Live Performance Industry in Australia

2021 Ticket Attendance and Revenue Report
Final Report

Live Performance Australia

Reliance Restricted

27 March 2023

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1 Executive Summary

1 Executive Summary

In 2021, the live performance industry reported greater total ticket revenue and attendance than in 2020. However as COVID-19 restrictions still remained in 2021, total ticket sales and revenue did not reach pre-pandemic levels. Restrictions were particularly prevalent in the two major markets, NSW and Victoria. These States were impacted more than other jurisdictions as public health measures, border closures, reduced venue capacities, operational restrictions, as well as mandatory quarantine requirements for international artists, remained.

$0.7b revenue	12.0% y-o-y growth	65.4% decline from 2019

10.9m attendance	40.1% y-o-y growth	54.4% decline from 2019

Top Events

Hamilton, *Frozen, Harry Potter and the Cursed Child* and Adelaide Fringe generated the highest revenue in 2021.

Key Highlights

Ballet and Dance experienced a significant increase in revenue and attendance in 2021, driven by major performances such as *New York Dialects*, *Counterpointe*, *The Sleeping Beauty* and *The Nutcracker.*

Childrens/Family experienced a significant increase in revenue and attendance in 2021, driven by events such as The Wiggles, *Bluey's Big Play*, *Paw Patrol Live!, Sesame Street Circus* and *Shaun The Sheep.*

Top events in Musical Theatre in 2021 included *Hamilton*, *Frozen, Moulin Rouge!* and *Come from Away.*

Similar to 2020, COVID-19 restrictions such as border restrictions, venue closures and capacity limits continued to cause significant disruptions to the live entertainment industry across Australia in 2021.

New South Wales (NSW)

- NSW accounted for the highest market share of revenue (32.0%) and the highest market share of attendance (24.0%) in 2021.
- NSW was impacted by COVID-19 restrictions in 2021, which impacted its overall revenue and attendance.
- Musical Theatre contributed the highest share to NSW's overall revenue and attendance, with a share of 50.9% and 33.3% respectively in 2021.

Victoria (VIC)

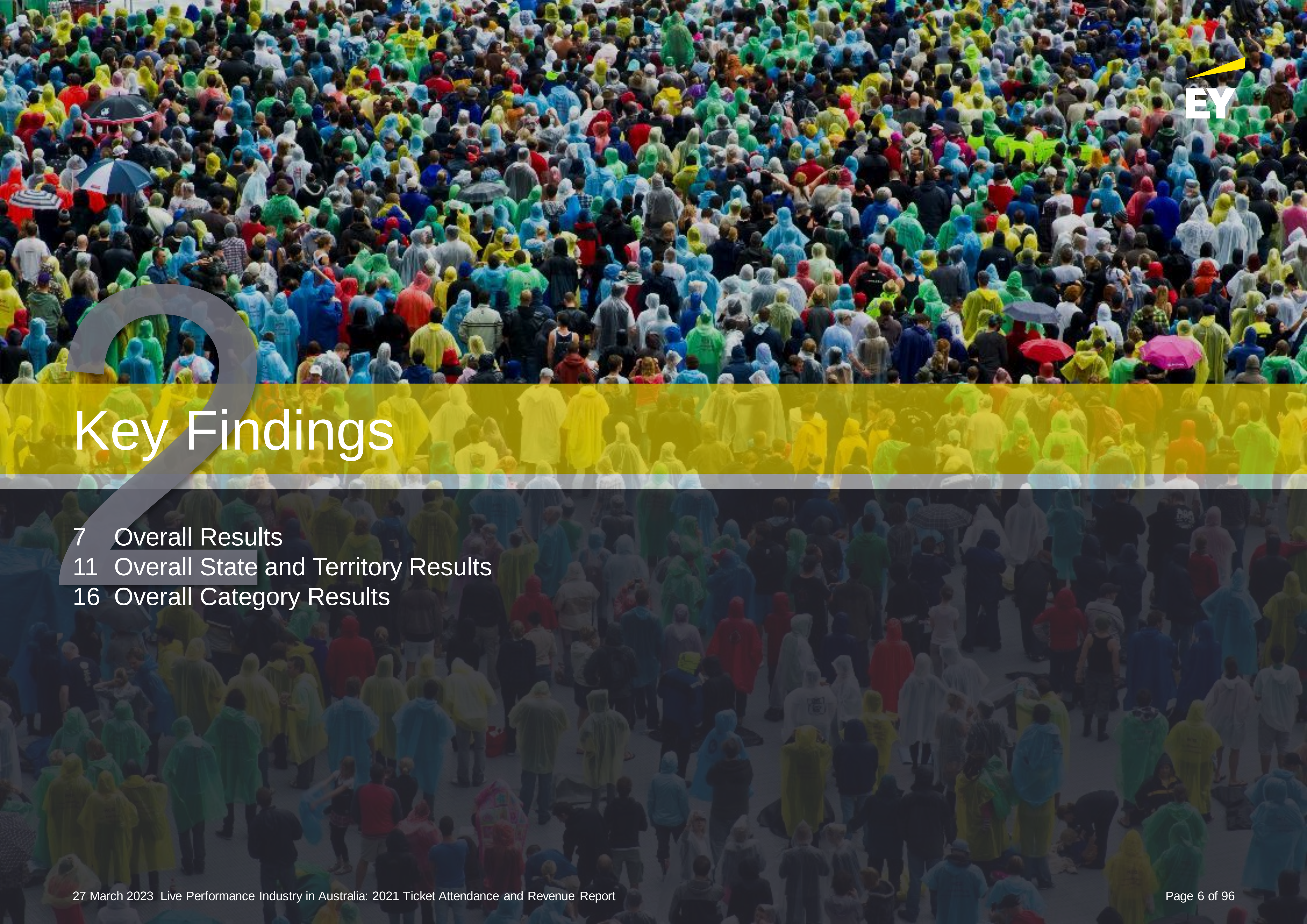
- VIC accounted for the second highest market share of revenue (23.3%) and the second highest market share of attendance (21.8%) in 2021.
- VIC was impacted by COVID-19 restrictions in 2021, which impacted its overall revenue and attendance.
- Contemporary Music contributed the highest share of revenue (24.6%) and Comedy contributed the highest share of attendance (28.5%) in Victoria in 2021.

Musical Theatre

- Musical Theatre accounted for the largest market share of revenue (29.8%) and the second largest market share of attendance (16.4%) in 2021.
- Musical Theatre experienced a significant y-o-y growth in revenue by 201.8% (to $202.3m) and a significant y-o-y growth in attendance by 144.8% (to 1.8m) in 2021.
- NSW, VIC and QLD combined generated approximately 86.2% of revenue market share and 82.5% of attendance market share in 2021.

Contemporary Music

- Contemporary Music accounted for the second largest market share of revenue (21.4%) and the largest market share of attendance (25.1%) in 2021.
- The revenue reported in 2021 was the lowest recorded revenue for the Contemporary Music category since 2004.
- Contemporary Music market share in revenue and attendance in 2021 was lower than previous years, due to COVID-19 restrictions and limited national and international touring activity.



2 Key Findings

Overall Results

The live performance industry experienced a significant decline in revenue and attendance in 2020 due to COVID-19 restrictions.

In 2021, the industry experienced y-o-y growth in both revenue and attendance. However, the overall live performance industry's revenue and attendance in 2021 was lower than that of 2018 and 2019.

This was primarily due to COVID-19 border restrictions imposed on the two major markets (NSW and VIC) for extended periods, limited touring activity across Australia, venue closures, and the cancellation of events in response to COVID-19 restrictions.

$0.7b

Revenue

In 2021, the Australian live performance industry generated total ticket sales revenue of almost $0.7b, an increase of **12.0%** from 2020 and a decrease of **65.4%** from 2019 (pre-COVID).
The y-o-y increase can be primarily attributed to the increase in the total number of paid tickets. This is partially offset by a decline in the average ticket price in 2021.

10.9m

Attendance

Approximately 10.9m tickets were issued in 2021, a **40.1%** growth from 2020. However this is **54.4%** lower than 2019.

Of the 10.9m total tickets, the number of paid tickets issued was 9.8m (a significant increase from 7.0m tickets sold in 2020). The remaining 1.0m tickets issued in 2021 were complimentary, sponsor allocated and zero priced tickets.

$69.02

Average ticket price

The average ticket price declined by **20.8%** from $87.14 in 2020 to $69.02 in 2021.

While Ballet and Dance witnessed the highest y-o-y increase in the average ticket price (by 44.3% to $86.08), Contemporary Music witnessed the largest y-o-y decline (by 51.0% to $56.81) in 2021, largely due to the absence of major international concert tours.

Key insights

- Despite experiencing extended public health measures, NSW and VIC combined accounted for 55.3% of Australia's live performance revenue and 45.8% of attendance in 2021.
- All states and territories except VIC and SA experienced y-o-y growth in revenue and all states and territories except SA experienced y-o-y growth in attendance in 2021. The Northern Territory (NT) and Australian Capital Territory (ACT) experienced the highest growth in percentage terms in revenue and attendance in Australia.
- Ballet and Dance experienced the highest growth in revenue (257.6%) among all categories, primarily driven by major performances such as *New York Dialects*, *Counterpointe*, *The Sleeping Beauty* and *The Nutcracker*.
- Musical Theatre and Contemporary Music represented the two largest categories, generating 29.8% and 21.4% of revenue respectively, and 16.4% and 25.1% of attendance respectively of the overall live performance market in 2021.
- Growth in revenue and attendance in any given year is mainly attributed to the increase in major tours or events, particularly international tours in the market in any given year. There were no major international tours to Australia in 2021.

Overall Results

Trend analysis over the years

Total Attendance and Revenue

2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance*	Growth (%)	Average Ticket Price ($)**	Growth (%)
2004	$689,599,070	-	13,477,231	-	$55.13	-
2005	$834,337,206	21.0%	15,808,790	17.3%	$60.62	10.0%
2006	$1,158,064,526	38.8%	19,835,756	25.5%	$64.08	5.7%
2007	$1,228,658,664	6.1%	20,887,365	5.3%	$66.03	3.1%
2008	$1,061,273,304	(13.6%)	15,823,705	(24.2%)	$76.60	16.0%
2009	$1,083,329,949	2.1%	15,196,773	(4.0%)	$80.57	5.2%
2010	$1,327,805,816	22.6%	17,241,139	13.5%	$86.43	7.3%
2011	$1,309,187,150	(1.4%)	17,345,720	0.6%	$85.99	(0.5%)
2012	$1,204,883,551	(8.0%)	16,273,730	(6.2%)	$85.46	(0.6%)
2013	$1,478,976,893	22.7%	17,926,626	10.2%	$92.16	7.8%
2014	$1,507,963,952	2.0%	18,536,434	3.4%	$91.57	(0.6%)
2015***	$1,413,208,686	(6.3%)	18,626,457	0.5%	$86.34	(5.7%)
2016	$1,430,399,693	1.2%	18,782,588	0.8%	$83.72	(3.0%)
2017	$1,884,141,882	31.7%	23,027,550	22.6%	$90.59	8.2%
2018^	$2,063,885,872	9.5%	25,788,548	12.0%	$96.61	6.6%
2019	$1,964,641,552	(4.8%)	23,864,415	(7.5%)	$92.89	(3.9%)
2020	$605,973,596	(69.2%)	7,761,710	(67.5%)	$87.14	(6.2%)
2021	$678,784,958	12.0%	10,877,839	40.1%	$69.02	(20.8%)

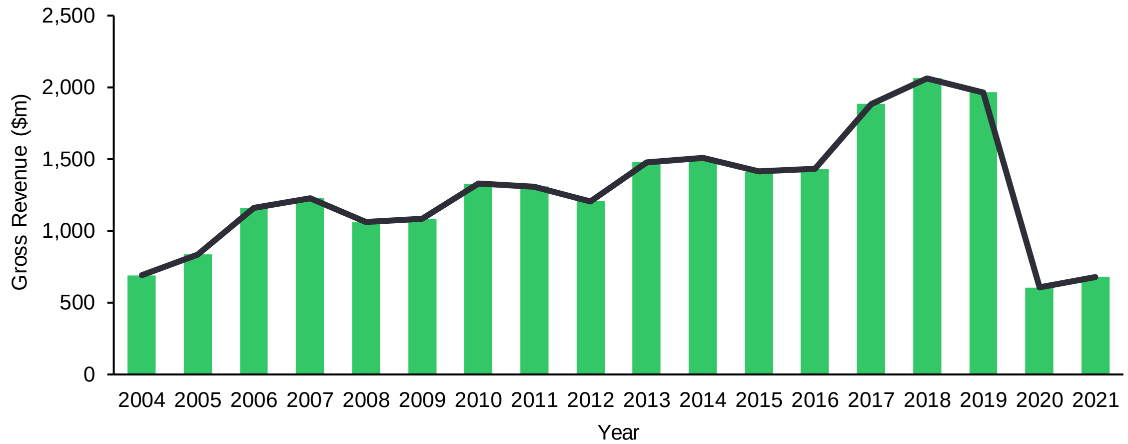
An analysis of longer term trends (see page 9) provides an indication of how the industry has performed in recent years. It is to be noted that data used to prepare the reports prior to 2008 was not provided in a disaggregated format. As such, EY was unable to validate the accuracy of the allocation of events in the years prior to 2008. The trend analysis has only been performed on data from 2008 to 2021. Further, these trends do 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 *** The 2015 survey did not include the revenue and attendance generated by the Fringe World Festival in 2015. To ensure the report is comparing figures on a like for like basis. EY has adjusted the 2015 revenue and attendance figures in the 2016 report.

Overall Results

Revenue

2004 → 2021

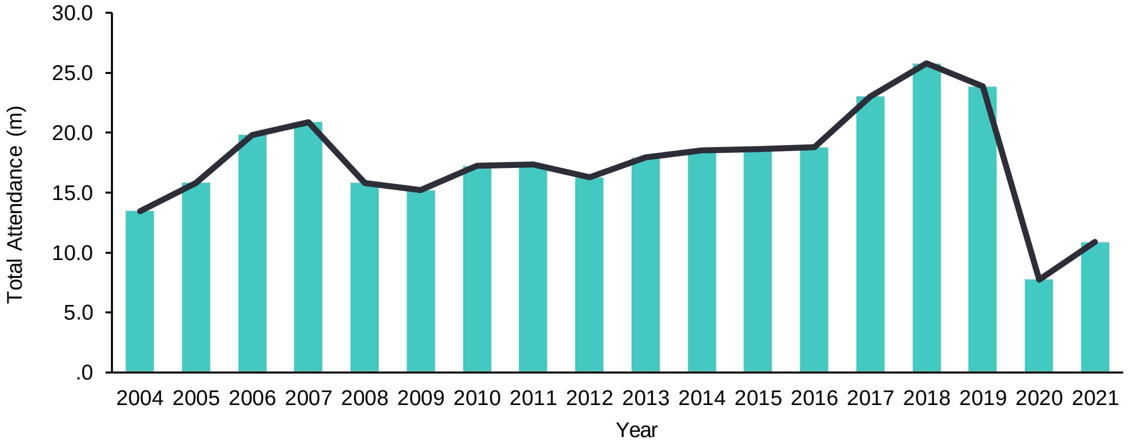


Key Revenue Insights

- In 2021, industry revenue grew year-over-year (y-o-y) by 12.0%. There was a significant fall in revenue in 2020, as a result of COVID-19 restrictions. Although the industry partially recovered in 2021, revenue was still significantly lower compared to 2018 and 2019 as the two major markets, NSW and VIC, were closed for extended periods due to COVID-19 restrictions.
- Revenue has grown at a compound annual growth rate (CAGR) of 5.8% over the period 2008 to 2019, whereas between 2019 to 2021 it declined at a CAGR of 41.2%.
- In 2021, Ballet and Dance experienced the highest y-o-y increase (257.6%) in revenue among all the categories, followed by Children's/Family (229.9%).
- All states and territories except VIC and SA witnessed a y-o-y increase in revenue in 2021. NT witnessed the highest y-o-y growth in revenue by 517.4% (to $5.2m).

Attendance

2004 → 2021

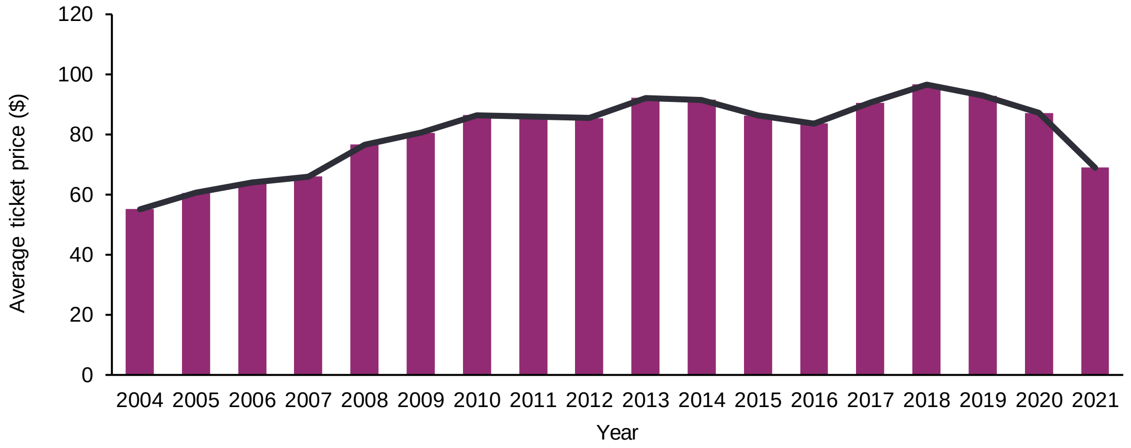


Key Attendance Insights

- Total attendance increased y-o-y by 40.1% from 7.8m in 2020 to 10.9m in 2021. However, attendance was still significantly lower than the attendance reported in 2018 and 2019. This was due to reduced venue capacity, operational restrictions and the two major markets (NSW and VIC) closed for extended periods due to COVID-19 restrictions.
- Attendance grew at a CAGR of 3.8% from 2008 to 2019, whereas from 2019 to 2021 it declined at a CAGR of 32.5%.
- All states and territories except SA witnessed a y-o-y increase in attendance in 2021. NT experienced the highest y-o-y growth in attendance (395.0%), followed by ACT (109.9%).
- In 2021, the Comedy category experienced the highest y-o-y increase (246.2%) among all categories, followed by Childrens/Family (177.9%).

Overall Results

Average Ticket Price 2004 → 2021



Key Average Ticket Price Insights

- The average ticket price decreased by 9.9%, from $76.60 in 2008 to $69.02 in 2021.
- The average ticket price has grown at a CAGR of 1.8% from 2008 to 2019, whereas from 2019 to 2021 it declined at a CAGR of 13.8%.
- The average ticket price decreased by 20.8% y-o-y, from $87.14 in 2020 to $69.02 in 2021.
- In 2021, Ballet and Dance witnessed the highest y-o-y growth in average ticket price, at 44.3% growth.
- Festivals (Contemporary Music), followed by Opera, recorded the highest average ticket price among all the categories in 2021, at $124.16 and $118.94 respectively.

Overall State and Territory Results

New South Wales (NSW) experienced significant y-o-y growth in revenue and attendance in 2021. However, the revenue and attendance reported was lower compared to 2018 and 2019, as NSW was closed for extended periods due to COVID-19 restrictions in 2021.

- **NSW** experienced a growth in revenue (by 19.0% to $217.2m) and in attendance (by 33.0% to 2.6m) between 2020 and 2021.
- The increase in revenue was driven by **Circus and Physical Theatre** (1036.1%), **Musical Theatre** (386.4%), **Childrens/Family** (213.9%), **Ballet and Dance** (205.5%) and **Classical Music** (118.1%). This revenue was partially offset by declines in revenue in **Special Events** (81.2%), **Contemporary Music** (71.9%), **Festivals (Contemporary Music)** (40.5%) and **Opera** (14.3%).
- **Circus and Physical Theatre** revenue increased primarily due to a 471.3% increase in attendance in 2021. The growth was primarily attributed to *Magic Mike Live* and *The Little Prince*. **Musical Theatre** revenue increased primarily due to a 233.5% increase in attendance and increase in average ticket price in 2021. Top events included *Hamilton*, *Frozen* and *Come from Away*.
- **Childrens/Family** revenue increased due to an increase in attendance by 133.4%, primarily driven by events such as The Wiggles and *Bluey's Big Play*. **Ballet and Dance** revenue increased primarily due to a 148.9% increase in attendance and increase in average ticket price in 2021.
- **Classical Music** revenue increased primarily due to a 80.0% increase in attendance. Top events included *Love Actually In Concert* and *Queen Orchestrated.*
- **Contemporary Music** revenue declined, primarily due to a decline in attendance by 41.0% and fall in average ticket price in 2021. Revenue declined in **Festivals (Contemporary Music), Special Events** and **Opera**, primarily due to declines in attendance in 2021.

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Victoria (VIC) experienced a slight y-o-y decline in revenue despite a significant y-o-y growth in attendance in 2021. The revenue and attendance reported were lower than 2018 and 2019, as VIC experienced extended periods of COVID-19 restrictions in 2021.

- **VIC** experienced a slight decline in revenue (by 0.2% to $157.9m) and fifth highest growth in attendance (by 53.3% to 2.4m) between 2020 and 2021.
- All categories except **Festivals (Multi-Category), Contemporary Music** and **Classical Music** witnessed a y-o-y increase in revenue. **Opera** (672.3%), **Special Events** (439.9%), **Ballet and Dance** (424.7%), **Comedy** (383.1%) and **Childrens/Family** (291.8%) experienced the highest growth in revenue.
- **Opera** revenue increased primarily due to a 423.5% increase in attendance and an increase in average ticket price in 2021. Major opera performances in 2021 included *Aida*, *Das Rheingold* and *Ernani*. **Special Events** revenue increased, despite a decrease in attendance by 42.7%. This was primarily due to the increase in average ticket price in 2021. **Ballet and Dance** revenue increased significantly due to an increase in attendance by 575.8%, driven by events such as *Celebration Gala* and *Summertime at the Ballet*.
- **Childrens/Family** increased as a result of a 235.1% increase in attendance and an increase in average ticket price in 2021. Major events included The Wiggles, *Paw Patrol Live!*, *Shaun the Sheep* and *The Midnight Gang*.
- **Comedy** revenue increased primarily due to a 881.8% increase in attendance. This was partially offset by a decline in average ticket price in 2021. The growth was predominately driven by Melbourne International Comedy Festival (which was cancelled in 2020) and performances by comedians such as Daniel Sloss and Arj Barker.
- **Festivals (Multi-Category)** revenue declined, despite an increase in attendance by 23.8%. This was primarily due to a fall in average ticket price in 2021. **Contemporary Music** revenue declined, due to a decline in attendance by 8.1% and fall in average ticket price in 2021. **Classical Music** revenue declined due to a drop in attendance and a fall in average ticket price in 2021.

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Overall State and Territory Results

In 2021, Queensland (QLD) experienced y-o-y growth in revenue and in attendance compared to 2020, which was highly impacted by COVID-19 restrictions and limited touring activity.

- **QLD** experienced growth in revenue (by 13.7% to $132.9m) and significant growth in attendance (by 75.6% to 2.2m) between 2020 and 2021.
- Revenue growth was driven by significant increases in revenue in **Ballet and Dance** (487.5%), **Festivals (Multi-Category)** (431.3%), **Opera** (363.6%), **Musical Theatre** (290.9%), **Childrens/Family** (283.1%), **Theatre** (149.7%), **Classical Music** (147.8%), **Comedy** (75.6%) and **Festivals (Contemporary Music)** (63.7%). The revenue was partially offset by declines in revenue in **Circus and Physical Theatre** (60.3%), **Contemporary Music** (42.8%) and **Special Events** (34.0%).
- **Ballet and Dance** revenue increased due to 297.0% increase in attendance and an increase in average ticket price in 2021. Top events included *The Sleeping Beauty*, *The Nutcracker* and *Dracula*. **Festivals (Multi Category)** revenue increased as a result of an increase in attendance by 854.8%. Major festivals included Brisbane Festival and MELT (Queer Arts & Culture) Festival.
- **Musical Theatre** revenue increased primarily due to a 255.6% increase in attendance and an increase in average ticket price in 2021. Top events included *Charlie & Chocolate Factory* and *Come from Away*.
- **Opera** revenue increased primarily due to an increase in attendance by 116.6%, attributed to events such as *The Marriage of Figaro* and *Verdi.*
- **Childrens/Family**, **Theatre**, **Comedy** and **Festivals (Contemporary Music)** revenue increased largely due to an increase in attendance. **Classical Music** revenue increased primarily due to a 162.8% increase in attendance, partially offset by a decrease in average ticket price in 2021.
- **Circus and Physical Theatre** revenue declined due to a 36.3% decrease in attendance and a decrease in average ticket price in 2021. **Contemporary Music** and **Special Events** revenue declined despite an increase in attendance. This was due to a decrease in average ticket price in 2021.

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Western Australia (WA) witnessed y-o-y growth in revenue and in attendance in 2021.

- **WA** experienced growth in revenue (by 16.8% to $85.0m) and in attendance (by 26.6% to 1.6m) between 2020 and 2021.
- Revenue growth was driven by significant increases in revenue in **Childrens/Family** (256.1%), **Musical Theatre** (238.7%), **Opera** (217.5%), **Theatre** (198.9%), **Classical Music** (172.0%), **Ballet and Dance** (105.2%), **Circus and Physical Theatre** (94.4%) and **Comedy** (67.4%). The revenue was partially offset by a decline in revenue in **Special Events** (70.7%), **Festivals (Contemporary Music)** (57.0%) and **Festivals (Multi-Category)** (20.3%).
- **Childrens/Family** revenue increased mainly due to a 193.0% increase in attendance and an increase in average ticket price in 2021. Top events included *Bluey's Big Play* and The Wiggles.
- **Musical Theatre,** and **Ballet and Dance** revenue increased primarily due to an increase in attendance. **Classical Music**, **Theatre** and **Comedy** revenue increased mostly due to an increase in attendance, partially offset by the decrease in average ticket price in 2021.
- **Opera** and **Circus and Physical Theatre** revenue increased despite a decrease in attendance. This was largely due to an increase in average ticket price in 2021.
- **Special Events, Festivals (Contemporary Music)** and **Festivals (Multi-Category)** revenue declined as a result of a decrease in attendance in 2021.

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Overall State and Territory Results

South Australia (SA) witnessed a y-o-y decline in revenue and in attendance in 2021.

Amongst all states and territories, SA is the only state which experienced a decline in both revenue and attendance in 2021.

- **SA** experienced a decline in revenue (by 9.2% to $54.2m) and a decline in attendance (by 2.0% to 1.4m) between 2020 and 2021.
- These results were primarily driven by the declines in revenue in **Special Events** (83.3%), **Festivals (Contemporary Music)** (59.1%), **Contemporary Music** (35.1%), **Musical Theatre** (34.9%), **Comedy** (17.0%) and **Festivals (Multi-Category)** (11.0%).
- **Special Events**, **Festivals (Contemporary Music)**, **Musical Theatre**, **Comedy** and **Festivals (Multi Category)** revenue declined primarily due to decreases in attendance in 2021, with border restrictions impacting shows and visitors that could enter the state. **Contemporary Music** witnessed a decline in revenue despite an increase in attendance in 2021. This is primarily due to a fall in average ticket price in 2021.
- The decline in revenue was partially offset by significant increases in revenue in **Circus and Physical Theatre** (6131.2%), **Opera** (2435.8%), **Ballet and Dance** (877.9%), **Childrens/Family** (546.1%) and **Classical Music** (411.8%).
- **Circus and Physical Theatre** revenue increased primarily due to a significant increase in attendance in 2021. Top events included *The Ultimate Vegas Show* and *Circus – The Show*.
- **Childrens/Family** revenue increased mainly due to a 307.7% increase in attendance and an increase in average ticket price in 2021. Top events included *Sesame Street*, *Bluey's Big Play* and The Wiggles.
- **Ballet and Dance** and **Classical Music** revenues increased largely due to an increase in attendance and an increase in average ticket price in 2021. **Opera** revenue increased despite a decrease in attendance. This was due to an increase in average ticket price in 2021.

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Due to their size, Northern Territory (NT), Australian Capital Territory (ACT) and Tasmania contributed the least to overall live performance revenue in Australia in 2021.

- **NT** witnessed the highest y-o-y growth in revenue (517.4% to $5.3m) and the highest y-o-y growth in attendance (395.0% to 0.1m) amongst all states and territories between 2020 and 2021.
- The growth in revenue was primarily driven by a growth in **Festivals (Contemporary Music)**, **Festivals (Multi-Category)**, **Theatre**, **Circus and Physical Theatre** and **Comedy**. Some of these categories witnessed significant growth in 2021, as events in these categories could proceed in 2021 following the COVID-19 restrictions in 2020. There was also a new data provider.
- **ACT** witnessed the second highest y-o-y growth in revenue (112.5% to $12.1m) and the second highest y-o-y growth in attendance (109.9% to 0.2m) amongst all states and territories between 2020 and 2021.
- The growth in revenue was largely driven by a growth in the **Festivals (Contemporary Music), Opera**, **Childrens/Family**, **Theatre** and **Contemporary Music** categories.
- **Tasmania** witnessed the third highest y-o-y growth in revenue (52.8% to $14.2m) and the third highest y-o-y growth in attendance (89.1% to 0.4m) amongst all states and territories between 2020 and 2021.
- The growth in revenue was driven by growth in the **Comedy, Classical Music, Musical Theatre** and **Festival (Multi Category)** categories.

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Overall State and Territory Results

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

- **NSW** recorded the highest share of revenue and attendance, representing 32.0% and 24.0% of the national market share of revenue and attendance respectively in 2021. Due to an extended lockdown, these results are lower than pre-COVID levels.
- **VIC** represented the second highest market share of revenue and attendance amongst all the states and territories in Australia, accounting for 23.3% and 21.8% of the national market share of revenue and attendance respectively in 2021. VIC's market share was also lower than pre-COVID levels.
- Combined, **VIC** and **NSW** generated approximately 55.3% of Australia's live performance revenue and 45.8% of attendance in 2021.
- National spend per capita in 2021 was $26.35. **WA** and **SA** held the top positions in spend per capita in 2021, with $30.77 (16.8% higher than national spend per capita) and $30.01 (13.9% higher than national spend per capita) respectively.
- **NSW** spend per capita in 2021 was $26.82 (1.8% higher than national spend per capita). **VIC** spend per capita was $24.08 (8.6% lower than the national spend per capita).

See p. 31, p. 34, p. 40, p. 43

- **NSW** and **Victoria** usually account for the largest market share of revenue and attendance across categories in the previous years. However, there were notable exceptions in 2021 (as mentioned below). These exceptions were partly due to the extended COVID-19 lockdowns and public health measures in **NSW** and **Victoria** in 2021.
- Notable exceptions in 2021 included:
  - In **Ballet and Dance**, **NSW** and **QLD** combined accounted for the largest market share of revenue and attendance.
  - In **Circus and Physical Theatre**, **NSW** and **QLD** generated the majority of revenue and attendance with a combined 82.0% market share of revenue and 82.8% of attendance. Major events in NSW and QLD included *Magic Mike Live, The Little Prince,* and *Infamous the Show.*
  - In **Classical Music**, **NSW** and **WA** combined accounted for the largest market share of revenue and attendance.
  - In **Contemporary Music**, **Festivals (Contemporary Music)**, **Comedy** and **Special Events** - **VIC** and **QLD** combined accounted for the largest market share of revenue and attendance.
  - In **Festivals (Multi-Category)**, **SA** and **WA** generated the majority of revenue and attendance, with a combined 82.3% market share of revenue and 72.8% of attendance. Major annual festivals held in **SA** and **WA** included Adelaide Fringe, Fringe World Festival and Adelaide Festival.
  - In **Musical Theatre**, **NSW** and **VIC** combined accounted for the largest market share of revenue, while **NSW** and **QLD** accounted for the largest market share of attendance.

2021 Analysis of Top 5 Categories and Top 3 Biggest Changes

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

Top 5 Categories - Revenue and Attendance 2021

Revenue 2021		
Category	Total Revenue	Industry Share
Musical Theatre	$202,342,943	29.8%
Contemporary music	$144,938,333	21.4%
Theatre	$53,563,159	7.9%
Festivals (Contemporary Music)	$51,279,951	7.6%
Comedy	$50,301,163	7.4%

Attendance 2021		
Category	Total Attendance	Industry Share
Contemporary music	2,731,661	25.1%
Musical Theatre	1,784,772	16.4%
Festivals (Multi-Category)	1,554,151	14.3%
Comedy	1,171,696	10.8%
Children's/Family	1,050,643	9.7%

Top 3 Biggest Changes by Category 2021

Biggest Increase in Revenue	
Category	Increase from 2020
Ballet and Dance	257.6%
Children's/Family	229.9%
Musical Theatre	201.8%

Biggest Increase in Attendance	
Category	Increase from 2020
Comedy	246.2%
Childrens/Family	177.9%
Ballet and Dance	164.6%

Biggest Decline in Revenue	
Category	Decrease from 2020
Contemporary music	(53.1%)
Special Events	(44.0%)
Circus and Physical Theatre	(6.5%)

Biggest Decline in Attendance	
Category	Decrease from 2020
Special Events	(52.8%)
Contemporary music	(4.9%)
Circus and Physical Theatre / Festivals (Multi-Category)	(0.9%)

Overall Category Results

This section presents an analysis for each of the 12 event categories.

In 2021, some of the categories reported significant growth in revenue and attendance as compared to 2020, which was impacted by COVID-19 restrictions and limited touring activity.

As COVID-19 restrictions continued in 2021, overall revenue and attendance levels were lower than 2018 and 2019.

The categories are defined in Appendix B.

In 2021, **Musical Theatre**, **Comedy, Theatre**, **Classical Music, Ballet and Dance and Childrens/Family** were significant contributors to the live performance industry; these categories experienced significant increases in revenue and attendance.

