN'S/FAMILY	16.1%
3	SPECIAL EVENTS	24.2%	FESTIVALS (SINGLE-CATEGORY)	9.9%

TABLE ES6

Total Revenue and Attendances by Category (2013)

CATEGORY	REVENUE	% CHANGE IN REVENUE (FROM 2012)	SHARE OF INDUSTRY	TICKETS	% CHANGE IN ATTENDANCE (FROM 2012)	SHARE OF INDUSTRY
BALLET AND DANCE	$62,832,992	8.6%	4.2%	976,336	6.1%	5.4%
CHILDREN'S/FAMILY	$38,684,410	-25.0%	2.6%	1,090,598	-16.1%	6.1%
CIRCUS AND PHYSICAL THEATRE	$142,033,217	162.8%	9.6%	1,285,991	131.5%	7.2%
CLASSICAL MUSIC	$70,481,841	15.8%	4.8%	1,169,643	-6.8%	6.5%
COMEDY	$41,473,321	-14.8%	2.8%	912,609	-7.0%	5.1%
CONTEMPORARY MUSIC	$628,130,146	30.3%	42.5%	6,266,137	14.3%	35.0%
FESTIVALS (MULTI-CATEGORY)	$25,622,029	98.4%	1.7%	786,530	201.8%	4.4%
FESTIVALS (SINGLE-CATEGORY)	$107,367,780	9.2%	7.3%	1,053,419	-9.9%	5.9%
MUSICAL THEATRE	$193,389,763	-4.9%	13.1%	2,085,131	-6.2%	11.6%
OPERA	$43,283,705	-9.5%	2.9%	344,761	-20.0%	1.9%
SPECIAL EVENTS	$6,030,274	41.9%	0.4%	113,294	24.2%	0.6%
THEATRE	$119,647,414	44.2%	8.1%	1,842,177	15.0%	10.3%
TOTAL	$1,478,976,893	22.7%	100.0%	17,926,626	10.2%	100.0%

Survey Participants

Large Scale Venues and Events

Araluen Centre for Arts & Entertainment NT
The Arts Centre (Melbourne)
Arts Projects Australia (WOMADelaide) SA
BASS SA
Bluesfest
Canberra Ticketing
Cirque du Soleil
Darwin Entertainment Centre
FringeTIX (Adelaide Fringe)
Fringe World Festival (Perth)
Melbourne Recital Centre
The Ticket Group (previously Moshtix and Foxtix)
Queensland Performing Arts Centre (Qtix)
Sydney Opera House
Ticketmaster
Ticketek

AMPAG Companies

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