- **Musical Theatre** witnessed the third highest growth in revenue and the fourth highest growth in attendance amongst all categories, generating a 201.8% growth in revenue (to $202.3m) and 144.8% growth in attendance (to 1.8m) in 2021. The growth was primarily attributed to musicals such as *Hamilton, Frozen, Moulin Rouge!* and *Come from Away*. Additionally, an increase in the average ticket price (by 20.0% to $118.88) contributed to the growth in revenue. Between 2004 and 2019, revenue in the **Musical Theatre** category has increased by 143.2% and attendance has increased by 86.8%, whereas from 2019 to 2021, revenue has decreased by 40.0% and attendance has decreased by 48.3%. See p. 77
- **Comedy** experienced the fourth highest growth in revenue and the highest growth in attendance amongst all categories, generating 134.1% growth in revenue (to $50.3m) and 246.2% growth in attendance (to 1.2m) in 2021. The growth in revenue was partially offset by the decrease in average ticket price (by 34.4% to $45.20). The top events in this category in 2021 were the Melbourne International Comedy Festival and performances by renowned comedians such as Carl Barron, Daniel Sloss, Hannah Gadsby and Russell Howard. Between 2009 and 2019, revenue in the **Comedy** category has increased by 160.8% and attendance has increased by 182.5%, whereas from 2019 to 2021, revenue has decreased by 51.3% and attendance has decreased by 46.1%. See p. 65
- **Theatre** experienced an increase in revenue by 34.4% (to $53.6m) and an increase in attendance by 56.8% (to 0.7m) in 2021. The growth was primarily due to the reopening of *Harry Potter and the Cursed Child*. The growth in revenue was partially offset by the decrease in the average ticket price (by 15.8% to $88.56). Between 2004 and 2019, revenue in the **Theatre** category has increased by 63.9% despite a decrease in attendance by 30.5%. This was due to an increase in the average ticket price by 146.3%. However, from 2019 to 2021, revenue has decreased by 63.5% and attendance has decreased by 56.8%. See p. 86
- **Classical Music** experienced an increase in revenue by 109.7% (to $38.0m) and an increase in attendance by 105.4% (to 0.6m) in 2021. The average ticket price decreased by 6.7% (to $76.26). The top events in this category in 2021 were *Love Actually In Concert*, *Star Wars: Return of the Jedi in Concert*, *One Big Voice* and *Queen Orchestrated.* Between 2004 and 2019, revenue in the **Classical Music** category has increased by 108.6% and attendance has increased by 23.9%, whereas from 2019 to 2021, revenue has decreased by 56.5% and attendance has decreased by 54.8%. See p. 62
- **Ballet and Dance** experienced the highest growth in revenue and the third highest growth in attendance amongst all categories, generating 257.6% growth in revenue (to $26.9m) and 164.6% growth in attendance (to 0.4m) in 2021. An increase in the average ticket price (by 44.3% to $86.08) contributed to the growth in revenue. However, the revenue and attendance reported in 2021 are the second lowest recorded values (2020 being the lowest) in this category since 2004, due to major ballet and dance companies not being able to perform because of COVID-19 restrictions. The top events in this category in 2021 were *New York Dialects*, *Counterpointe*, *The Sleeping Beauty* and *The Nutcracker*. Between 2004 and 2021, the revenue in the **Ballet and Dance** category decreased by 12.1% and attendance decreased by 46.8%. However, the average ticket price increased by 71.9% over the same period. See p. 53
- **Childrens/Family** experienced the second highest growth in revenue and the second highest growth in attendance amongst all categories, generating 229.9% growth in revenue (to $34.3m) and 177.9% growth in attendance (to 1.1m) in 2021. An increase in the average ticket price (by 19.0% to $36.10) contributed to the growth in revenue. The top events in this category in 2021 were The Wiggles, *Bluey's Big Play*, *Paw Patrol Live!, Sesame Street Circus* and *Shaun The Sheep.* Between 2004 and 2021, the revenue in the **Childrens/Family** category increased by 219.4% and attendance increased by 103.9%. See p. 56

Overall Category Results

Opera experienced an increase in revenue, driven by growth in attendance and average ticket price in 2021.

Festivals (Contemporary Music) witnessed a decline in revenue, despite an increase in attendance in 2021, primarily due to a decrease in the average ticket price.

- **Opera** experienced an increase in revenue by 38.3% (to $15.6m) and an increase in attendance by 2.2% (to 0.2m) in 2021. An increase in the average ticket price (by 36.0% to $118.94) contributed to the growth in revenue. However, 2021 has the second lowest recorded revenue and attendance in Opera since 2004 (2020 being the lowest). This is primarily due to postponement of several performances by Opera Australia due to COVID-19 restrictions. The top events in this category in 2021 were *La Traviata on Sydney Harbour*, *Aida* and *Tosca*. Between 2004 and 2021, revenue in the **Opera** category decreased by 75.0% and attendance decreased by 76.0%. However, the average ticket price has increased by 9.2% over the same period. See p. 80
- **Festivals (Contemporary Music)** experienced a decline in revenue by 5.3% (to $51.3m) despite an increase in attendance by 5.6% (to 0.5m) in 2021. This was primarily due to the decrease in average ticket price (by 12.8% to $124.16). Top events in 2021 were Red Hot Summer Tour, SummerSalt, Beyond The City and Yours and Owls Festival. Between 2004 and 2019, revenue in the **Festivals (Contemporary Music)** category has increased by 1906.1% and attendance has increased by 661.0%, whereas from 2019 to 2021, revenue has decreased by 71.6% and attendance has decreased by 68.1%. See p. 74

Contemporary Music, Circus and Physical Theatre, Festivals (Multi-Category) and Special Events witnessed a decline in revenue and attendance in 2021.

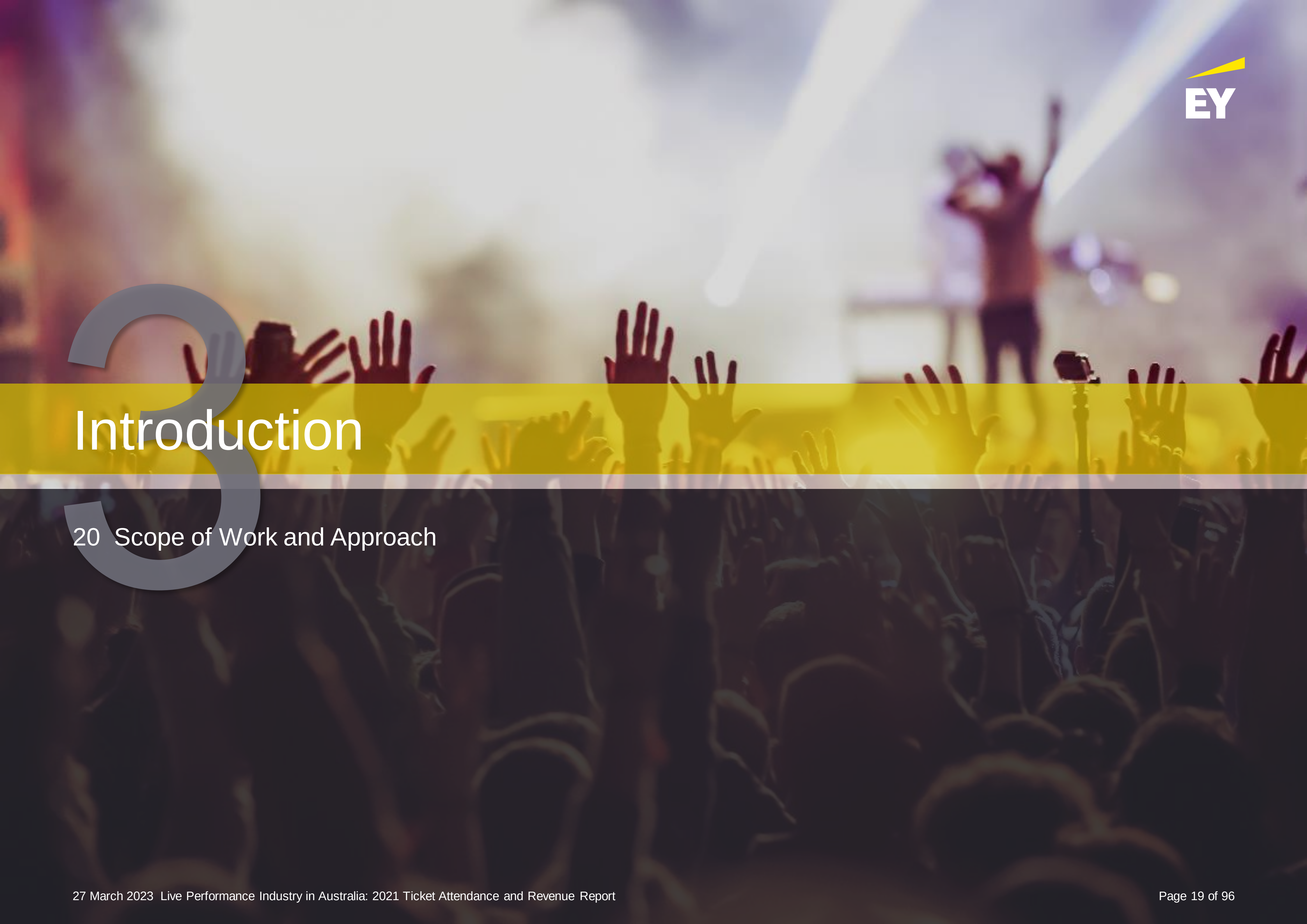
- **Contemporary Music** witnessed the highest y-o-y decline in revenue (by 53.1% to $144.9m) and the second highest y-o-y decline in attendance (by 4.9% to 2.7m) among all the categories in 2021. The decline in the average ticket price (by 51.0% to $56.81) further contributed to the decline in revenue. The revenue and attendance reported in 2021 is the lowest recorded revenue and attendance for **Contemporary Music** since 2004, reflecting the fact that there were no major international concert tours. Further, the average ticket price in 2021 is the lowest recorded average ticket price for this category since 2004. The top events in this category in 2021 were *Midnight Oil*, *The Cat Empire*, *By The C* and performances by Keith Urban and Paul Kelly. See p. 68
- **Circus and Physical Theatre** witnessed a decline in revenue (by 6.5% to $21.2m) and a slight decline in attendance (by 0.9% to 0.3m) in 2021. The decline in the average ticket price (by 4.1% to $85.78) further contributed to the decline in revenue. The top events in this category in 2021 were *Magic Mike Live*, *The Little Prince*, *Matador* and *Infamous the Show*. Between 2009 and 2021, revenue in the **Circus and Physical Theatre** category increased by 146.7% and attendance increased by 37.4%. See p. 59
- **Festivals (Multi-Category)** experienced a slight decline in revenue (by 4.6% to $37.7m) and attendance (by 0.9% to 1.6m) in 2021. The decline in revenue was partially offset by the increase in the average ticket price (by 5.4% to $30.20). The top events in this category in 2021 were the Adelaide Fringe, Fringe World Festival, Adelaide Festival and Darwin Festival. See p. 71
- **Special Events** experienced a decline in revenue (by 44.0% to $2.6m) and a decline in attendance (by 52.8% to 78.7k) in 2021. The decline in the average ticket price (by 25.1% to $41.51) further contributed to the decline in revenue. The top events in this category in 2021 were *Carols by Candlelight* and *Last Night of the Proms*. The **Special Events** category is particularly variable as it is dependent on whether performances that cannot be classified into other categories take place. See p. 83

Overall Category Results

Musical Theatre and Contemporary Music continue to be the top contributors to the overall live performance market in 2021.

- The top 5 categories accounted for approximately 74.0% of industry revenue and 62.6% of attendance in 2021 (**Musical Theatre, Contemporary Music, Theatre, Festivals (Contemporary Music)** and **Comedy**).
- As with previous years, in 2021, **Musical Theatre** and **Contemporary Music** represented the two largest categories in the industry generating 29.8% and 21.4% of revenue respectively, and 16.4% and 25.1% of attendance respectively. Combined, these two categories account for 51.2% of the live performance industry in terms of revenue and 41.5% of attendance in 2021, although these results are lower than pre-COVID levels.

See p. 50



3 Introduction

Scope of Work and Approach

Defining our tasks performed and our approach

Scope of Work

Ernst & Young (EY) has been engaged by Live Performance Australia (LPA) for preparation of the 2021 Live Performance Australia Ticket Attendance and Revenue Report ("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 audience.

The scope of our work included:

- Data collected on the number of ticket sales and associated revenue for the live performance industry in Australia ("2021 national data") from Data Providers. LPA provided assistance with collecting the data
- Analysis of the 2021 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 ticketing data to defined event categories. In Appendix B of this Report, these event categories are described.

Further, as part of these guidelines, the ticketing companies and venues were requested to exclude from their data all events produced or presented by the 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.

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

- Events which were wrongly classified were reallocated. For example, music festivals were reallocated to Festivals (Contemporary Music)
- Online streamed events were included in 2020 due to an increase in online streaming as an impact of COVID-19 and have been included in 2021
- Non live performance events such as sporting events, talk shows, fashion festivals, food festivals (that do not include music line ups), workshops, cinema screenings, award nights and graduation ceremonies were excluded
- Amateur events such as school performances, dance academy concerts and other community group performances were excluded.

Scope of Work and Approach

Limitations and report changes from previous years

Limitations

The information and analysis contained in this Report is based on ticketing data provided by 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 haveidentified 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. While 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 involved in the Report. LPA and EY are working towards improving the Report's inclusion of these events by increasing the regional providers' dataset.

It is important to note that festivals are under-reported in this Report as some festivals maintain their own ticketing systems and many of these do not contribute data into this Report. The inclusion of ticketing data from Oztix, Bluesfest, MONA FOMA and Dark Mofo in recent years addresses some under reporting in the festival categories. However, revenue and attendance are likely to be undervalued in the category because a number of boutique festival events are self-ticketed and are not presently contributing data to the Report. For numerous festivals, the Report only documents paid tickets and does not include the substantial unpaid and/or 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 part of the Report are not included in the results. However, data from Oztix, Ticketek, Ticketmaster and Moshtix (The Ticket Group) helps to decrease the level of under-reporting, as these ticketing agencies include smaller performances at certain bars and hotels. 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 2021 data was compared against historical data sourced directly from Live Performance Australia's Live Performance Industry in Australia 2006 - 2020 Reports. EY acknowledges that we did not revisit the data collection and allocation methodology used in 2006 and 2007 as the historical data used to prepare the reports in these years was not provided in a disaggregated format. As such, EY was unable to query the accuracy of the allocation of events in these years. Therefore, data was compared from 2008 to 2021. Inconsistencies may exist in the data collection methodology between the surveys performed in these ten years, and for previous surveys (where more detailed event specific information was not requested).

Changes in the report compared to previous years

- In 2016, the term Festivals (Single-Category) was renamed Festivals (Contemporary Music) and is currently referred to as Festivals (Contemporary Music).
- The new providers 'Melbourne International Jazz Festival' and 'Darwin Festival' were included in the 2021 report.

4 State Analysis

2021 Revenue and Attendance by State/Territory

Revenue and Attendance by State/Territory

2021

	Revenue				Attendance			
State/Territory	Revenue	Share of Industry (2021)	Share of Industry (2020)	Change in Revenue from 2020	Tickets	Share of Industry (2021)	Share of Industry (2020)	Change in Attendance from 2020
New South Wales	$217,159,216	32.0%	30.1%	19.0%	2,608,375	24.0%	25.3%	33.0%
Victoria	$157,935,937	23.3%	26.1%	(0.2%)	2,371,989	21.8%	19.9%	53.3%
Queensland	$132,908,255	19.6%	19.3%	13.7%	2,213,863	20.4%	16.2%	75.6%
Western Australia	$84,984,114	12.5%	12.0%	16.8%	1,630,414	15.0%	16.6%	26.6%
South Australia	$54,221,032	8.0%	9.9%	(9.2%)	1,365,079	12.5%	18.0%	(2.0%)
Australian Capital Territory	$12,112,793	1.8%	0.9%	112.5%	212,210	2.0%	1.3%	109.9%
Tasmania	$14,216,098	2.1%	1.5%	52.8%	351,977	3.2%	2.4%	89.1%
Northern Territory	$5,247,513	0.8%	0.1%	517.4%	123,932	1.1%	0.3%	395.0%
Total	**$678,784,958**	**100.0%**	**100.0%**	**12.0%**	**10,877,839**	**100.0%**	**100.0%**	**40.1%**

Analysis

- In 2021, the live performance industry across Australia experienced a y-o-y increase in both revenue (12.0%) and attendance (40.1%).
- NSW had the highest industry share of revenue (32.0%) and attendance (24.0%) in Australia.

2021 Population and Per Capita Results

Per Capita Results

2021

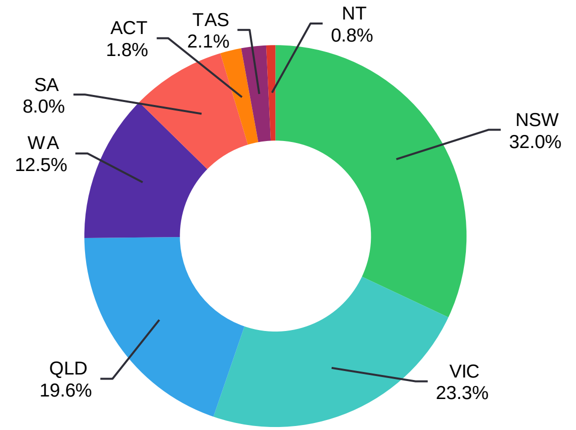
State/Territory	Population (2021) (m)	Share of Population	Share of Industry Revenue	Share of Industry Attendance	Spend per Capita
New South Wales	8.10	31.4%	32.0%	24.0%	$26.82
Victoria	6.56	25.5%	23.3%	21.8%	$24.08
Queensland	5.27	20.4%	19.6%	20.4%	$25.24
Western Australia	2.76	10.7%	12.5%	15.0%	$30.77
South Australia	1.81	7.0%	8.0%	12.5%	$30.01
Australian Capital Territory	0.45	1.8%	1.8%	2.0%	$26.72
Tasmania	0.57	2.2%	2.1%	3.2%	$24.95
Northern Territory	0.25	1.0%	0.8%	1.1%	$21.05
Total	**25.76**	**100.0%**	**100.0%**	**100.0%**	**$26.35**

Comments

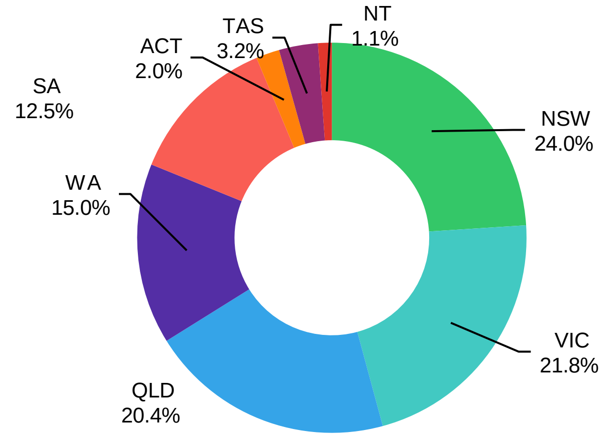
- The state and territory breakdowns do not take into account people who travel from interstate or overseas to attend a live performance. Industry share only accounts for the state or territory in which the performance took place. As such, the revenue and attendance of the performance are fully attributed 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 Victoria continued to account for the highest share in industry revenue and attendance respectively, due to the following reasons:
  - Some of Australia's largest performing arts companies are based in NSW and Victoria with the bulk of their performances in Sydney and Melbourne. These companies include Opera Australia (Sydney), Melbourne Symphony Orchestra, Sydney Symphony Orchestra and the Australian Ballet (Melbourne).
  - Destination NSW and Visit Victoria are particularly active in the live performance major events markets and have been successful in attracting major live performance events to these States.
- However, NSW and VIC lost market share in industry attendance relative to its share of population. The extended lockdown experienced in NSW and VIC meant events could not be held for a large proportion of 2021.
- WA ($30.77) and SA ($30.01) hold top positions in per capita spend amongst all states and territories in 2021.

2021 Revenue and Attendance Breakdown

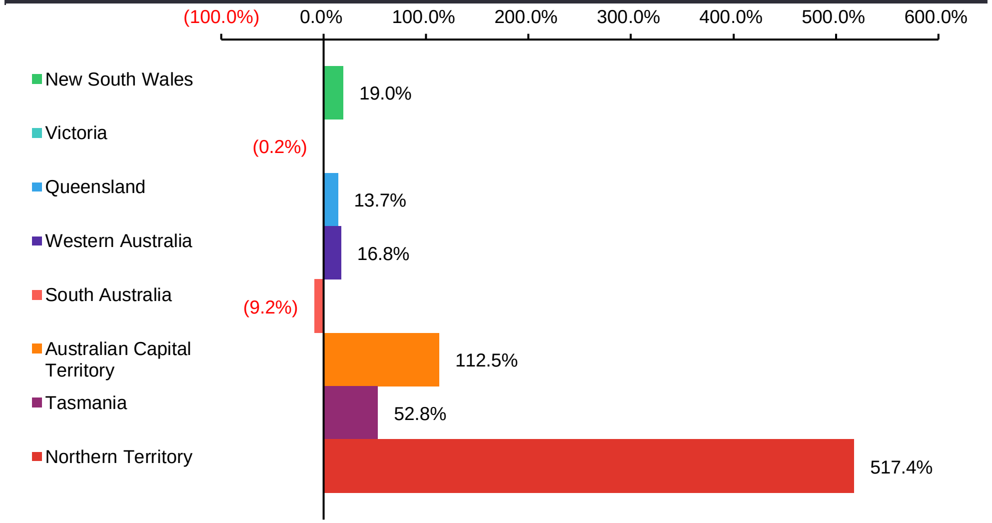
Market Share (Revenue) by State/Territory 2021



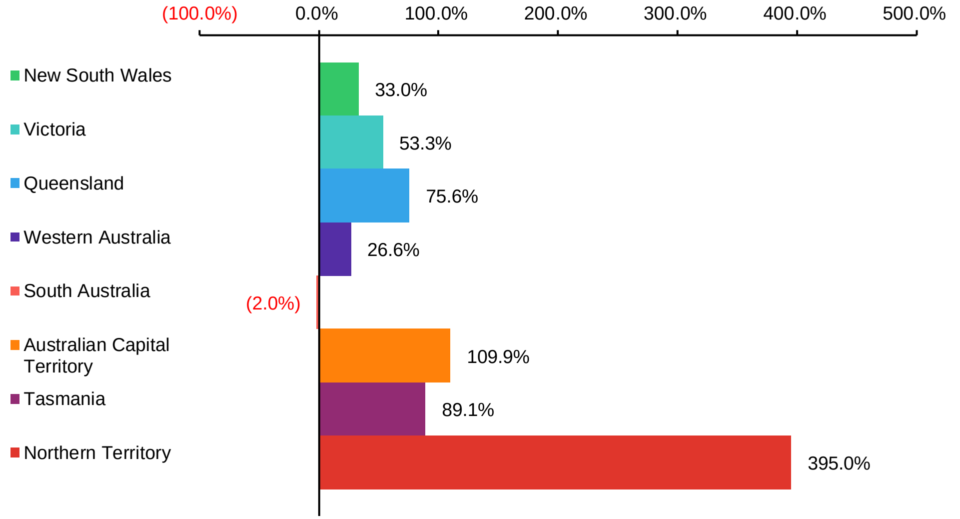
Market Share (Attendance) by State/Territory 2021



Percentage Movement in Revenue by State/Territory 2020 → 21



Percentage Movement in Attendance by State/Territory 2020 → 21



2021 Revenue by Category and State/Territory

Revenue by Category and State/Territory 2021

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	$8,421,907	$2,699,987	$7,758,167	$5,231,802	$1,913,894	$504,241	$321,410	$91,075	$26,942,483
Childrens/Family	$9,044,567	$6,486,534	$7,800,340	$4,560,236	$3,315,782	$2,619,998	$200,667	$270,158	$34,298,281
Circus & Physical Theatre	$10,139,508	$2,697,566	$7,267,740	$767,472	$154,380	$4,463	-	$189,573	$21,220,702
Classical Music	$9,638,774	$5,851,160	$5,353,652	$9,343,702	$5,712,801	$916,577	$1,012,188	$144,210	$37,973,064
Comedy	$7,785,045	$23,413,298	$10,058,575	$3,661,561	$1,095,759	$2,457,348	$1,255,680	$573,898	$50,301,163
Contemporary Music	$30,307,095	$38,924,624	$36,858,464	$20,594,966	$11,574,737	$2,808,663	$3,407,667	$462,117	$144,938,333
Festivals (Multi Category)	$1,257,494	$540,396	$2,023,667	$9,604,151	$21,390,654	-	$1,544,942	$1,311,729	$37,673,034
Festivals (Contemporary Music)	$7,383,207	$12,191,969	$17,321,146	$4,220,437	$3,652,224	$745,894	$3,700,738	$2,064,337	$51,279,951
Musical Theatre	$110,517,895	$34,249,438	$29,802,816	$22,004,282	$2,868,137	$342,764	$2,557,611	-	$202,342,943
Opera	$8,695,137	$3,208,666	$1,160,817	$1,380,360	$821,997	$352,767	-	$29,677	$15,649,421
Special Events	$135,407	$930,434	$923,739	$528,739	$46,010	-	$12,569	$25,528	$2,602,427
Theatre	$13,833,179	$26,741,866	$6,579,131	$3,086,405	$1,674,659	$1,360,079	$202,628	$85,212	$53,563,159
Total	**$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**

Analysis

- Musical Theatre and Contemporary Music represented the two largest categories in the industry generating 29.8% and 21.4% of the overall revenue respectively in 2021. Ballet and Dance witnessed the highest y-o-y growth in revenue (257.6%) and Contemporary Music witnessed the highest y-o-y decline in revenue (53.1%) in 2021.

2021 Attendance by Category and State/Territory

Attendance by Category and State/Territory

2021

Category	NSW	VIC	QLD	WA	SA	ACT	TAS	NT	Total
Ballet and Dance	86,227	40,974	114,992	78,141	23,953	9,052	5,749	4,417	363,505
Childrens/Family	307,969	169,763	219,827	133,048	116,640	70,281	23,170	9,945	1,050,643
Circus & Physical Theatre	110,251	27,161	115,349	13,603	3,773	191	-	2,085	272,413
Classical Music	123,317	95,109	84,544	180,329	77,001	11,611	19,705	3,733	595,349
Comedy	149,233	675,538	188,769	65,861	17,868	40,659	23,419	10,349	1,171,696
Contemporary Music	549,497	658,542	731,773	442,283	212,337	46,055	79,144	12,030	2,731,661
Festivals (Multi Category)	66,979	60,594	106,374	333,041	799,053	-	130,758	57,352	1,554,151
Festivals (Contemporary Music)	66,638	102,563	157,463	37,435	38,732	6,946	31,551	20,621	461,949
Musical Theatre	867,313	281,935	323,902	245,654	26,722	5,341	33,905	-	1,784,772
Opera	66,358	36,804	17,844	17,944	8,295	3,578	-	476	151,299
Special Events	6,024	18,480	39,471	11,682	1,834	-	435	782	78,708
Theatre	208,569	204,527	113,555	71,393	38,871	18,496	4,141	2,142	661,694
Total	**2,608,375**	**2,371,989**	**2,213,863**	**1,630,414**	**1,365,079**	**212,210**	**351,977**	**123,932**	**10,877,839**

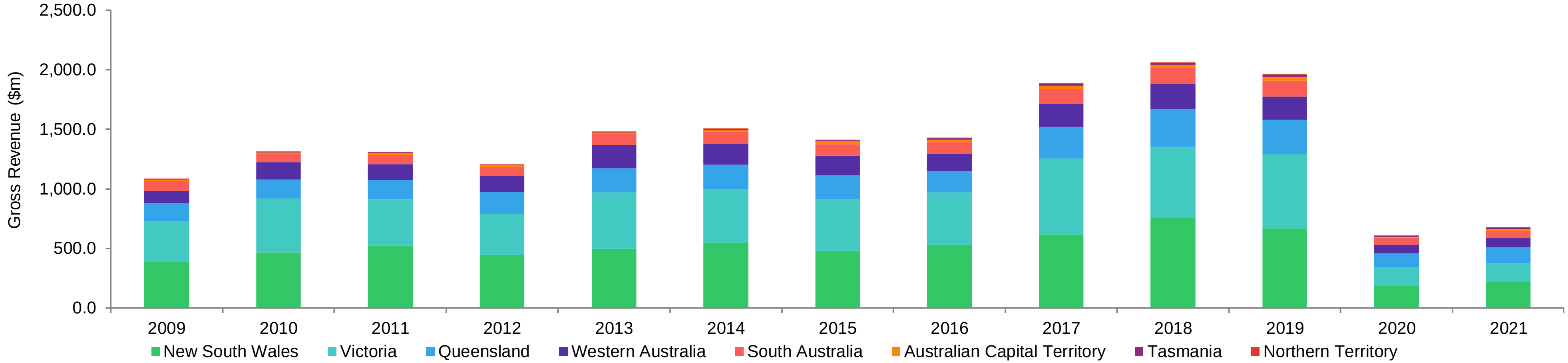
Analysis

- Contemporary Music and Musical Theatre represented the two largest categories in the industry generating 25.1% and 16.4% of the overall attendance respectively in 2021. Comedy witnessed the highest y-o-y increase in attendance by 246.2% and Special Events reported the largest y-o-y decline in attendance by 52.8% in 2021.

State/Territory Revenue and Attendance

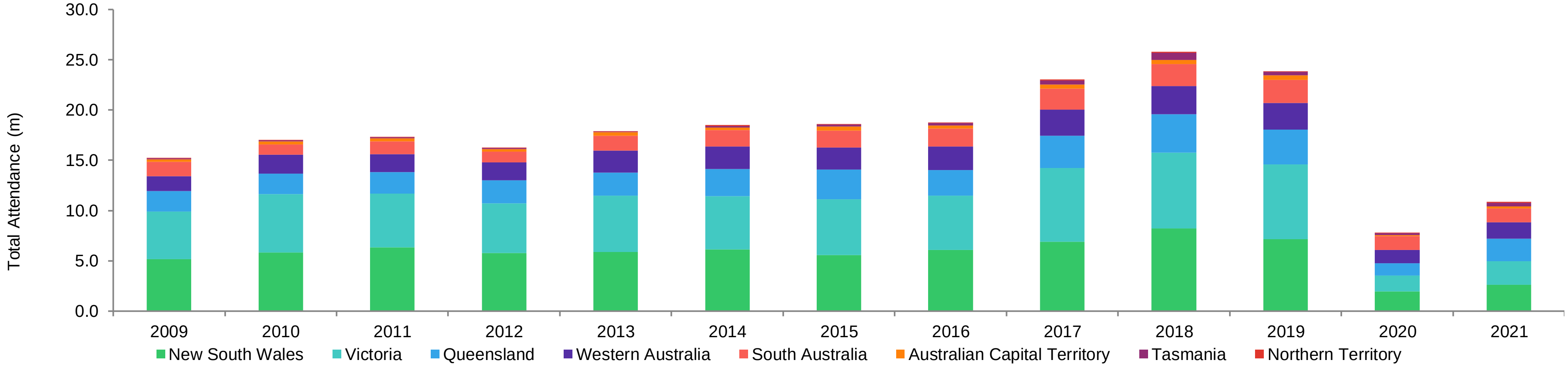
Revenue by State/Territory

2009 → 2021



Attendance by State/Territory

2009 → 2021



State/Territory Revenue and Attendance

Revenue by State/Territory

2009 → 2021

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**

Analysis

- NSW represented the highest market share of revenue amongst all the states and territories in Australia, accounting for 32.0% of the national market share of revenue in 2021.

* 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 → 2021

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**

Analysis

- NSW represented the highest market share of attendance amongst all the states and territories in Australia, accounting for 24.0% of the national market share of attendance in 2021.

* 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

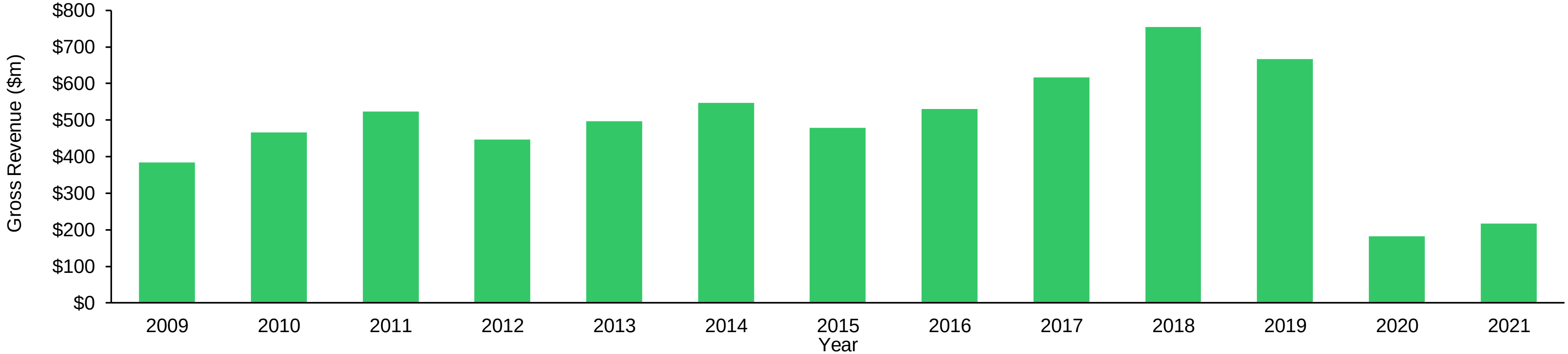
- NSW generated $217.2m in revenue and recorded 2.6m in attendance in 2021. These results are well below pre-pandemic levels and were constrained by public health measures in place for extended periods.
- NSW accounted for the largest industry share of revenue (32.0%) and attendance (24.0%) in 2021.
- The NSW spend per capita in 2021 was $26.82.
- Musical Theatre contributed the highest share to NSW's overall revenue and attendance, with a share of 50.9% and 33.3% respectively.
- In 2021, NSW experienced a y-o-y increase in revenue (19.0%) and in attendance (33.0%), driven primarily by the following categories:
  - Circus and Physical Theatre witnessed a large growth in revenue (1036.1%), contributed by the growth in attendance (471.3%). The growth was primarily attributed to *Magic Mike Live* and *The Little Prince.*
  - Musical Theatre witnessed a significant increase in revenue (386.4%), primarily due to a increases in attendance (233.5%) and average ticket price. Top events included *Hamilton*, *Frozen* and *Come from Away*.
  - Childrens/Family revenue increased by 213.9% with an increase in attendance by 133.4%, primarily driven by events such as The Wiggles and *Bluey's Big Play*.
  - Ballet and Dance saw an increase in revenue by 205.5% with an increase in attendance by 148.9%. The top events which primarily contributed to the growth in revenue included *New York Dialects, Counterpointe* and *Celebration Gala.*
  - Classical Music revenue increased by 118.1% with an increase in attendance by 80.0%, primarily driven by events such as *Love Actually In Concert* and *Queen Orchestrated.*
- The growth in revenue was offset by y-o-y declines in Special Events (81.2%), Contemporary Music (71.9%), Festivals (Contemporary Music) (40.5%) and Opera (14.3%).

	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$383,713,353	-	5,176,385	-
2010	$465,761,849	21.4%	5,818,163	12.4%
2011	$523,903,477	12.5%	6,331,001	8.8%
2012	$446,063,403	(14.9%)	5,795,757	(8.5%)
2013	$497,463,659	11.5%	5,865,914	1.2%
2014	$547,173,799	10.0%	6,132,827	4.6%
2015	$478,077,501	(12.6%)	5,592,686	(8.8%)
2016	$530,186,274	10.9%	6,073,498	8.6%
2017	$615,837,613	16.2%	6,893,117	13.5%
2018	$753,667,850	22.4%	8,230,950	19.4%
2019	$666,736,971	(11.5%)	7,164,995	(13.0%)
2020	$182,518,521	(72.6%)	1,960,925	(72.6%)
2021	$217,159,216	19.0%	2,608,375	33.0%

NSW Analysis

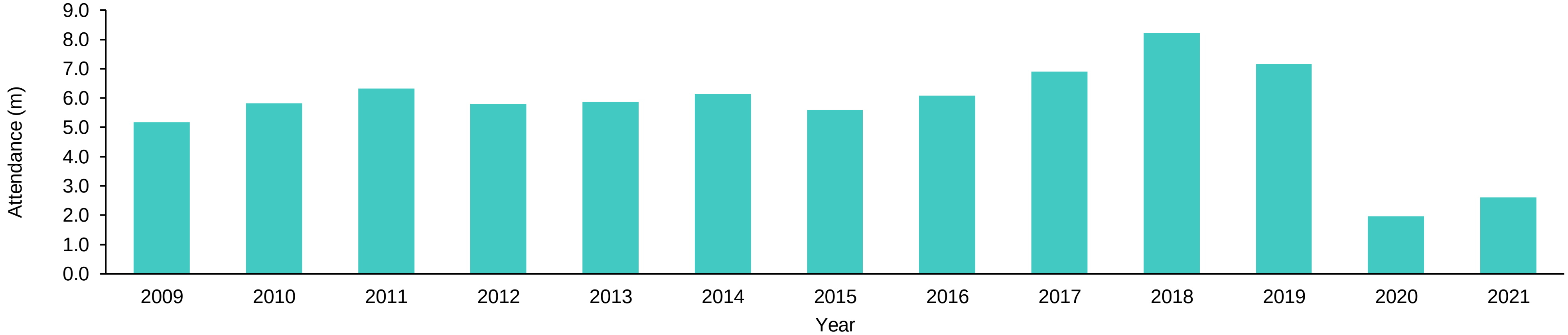
Revenue – NSW

2009 → 2021



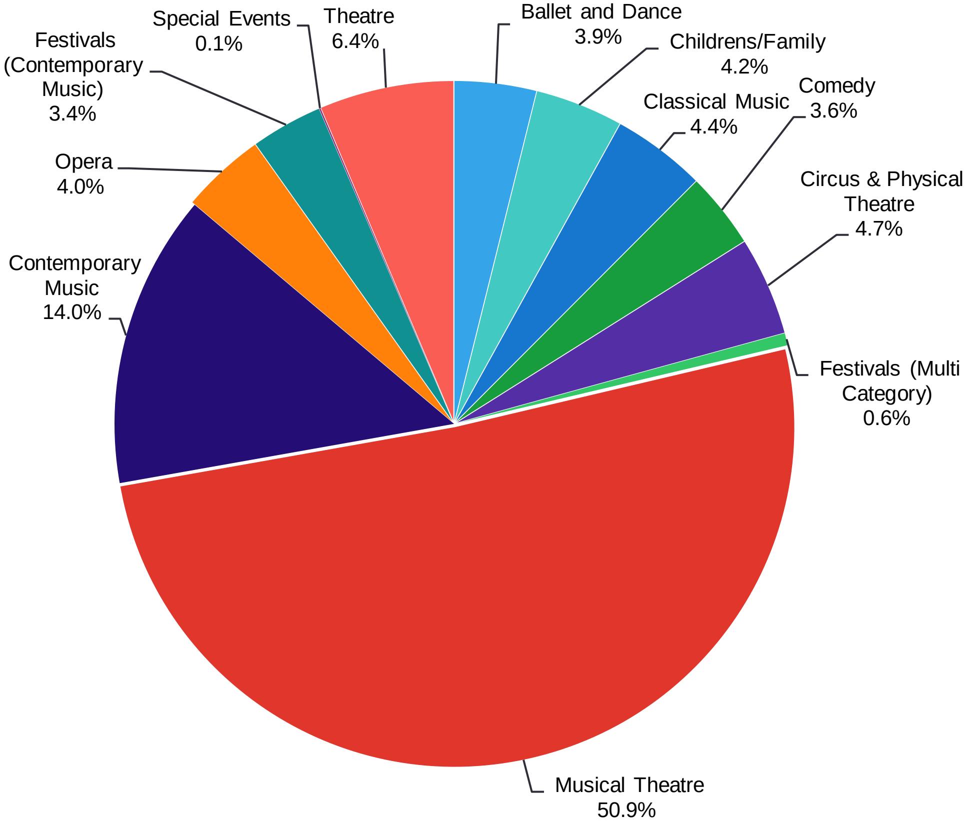
Attendance – NSW

2009 → 2021

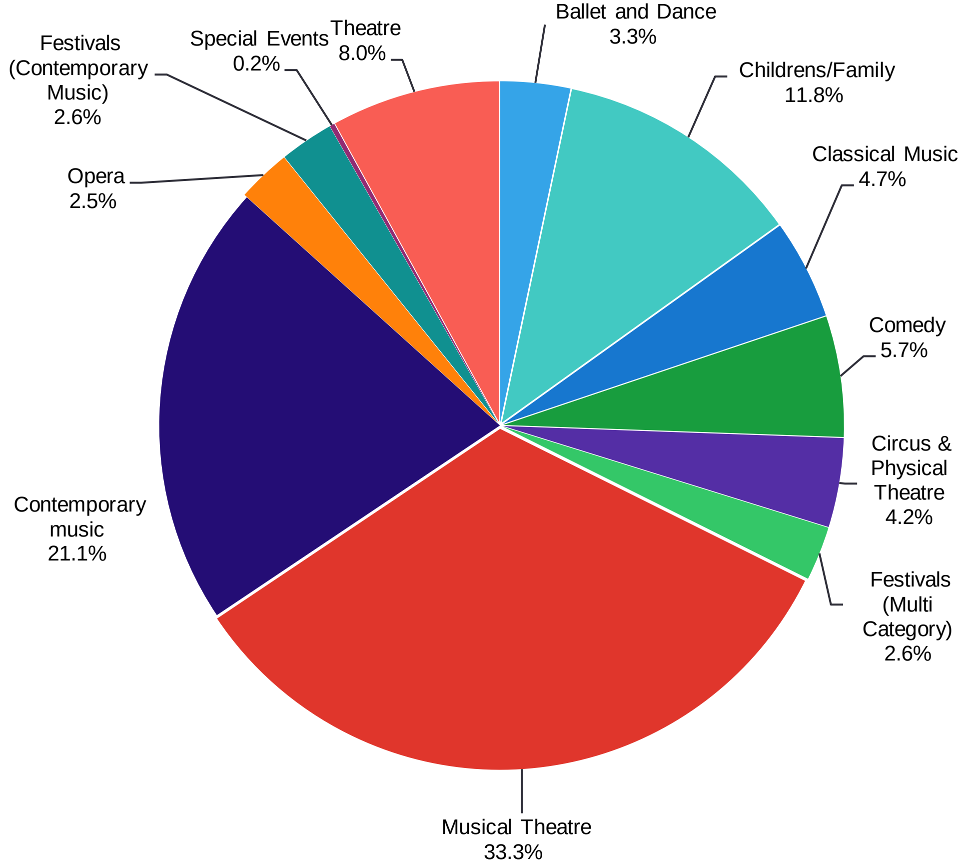


NSW Analysis

NSW Revenue by Category 2021



NSW Attendance by Category 2021



VIC Analysis

VIC Revenue and Attendance

- In 2021, Victoria generated $157.9m in revenue and recorded 2.4m in attendance. These results are yet to return to pre-COVID levels and were hindered by the extended public health measures in the state.
- The Victoria spend per capita in 2021 was $24.08.
- Victoria recorded the second highest share of revenue (23.3%) and attendance (21.8%) amongst all the states and territories in Australia in 2021.
- Contemporary Music contributed the highest share of revenue (24.6%) and Comedy contributed the highest share of attendance (28.5%) among all the categories in Victoria.
- In 2021, Victoria witnessed a slight decline in revenue (0.2%) despite a y-o-y increase in attendance (53.3%) when compared to 2020. This is primarily driven by the y-o-y decline in the Festivals (Multi Category) (58.7%), Contemporary Music (52.4%) and Classical Music (9.0%) categories:
  - Festivals (Multi-Category) revenue declined, despite an increase in attendance by 23.8%. This was primarily due to a fall in average ticket price in 2021.
  - Contemporary Music revenue declined due to a decline in attendance by 8.1% and fall in average ticket price in 2021. Classical Music revenue declined due to a decline in attendance and a fall in average ticket price in 2021.
- The decline in revenue was partially offset by the growth in the following categories:
  - Opera witnessed a significant growth in revenue by 672.3% due to increases in attendance by 423.5% and average ticket price. Top events included *Aida*, *Das Rheingold*, and *Ernani*.
  - Special Events revenue increased by 439.9% partially offset by decrease in attendance by 42.7%. The increase in revenue was primarily driven by *Carols by Candlelight*.
  - Ballet and Dance revenue increased significantly by 424.7%, primarily due to an increase in attendance by 575.8%, driven by events such as *Celebration Gala* and *Summertime at the Ballet*.
  - Comedy revenue increased significantly by 383.1%, primarily due to an increase in attendance by 881.8%. The growth was primarily driven by Melbourne International Comedy Festival and performances by comedians such as Daniel Sloss and Arj Barker.
  - Childrens/Family revenue increased significantly by 291.8%, primarily due to an increase in attendance by 235.1%, driven by events such as The Wiggles, *Paw Patrol Live!*, *Shaun the Sheep* and *The Midnight Gang*.

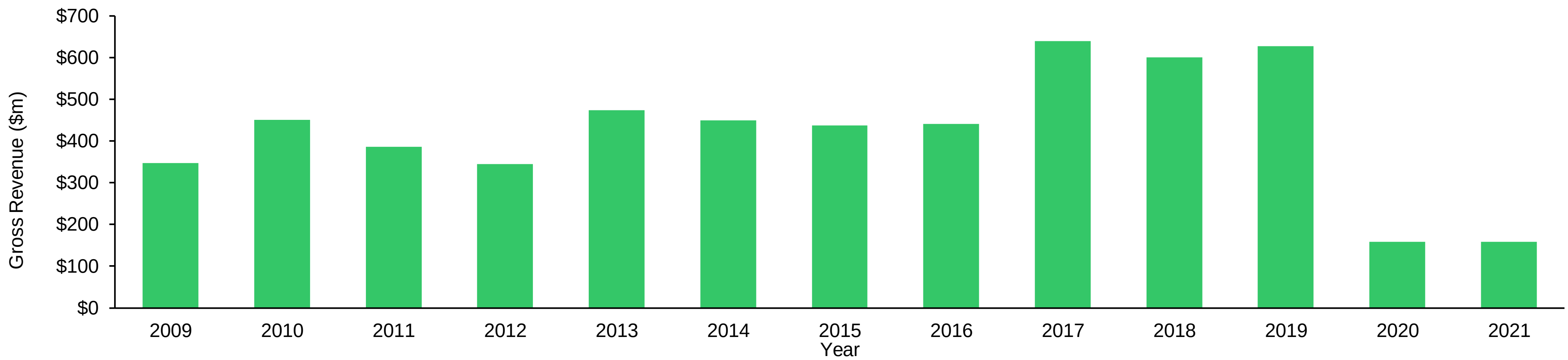
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$347,305,100	-	4,744,449	-
2010	$451,053,035	29.9%	5,820,603	22.7%
2011	$385,643,996	(14.5%)	5,359,749	(7.9%)
2012	$344,389,414	(10.7%)	4,916,559	(8.3%)
2013	$473,516,913	37.5%	5,607,475	14.1%
2014	$450,034,039	(5.0%)	5,318,537	(5.2%)
2015	$436,933,907	(2.9%)	5,548,412	4.3%
2016	$440,330,153	0.8%	5,431,066	(2.1%)
2017	$639,876,934	45.3%	7,364,313	35.6%
2018^	$600,318,261	(6.2%)	7,519,194	2.1%
2019	$627,378,900	4.5%	7,408,467	(1.5%)
2020	$158,294,023	(74.8%)	1,546,959	(79.1%)
2021	$157,935,937	(0.2%)	2,371,989	53.3%

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

VIC Analysis

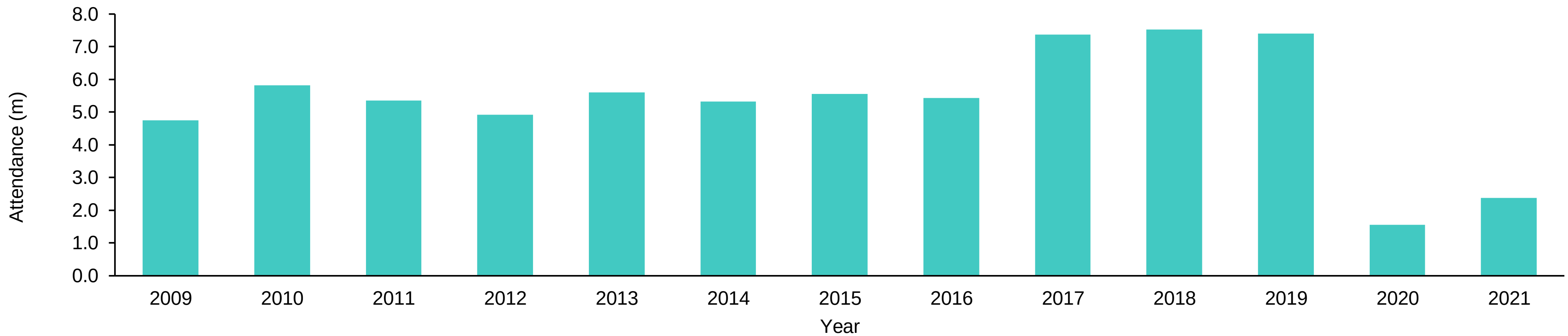
Revenue – VIC

2009 → 2021



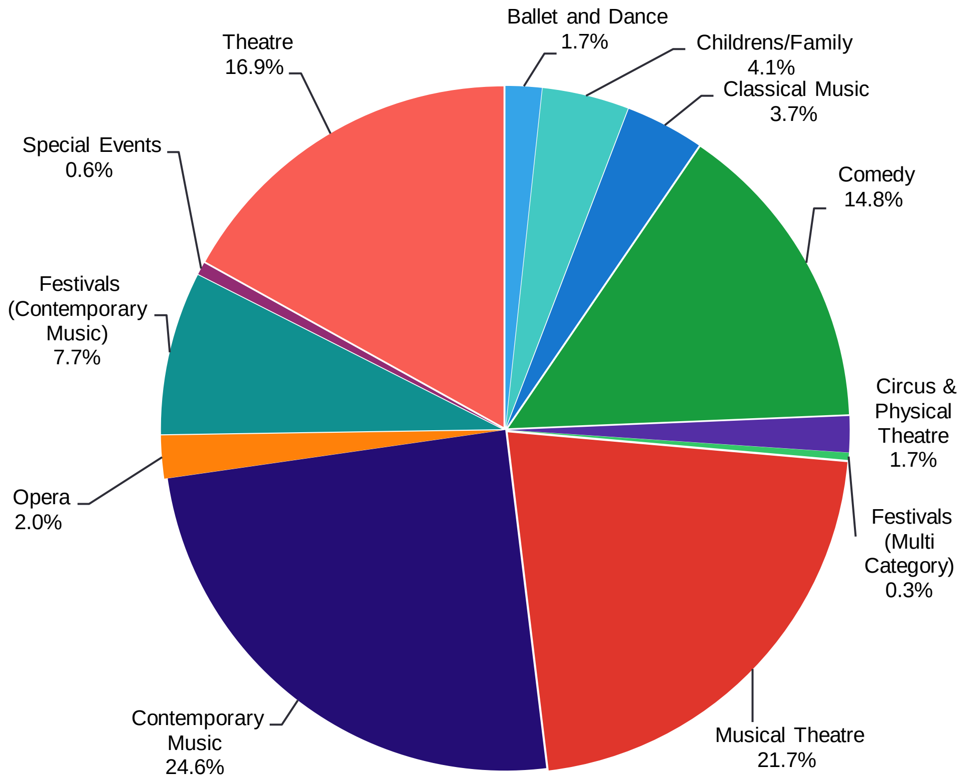
Attendance – VIC

2009 → 2021

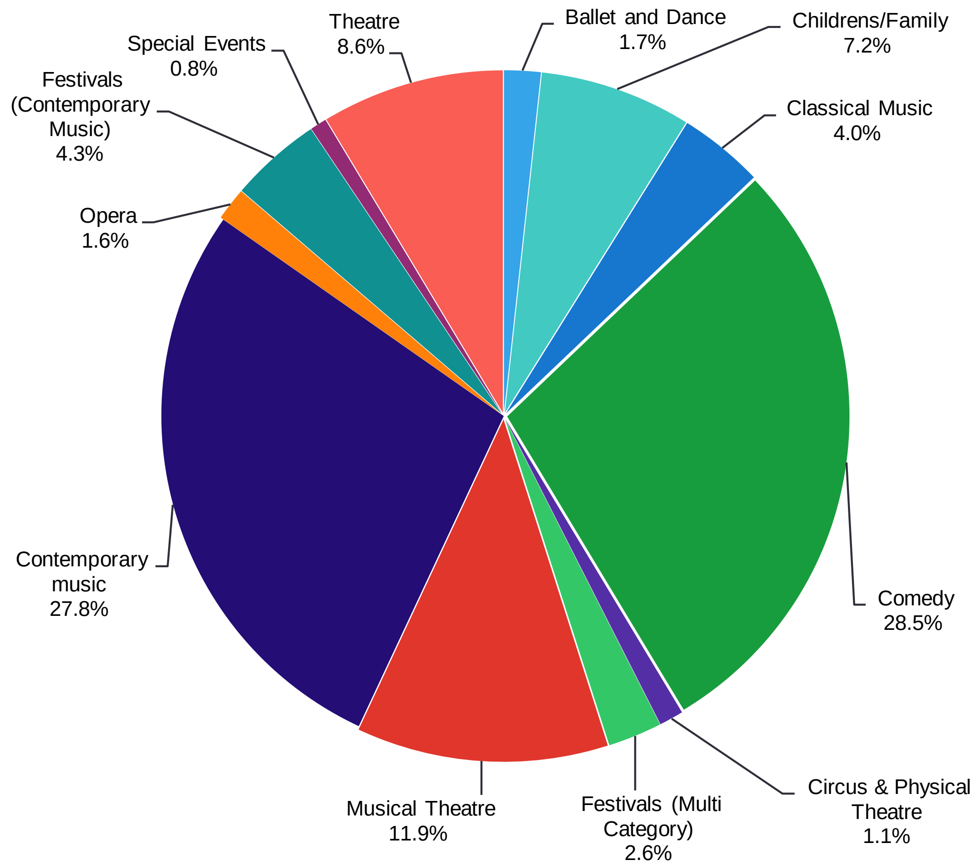


VIC Analysis

VIC Revenue by Category 2021



VIC Attendance by Category 2021



QLD Analysis

QLD Revenue and Attendance

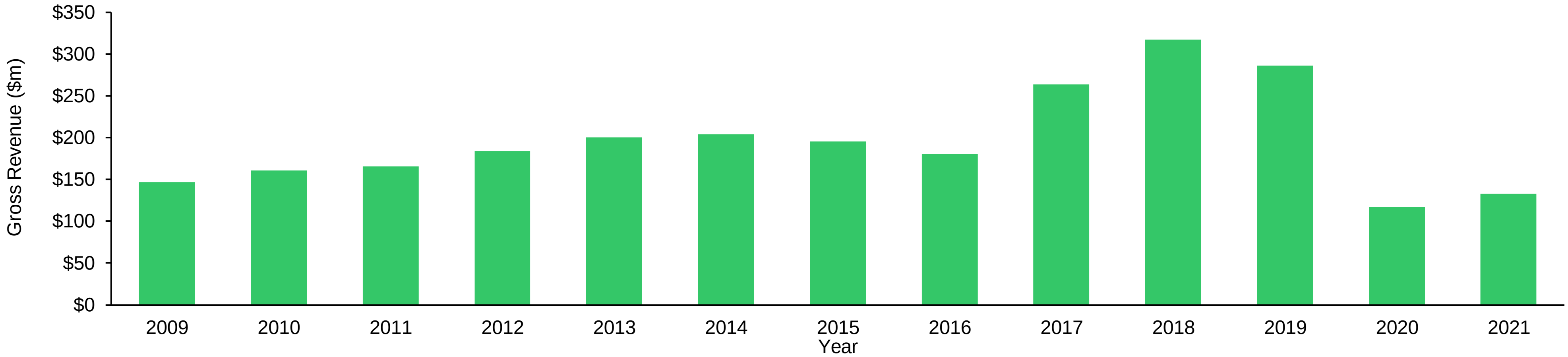
- In 2021, QLD generated $132.9m in revenue and recorded 2.2m in attendance. These results have not returned to pre-pandemic levels, and were likely hindered by venue capacity and border restrictions.
- QLD spend per capita was $25.24 in 2021.
- QLD accounted for the third largest industry share of revenue (19.6%) and attendance (20.4%) in 2021.
- Contemporary Music was the largest contributor to total revenue and attendance in QLD among all categories with 27.7% and 33.1% of total share respectively. Top events include performances by Midnight Oil, The Cat Empire, Paul Kelly and Tina Arena.
- QLD witnessed an increase in revenue by 13.7% and a 75.6% growth in attendance in 2021. The growth in revenue was primarily driven by the following categories as compared to 2020:
  - Ballet and Dance witnessed a significant growth in revenue (487.5%) and in attendance (297.0%), primarily driven by events such as *The Sleeping Beauty, The Nutcracker* and *Dracula.*
  - Festivals (Multi Category) witnessed a growth in revenue (431.3%) driven by an increase in attendance by 854.8%. Major festivals included Brisbane Festival and MELT (Queer Arts & Culture) Festival.
  - Opera witnessed increases in revenue by 363.6% and attendance by 116.6% primarily attributed to events such as *The Marriage of Figaro* and *Verdi.*
  - Musical Theatre witnessed a significant growth in revenue (290.9%) and in attendance (255.6%), primarily driven by events such as *Charlie and the Chocolate Factory* and *Come from Away.*
- The growth in revenue was partially offset by the y-o-y decline in revenue in Circus and Physical Theatre (60.3%), Contemporary Music (42.8%) and Special Events (34.0%).
  - Circus and Physical Theatre revenue declined primarily due to a 36.3% decrease in attendance and decrease in average ticket price in 2021.
  - Contemporary Music revenue declined despite a 29.2% increase in attendance. This was primarily due to a decrease in average ticket price in 2021.
  - Special Events revenue declined despite a 37.8% increase in attendance. This was primarily due to a decrease in average ticket price in 2021.

	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$146,567,867	-	2,006,608	-
2010	$160,520,942	9.5%	2,043,327	1.8%
2011	$165,840,931	3.3%	2,150,329	5.2%
2012	$183,775,420	10.8%	2,302,462	7.1%
2013	$200,178,524	8.9%	2,318,207	0.7%
2014	$203,918,468	1.9%	2,661,632	14.8%
2015	$195,336,838	(4.2%)	2,914,530	9.5%
2016	$180,304,512	(7.7%)	2,527,535	(13.3%)
2017	$263,878,152	46.4%	3,196,581	26.5%
2018	$317,179,536	20.2%	3,840,497	20.1%
2019	$286,191,954	(9.8%)	3,477,020	(9.5%)
2020	$116,868,728	(59.2%)	1,260,436	(63.7%)
2021	$132,908,255	13.7%	2,213,863	75.6%

QLD Analysis

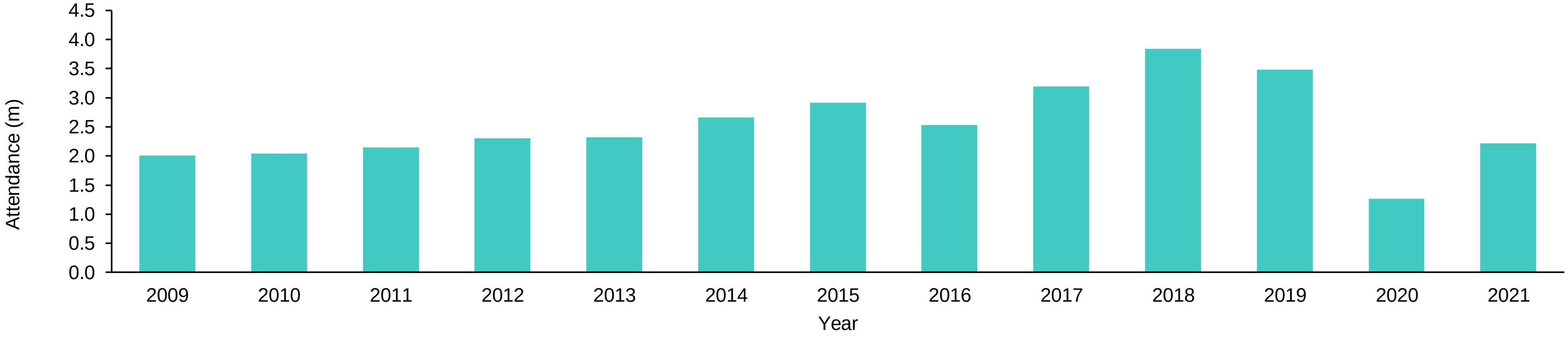
Revenue – QLD

2009 → 2021



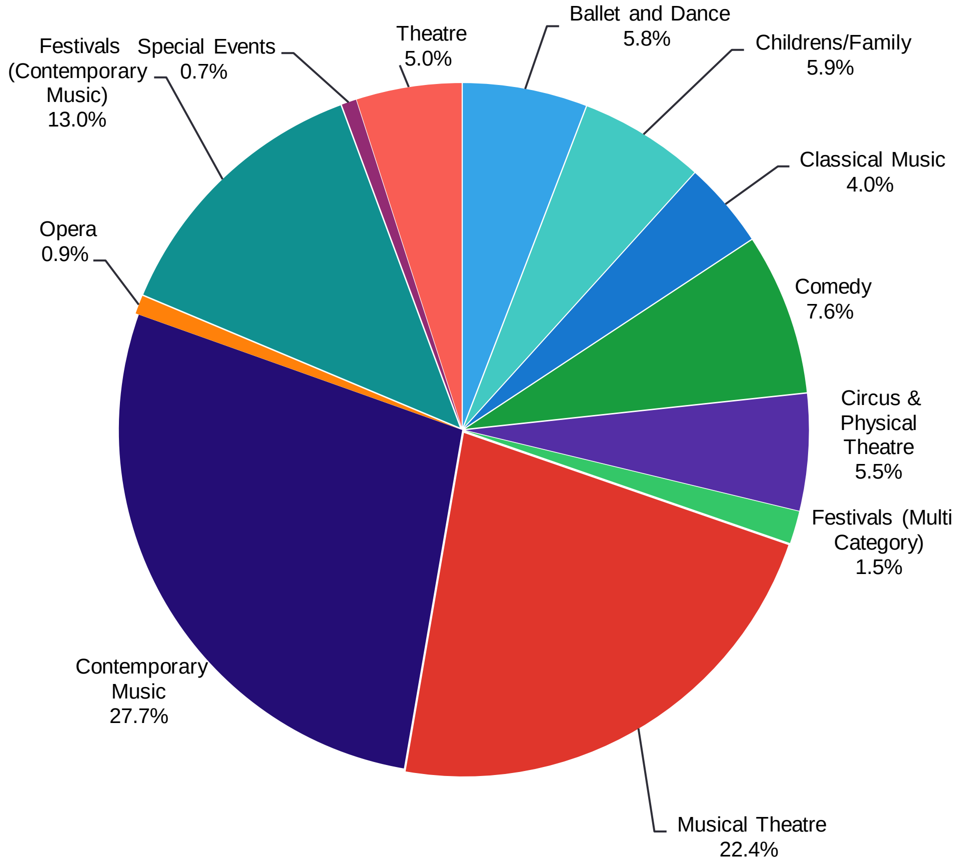
Attendance – QLD

2009 → 2021

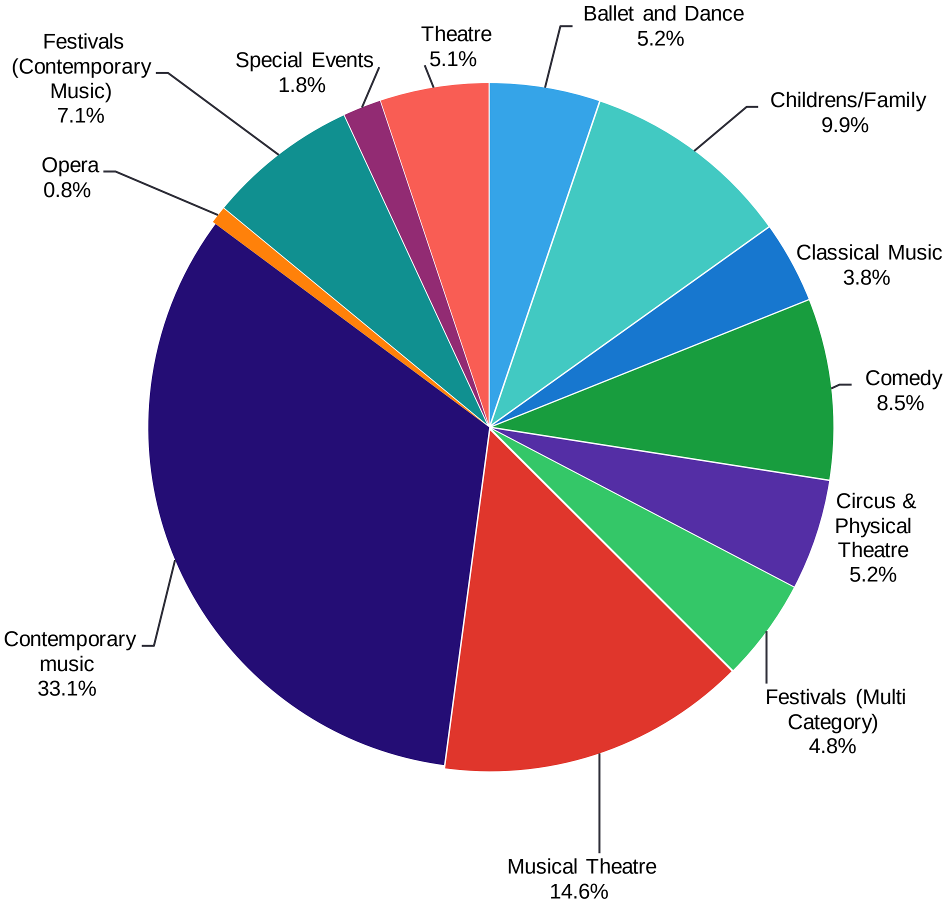


QLD Analysis

QLD Revenue by Category 2021



QLD Attendance by Category 2021



WA Analysis

WA Revenue and Attendance

- WA generated $85.0m in revenue and recorded 1.6m in attendance in 2021. These results are lower than pre-COVID levels. Despite WA experiencing fewer business activity restrictions relative to other states, live performance activity was likely constrained by venue capacity and border restrictions.
- In 2021, WA spend per capita was $30.77, highest amongst all the states and territories.
- In 2021, Musical Theatre contributed the highest share to WA's total revenue (25.9%) and Contemporary Music contributed the highest share to WA's total attendance (27.1%).
- WA witnessed a y-o-y growth in revenue (16.8%) and attendance (26.6%) in 2021. The growth in revenue was primarily driven by the following categories compared to 2020:
  - Childrens/Family experienced an increase in revenue (256.1%) and attendance (193.0%) primarily driven by events like *Bluey's Big Play* and The Wiggles.
  - Musical Theatre revenue increased by 238.7% primarily due to a 186.9% increase in attendance in 2021. Top events were *Charlie and the Chocolate Factory, Priscilla Queen of the Desert* and *West Side Story*.
  - Opera saw an increase in revenue by 217.5% despite a decline in the attendance by 12.9%.This is primarily due to increase in the average ticket price. The key events that contributed to the growth in revenue were *The Marriage of Figaro, Cavalleria Rusticana / Pagliacci* and *The Barber of Seville.*
  - Theatre experienced a significant increase in revenue by 198.9% driven by growth in attendance by 380.7%. This was primarily driven by events such as *York*, *Animal Farm* and *The Tempest*.
  - Classical Music experienced an y-o-y increase of 172.0% in revenue, driven by significant growth in attendance (228.0%). The top events were *Star Wars: Return of the Jedi in Concert* and *One Big Voice*.
- The growth in revenue was partially offset by the y-o-y decline in Special Events (70.7%), Festivals (Contemporary Music) (57.0%) and Festivals (Multi Category) (20.3%), primarily due to the decline in attendance in 2021.

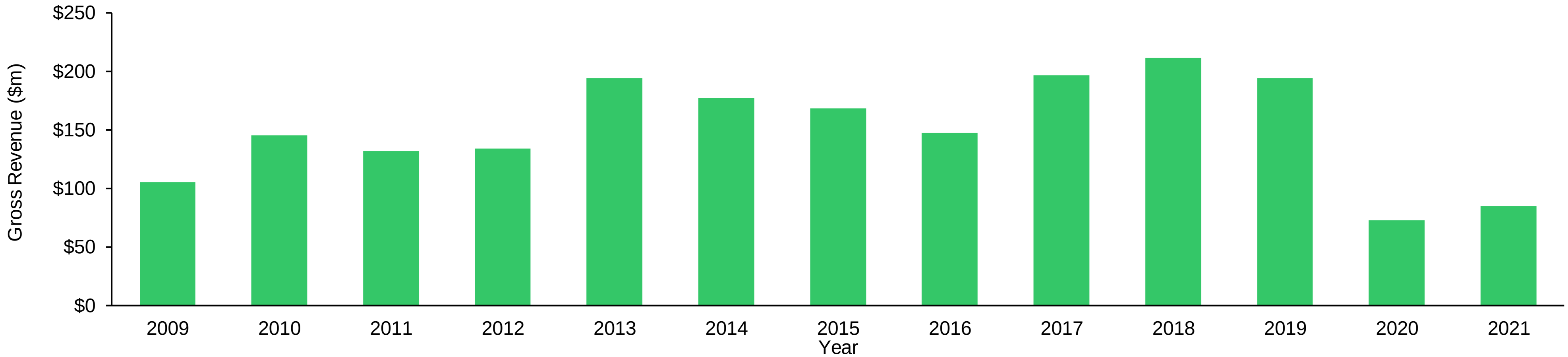
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$105,312,778	-	1,468,882	-
2010	$145,479,374	38.1%	1,879,408	27.9%
2011	$131,936,782	(9.3%)	1,788,262	(4.8%)
2012	$134,131,622	1.7%	1,791,795	0.2%
2013	$194,312,089	44.9%	2,153,483	20.2%
2014	$177,326,653	(8.7%)	2,266,435	5.2%
2015*	$168,688,271	(4.9%)	2,217,942	(2.1%)
2016	$147,807,422	(12.4%)	2,334,951	5.3%
2017	$196,671,338	33.1%	2,604,391	11.5%
2018	$211,421,549	7.5%	2,772,963	6.5%
2019	$194,184,329	(8.2%)	2,648,785	(4.5%)
2020	$72,739,451	(62.5%)	1,287,780	(51.4%)
2021	$84,984,114	16.8%	1,630,414	26.6%

** 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

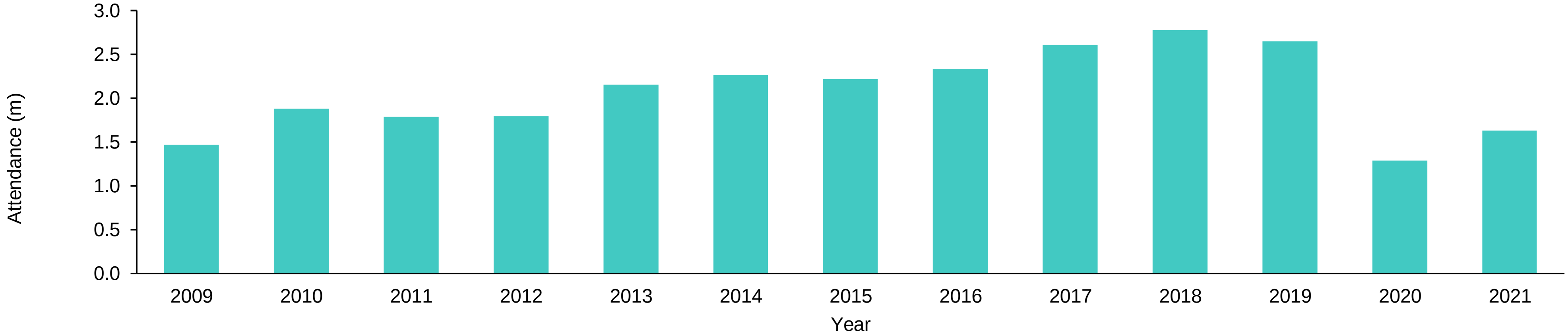
Revenue – WA

2009 → 2021



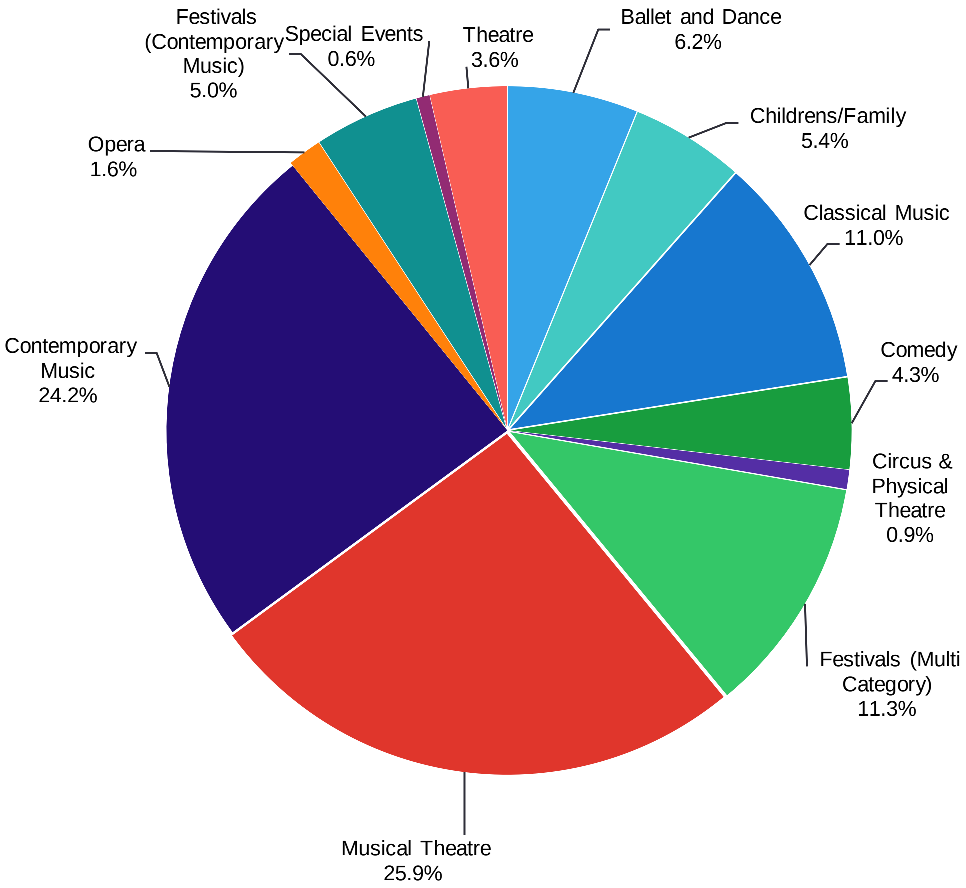
Attendance – WA

2009 → 2021

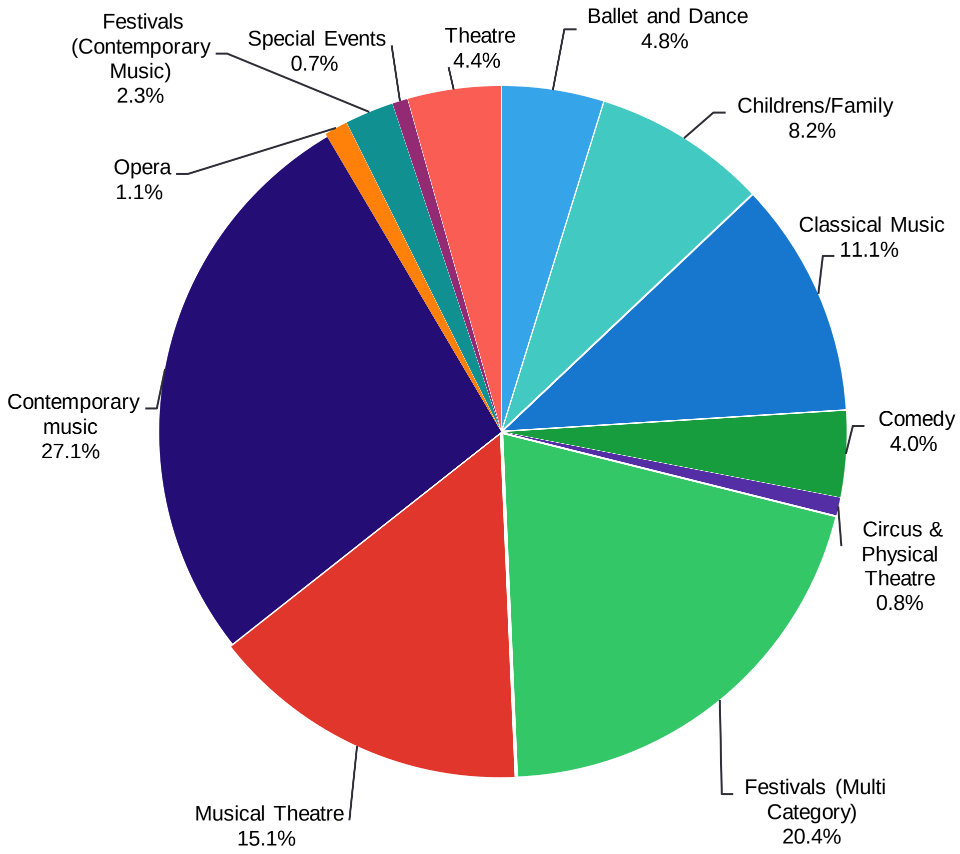


WA Analysis

WA Revenue by Category 2021



WA Attendance by Category 2021



SA Analysis

SA Revenue and Attendance

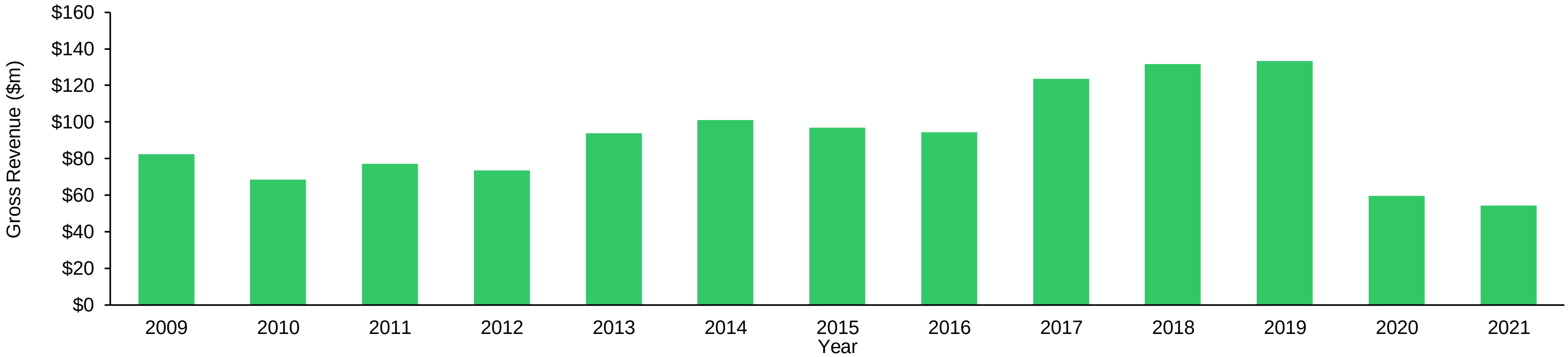
- In 2021, SA generated $54.2m in revenue and recorded 1.4m in attendance. These results are yet to return to pre-COVID levels and were likely constrained by venue capacity and border restrictions.
- SA per capita spend in 2021 was $30.01, second highest amongst all states and territories.
- Festivals (Multi Category) contributed the highest share to SA's overall revenue and attendance, with a share of 39.5% and 58.5% respectively.
- SA witnessed a y-o-y decline in revenue (9.2%) and attendance (2.0%) in 2021. These results were primarily driven by the declines in revenue in Special Events (83.3%), Festivals (Contemporary Music) (59.1%), Contemporary Music (35.1%), Musical Theatre (34.9%), Comedy (17.0%) and Festivals (Multi Category) (11.0%).
- Special Events, Festivals (Contemporary Music), Musical Theatre, Comedy and Festivals (Multi Category) witnessed decline in revenue, primarily due to the decline in attendance in 2021. Contemporary Music witnessed decline in revenue despite an increase in attendance in 2021. This is primarily due to a fall in average ticket price in 2021.
- The decline in revenue was partially offset by the growth in the following categories:
  - Circus and Physical Theatre experienced a significant y-o-y growth in revenue (6131.2%) and in attendance (4501.2%) in 2021. However, the overall contribution to the SA's overall revenue is quite low. Top events included *The Ultimate Vegas Show* and *Circus – The Show*.
  - Opera experienced a significant growth in revenue (2435.8%) in 2021, despite a decline in the attendance (74.4%). This was primarily attributed to few opera events being presented in 2020 due to COVID-19 restrictions. Additionally, the increase in average ticket price in 2021 contributed to the growth in revenue. Top events which contributed to the growth in revenue were *Sweeney Todd* and *The Barber of Seville*.
  - Ballet and Dance witnessed a growth of 877.9% in revenue and 390.6% in attendance. The major events included *Anna Karenina* and "*G*".
  - Childrens/Family experienced a growth of 546.1% in revenue and 307.7% growth in attendance, primarily attributable to an increase in the number of events being hosted in SA including *Sesame Street*, *Bluey's Big Play* and The Wiggles.
  - Classical Music revenue increased by 411.8% primarily due to increased attendance and average ticket price in 2021.

	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%)

SA Analysis

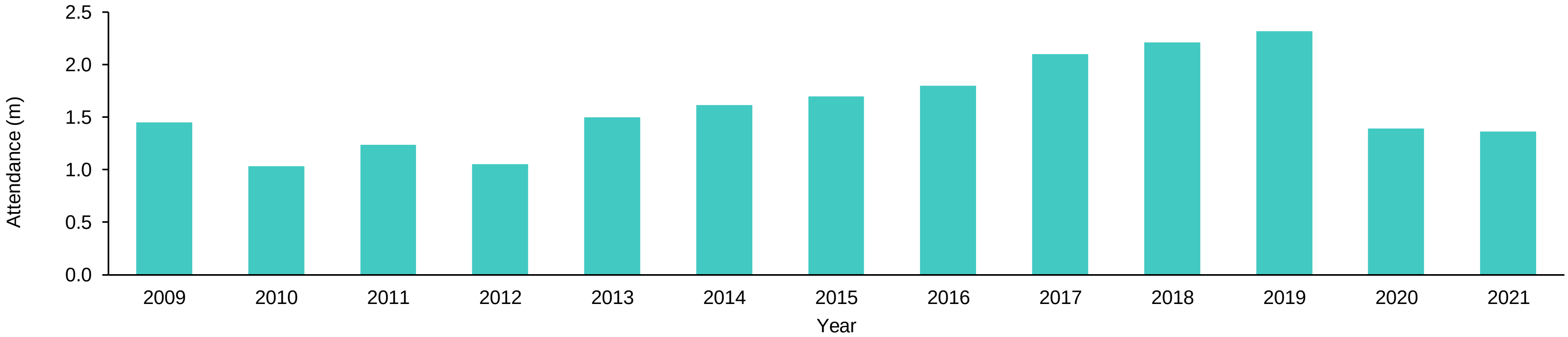
Revenue – SA

2009 → 2021



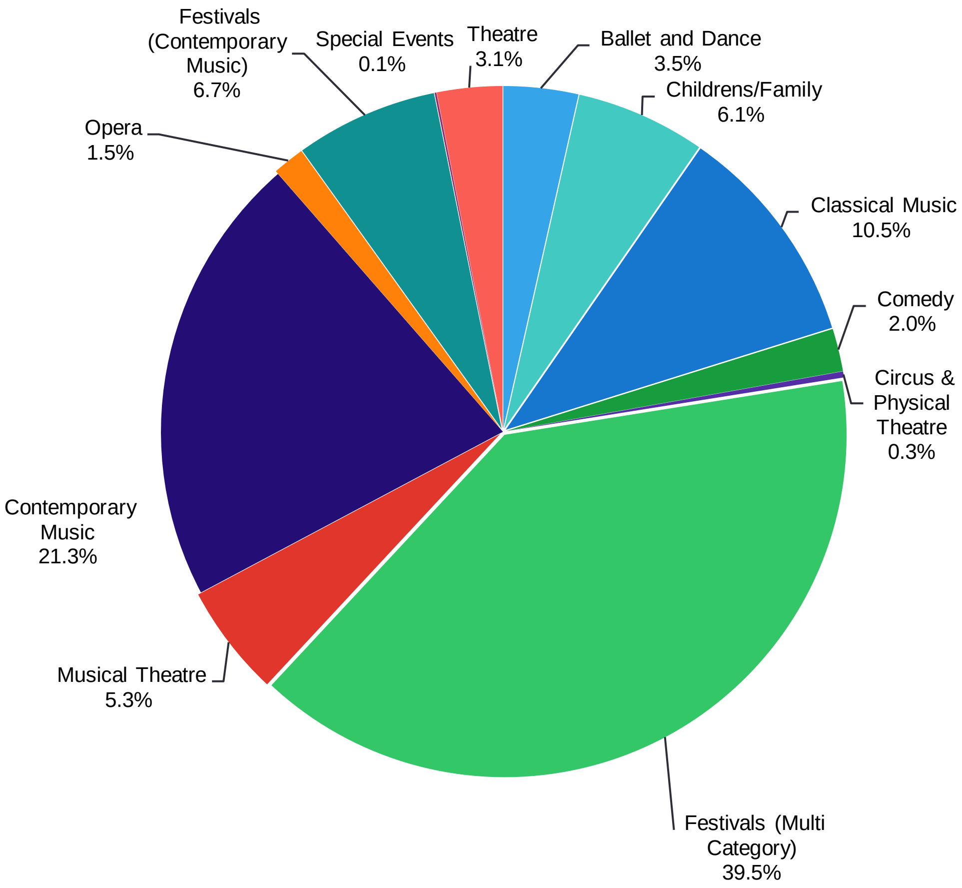
Attendance – SA

2009 → 2021

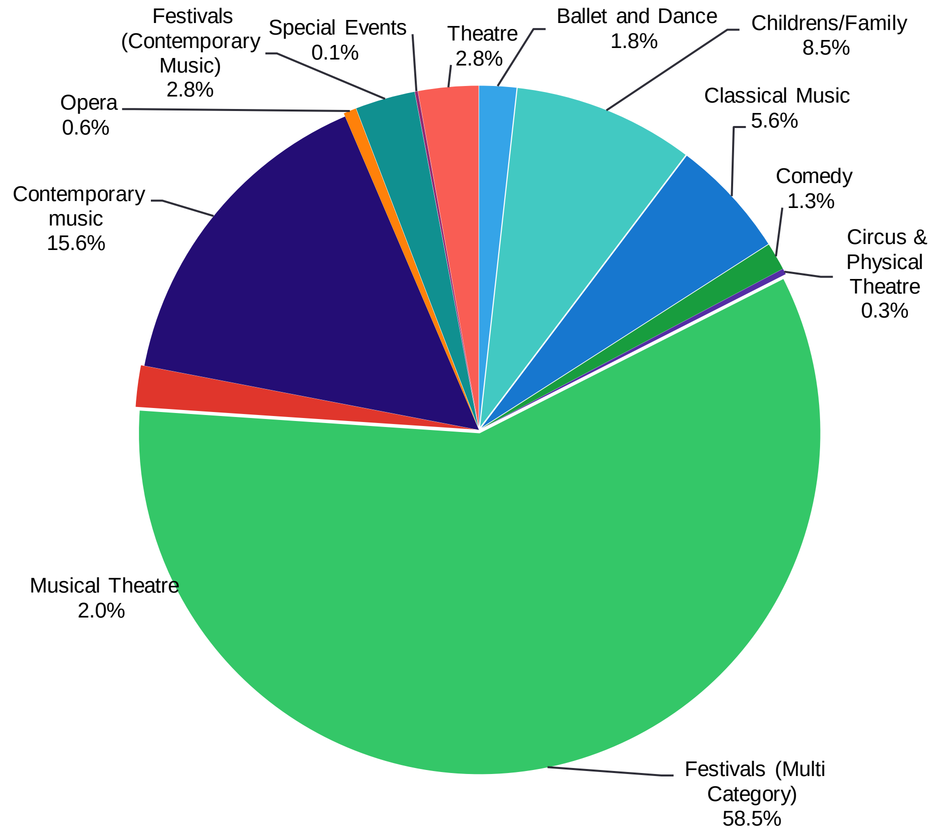


SA Analysis

SA Revenue by Category 2021



SA Attendance by Category 2021



ACT/TAS/NT Analysis

ACT/TAS/NT Revenue and Attendance

- In 2021, ACT/TAS/NT revenue increased by 99.2% to $31.6m and attendance increased by 120.4% to 0.7m. Together, they contributed 4.7% of industry share of revenue and 6.3% of industry share of attendance in 2021.
- Contemporary Music was the highest contributor to revenue (21.2%) and Festivals (Multi Category) was the highest contributor to attendance (27.3%) in ACT/TAS/NT.
- ACT witnessed the second highest y-o-y growth in revenue (112.5% to $12.1m) and second highest y-o-y growth in attendance (109.9% to 0.2m) amongst all states and territories in 2021, with $26.72 per capita spend in 2021.
  - This was driven by significant y-o-y growth in revenue in the Festivals (Contemporary Music), Opera, Childrens/Family, Theatre, Comedy and Classical Music categories.
  - Top events included *Sesame Street Circus,* SummerSalt and performances by Carl Barron and Tina Arena.
- TAS witnessed the third highest y-o-y growth in revenue (52.8% to $14.2m) and third highest y-o-y growth in attendance (89.1% to 0.4m) amongst all states and territories, with a per capita spend of $24.95 in 2021.
  - This was driven by significant y-o-y growth in revenue in the Comedy, Classical Music, Musical Theatre, Festivals (Contemporary Music) and Festival (Multi Category) categories.
  - Top events included *The Rocky Horror Show* and Party in the Apocalypse Pt.1.
- NT witnessed the highest y-o-y growth in revenue (517.4% to $5.3m) and the highest y-o-y growth in attendance (395.0% to 0.1m) amongst all states and territories in 2021. NT had the lowest per capita spend of $21.05 in 2021, which may be due to a large number of free events being presented in the NT.
  - The growth in revenue was primarily driven by an increase in Festivals (Contemporary Music), Festivals (Multi-Category), Theatre, Circus and Physical Theatre and Comedy. Some of these categories witnessed significant growth in 2021, as there were few or no events in the NT in these categories in 2020 due to COVID-19 restrictions, and there was also a new data provider.
  - Top events included Bassinthegrass, Darwin Festival and SummerSalt.

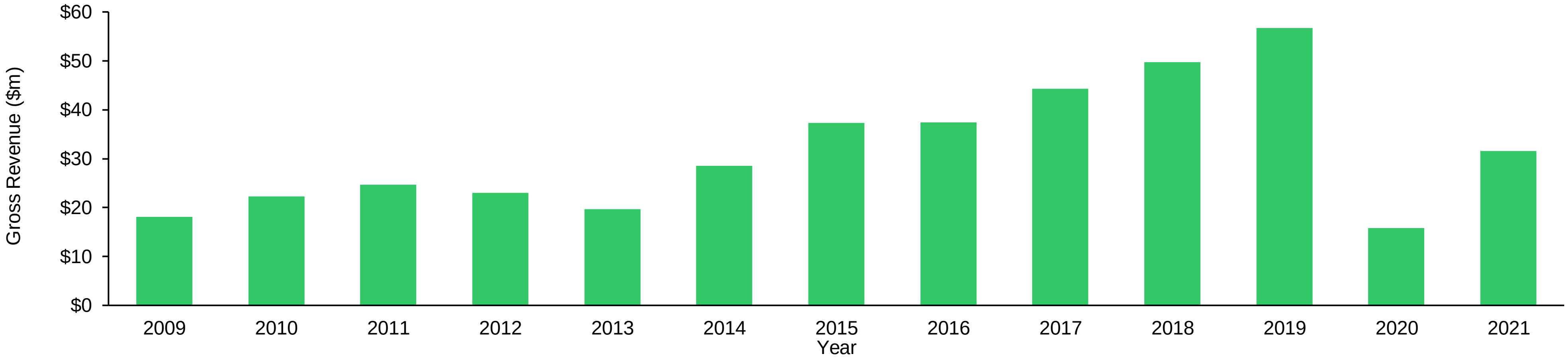
	Revenue		Attendance	
Year	Revenue	Growth (%)	Total Attendance	Growth (%)
2009	$18,103,869	-	351,189	-
2010	$22,345,107	23.4%	460,793	31.2%
2011	$24,646,007	10.3%	478,993	3.9%
2012	$22,986,999	(6.7%)	413,160	(13.7%)
2013	$19,640,815	(14.6%)	484,343	17.2%
2014	$28,566,945	45.4%	542,736	12.1%
2015	$37,367,387	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%

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

ACT/TAS/NT Analysis

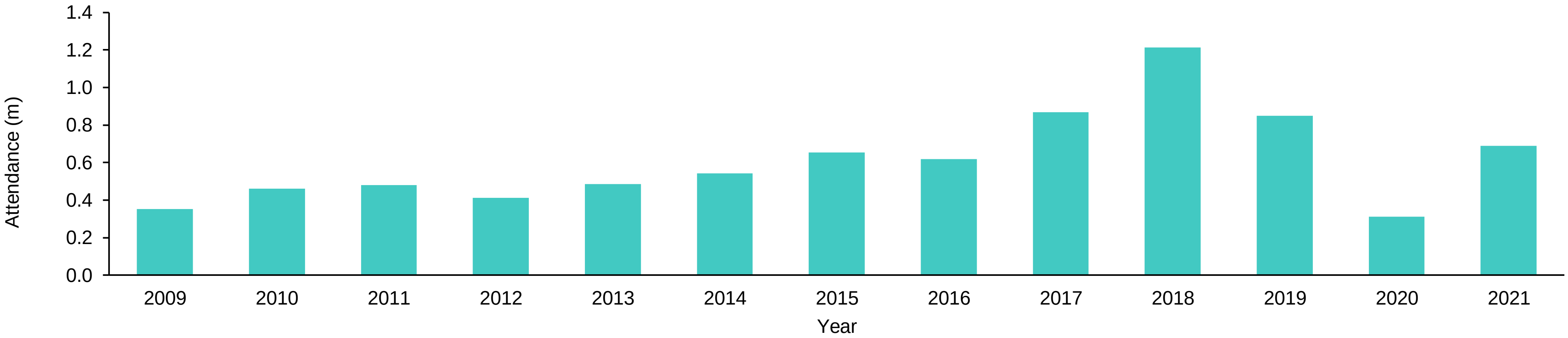
Revenue – ACT/TAS/NT

2009 → 2021



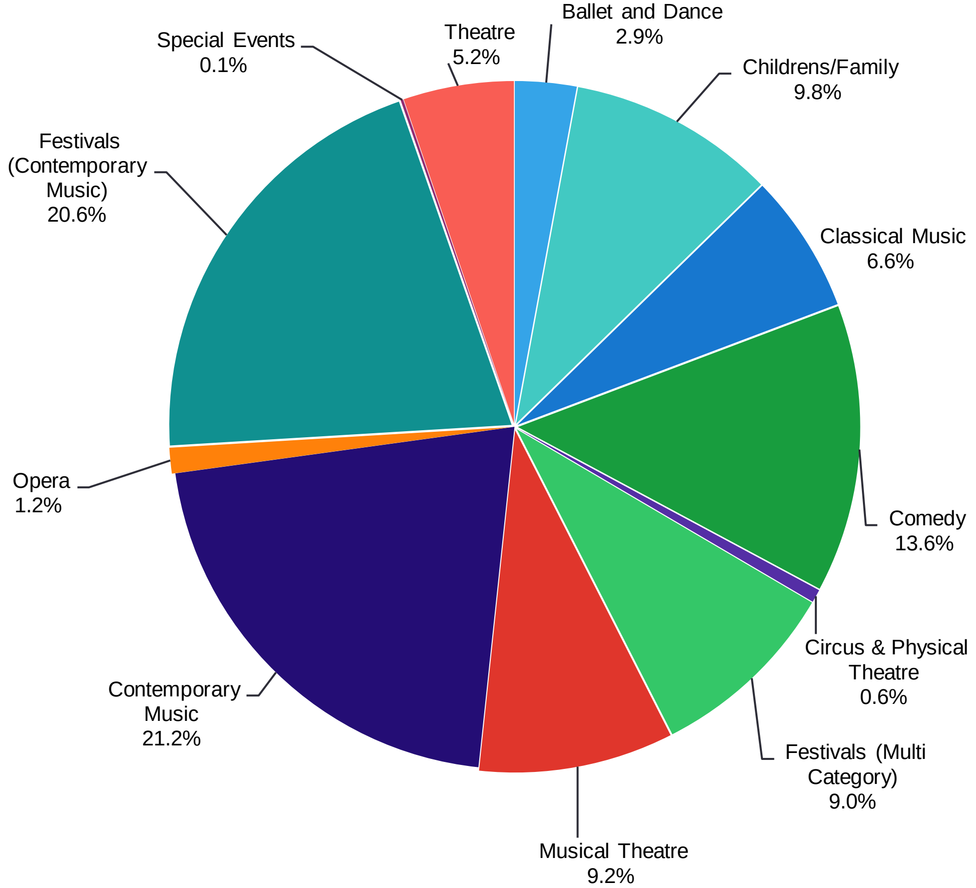
Attendance – ACT/TAS/NT

2009 → 2021

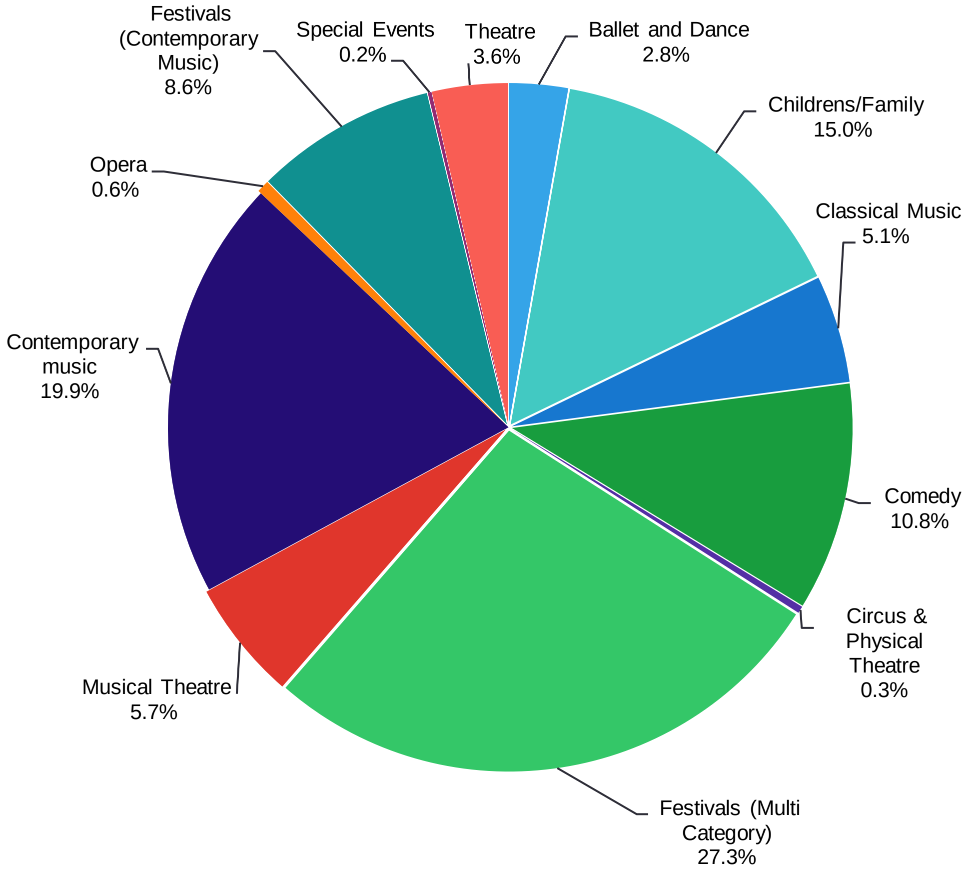


ACT/TAS/NT Analysis

ACT/TAS/NT Revenue by Category 2021



ACT/TAS/NT Attendance by Category 2021



5 Category Analysis

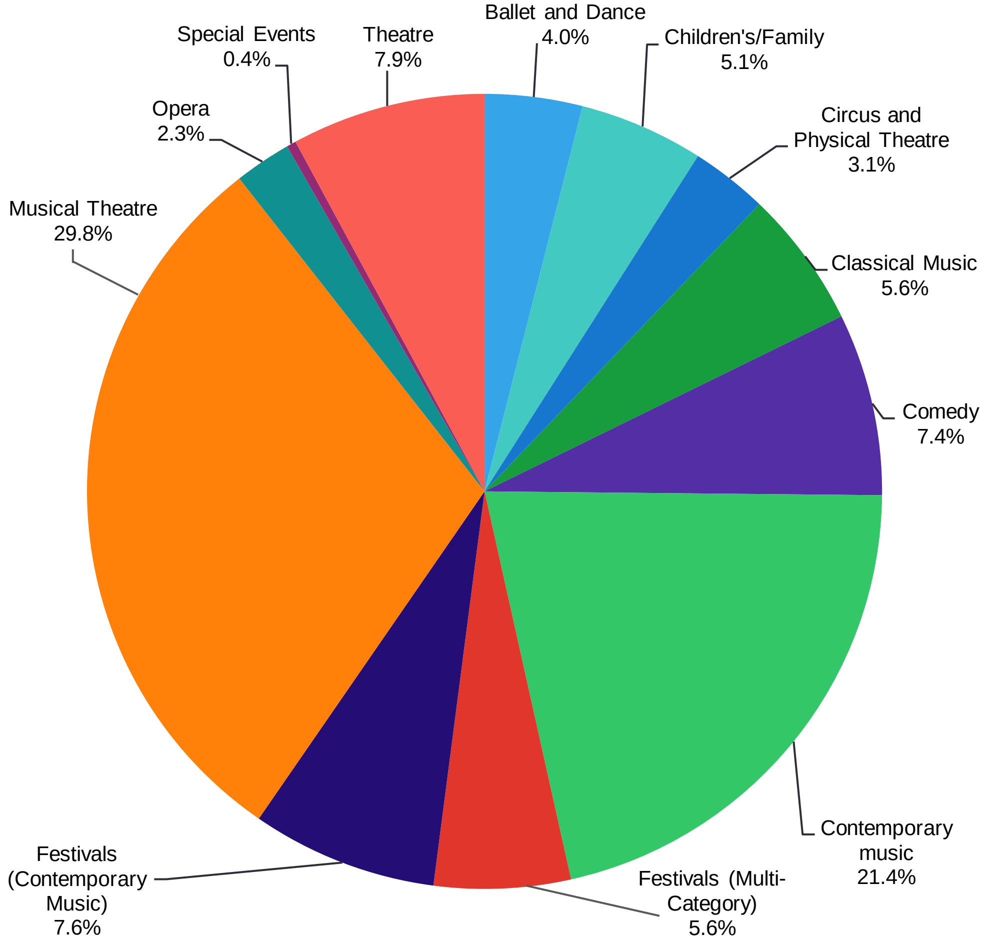
Total Revenue and Attendance by Category

Revenue and Attendance by Category 2021

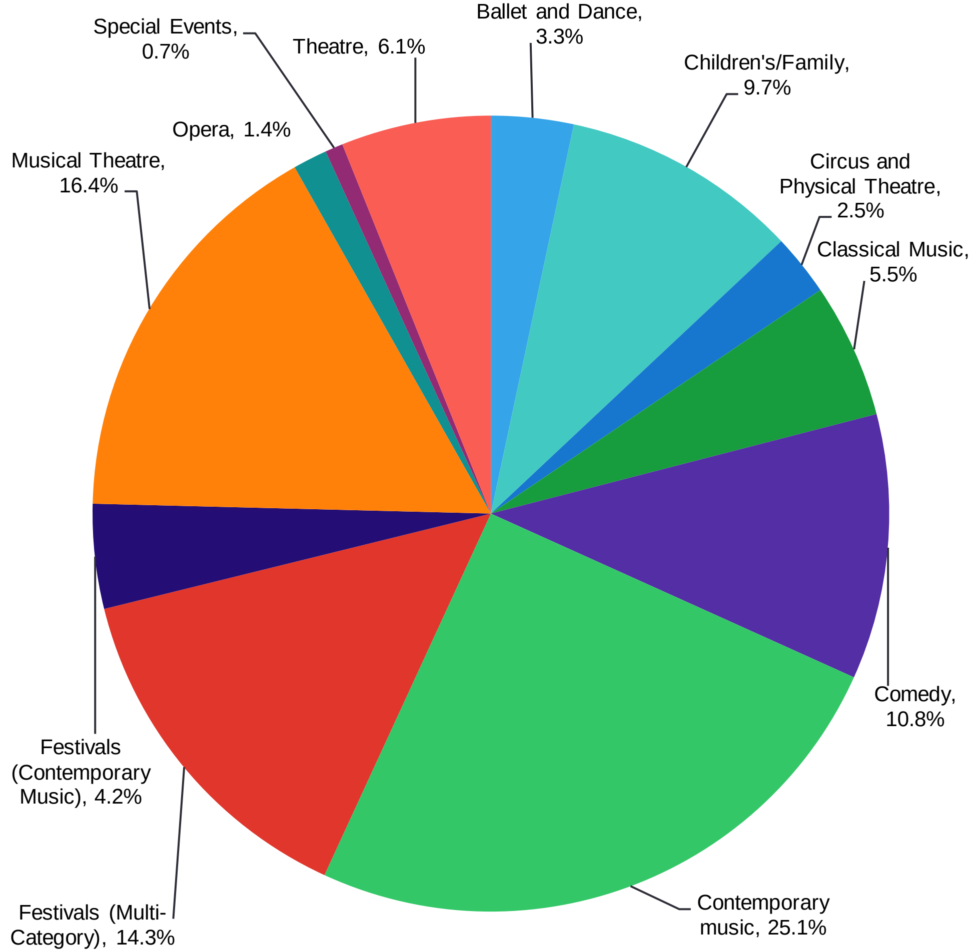
	Revenue			Attendance		
Category	Revenue	% Change in Revenue (from 2020)	Share of Industry	Tickets	% Change in Attendance (from 2020)	Share of Industry
Ballet and Dance	$26,942,483	257.6%	4.0%	363,505	164.6%	3.3%
Childrens/Family	$34,298,281	229.9%	5.1%	1,050,643	177.9%	9.7%
Circus and Physical Theatre	$21,220,702	(6.5%)	3.1%	272,413	(0.9%)	2.5%
Classical Music	$37,973,064	109.7%	5.6%	595,349	105.4%	5.5%
Comedy	$50,301,163	134.1%	7.4%	1,171,696	246.2%	10.8%
Contemporary Music	$144,938,333	(53.1%)	21.4%	2,731,661	(4.9%)	25.1%
Festivals (Multi Category)	$37,673,034	(4.6%)	5.6%	1,554,151	(0.9%)	14.3%
Festivals (Contemporary Music)	$51,279,951	(5.3%)	7.6%	461,949	5.6%	4.2%
Musical Theatre	$202,342,943	201.8%	29.8%	1,784,772	144.8%	16.4%
Opera	$15,649,421	38.3%	2.3%	151,299	2.2%	1.4%
Special Events	$2,602,427	(44.0%)	0.4%	78,708	(52.8%)	0.7%
Theatre	$53,563,159	34.4%	7.9%	661,694	56.8%	6.1%
Total	**$678,784,958**	**12.0%**	**100.0%**	**10,877,839**	**40.1%**	**100.0%**

Total Revenue and Attendance by Category

Revenue by Category 2021

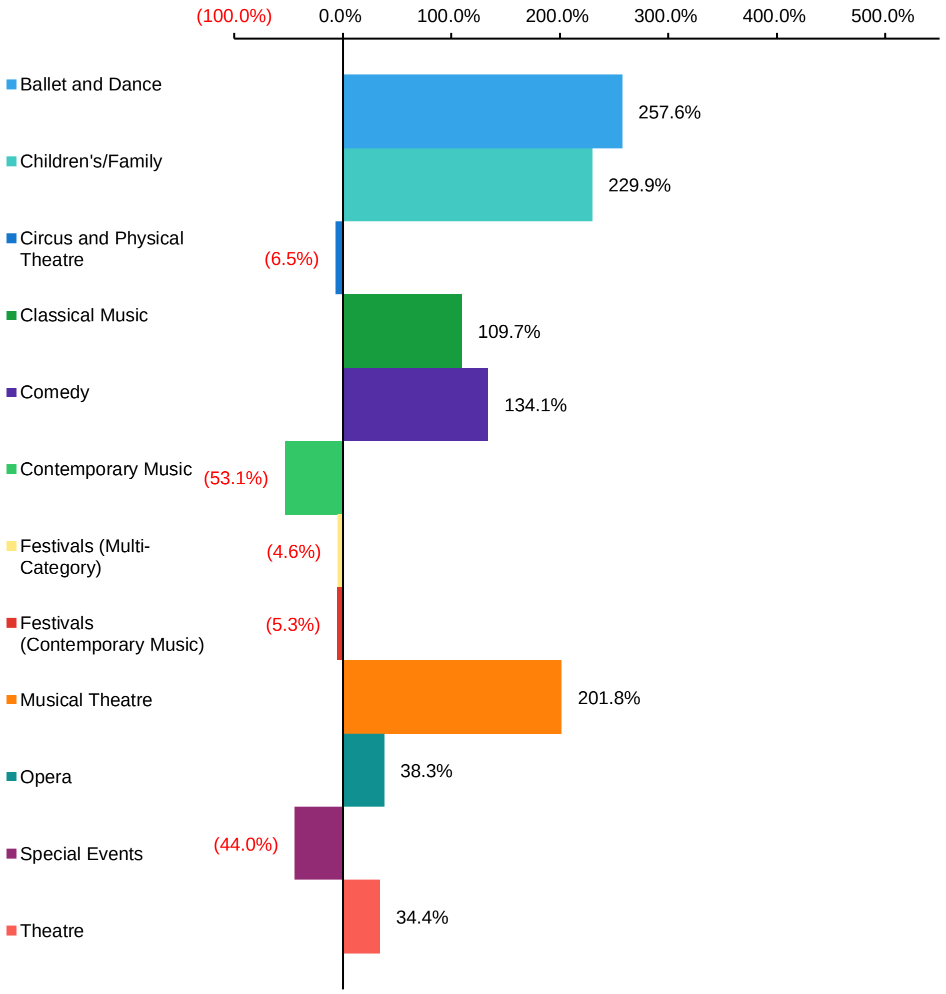


Attendance by Category 2021

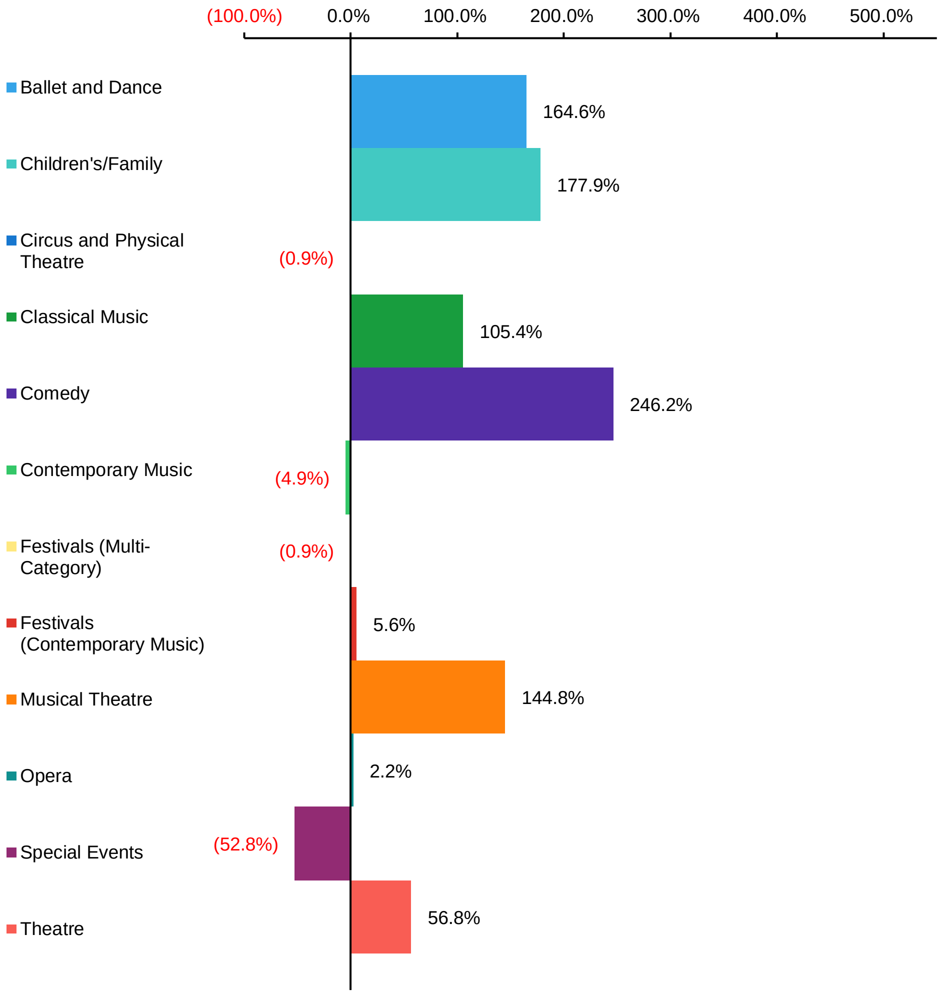


Total Revenue and Attendance by Category

Percentage Movement in Revenue by Category 2020 → 21



Percentage Movement in Attendance by Category 2020 → 21



Ballet and Dance

National Overview

- The Ballet and Dance category witnessed the highest y-o-y growth in revenue by 257.6% (from $7.5m in 2020 to $26.9m in 2021) and the third highest y-o-y growth in attendance amongst all categories by 164.6% (from 0.1m in 2020 to 0.4m in 2021). An increase in the average ticket price by 44.3% y-o-y (from $59.64 in 2020 to $86.08 in 2021) also contributed to the growth in revenue.
- The revenue in Ballet and Dance was primarily driven by major performances such as *New York Dialects*, *Counterpointe*, *The Sleeping Beauty* and *The Nutcracker*.
- The significant growth in revenue and attendance reflects the resumption of ballet and dance events following significant COVID-19 restrictions in 2020.
- In 2021, 82.1% of revenue and 71.7% 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 the West Australian Ballet. NPAP Ballet and Dance category companies experienced a significant increase in revenue by 414.3% and attendance by 172.1% in 2021 compared to 2020.
- In 2021, NSW, QLD and WA generated the most revenue and attendance in this category. NSW, QLD and WA held a national market share of approximately 31.3%, 28.8% and 19.4% respectively in revenue and 23.7%, 31.6% and 21.5% respectively in attendance. These three states together generated 79.5% of national Ballet and Dance revenue and 76.8% attendance in 2021.
- In 2021, all states and territories showed a y-o-y growth in revenue and in attendance. SA experienced highest y-o-y growth in revenue (877.9%) and second highest y-o-y growth in attendance (390.6%) in Ballet and Dance, driven by performances such as *Anna Karenina*, *G* by Garry Stewart and *Celtic Illusion: Reimagined*.
- QLD experienced the second highest y-o-y growth in revenue (487.5%) and third highest y-o-y growth in attendance (297.0%). The growth in revenue was driven by major performances including *The Sleeping Beauty*, *The Nutcracker* and *Dracula*.
- VIC witnessed the third highest y-o-y growth in revenue (424.7%) and the highest y-o-y growth in attendance (575.8%). TAS improved significantly in 2021, considering no events were held in 2020 due to COVID-19 restrictions.

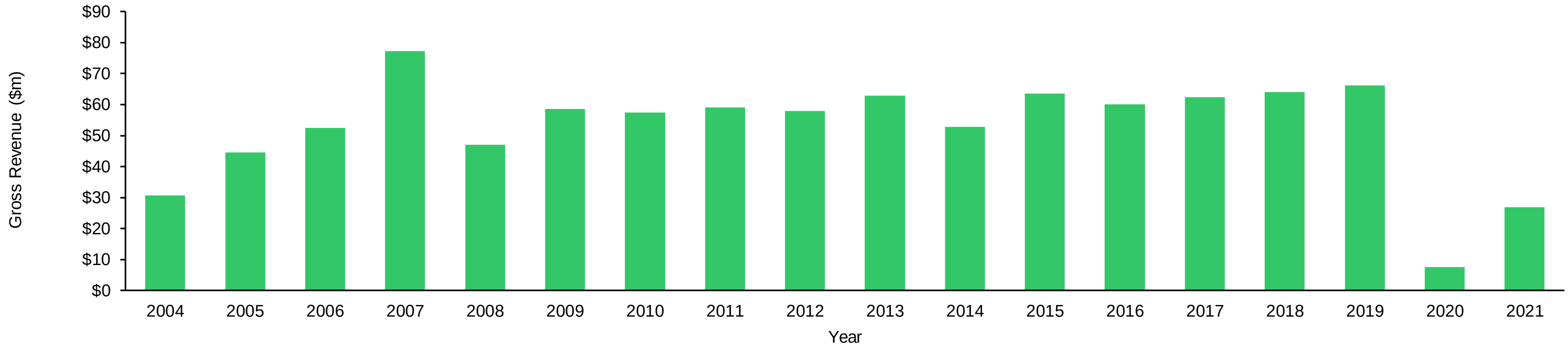
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$30,664,060	-	682,755	-	$50.07	-
2005	$44,563,085	45.3%	930,639	36.3%	$52.76	5.4%
2006	$52,523,644	17.9%	1,113,849	19.7%	$50.52	(4.2%)
2007	$77,287,071	47.1%	1,457,306	30.8%	$57.39	13.6%
2008	$47,051,946	(39.1%)	934,533	(35.9%)	$60.67	5.7%
2009	$58,570,704	24.5%	1,050,763	12.4%	$63.33	4.4%
2010	$57,509,401	(1.8%)	1,023,077	(2.6%)	$64.86	2.4%
2011	$59,164,135	2.9%	947,846	(7.4%)	$71.93	10.9%
2012	$57,865,897	(2.2%)	920,193	(2.9%)	$77.93	8.3%
2013	$62,832,992	8.6%	976,336	6.1%	$74.69	(4.2%)
2014	$52,771,905	(16.0%)	767,890	(21.3%)	$80.82	8.2%
2015	$63,522,318	20.4%	859,095	11.9%	$84.36	4.4%
2016	$60,079,595	(5.4%)	815,458	(5.1%)	$82.59	(2.1%)
2017	$62,339,482	3.8%	810,483	(0.6%)	$85.57	3.6%
2018	$63,988,882	2.6%	800,781	(1.2%)	$90.81	6.1%
2019	$66,158,598	3.4%	803,472	0.3%	$92.17	1.5%
2020	$7,534,678	(88.6%)	137,389	(82.9%)	$59.64	(35.3%)
2021	$26,942,483	257.6%	363,505	164.6%	$86.08	44.3%

Ballet and Dance

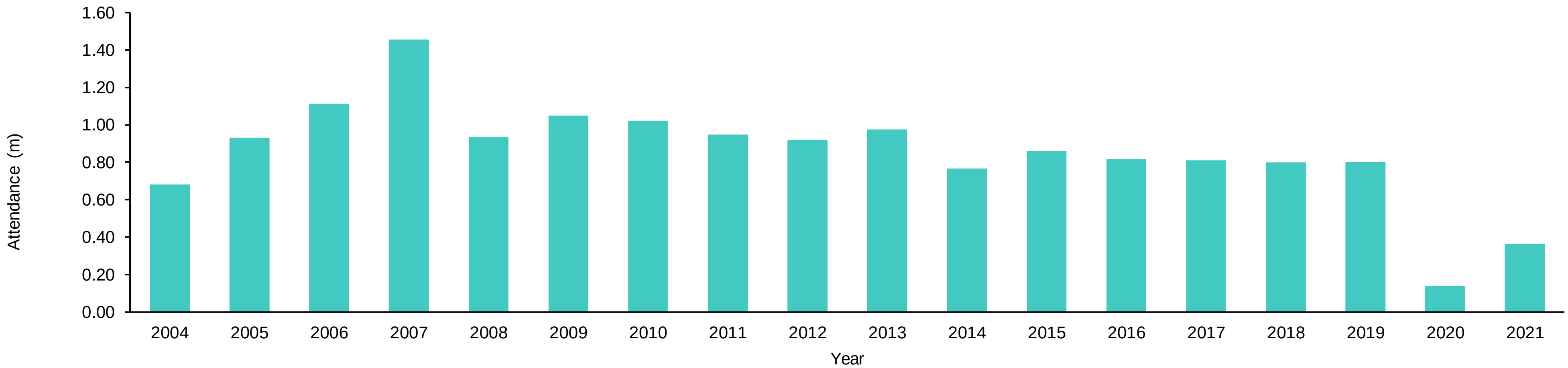
Revenue

2004 → 2021



Total Attendance

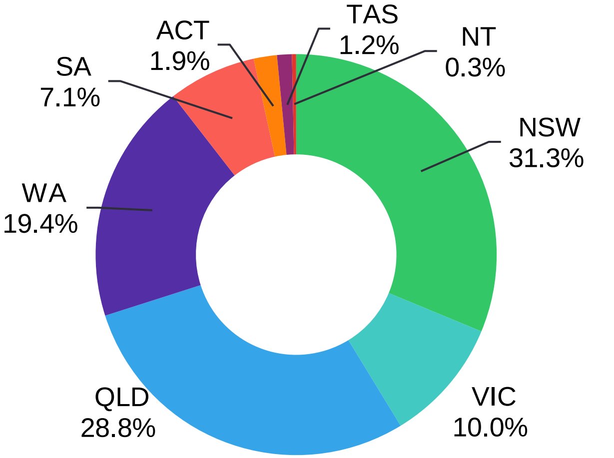
2004 → 2021



Ballet and Dance

Revenue by State/Territory

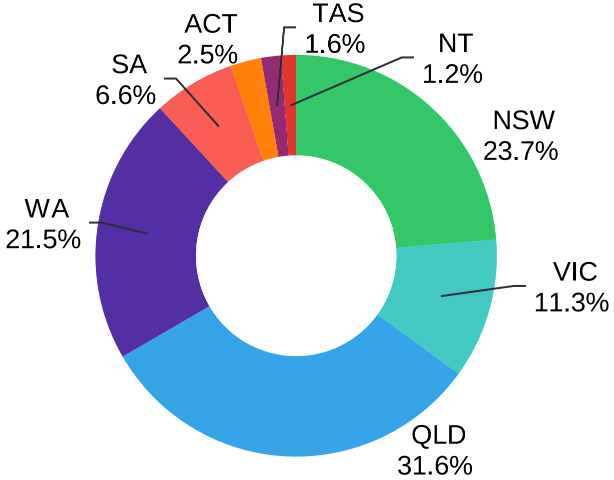
2021



State/ Territory	Revenue	Market Share Proportion	% Market Share Change from 2020 (%)
NSW	$8,421,907	31.3%	(5.3%)
VIC	$2,699,987	10.0%	3.2%
QLD	$7,758,167	28.8%	11.3%
WA	$5,231,802	19.4%	(14.4%)
SA	$1,913,894	7.1%	4.5%
ACT	$504,241	1.9%	(0.3%)
TAS	$321,410	1.2%	1.2%
NT	$91,075	0.3%	(0.1%)
Total	**$26,942,483**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	86,227	23.7%	(1.5%)
VIC	40,974	11.3%	6.9%
QLD	114,992	31.6%	10.6%
WA	78,141	21.5%	(20.3%)
SA	23,953	6.6%	3.0%
ACT	9,052	2.5%	(0.6%)
TAS	5,749	1.6%	1.6%
NT	4,417	1.2%	0.4%
Total	**$363,505**	**100.0%**	

Childrens/Family

National Overview

- Childrens/Family witnessed the second highest y-o-y growth in revenue by 229.9% (from $10.4m in 2020 to $34.3m in 2021) and the second highest y-o-y growth in attendance amongst all categories by 177.9% (from 0.4m in 2020 to 1.1m in 2021). An increase in the average ticket price by 19.0% (from $30.33 in 2020 to $36.10 in 2021) also contributed to the growth in revenue.
- The results in this category were primarily driven by events such as The Wiggles, *Bluey's Big Play*, *Paw Patrol Live!, Sesame Street Circus* and *Shaun The Sheep.*
- The 2021 results in the Childrens/Family category improved considerably compared to 2020, although lower than pre-COVID levels. Childrens/Family events are generally of a scale which were less impacted by COVID restrictions relative to other categories.
- In 2021, NSW and QLD together generated the most revenue and attendance in this category, with a national market share of approximately 26.4% and 22.7% respectively in revenue and 29.3% and 20.9% respectively in attendance. These two states combined generated 49.1% of national Childrens/Family category revenue and 50.2% of attendance in 2021.
- In 2021, all states and territories except TAS had y-o-y growth in revenue and attendance in this category.
- ACT experienced the highest y-o-y growth in revenue (561.7%) and in attendance (384.7%). The growth in revenue was driven by major performances including *Sesame Street Circus* and *Bluey's Big Play*.
- SA witnessed the second highest y-o-y growth in revenue (546.1%) and in attendance (307.7%), driven by major performances such as *Sesame Street Circus Spectacular*, *Bluey's Big Play*, The Wiggles and *Paw Patrol Live!*
- Victoria experienced the third highest y-o-y growth in revenue (291.8%) and the fourth highest y-o-y growth in attendance (235.1%). The growth in revenue was driven by major performances including The Wiggles, *Paw Patrol Live!, Shaun The Sheep*, *The Midnight Gang* and *Sesame Street*.

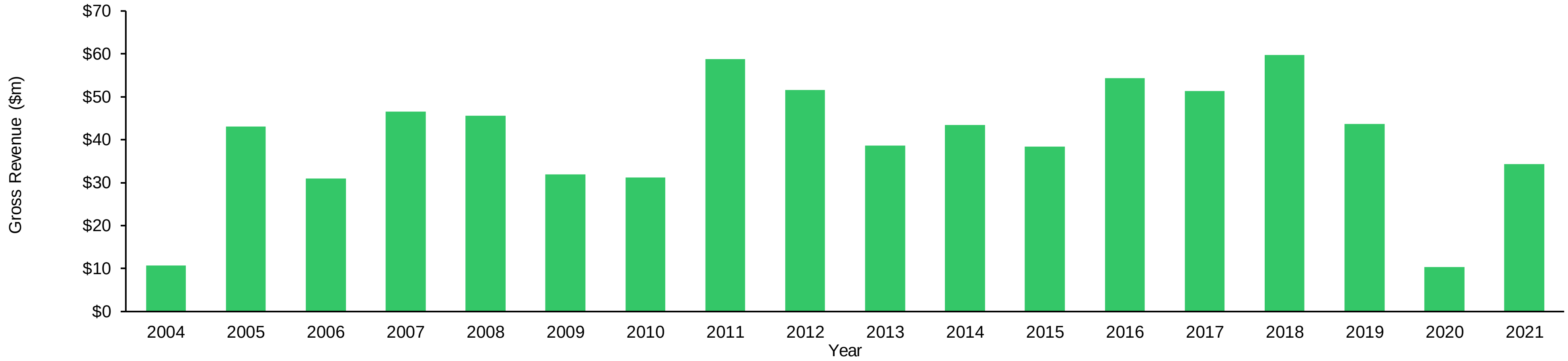
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$10,737,662	-	515,276	-	$21.25	-
2005	$43,108,863	301.5%	1,271,239	146.7%	$35.52	67.1%
2006	$30,944,086	(28.2%)	1,114,427	(12.3%)	$28.96	(18.5%)
2007	$46,535,403	50.4%	1,393,942	25.1%	$36.49	26.0%
2008	$45,647,441	(1.9%)	1,455,400	4.4%	$34.24	(6.2%)
2009	$31,904,974	(30.1%)	1,076,332	(26.0%)	$32.38	(5.4%)
2010	$31,247,780	(2.1%)	974,624	(9.4%)	$34.23	5.7%
2011	$58,777,398	88.1%	1,453,012	49.1%	$43.87	28.1%
2012	$51,587,317	(12.2%)	1,300,334	(10.5%)	$43.17	(1.6%)
2013	$38,684,410	(25.0%)	1,090,598	(16.1%)	$38.17	(11.6%)
2014	$43,431,918	12.3%	1,214,273	11.3%	$38.27	0.3%
2015	$38,368,367	(11.7%)	1,081,003	(11.0%)	$39.15	2.3%
2016	$54,316,058	41.6%	1,376,254	27.3%	$42.87	9.5%
2017	$51,308,258	(5.5%)	1,305,672	(5.1%)	$42.35	(1.2%)
2018	$59,777,596	16.5%	1,650,955	26.4%	$40.63	(4.1%)
2019	$43,649,235	(27.0%)	1,172,129	(29.0%)	$41.08	1.1%
2020	$10,396,875	(76.2%)	378,053	(67.7%)	$30.33	(26.2%)
2021	$34,298,281	229.9%	1,050,643	177.9%	$36.10	19.0%

Childrens/Family

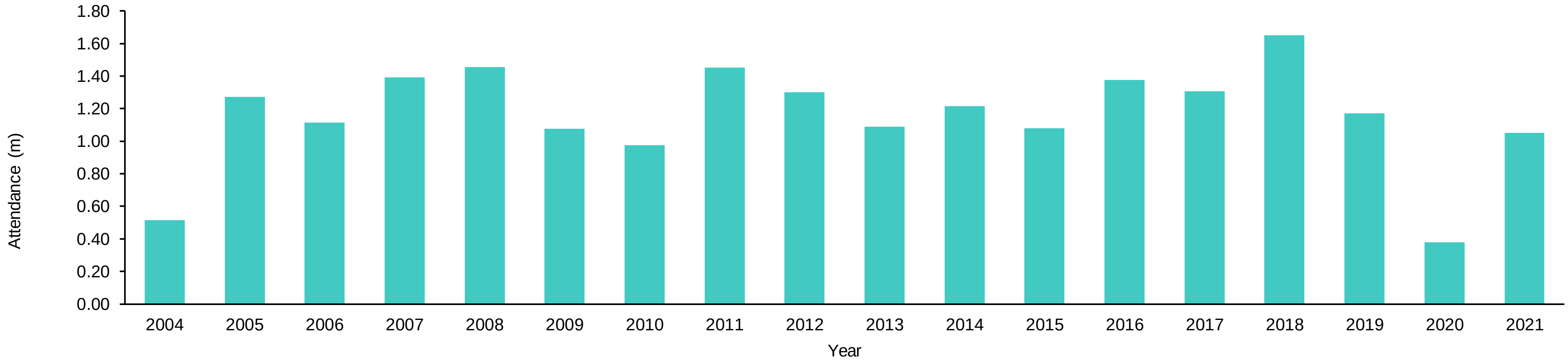
Revenue

2004 → 2021



Total Attendance

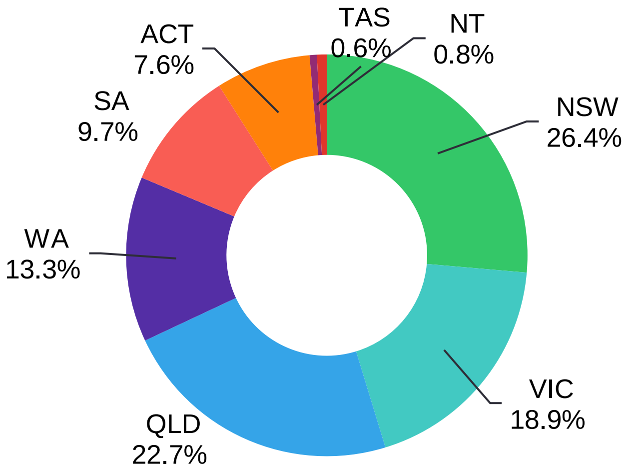
2004 → 2021



Childrens/Family

Revenue by State/Territory

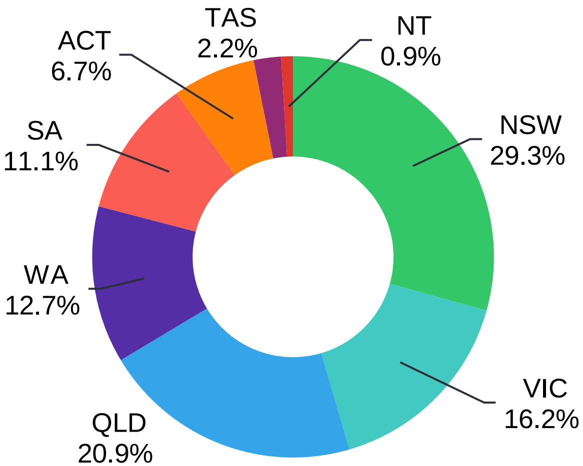
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$9,044,567	26.4%	(1.3%)
VIC	$6,486,534	18.9%	3.0%
QLD	$7,800,340	22.7%	3.2%
WA	$4,560,236	13.3%	1.0%
SA	$3,315,782	9.7%	4.7%
ACT	$2,619,998	7.6%	3.8%
TAS	$200,667	0.6%	(13.6%)
NT	$270,158	0.8%	(0.8%)
Total	**$34,298,281**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	307,969	29.3%	(5.6%)
VIC	169,763	16.2%	2.8%
QLD	219,827	20.9%	4.7%
WA	133,048	12.7%	0.7%
SA	116,640	11.1%	3.5%
ACT	70,281	6.7%	2.9%
TAS	23,170	2.2%	(7.9%)
NT	9,945	0.9%	(1.0%)
Total	**1,050,643**	**100.0%**	

Circus and Physical Theatre

National Overview

- Circus and Physical Theatre witnessed a y-o-y decline in revenue by 6.5% (from $22.7m in 2020 to $21.2m in 2021) and a slight y-o-y decline in attendance by 0.9% (from 0.3m in 2020 to 0.3m in 2021).
- The average ticket price decreased by 4.1% (from $89.48 in 2020 to $85.78 in 2021), which contributed to the decline in revenue.
- Circus and Physical Theatre contributed 3.1% to the total industry share of revenue and 2.5% to the total attendance in 2021.
- Top events in this category included *Magic Mike Live, The Little Prince, Matador,* and *Infamous the Show*.
- 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. In 2021, there were no Cirque du Soleil tours.
- In 2021, NSW and QLD together generated the most revenue and attendance in this category, with a national market share of approximately 47.8% and 34.2% respectively in revenue and 40.5% and 42.3% respectively in attendance. These two states combined generated 82.0% of national Circus and Physical Theatre category revenue and 82.8% of attendance in 2021.
- In 2021, NT and SA witnessed the highest and second highest y-o-y increase in revenue and attendance respectively. However, their contribution to the overall revenue and attendance in this category is low. Top events in NT and SA were *Cosentino – Deception* and *The Ultimate Vegas Show* respectively.
- ACT witnessed a y-o-y decline in revenue by 99.0% and attendance by 98.7% in 2021. Similar to 2020, there were no Circus and Physical Theatre events held in TAS in 2021.

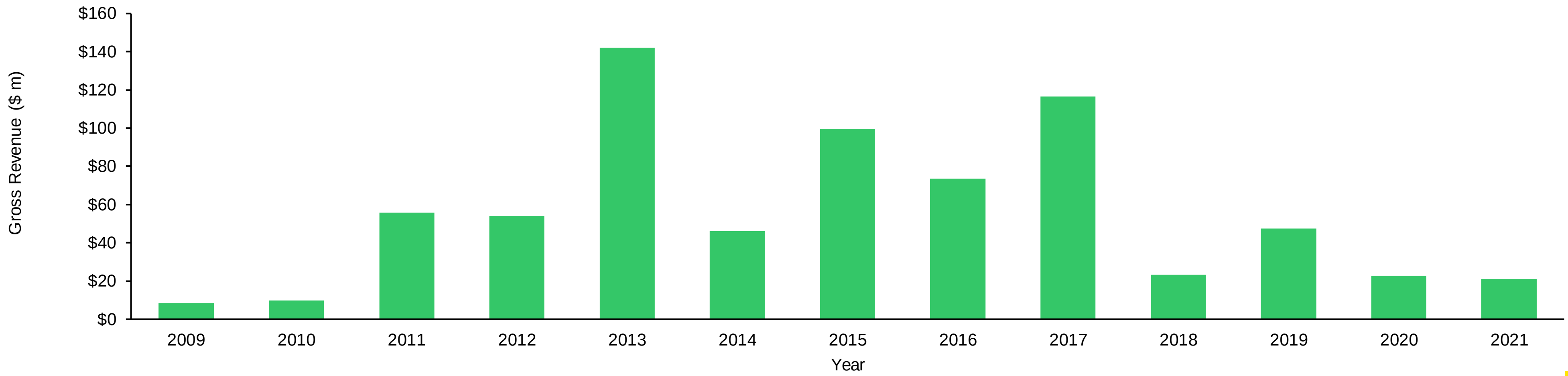
Revenue and Attendance 2009 → 2021

	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%)

Circus and Physical Theatre

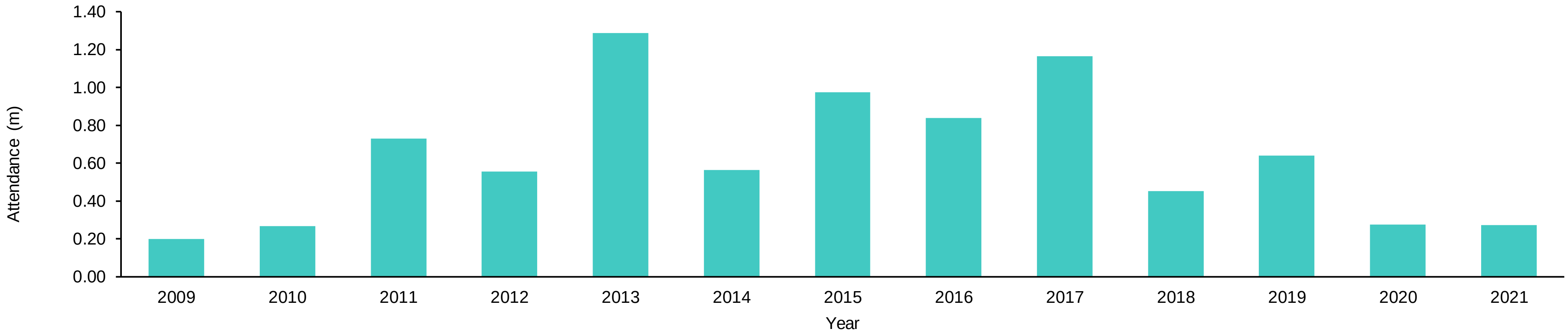
Revenue

2009 → 2021



Total Attendance

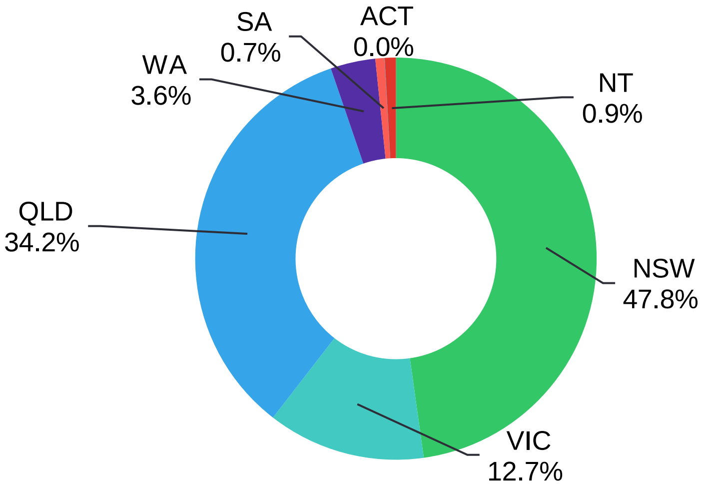
2009 → 2021



Circus and Physical Theatre

Revenue by State/Territory

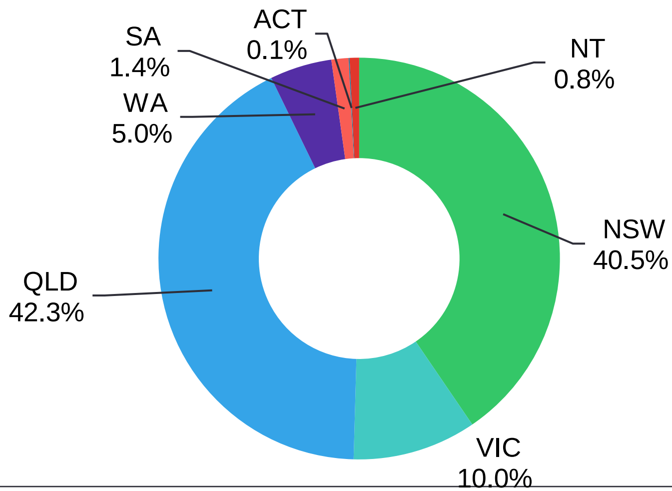
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$10,139,508	47.8%	43.8%
VIC	$2,697,566	12.7%	1.0%
QLD	$7,267,740	34.2%	(46.3%)
WA	$767,472	3.6%	1.9%
SA	$154,380	0.7%	0.7%
ACT	$4,463	0.02%	(2.0%)
TAS	-	-	-
NT	$189,573	0.9%	0.9%
Total	**$21,220,702**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	110,251	40.5%	33.5%
VIC	27,161	10.0%	(6.0%)
QLD	115,349	42.3%	(23.5%)
WA	13,603	5.0%	(0.7%)
SA	3,773	1.4%	1.4%
ACT	191	0.1%	(5.4%)
TAS	-	-	-
NT	2,085	0.8%	0.7%
Total	**272,413**	**100.0%**	

Classical Music

National Overview

- Classical Music witnessed a y-o-y increase in revenue by 109.7% (from $18.1m in 2020 to $38.0m in 2021) and a y-o-y increase in attendance by 105.4% (from 0.3m in 2020 to 0.6m in 2021).
- The average ticket price has declined by 6.7% (from $81.75 in 2020 to $76.26 in 2021).
- The revenue in this category was primarily driven by events such as *Love Actually In Concert*, *Star Wars: Return of the Jedi in Concert*, *One Big Voice* and *Queen Orchestrated.*
- Similar to previous years, performances by NPAP companies contributed significantly to the revenue (50.9%) and attendance (55.7%) in this category in 2021. NPAP companies include Adelaide Symphony Orchestra, Australian Brandenburg Orchestra, Australian Chamber Orchestra, Melbourne Symphony Orchestra, Musica Viva Australia, Opera Queensland, Orchestra Victoria, Queensland Symphony Orchestra, Sydney Symphony Orchestra, Tasmanian Symphony Orchestra and West Australian Symphony Orchestra.
- In 2021, NSW and WA generated the most revenue and attendance in this category, with a national market share of approximately 25.4% and 24.6% respectively in revenue and 20.7% and 30.3% respectively in attendance. These two states combined generated 50.0% of the overall revenue and 51.0% of the overall attendance in this category in 2021.
- Top events in NSW included *Love Actually In Concert*, *Queen Orchestrated*, *Noel! Noel!*, and *Jurassic Park In Concert*. Top events in WA included *Star Wars: Return of the Jedi in Concert* and *One Big Voice.*
- In 2021, all states and territories except Victoria witnessed y-o-y growth in revenue and attendance in this category.
- SA witnessed the highest y-o-y growth in revenue (411.8%) and in attendance (280.4%). The growth was driven by major events such as *Blue Planet II* and The Ten Tenors.

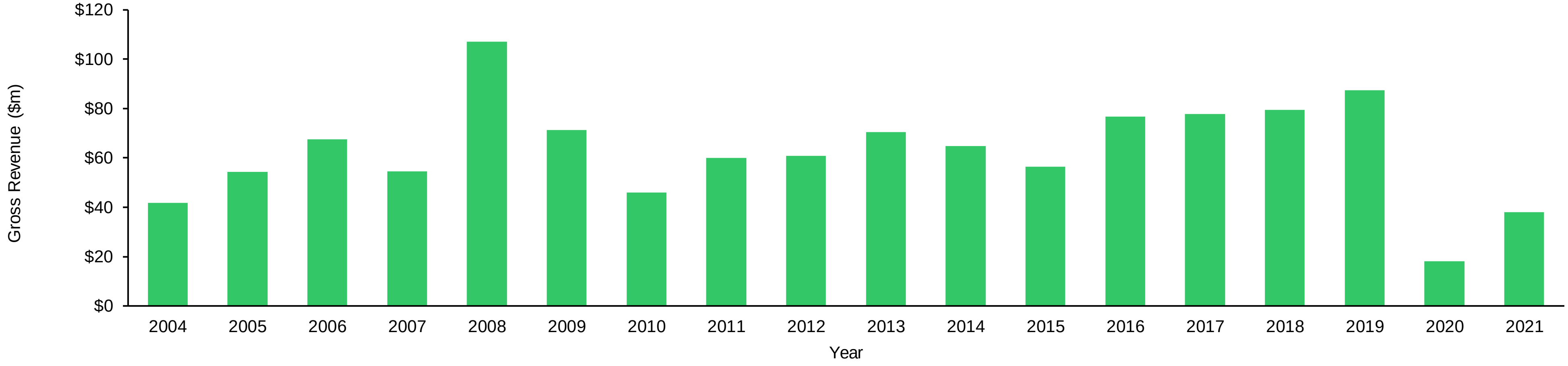
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$41,875,659	-	1,062,071	-	$43.21	-
2005	$54,395,768	29.9%	1,154,340	8.7%	$52.95	22.5%
2006	$67,568,915	24.2%	1,571,748	36.2%	$46.93	(11.4%)
2007	$54,615,181	(19.2%)	1,104,146	(29.8%)	$55.85	19.0%
2008	$107,050,440	96.0%	1,478,281	33.9%	$84.81	51.9%
2009	$71,273,338	(33.4%)	1,120,002	(24.2%)	$74.01	(12.7%)
2010	$45,882,050	(35.6%)	962,132	(14.1%)	$60.43	(18.3%)
2011	$60,096,039	31.0%	1,048,115	8.9%	$68.82	13.9%
2012	$60,884,219	1.3%	1,254,963	19.7%	$60.34	(12.3%)
2013	$70,481,841	15.8%	1,169,643	(6.8%)	$73.18	21.3%
2014	$64,870,493	(8.0%)	1,015,122	(13.2%)	$75.05	2.6%
2015	$56,395,824	(13.1%)	993,906	(2.1%)	$71.50	(4.7%)
2016	$76,764,404	36.1%	1,219,293	22.7%	$78.43	9.7%
2017	$77,883,209	1.5%	1,318,421	8.1%	$77.12	(1.7%)
2018	$79,456,707	2.0%	1,261,565	(4.3%)	$79.13	2.6%
2019	$87,333,188	9.9%	1,316,235	4.3%	$81.35	2.8%
2020	$18,111,125	(79.3%)	289,888	(78.0%)	$81.75	0.5%
2021	$37,973,064	109.7%	595,349	105.4%	$76.26	(6.7%)

Classical Music

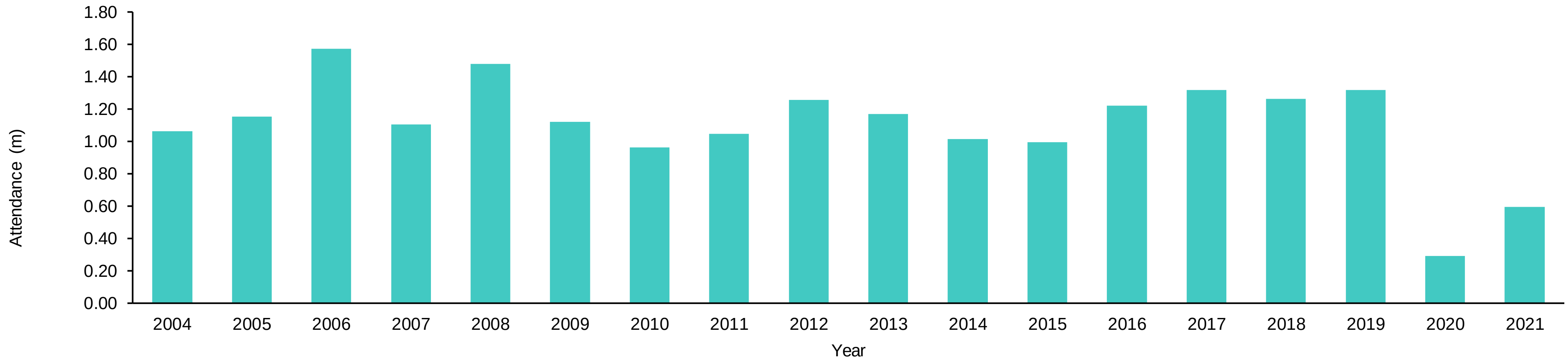
Revenue

2004 → 2021



Total Attendance

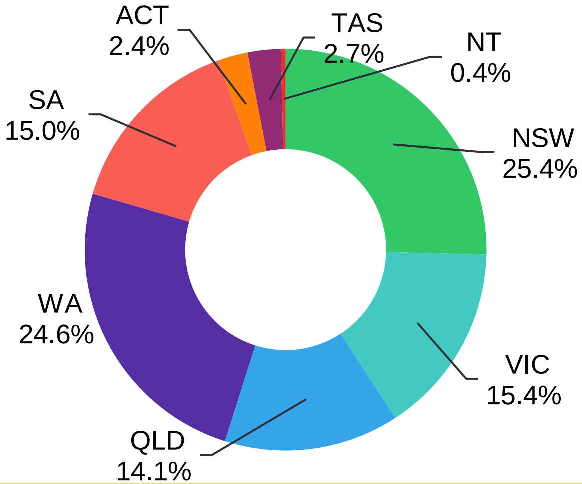
2004 → 2021



Classical Music

Revenue by State/Territory

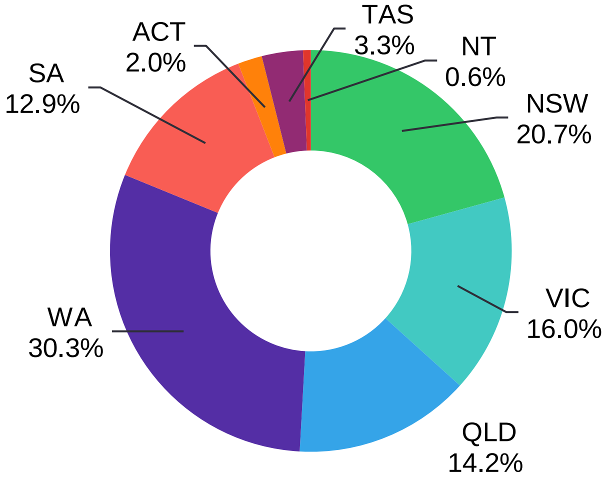
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$9,638,774	25.4%	1.0%
VIC	$5,851,160	15.4%	(20.1%)
QLD	$5,353,652	14.1%	2.2%
WA	$9,343,702	24.6%	5.6%
SA	$5,712,801	15.0%	8.9%
ACT	$916,577	2.4%	1.0%
TAS	$1,012,188	2.7%	1.6%
NT	$144,210	0.4%	(0.1%)
Total	**$37,973,064**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	123,317	20.7%	(2.9%)
VIC	95,109	16.0%	(17.4%)
QLD	84,544	14.2%	3.1%
WA	180,329	30.3%	11.3%
SA	77,001	12.9%	6.0%
ACT	11,611	2.0%	0.8%
TAS	19,705	3.3%	(0.6%)
NT	3,733	0.6%	(0.3%)
Total	**595,349**	**100.0%**	

Comedy

National Overview

- Comedy experienced the fourth highest y-o-y growth in revenue by 134.1% (from $21.5m in 2020 to $50.3m in 2021) and the highest y-o-y growth in attendance by 246.2% (from 0.3m in 2020 to 1.2m in 2021). The growth in revenue was partially offset by the y-o-y decline in the average ticket price by 34.4% (from $68.88 in 2020 to $45.20 in 2021).
- Comedy generated 7.4% of the overall live performance revenue and 10.8% of the overall live performance attendance in 2021.
- In 2021, the growth in Comedy was primarily driven by the Melbourne International Comedy Festival (which was not presented in 2020) and performances by renowned comedians such as Carl Barron, Daniel Sloss, Hannah Gadsby and Russell Howard.
- Victoria generated the most revenue and attendance in this category, representing 46.5% of the market share in revenue and 57.7% of the total attendance in 2021.
- In 2021, all states and territories except SA experienced y-o-y growth in revenue and attendance in this category.
- TAS witnessed the highest y-o-y growth in revenue (727.9%) and the second highest y-o-y increase in attendance (643.2%) in 2021. Major events that led to the growth in TAS revenue were *Tool Story* and performances by Hannah Gadsby, Arj Barker and Kevin Bloody Wilson. However, its impact is minimal as it represented only 2.5% in revenue and 2.0% in attendance of the overall market share in the Comedy category.
- Victoria witnessed the second highest y-o-y increase in revenue (383.1%) and the highest y-o-y increase in attendance (881.8%). Top events included Melbourne International Comedy Festival and performances by renowned comedians such as Daniel Sloss, Arj Barker, Adam Hills and Russell Howard.

Revenue and Attendance 2009 → 2021

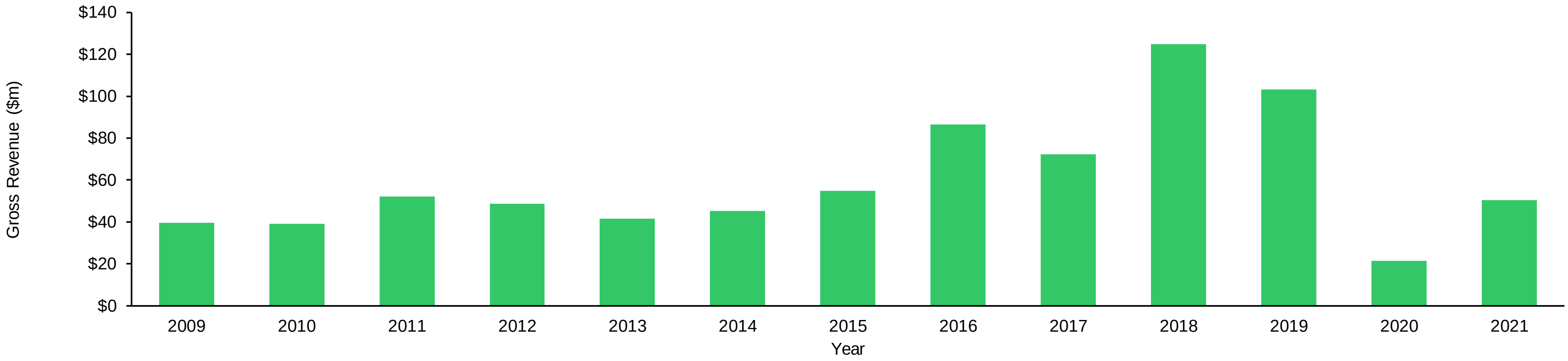
	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2009	$39,570,117	-	769,058	-	$44.07	-
2010	$39,048,164	(1.3%)	792,713	3.1%	$51.53	16.9%
2011	$51,999,602	33.2%	1,011,342	27.6%	$55.07	6.9%
2012	$48,694,665	(6.4%)	981,035	(3.0%)	$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%)

Note: Data is provided from 2009 as the 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

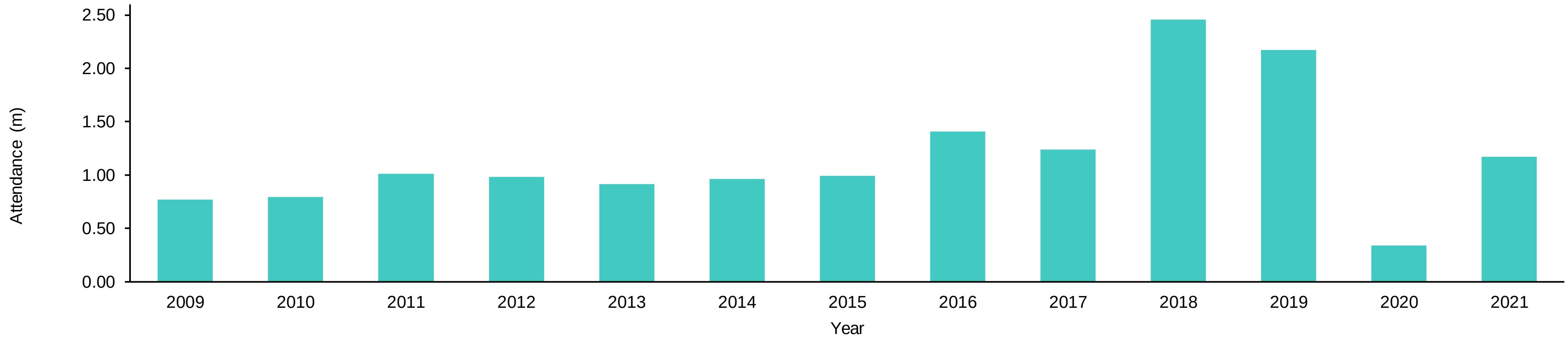
Revenue

2009 → 2021



Total Attendance

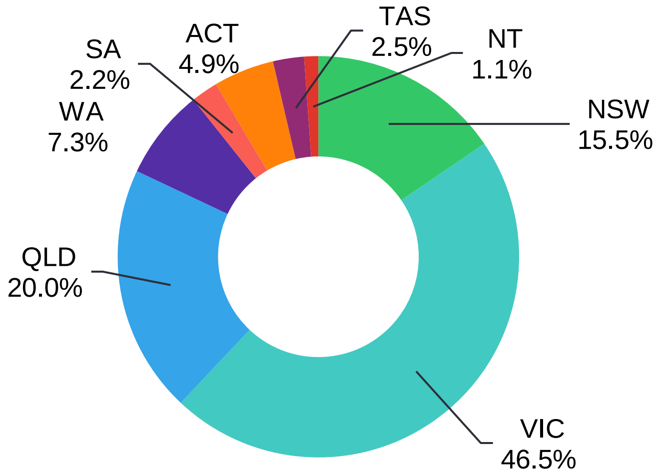
2009 → 2021



Comedy

Revenue by State/Territory

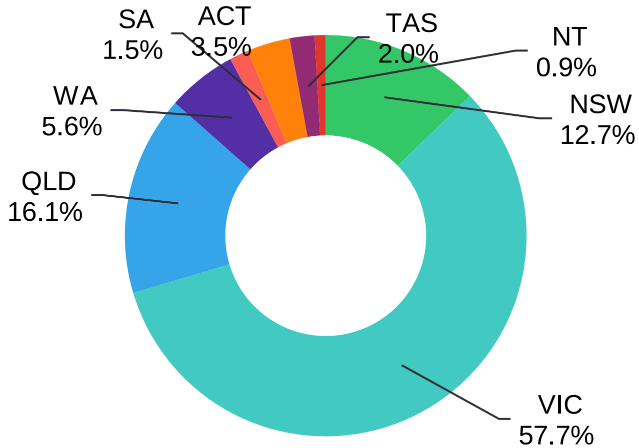
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$7,785,045	15.5%	(11.9%)
VIC	$23,413,298	46.5%	24.0%
QLD	$10,058,575	20.0%	(6.7%)
WA	$3,661,561	7.3%	(2.9%)
SA	$1,095,759	2.2%	(4.0%)
ACT	$2,457,348	4.9%	(1.0%)
TAS	$1,255,680	2.5%	1.8%
NT	$573,898	1.1%	0.6%
Total	**$50,301,163**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	149,233	12.7%	(11.4%)
VIC	675,538	57.7%	37.3%
QLD	188,769	16.1%	(18.4%)
WA	65,861	5.6%	(2.9%)
SA	17,868	1.5%	(3.9%)
ACT	40,659	3.5%	(1.8%)
TAS	23,419	2.0%	1.1%
NT	10,349	0.9%	0.1%
Total	**1,171,696**	**100.0%**	

Contemporary Music

National Overview

- Contemporary Music category witnessed the highest y-o-y decline in revenue by 53.1% (from $309.2m in 2020 to $144.9m in 2021) and the second highest y-o-y decline in attendance by 4.9% (from 2.9m in 2020 to 2.7m in 2021) among all the categories in 2021. The average ticket price declined by 51.0% y-o-y from $115.82 in 2020 to $56.81 in 2021.
- Contemporary Music continued to be significantly impacted by COVID-19 restrictions and uncertainty. In 2021, this category recorded the lowest revenue, lowest attendance and lowest average ticket price since 2004.
- Major events in this category in 2021 were performances by Midnight Oil, The Cat Empire, By The C: Icehouse, Keith Urban and Paul Kelly.
- Contemporary Music continued to be a significant contributor to the live performance market share, accounting for the second largest market share of revenue (21.4%) and the largest market share of attendance (25.1%) in 2021. However, Contemporary Music lost a significant market share in revenue and in attendance in 2020 and 2021 due to COVID-19 restrictions and limited national and international touring activity.
- 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.
- VIC generated the largest market share in revenue (26.9%) and the second largest market share in attendance (24.1%) in Contemporary Music.
- VIC and QLD combined generated 52.3% market share in revenue (26.9% and 25.4%) and 50.9% share in attendance (24.1% and 26.8%) in 2021.
- VIC witnessed a y-o-y decline in revenue by 52.4% and a y-o-y decline in attendance by 8.1%. NSW witnessed a y-o-y decline in revenue by 71.9% and a y-o-y decline in attendance by 41.0%.
- In 2021, QLD witnessed a y-o-y decline in revenue by 42.8%, despite a y-o-y growth in attendance by 29.2%.

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

Revenue and Attendance 2004 → 2021

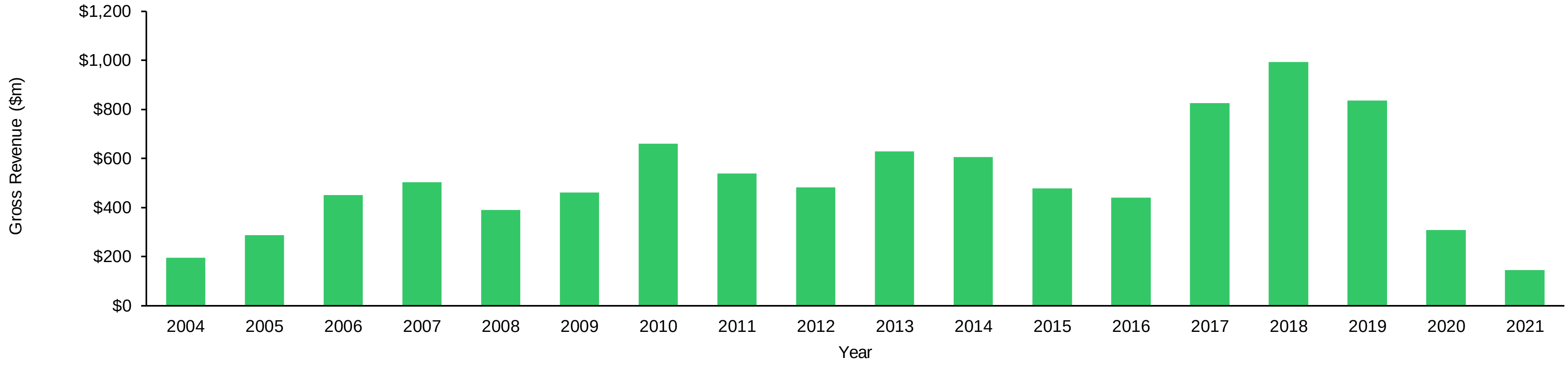
	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$195,058,791	-	2,737,873	-	$77.09	-
2005	$287,201,319	47.2%	3,924,276	43.3%	$83.37	8.1%
2006	$450,855,531	57.0%	5,295,988	35.0%	$92.78	11.3%
2007	$503,240,419	11.6%	5,975,561	12.8%	$90.49	(2.5%)
2008	$389,160,746	(22.7%)	4,330,620	(27.5%)	$101.35	12.0%
2009	$460,443,027	18.3%	4,682,805	8.1%	$108.61	7.2%
2010	$659,102,048	43.1%	7,028,235	50.1%	$102.78	(5.4%)
2011	$539,274,481	(18.2%)	5,939,618	(15.5%)	$103.45	0.6%
2012	$482,180,550	(10.6%)	5,484,257	(7.7%)	$100.27	(3.1%)
2013	$628,130,146	30.3%	6,266,137	14.3%	$110.50	10.2%
2014	$604,963,041	(3.7%)	6,386,058	1.9%	$107.60	(2.6%)
2015	$477,904,944	(21.0%)	5,554,811	(13.0%)	$96.38	(10.4%)
2016	$440,083,629	(7.9%)	5,658,753	1.9%	$85.35	(11.4%)
2017	$826,050,167	87.7%	8,464,739	49.6%	$105.73	23.9%
2018^	$993,736,022	20.3%	9,608,089	13.5%	$112.91	6.8%
2019	$835,544,629	(15.9%)	8,290,100	(13.7%)	$109.54	(3.0%)
2020	$309,203,112	(63.0%)	2,872,206	(65.4%)	$115.82	5.7%
2021	$144,938,333	(53.1%)	2,731,661	(4.9%)	$56.81	(51.0%)

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

Contemporary Music

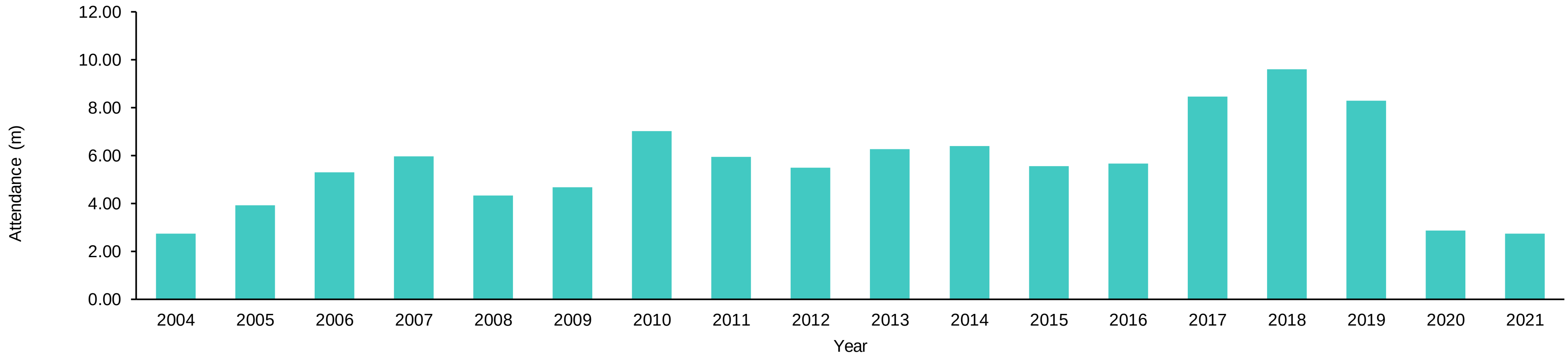
Contemporary Music – Revenue

2004 → 2021



Contemporary Music – Total Attendance

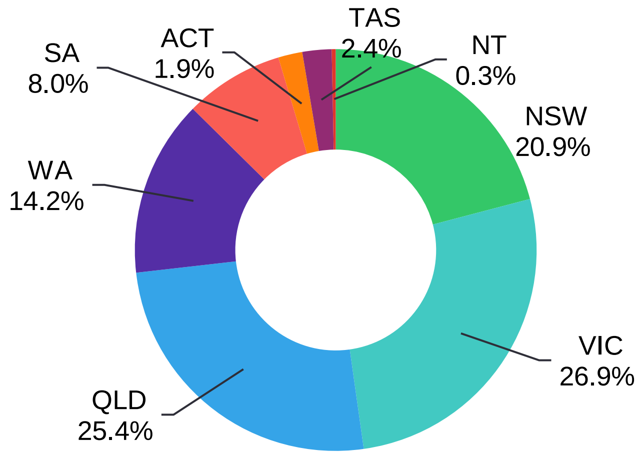
2004 → 2021



Contemporary Music

Revenue by State/Territory

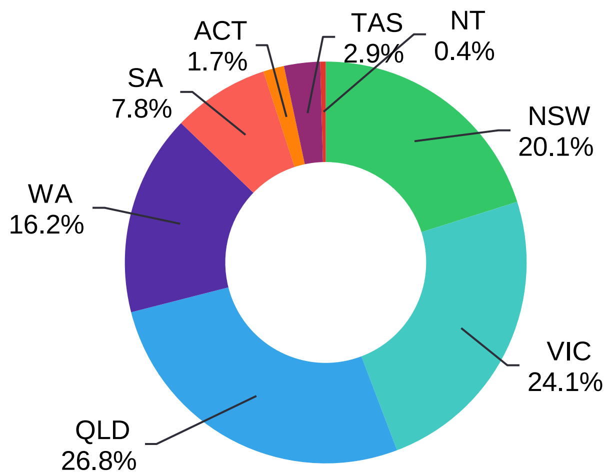
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$30,307,095	20.9%	(13.9%)
VIC	$38,924,624	26.9%	0.4%
QLD	$36,858,464	25.4%	4.6%
WA	$20,594,966	14.2%	4.1%
SA	$11,574,737	8.0%	2.2%
ACT	$2,808,663	1.9%	1.1%
TAS	$3,407,667	2.4%	1.3%
NT	$462,117	0.3%	0.2%
Total	**$144,938,333**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	549,497	20.1%	(12.3%)
VIC	658,542	24.1%	(0.8%)
QLD	731,773	26.8%	7.1%
WA	442,283	16.2%	2.4%
SA	212,337	7.8%	2.0%
ACT	46,055	1.7%	0.5%
TAS	79,144	2.9%	1.1%
NT	12,030	0.4%	0.1%
Total	**2,731,661**	**100.0%**	

Festivals (Multi-Category)

National Overview

- Festivals (Multi-Category) experienced slight y-o-y declines in revenue by 4.6% from $39.5m in 2020 to $37.7m in 2021) and attendance by 0.9% (to 1.6m in 2021). The decline in revenue was partially offset by the y-o-y increase in the average ticket price by 5.4% (from $28.66 in 2020 to $30.20 in 2021).
- In 2021, the major contributing events in this category were Adelaide Fringe, Fringe World Festival (Perth), Adelaide Festival and Darwin Festival.
- Festivals (Multi-Category) contributed 5.6% of the total share in revenue and 14.3% of the total share in attendance in 2021.
- In 2021, SA and WA generated the majority of revenue and attendance in this category, with a combined 82.3% market share of revenue and 72.8% of attendance. Both states witnessed y-o-y decline in revenue and attendance, which impacted the overall revenue and attendance in this category in 2021. Major festivals in SA and WA included Adelaide Fringe, Fringe World Festival (Perth) and Adelaide Festival.
- QLD witnessed the highest y-o-y increase in revenue by 431.3% and attendance by 854.8% in 2021. Major contributors to its revenue were Brisbane Festival and MELT (Queer Arts & Culture) Festival.
- TAS witnessed a y-o-y increase of 149.9% in revenue with 253.3% y-o-y increase in attendance. Major contributors to its revenue were Dark Mofo and Mona Foma.
- NT witnessed significant y-o-y growth in revenue and attendance in 2021, considering no events were held in 2020 due to COVID-19 restrictions. Major festivals included Darwin Festival and Barunga Festival.

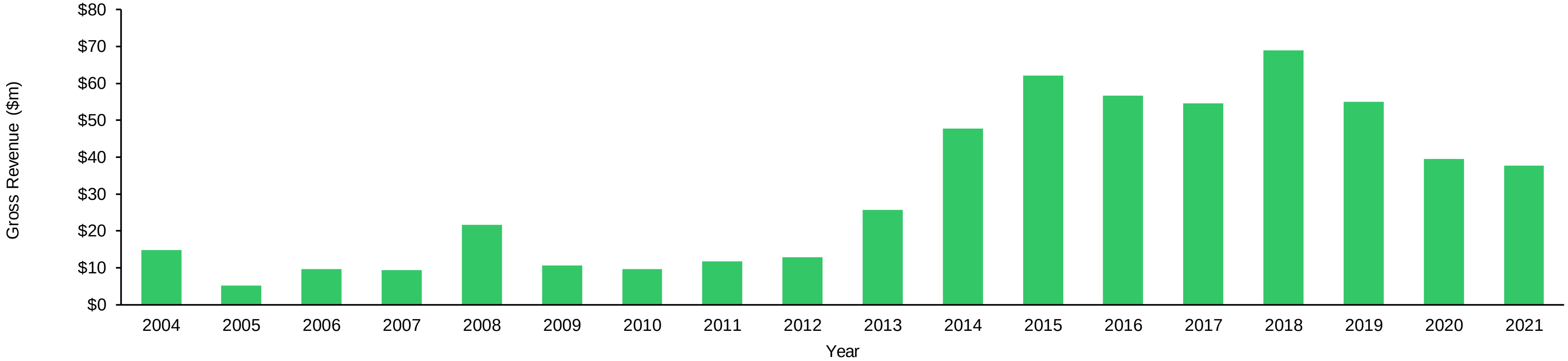
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$14,842,476	-	483,858	-	$32.26	-
2005	$5,170,934	(65.2%)	157,228	(67.5%)	$39.13	21.3%
2006	$9,633,454	86.3%	201,711	28.3%	$56.72	44.9%
2007	$9,318,441	(3.3%)	294,296	45.9%	$44.09	(22.3%)
2008	$21,615,824	132.0%	551,810	87.5%	$52.11	18.2%
2009	$10,642,917	(50.8%)	431,061	(21.9%)	$33.60	(35.5%)
2010	$9,570,915	(10.1%)	263,464	(38.9%)	$43.12	28.3%
2011	$11,777,244	23.1%	242,222	(8.1%)	$57.02	32.2%
2012	$12,916,787	9.7%	260,623	7.6%	$59.58	4.5%
2013	$25,622,029	98.4%	786,530	201.8%	$34.59	(41.9%)
2014	$47,805,136	86.6%	1,059,806	34.7%	$48.41	39.9%
2015	$62,162,178	30.0%	1,486,599	40.3%	$50.32	3.9%
2016	$56,641,751	(8.9%)	1,549,007	4.2%	$39.57	(21.4%)
2017	$54,635,677	(3.5%)	1,866,148	20.5%	$36.62	(7.5%)
2018	$68,972,653	26.2%	2,577,932	38.1%	$40.52	10.7%
2019	$54,984,915	(20.3%)	2,174,359	(15.7%)	$33.31	(17.8%)
2020	$39,493,105	(28.2%)	1,567,551	(27.9%)	$28.66	(14.0%)
2021	$37,673,034	(4.6%)	1,554,151	(0.9%)	$30.20	5.4%

Festivals (Multi-Category)

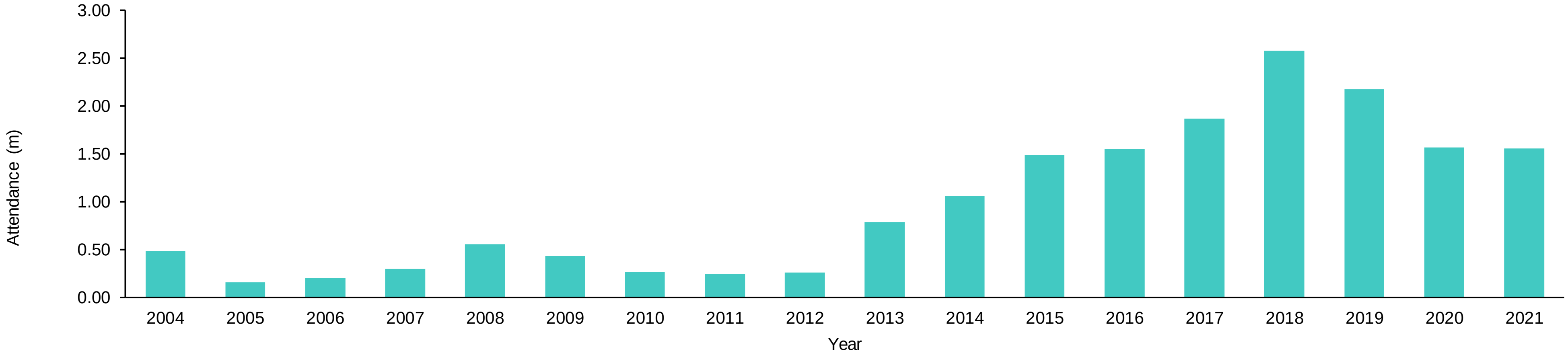
Festivals (Multi-Category) – Revenue

2004 → 2021



Festivals (Multi-Category) – Total Attendance

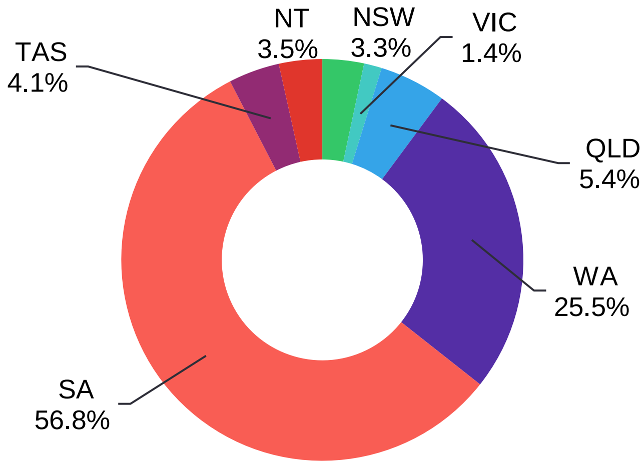
2004 → 2021



Festivals (Multi-Category)

Revenue by State/Territory

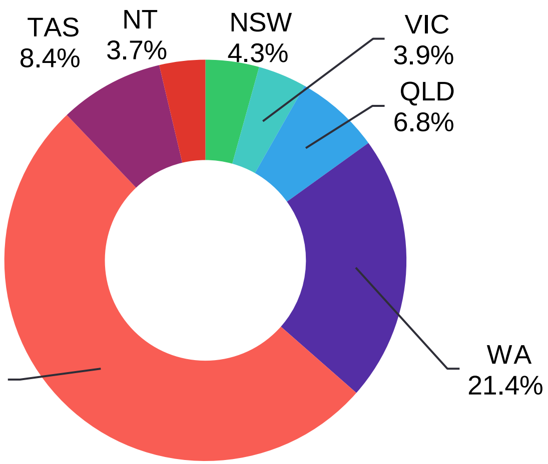
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$1,257,494	3.3%	0.6%
VIC	$540,396	1.4%	(1.9%)
QLD	$2,023,667	5.4%	4.4%
WA	$9,604,151	25.5%	(5.0%)
SA	$21,390,654	56.8%	(4.1%)
ACT	-	-	-
TAS	$1,544,942	4.1%	2.5%
NT	$1,311,729	3.5%	3.5%
Total	**$37,673,034**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	66,979	4.3%	2.2%
VIC	60,594	3.9%	0.8%
QLD	106,374	6.8%	6.1%
WA	333,041	21.4%	(7.6%)
SA	799,053	51.4%	(11.3%)
ACT	-	-	-
TAS	130,758	8.4%	6.1%
NT	57,352	3.7%	3.7%
Total	**1,554,151**	**100.0%**	

Festivals (Contemporary Music)

National Overview

- Festivals (Contemporary Music) witnessed a y-o-y decline in revenue by 5.3% (from $54.2m in 2020 to $51.3m in 2021), despite a y-o-y increase in attendance by 5.6% (from 0.4m in 2020 to 0.5m in 2021). This is primarily due to the y-o-y decline in the average ticket price by 12.8% (to $124.16) in 2021.
- Activity has not yet returned to pre-COVID levels, primarily due to ongoing COVID-19 restrictions hindering activity and business confidence.
- Festivals (Contemporary Music) contributed 7.6% to the total industry share of revenue and 4.2% to the total attendance in 2021. The revenue was primarily driven by festivals such as Red Hot Summer Tour, SummerSalt, Beyond the City and Yours and Owls Festival.
- In 2021, QLD and Victoria generated the most revenue and attendance in this category, with a national market share of approximately 33.8% and 23.8% respectively in revenue and 34.1% and 22.2% respectively in attendance. These two states generated 57.6% of overall revenue and 56.3% of attendance in this category in 2021.
- Major festivals that took place in QLD were Red Hot Summer Tour and Big Pineapple Music Festival. Major festivals that took place in Victoria were SummerSalt and Beyond the City.
- All states and territories except SA, WA and NSW witnessed a y-o-y increase in revenue and in attendance in 2021.
- ACT followed by NT witnessed significant y-o-y increase in revenue and attendance in 2021, as few events could be presented in ACT and NT in 2020 due to COVID-19 restrictions. Top festivals in ACT and NT included Bassinthegrass and SummerSalt.

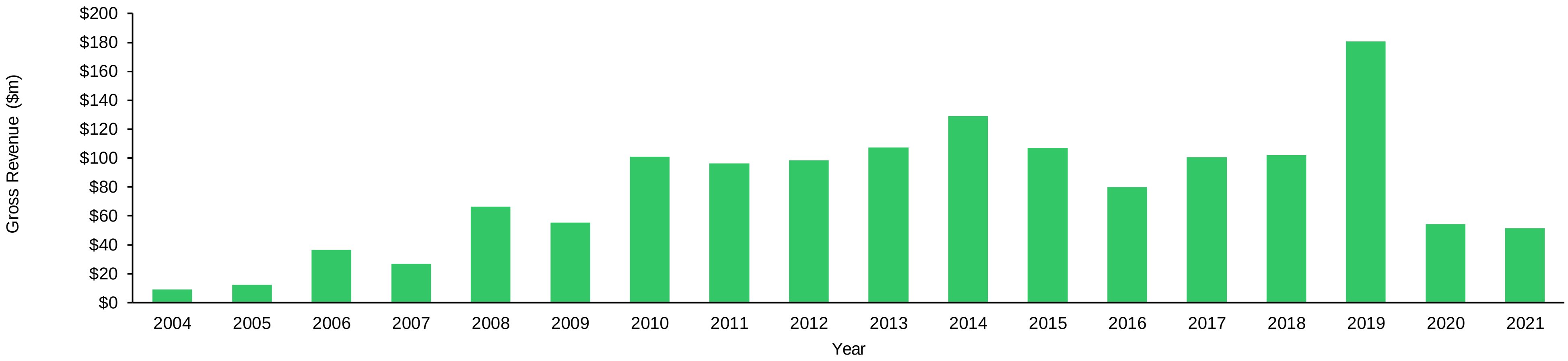
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$9,015,128	-	190,260	-	$54.69	-
2005	$12,128,384	34.5%	269,208	41.5%	$63.05	15.3%
2006	$36,576,877	201.6%	761,920	183.0%	$50.93	(19.2%)
2007	$26,972,082	(26.3%)	753,247	(1.1%)	$39.00	(23.4%)
2008	$66,429,106	146.3%	1,221,972	62.2%	$60.91	56.2%
2009	$55,275,589	(16.8%)	800,145	(34.5%)	$81.19	33.3%
2010	$100,918,020	82.6%	1,028,170	28.5%	$119.39	47.1%
2011	$96,453,486	(4.4%)	984,946	(4.2%)	$138.97	16.4%
2012	$98,365,490	2.0%	1,169,233	18.7%	$128.71	(7.4%)
2013	$107,367,780	9.2%	1,053,419	(9.9%)	$130.46	1.4%
2014	$129,210,058	20.3%	1,281,339	21.6%	$136.91	4.9%
2015	$106,825,241	(17.3%)	1,300,025	1.5%	$117.72	(14.0%)
2016	$79,865,326	(25.2%)	672,771	(48.2%)	$125.60	6.7%
2017	$100,657,080	26.0%	852,628	26.7%	$126.68	0.9%
2018	$102,015,922	1.3%	975,233	14.4%	$131.58	3.9%
2019	$180,852,859	77.3%	1,447,836	48.5%	$147.86	12.4%
2020	$54,174,572	(70.0%)	437,472	(69.8%)	$142.33	(3.7%)
2021	$51,279,951	(5.3%)	461,949	5.6%	$124.16	(12.8%)

Festivals (Contemporary Music)

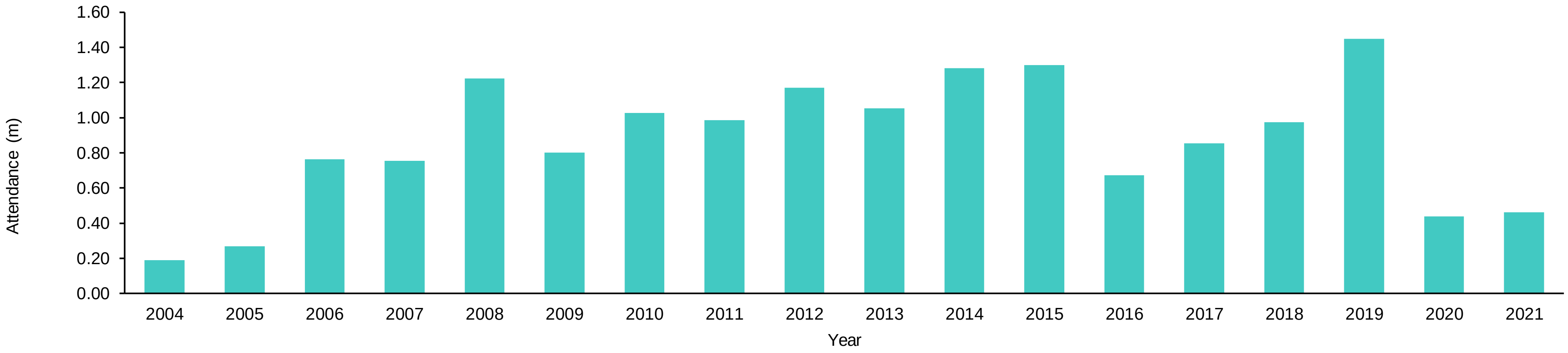
Revenue

2004 → 2021



Total Attendance

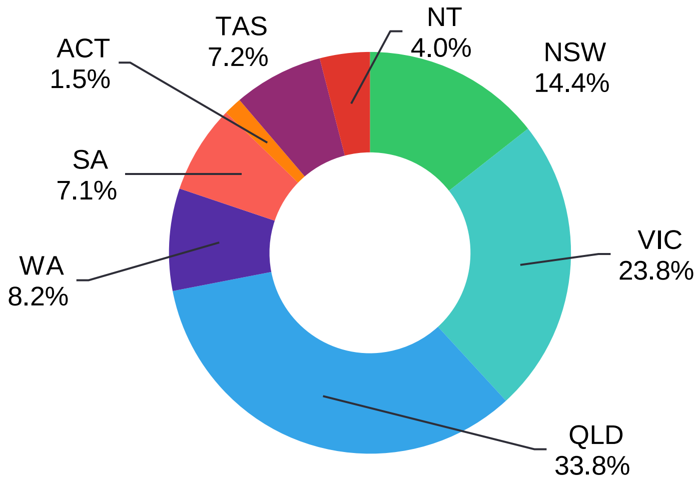
2004 → 2021



Festivals (Contemporary Music)

Revenue by State/Territory

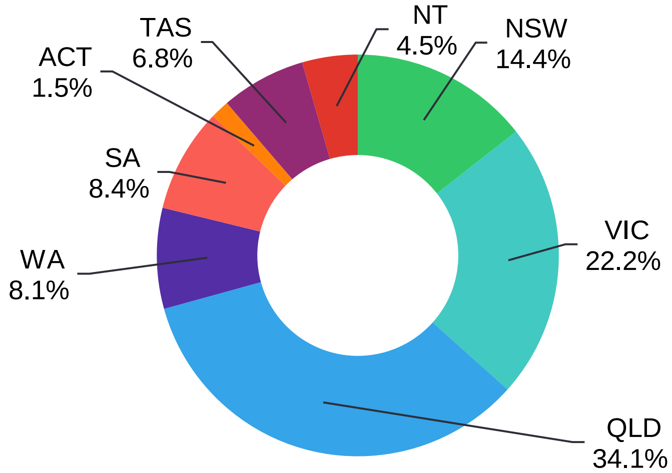
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$7,383,207	14.4%	(8.5%)
VIC	$12,191,969	23.8%	5.8%
QLD	$17,321,146	33.8%	14.2%
WA	$4,220,437	8.2%	(9.9%)
SA	$3,652,224	7.1%	(9.4%)
ACT	$745,894	1.5%	1.5%
TAS	$3,700,738	7.2%	2.2%
NT	$2,064,337	4.0%	4.0%
Total	**$51,279,951**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	66,638	14.4%	(11.1%)
VIC	102,563	22.2%	4.5%
QLD	157,463	34.1%	15.0%
WA	37,435	8.1%	(8.3%)
SA	38,732	8.4%	(5.8%)
ACT	6,946	1.5%	1.5%
TAS	31,551	6.8%	(0.3%)
NT	20,621	4.5%	4.5%
Total	**461,949**	**100.0%**	

Musical Theatre

National Overview

- Musical Theatre witnessed significant y-o-y growth of 201.8% in revenue from $67.1m in 2020 to $202.3m in 2021 and y-o-y growth of 144.8% in attendance from 0.7m in 2020 to 1.8m in 2021. The average ticket price increased by 20.0% from $99.07 in 2020 to $118.88 in 2021. Top events in this category in 2021 were *Hamilton*, *Frozen, Moulin Rouge!* and *Come from Away.*
- Musical Theatre continued to be a significant contributor to the live performance market share, accounting for the largest market share of revenue (29.8%) and the second largest market share of attendance (16.4%) within the overall live performance industry in 2021.
- NSW, VIC and QLD accounted for the major revenue and attendance in this category. NSW, VIC and QLD commands a market share of 54.6%, 16.9% and 14.7% in revenue, while their market share in attendance was 48.6%, 15.8% and 18.1% respectively. Combined they generated around 86.2% market share of revenue and a 82.5% market share of attendance in 2021.
- NSW witnessed the highest y-o-y increase of 386.4% in revenue and third highest y-o-y increase of 233.5% in attendance. Major musicals that performed in NSW included *Hamilton*, *Come from Away* and *Frozen*.
- VIC experienced a y-o-y increase of 37.3% in revenue and 19.1% y-o-y growth in attendance in this category. Major musicals that performed in Victoria included *Moulin Rouge!, Frozen* and *Come from Away.*
- QLD experienced a y-o-y increase of 290.9% in revenue and 255.6% y-o-y growth in attendance in this category. Major musicals that performed in QLD included *Charlie and The Chocolate Factory, Come from Away* and *Shrek.*
- All states and territories except SA and NT witnessed a y-o-y growth in revenue and in attendance in 2021. SA witnessed y-o-y declines in revenue by 34.9% and attendance by 37.3% in 2021. Similar to 2020, there were no events held in this category in NT in 2021.

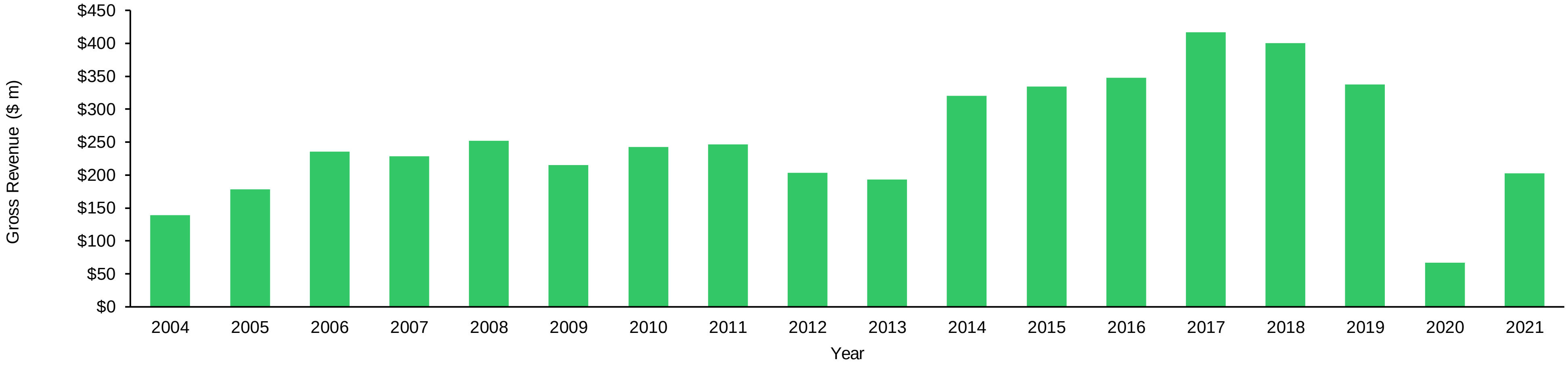
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$138,718,880	-	1,847,505	-	$76.34	-
2005	$178,032,172	28.3%	2,460,314	33.2%	$76.01	(0.4%)
2006	$235,922,584	32.5%	2,806,153	14.1%	$86.18	13.4%
2007	$228,854,618	(3.0%)	3,358,727	19.7%	$70.50	(18.2%)
2008	$252,199,267	10.2%	3,129,729	(6.8%)	$89.23	26.6%
2009	$214,959,848	(14.8%)	2,458,212	(21.5%)	$93.54	4.8%
2010	$242,897,364	13.0%	2,612,507	6.3%	$98.84	5.7%
2011	$246,792,376	1.6%	2,799,918	7.2%	$92.79	(6.1%)
2012	$203,278,606	(17.6%)	2,224,068	(20.6%)	$97.08	4.6%
2013	$193,389,763	(4.9%)	2,085,131	(6.2%)	$100.94	4.0%
2014	$320,342,329	65.6%	3,182,478	52.6%	$105.70	4.7%
2015	$334,869,038	4.5%	3,258,734	2.4%	$108.13	2.3%
2016	$347,684,296	3.8%	3,298,051	1.2%	$111.21	2.9%
2017	$416,802,525	19.9%	4,041,827	22.6%	$109.66	(1.4%)
2018	$400,199,798	(4.0%)	3,917,532	(3.1%)	$108.85	(0.7%)
2019	$337,338,257	(15.7%)	3,451,543	(11.9%)	$104.33	(4.2%)
2020	$67,051,689	(80.1%)	729,099	(78.9%)	$99.07	(5.0%)
2021	$202,342,943	201.8%	1,784,772	144.8%	$118.88	20.0%

Musical Theatre

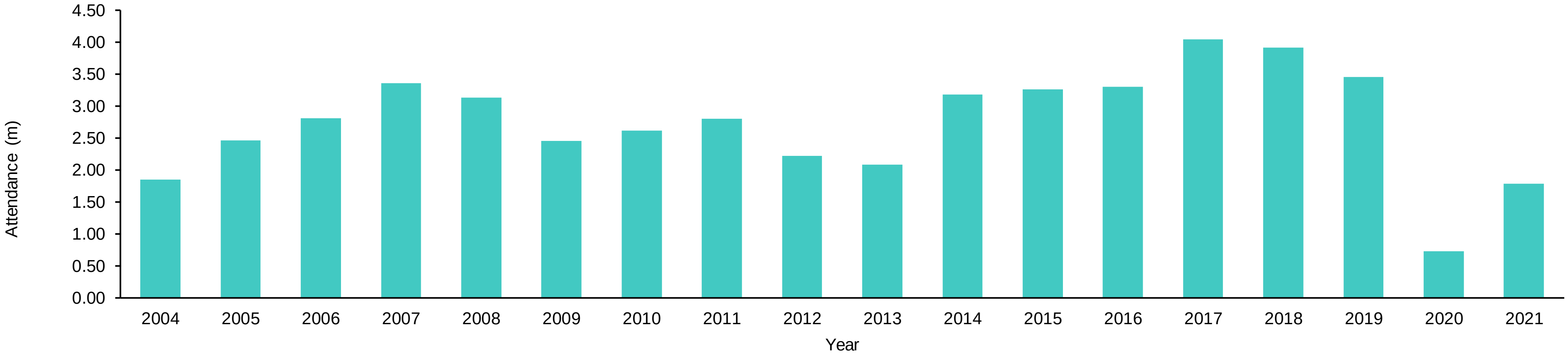
Revenue

2004 → 2021



Total Attendance

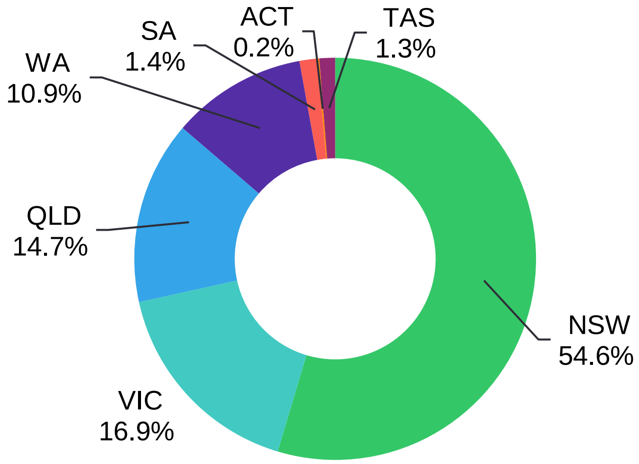
2004 → 2021



Musical Theatre

Revenue by State/Territory

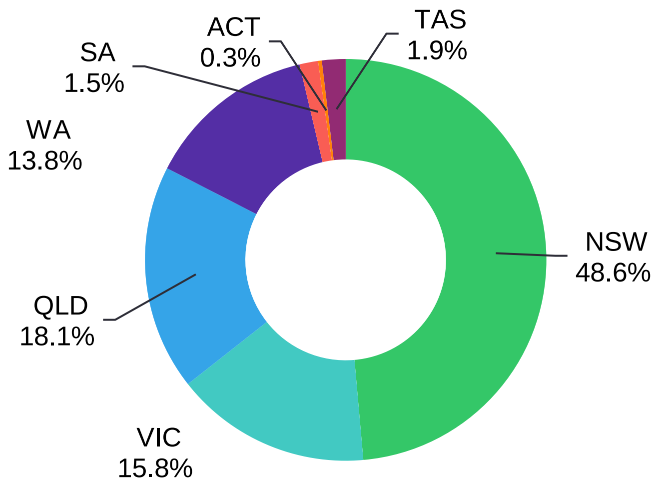
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$110,517,895	54.6%	20.7%
VIC	$34,249,438	16.9%	(20.3%)
QLD	$29,802,816	14.7%	3.4%
WA	$22,004,282	10.9%	1.2%
SA	$2,868,137	1.4%	(5.2%)
ACT	$342,764	0.2%	(0.1%)
TAS	$2,557,611	1.3%	0.3%
NT	-	-	-
Total	**$202,342,943**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	867,313	48.6%	12.9%
VIC	281,935	15.8%	(16.7%)
QLD	323,902	18.1%	5.7%
WA	245,654	13.8%	2.0%
SA	26,722	1.5%	(4.4%)
ACT	5,341	0.3%	(0.2%)
TAS	33,905	1.9%	0.6%
NT	-	-	-
Total	**1,784,772**	**100.0%**	

Opera

National Overview

- Opera witnessed a y-o-y increase in revenue by 38.3% (to $15.6m) and a y-o-y increase in attendance by 2.2% (to 0.2m) in 2021. The average ticket price increased y-o-y by 36.0% (from $87.47 in 2020 to $118.94 in 2021) which further contributed to growth in revenue.
- Opera has not yet returned to pre-COVID activity, with 2021 recording the second lowest result (2020 being the lowest) in this category since 2004. This is primarily due to postponement of several performances by Opera Australia due to COVID-19 restrictions in 2021.
- Major Opera performances in 2021 included *La Traviata*, *Aida* and *Tosca*.
- Similar to previous years, performances by NPAP companies including Opera Australia, Opera Queensland, West Australian Opera, Victorian Opera and the State Opera of South Australia contributed the majority to the overall revenue (91.5%) and attendance (86.2%) in this category in 2021.
- In 2021, NSW and Victoria generated the most revenue and attendance in this category, with a national market share of approximately 55.6% and 20.5% respectively in revenue and 43.9% and 24.3% respectively in attendance. These two states generated 76.1% of overall revenue and 68.2% of attendance in this category in 2021.
- In 2021, SA witnessed the highest y-o-y growth in revenue (2,435.8%), despite a y-o-y decline in attendance. The top event in SA was *The Barber of Seville*.
- ACT witnessed the second highest y-o-y growth in revenue (984.3%) and the highest y-o-y growth in attendance (730.2%), attributable to performances of *Carmen*.
- Victoria witnessed a significant y-o-y increase in revenue (672.3%) and attendance (423.5%). The top events were *Aida, Ernani* and *Das Rheingold*.
- NSW witnessed y-o-y declines in revenue by 14.3% and attendance by 16.3% in 2021. Major Opera performances in NSW included *La Traviata* and *Tosca*.

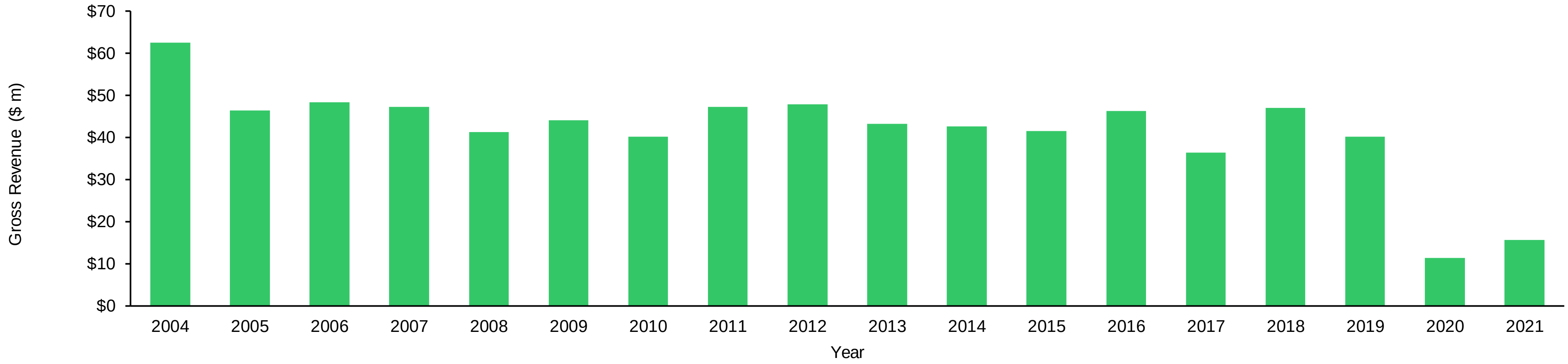
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$62,562,433	-	629,808	-	$108.88	-
2005	$46,390,544	(25.8%)	531,595	(15.6%)	$94.38	(13.3%)
2006	$48,331,324	4.2%	515,927	(2.9%)	$102.40	8.5%
2007	$47,249,031	(2.2%)	591,605	14.7%	$85.28	(16.7%)
2008	$41,316,885	(12.6%)	402,549	(32.0%)	$114.46	34.2%
2009	$44,044,808	6.6%	448,096	11.3%	$111.62	(2.5%)
2010	$40,128,943	(8.9%)	409,541	(8.6%)	$112.86	1.1%
2011	$47,305,786	17.9%	439,041	7.2%	$124.66	10.5%
2012	$47,843,971	1.1%	430,904	(1.9%)	$126.84	1.8%
2013	$43,283,705	(9.5%)	344,761	(20.0%)	$145.28	14.5%
2014	$42,620,749	(1.5%)	386,927	12.2%	$124.92	(14.0%)
2015	$41,505,346	(2.6%)	433,198	12.0%	$121.43	(2.8%)
2016	$46,247,521	11.4%	407,965	(5.8%)	$145.80	20.1%
2017	$36,349,186	(21.4%)	369,228	(9.5%)	$115.42	(20.8%)
2018	$46,965,221	29.2%	487,195	31.9%	$124.11	7.5%
2019	$40,201,835	(14.4%)	435,525	(10.6%)	$113.83	(8.3%)
2020	$11,313,725	(71.9%)	147,982	(66.0%)	$87.47	(23.2%)
2021	$15,649,421	38.3%	151,299	2.2%	$118.94	36.0%

Opera

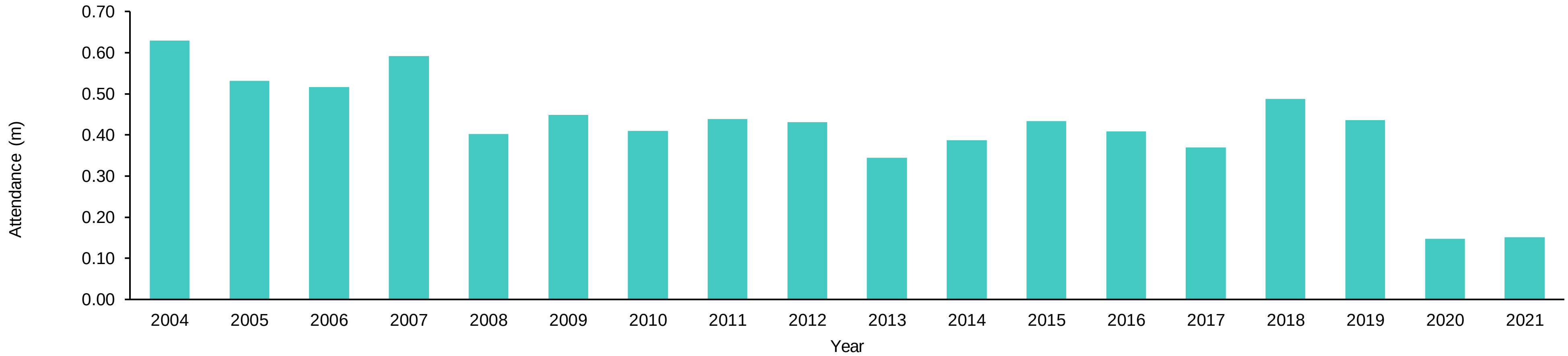
Opera – Revenue

2004 → 2021



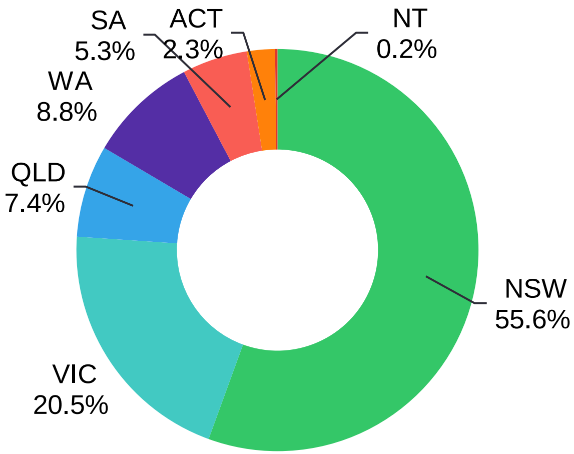
Opera – Total Attendance

2004 → 2021



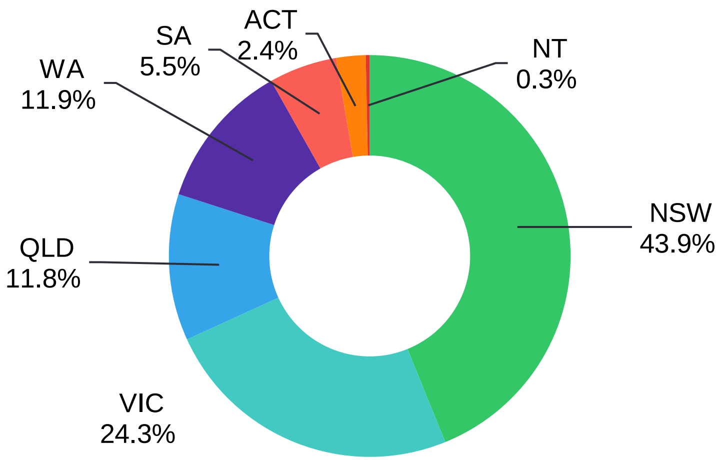
Opera

Revenue by State/Territory 2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$8,695,137	55.6%	(34.1%)
VIC	$3,208,666	20.5%	16.8%
QLD	$1,160,817	7.4%	5.2%
WA	$1,380,360	8.8%	5.0%
SA	$821,997	5.3%	5.0%
ACT	$352,767	2.3%	2.0%
TAS	-	-	-
NT	$29,677	0.2%	0.2%
Total	**$15,649,421**	**100.0%**	

Attendance by State/Territory 2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	66,358	43.9%	(9.7%)
VIC	36,804	24.3%	19.6%
QLD	17,844	11.8%	6.2%
WA	17,944	11.9%	(2.1%)
SA	8,295	5.5%	(16.4%)
ACT	3,578	2.4%	2.1%
TAS	-	-	-
NT	476	0.3%	0.3%
Total	**151,299**	**100.0%**	

Special Events

National Overview

- Special Events witnessed the second highest y-o-y decline in revenue and the highest y-o-y decline in attendance among all the categories in 2021.
- Special Events experienced a y-o-y decline in revenue by 44.0% (from $4.6m in 2020 to $2.6m in 2021) and y-o-y decline in attendance by 52.8% (from 0.2m in 2020 to 78.7k in 2021).
- The average ticket price declined y-o-y by 25.1% (from $55.40 in 2020 to $41.51 in 2021), which further contributed to the decline in revenue.
- The revenue and attendance in 2021 were the lowest recorded revenue and attendance in this category since 2004.
- The top events in this category in 2021 were *Carols By Candlelight* and *Last Night of the Proms.*
- In 2021, Victoria and QLD generated the most revenue and attendance in this category, with a national market share of approximately 35.8% and 35.5% respectively in revenue and 23.5% and 50.1% respectively in attendance. These two states generated 71.3% of overall revenue and 73.6% of attendance in this category in 2021.
- The top events in QLD included *Qpops Nye Gala 21* and *NYE Hollywood Glam Party*. The top events in Victoria included *Carols By Candlelight* and *Rockwiz's Really Really Good Friday.*
- In 2021, all states and territories except Victoria witnessed a y-o-y decline in revenue and all states and territories except QLD witnessed a y-o-y decline in attendance.
- In 2021, Victoria experienced the highest y-o-y growth in revenue (439.9%), despite a y-o-y decline in attendance.
- The Special Events category was particularly variable as it is dependent on whether performances that cannot be classified into other categories take place.

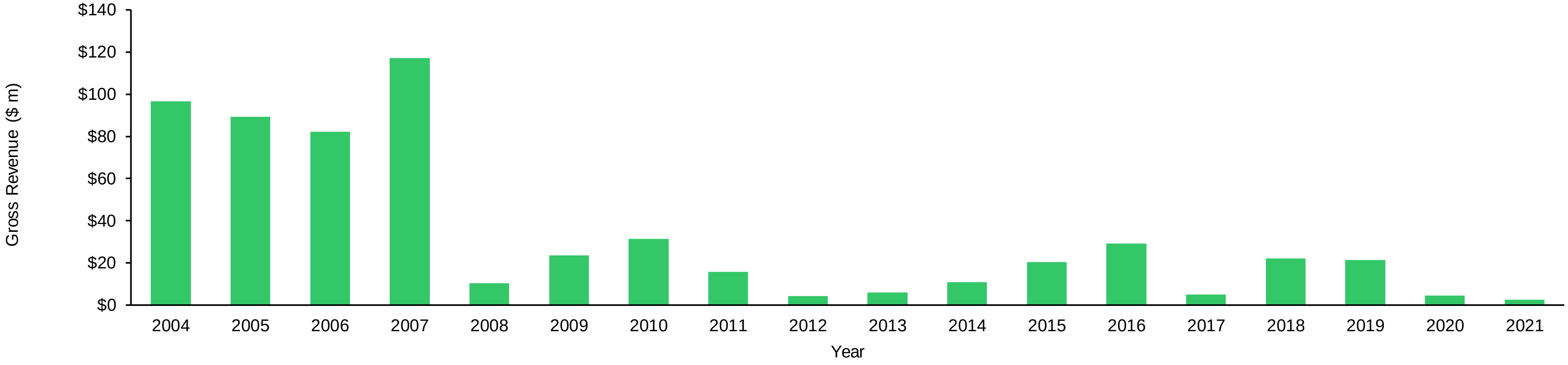
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$96,706,366	-	3,125,013	-	$45.43	-
2005	$89,357,246	(7.6%)	2,992,097	(4.3%)	$31.50	(30.7%)
2006	$82,143,879	(8.1%)	2,625,779	(12.2%)	$42.64	35.4%
2007	$117,203,892	42.7%	3,453,077	31.5%	$48.56	13.9%
2008	$10,324,979	(91.2%)	374,623	(89.2%)	$43.60	(10.2%)
2009	$23,602,096	128.6%	559,434	49.3%	$67.79	55.5%
2010	$31,449,876	33.3%	526,503	(5.9%)	$88.67	30.8%
2011	$15,799,946	(49.8%)	370,239	(29.7%)	$57.28	(35.4%)
2012	$4,250,001	(73.1%)	91,189	(75.4%)	$57.58	0.5%
2013	$6,030,274	41.9%	113,294	24.2%	$73.18	27.1%
2014	$10,984,057	82.1%	210,390	85.7%	$86.90	18.8%
2015	$20,340,607	85.2%	556,914	164.7%	$42.26	(51.4%)
2016	$29,310,579	44.1%	185,104	(66.8%)	$170.90	304.4%
2017	$5,049,945	(82.8%)	136,871	(26.1%)	$50.43	(70.5%)
2018	$22,115,160	337.9%	170,359	24.5%	$152.70	202.8%
2019	$21,352,158	(3.5%)	430,873	152.9%	$71.68	(53.1%)
2020	$4,644,130	(78.2%)	166,777	(61.3%)	$55.40	(22.7%)
2021	$2,602,427	(44.0%)	78,708	(52.8%)	$41.51	(25.1%)

Special Events

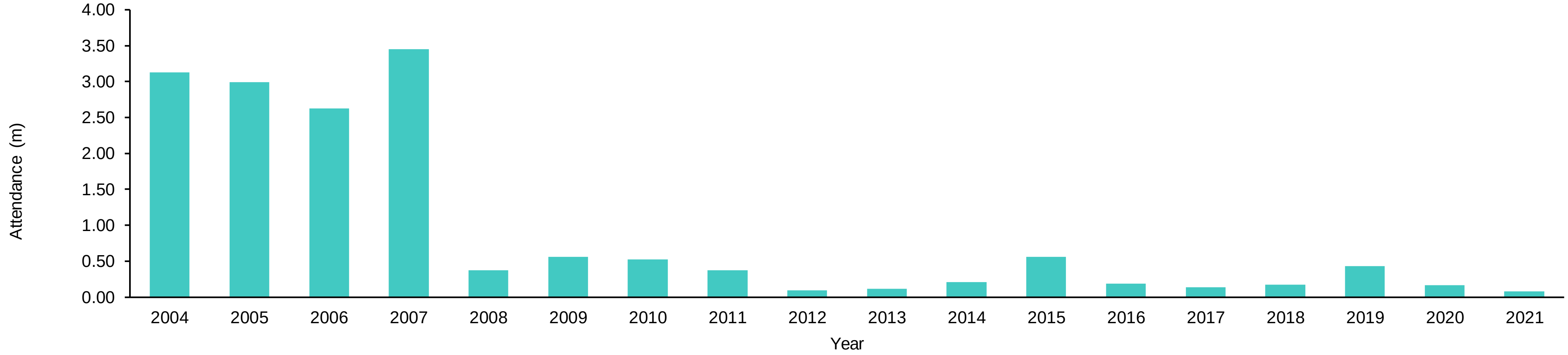
Revenue

2004 → 2021



Total Attendance

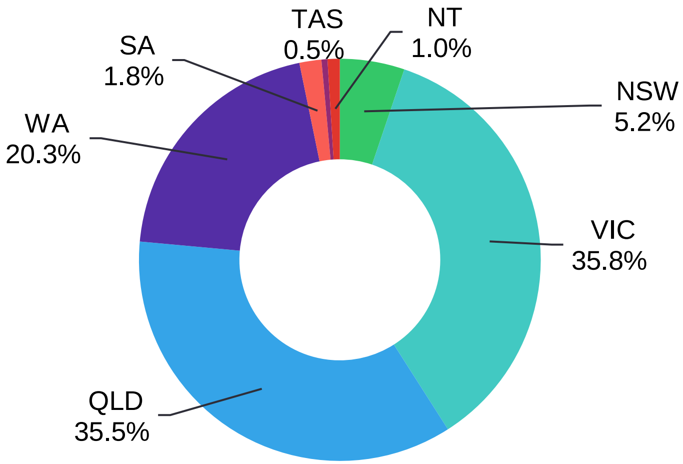
2004 → 2021



Special Events

Revenue by State/Territory

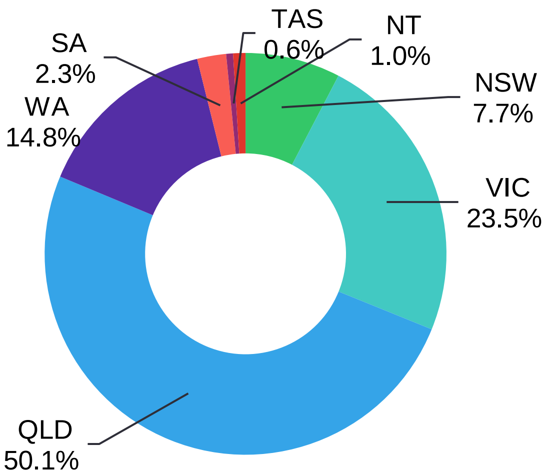
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$135,407	5.2%	(10.3%)
VIC	$930,434	35.8%	32.0%
QLD	$923,739	35.5%	5.3%
WA	$528,739	20.3%	(18.6%)
SA	$46,010	1.8%	(4.1%)
ACT	-	-	(4.6%)
TAS	$12,569	0.5%	0.1%
NT	$25,528	1.0%	0.2%
Total	**$2,602,427**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	6,024	7.7%	(17.1%)
VIC	18,480	23.5%	4.2%
QLD	39,471	50.1%	33.0%
WA	11,682	14.8%	(10.0%)
SA	1,834	2.3%	(6.6%)
ACT	-	-	(3.5%)
TAS	435	0.6%	0.03%
NT	782	1.0%	0.02%
Total	**78,708**	**100.0%**	

Theatre

National Overview

- Theatre experienced a y-o-y growth in revenue by 34.4% (from $39.9m in 2020 to $53.6m in 2021) and a y-o-y increase in attendance by 56.8% (from 0.4m in 2020 to 0.7m in 2021).
- Top events in this category in 2021 included *Harry Potter and the Cursed Child, Boy Swallows Universe,* and *Playing Beatie Bow.*
- The average ticket price decreased y-o-y by 15.8% (from $105.14 in 2020 to $88.56 in 2021).
- Theatre accounted for 7.9% of the overall live performance revenue and 6.1% of the total attendance in 2021.
- 49.5% of the revenue and 61.8% of the attendance in 2021 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 the State Theatre Company of South Australia.
- All states and territories witnessed a y-o-y increase in revenue and attendance in 2021. This occurred despite cancellations of Sydney Theatre Company and Melbourne Theatre Company productions as well as Adelaide theatres being capped at a lower audience capacity due to COVID-19 restrictions.
- Victoria generated the highest revenue and second highest attendance in this category, with a national market share of approximately 49.9% in revenue and 30.9% in attendance in 2021. This was largely attributed to *Harry Potter and the Cursed Child*.
- NT witnessed the highest growth y-o-y growth in revenue (949.4%) and attendance (815.4%). However, the impact was minimal, as NT contributed the lowest to the overall revenue and attendance in this category in 2021.

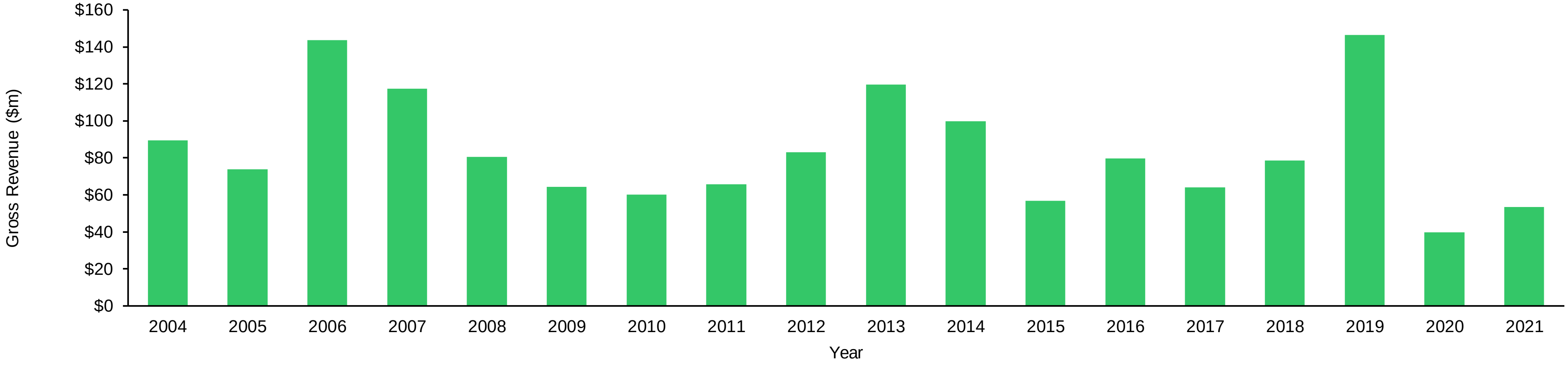
Revenue and Attendance 2004 → 2021

	Revenue		Attendance		Ticket Price	
Year	Revenue ($)	Growth (%)	Total Attendance	Growth (%)	Average Ticket Price ($)	Growth (%)
2004	$89,417,616	-	2,202,812	-	$43.87	-
2005	$73,988,892	(17.3%)	2,117,854	(3.9%)	$38.04	(13.3%)
2006	$143,564,232	94.0%	3,828,254	80.8%	$39.42	3.6%
2007	$117,382,525	(18.2%)	2,505,458	(34.6%)	$50.42	27.9%
2008	$80,476,671	(31.4%)	1,944,188	(22.4%)	$46.92	(6.9%)
2009	$64,440,541	(19.9%)	1,602,591	(17.6%)	$46.58	(0.7%)
2010	$60,151,139	(6.7%)	1,354,336	(15.5%)	$51.47	10.5%
2011	$65,880,712	9.5%	1,380,622	1.9%	$56.14	9.1%
2012	$82,973,259	25.9%	1,601,425	16.0%	$59.86	6.6%
2013	$119,647,414	44.2%	1,842,177	15.0%	$72.88	21.8%
2014	$99,714,555	(16.7%)	1,504,367	(18.3%)	$73.83	1.3%
2015	$56,831,724	(43.0%)	1,135,128	(24.5%)	$56.81	(23.0%)
2016	$79,584,271	40.0%	1,351,653	19.1%	$66.51	17.1%
2017	$64,217,536	(19.3%)	1,457,962	7.9%	$49.24	(26.0%)
2018	$78,505,052	22.2%	1,430,263	(1.9%)	$63.91	29.8%
2019	$146,562,112	86.7%	1,530,912	7.0%	$108.07	69.1%
2020	$39,867,422	(72.8%)	421,868	(72.4%)	$105.14	(2.7%)
2021	$53,563,159	34.4%	661,694	56.8%	$88.56	(15.8%)

Theatre

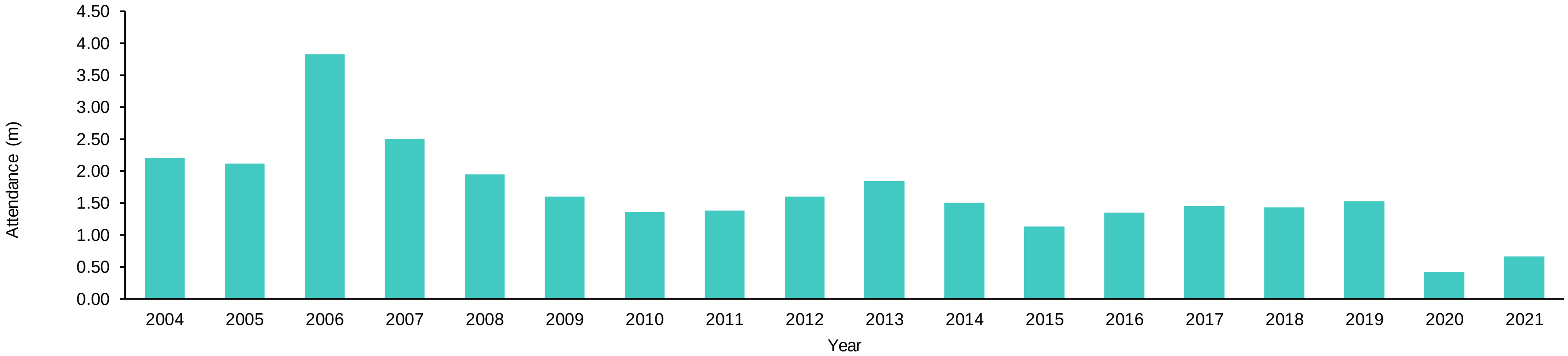
Theatre – Revenue

2004 → 2021



Theatre – Total Attendance

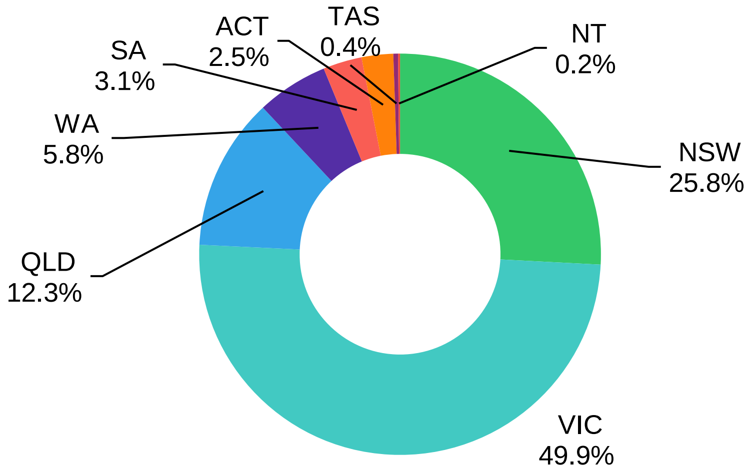
2004 → 2021



Theatre

Revenue by State/Territory

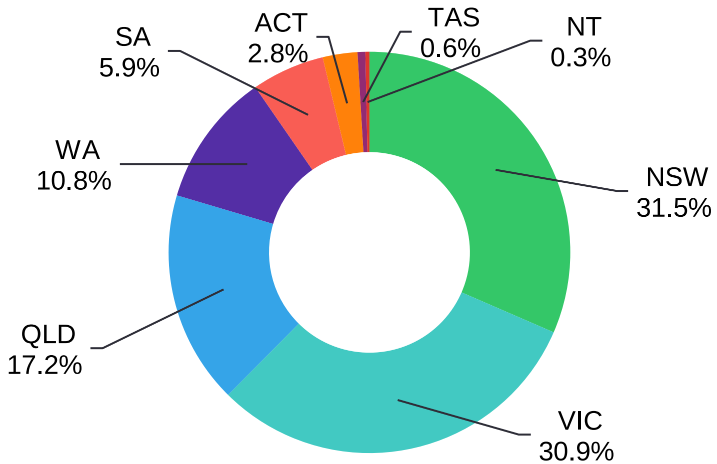
2021



State/ Territory	Revenue	Market Share Proportion	Market Share Change from 2020 (%)
NSW	$13,833,179	25.8%	(1.5%)
VIC	$26,741,866	49.9%	(10.0%)
QLD	$6,579,131	12.3%	5.7%
WA	$3,086,405	5.8%	3.2%
SA	$1,674,659	3.1%	0.5%
ACT	$1,360,079	2.5%	2.1%
TAS	$202,628	0.4%	(0.1%)
NT	$85,212	0.2%	0.1%
Total	**$53,563,159**	**100.0%**	

Attendance by State/Territory

2021



State/ Territory	Attendance	Market Share Proportion	Market Share Change from 2020 (%)
NSW	208,569	31.5%	(8.3%)
VIC	204,527	30.9%	(7.5%)
QLD	113,555	17.2%	5.1%
WA	71,393	10.8%	7.3%
SA	38,871	5.9%	1.1%
ACT	18,496	2.8%	2.1%
TAS	4,141	0.6%	(0.1%)
NT	2,142	0.3%	0.3%
Total	**661,694**	**100.0%**	

6

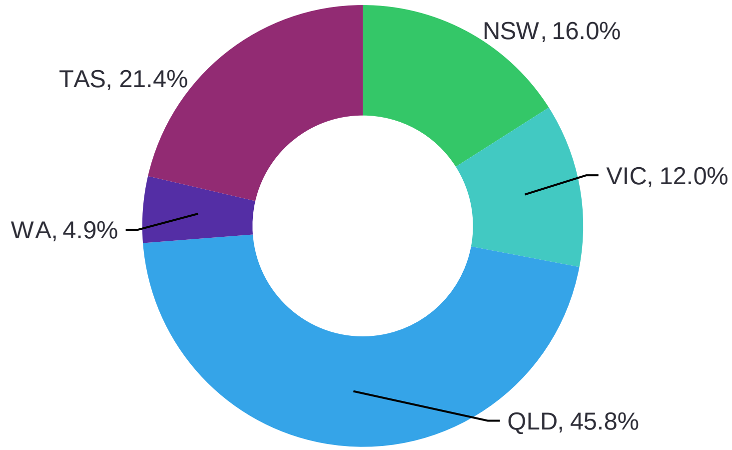
Regional Data Providers

Analysis by State - 2021

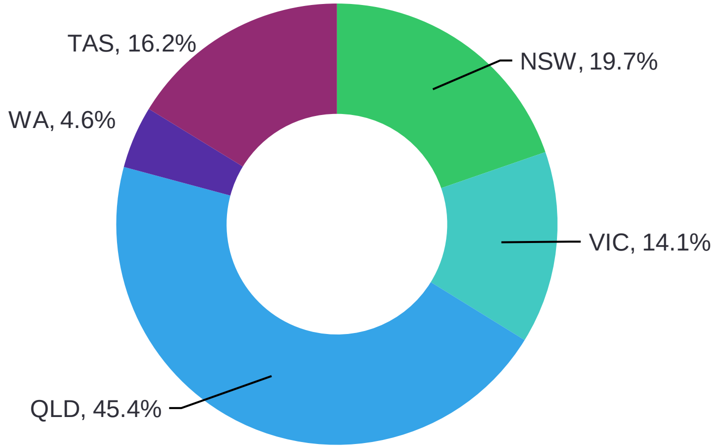
	Revenue	Attendance			
Category	Total Ticket Revenue	Paid	Zero-Priced	Comps	Total
NSW	2,933,459	68,575	108	4,916	73,599
VIC	2,196,680	46,285	612	5,786	52,683
QLD	8,396,583	159,661	250	9,604	169,515
WA	890,875	15,608	-	1,471	17,079
TAS	3,920,186	57,871	-	2,834	60,705
Total	**18,337,783**	**348,000**	**970**	**24,611**	**373,581**

- In 2021, QLD had the largest market share for both revenue (45.8%) and attendance (45.4%) in Australia. QLD reported $8.4m in revenue and 0.2m in attendance. 94.2% of the total tickets issued were paid tickets and the remaining were complimentary and zero priced tickets. Top events were *Mamma Mia* and *The Wedding Singer.*
- TAS recorded the second largest market share in terms of revenue (21.4%) and the third largest market share in attendance (16.2%) in Australia. TAS reported $3.9m in revenue and 60.7k in attendance. Out of the total tickets issued, 57.9k were paid tickets and the remaining were complimentary tickets. Top events were *Rocky Horror show* and *Body of Work by Hannah Gadsby.*
- NSW recorded the third highest market share in terms of revenue (16.0%) and the second largest market share in terms of attendance (19.7%). NSW reported $2.9m in revenue and 73.6k in attendance in 2021. Out of the total tickets issued, 68.6k were paid tickets and the rest were complimentary and zero-priced tickets. Top events included *The Wharf Revue* and *The Appleton Ladies Potato Race*.
- Victoria represented 12.0% of the market share of revenue and 14.1% of the market share of attendance. Victoria recorded $2.2m in revenue with 52.7k in attendance in 2021. Out of the total tickets issued, 46.3k were paid tickets and the rest were complimentary and zero priced tickets.
- WA represented 4.9% of the market share in revenue and 4.6% of the market share in attendance. WA reported $0.9m in revenue and 17.1k in attendance in 2021. Out of the total tickets issued, 15.6k were paid tickets and the rest were complimentary tickets.

Market Share (Revenue) by State/Territory 2021



Market Share (Attendance) by State/Territory 2021

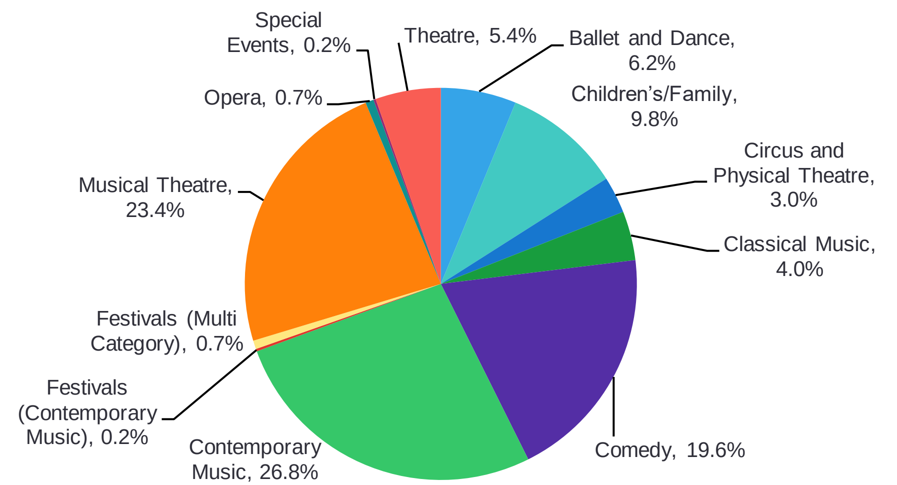


Analysis by Category - 2021

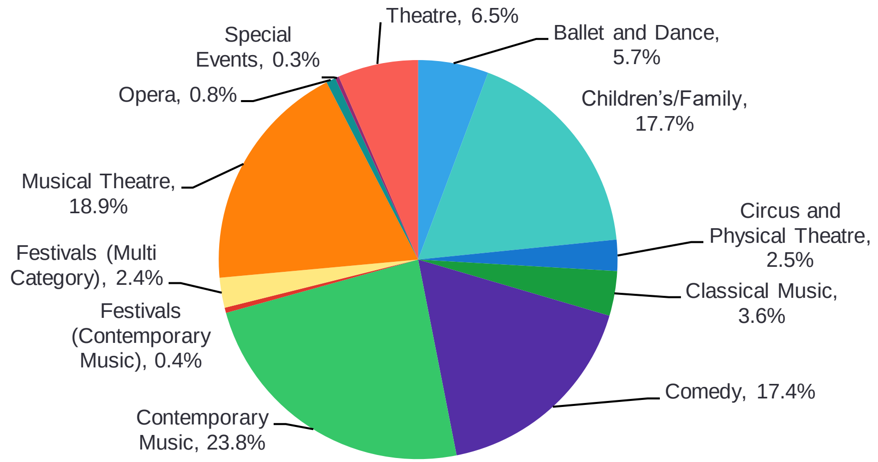
	Revenue	Attendance			
Category	Total Ticket Revenue	Paid	Zero-Priced	Comps	Total
Ballet and Dance	1,141,471	20,371	13	931	21,315
Childrens/Family	1,790,299	61,038	134	4,926	66,098
Circus and Physical Theatre	554,259	8,916	7	494	9,417
Classical Music	742,307	11,611	11	1,917	13,539
Comedy	3,590,841	62,342	16	2,507	64,865
Contemporary Music	4,909,051	83,320	168	5,367	88,855
Festivals (Contemporary Music)	37,361	1,484	-	104	1,588
Festivals (Multi Category)	129,311	8,185	-	891	9,076
Musical Theatre	4,294,080	65,815	74	4,575	70,464
Opera	125,451	2,453	-	410	2,863
Special Events	32,770	790	2	350	1,142
Theatre	990,582	21,675	545	2.139	24,359
Total	18,337,783	348,000	970	24,611	373,581

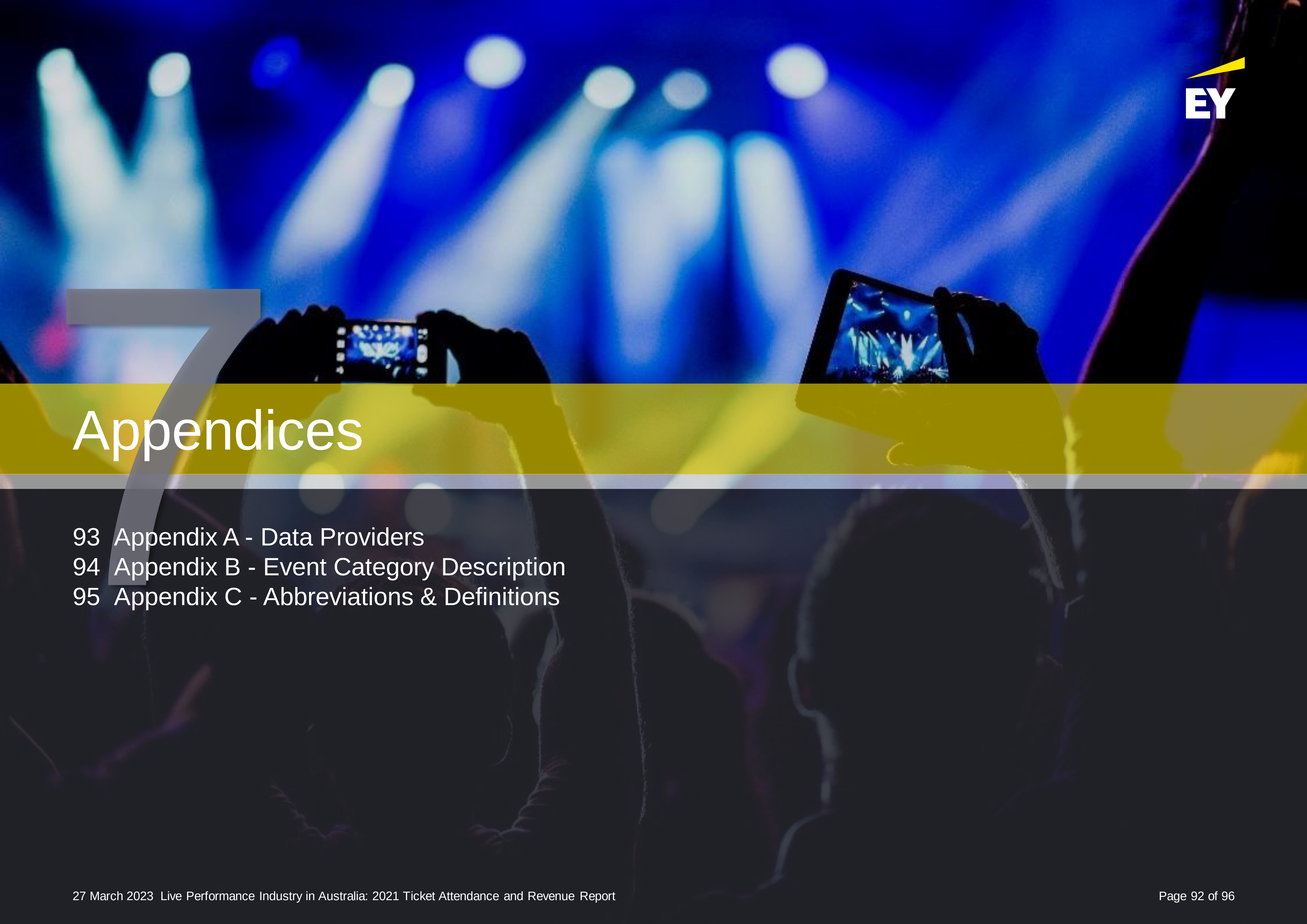
- Contemporary Music had the highest market share in revenue (26.8%) and in attendance (23.8%). This category reported $4.9m in revenue and 88.9k in attendance. Major events included performances from Paul Kelly and *APIA Good Times Tour.*
- Musical Theatre represented the second highest market share in revenue (23.4%) and in attendance (18.9%). This category reported $4.3m in revenue and 70.5k in attendance. Top events included *The Rocky Horrow Show* and *Mamma Mia.*
- Special Events, Festivals (Contemporary Music), Festivals (Multi Category) and Opera contributed the least to revenue and attendance among all the categories.

Market Share (Revenue) by Category 2021



Market Share (Attendance) by Category 2021





7 Appendices

Appendix A - Data Providers

The following companies were identified by LPA and provided both revenue and attendance data to EY for the 2021 calendar year.

Total revenue comprised of revenue sourced from paid tickets only (i.e. it excludes sponsorships), while the attendance data provided and applied in the analysis included both paid and non-paid tickets. Average ticket price data was calculated based on paid tickets only. For NPAP companies, the revenue included both single ticket sales as well as subscription revenue.

Regular Providers

- Adelaide Festival Centre
- Adelaide Fringe
- Araluen Arts Centre
- Arts Centre Melbourne
- AMPAG / NPAP Companies (refer below table)
- Brisbane Powerhouse
- Blue Room Theatre
- Canberra Theatre Centre
- Dark Mofo
- Darwin Entertainment Centre / Ntix
- Darwin Festival
- Fringe World Festival
- Hayes Theatre Co
- Melbourne Fringe Festival
- Melbourne International Arts Festival (Rising Festival)
- Melbourne International Comedy Festival
- Melbourne International Jazz Festival
- Melbourne Recital Centre
- MONA (MONA FOMA Festival)
- Oztix
- Perth Concert Hall (WA Venues and Events)
- Perth Theatre Trust
- Queensland Performing Arts Centre
- Sydney Opera House
- The Ticket Group (Moshtix)
- Ticketek Pty Ltd
- Ticketmaster Pty Ltd
- WOMADelaide

Regional Providers

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

AMPAG / NPAP Companies

- Adelaide Symphony Orchestra
- Australian Brandenburg Orchestra
- Australian Chamber Orchestra
- Artback NT
- Australian Ballet
- Back to Back Theatre
- Bangarra Dance Theatre
- Bell Shakespeare
- Belvoir
- Black Swan State Theatre Company
- Circa Contemporary Circus
- Dancenorth Australia
- Malthouse Theatre
- Melbourne Symphony Orchestra
- Melbourne Theatre Company
- Musica Viva Australia
- Opera Australia
- Opera Queensland
- Orchestra Victoria
- Queensland Ballet
- Queensland Symphony Orchestra
- Queensland Theatre
- State Opera of South Australia
- State Theatre Company of South Australia
- Sydney Dance Company
- Sydney Symphony Orchestra
- Sydney Theatre Company
- Tasmanian Symphony Orchestra
- Terrapin
- 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
Childrens/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
^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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