



# **SECURING THE FUTURE**

***AN ASSESSMENT OF PROGRESS  
2001 to 2008***

Major Performing Arts Board

Australia Council for the Arts

*August 2009*



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## 1 FOREWORD

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The 1999 Major Performing Arts Inquiry (MPAI) established the annual *Securing the Future* update report to track company and sector performance in accordance with the Inquiry's three major principles—access, artistic vibrancy and financial viability. The achievements of the companies in these areas are assessed to inform the sector and the governments that support it.

The MPA sector comprises 28 leading Australian companies in the fields of dance, theatre, orchestral and chamber music and opera. The companies' work is appreciated by audiences across Australia and, in many cases, on international stages. The companies are critically acclaimed and regularly recognised through a range of creative awards.

*Securing the Future 2001–2008* demonstrates that the implementation of the government-agreed recommendations of the Major Performing Arts Inquiry (MPAI) continued to result in a robust Major Performing Arts (MPA) sector for Australia. Since 2000 the MPA companies have built financial reserves, increased audience numbers, toured nationally and internationally, provided imaginative and far-reaching education programs and have taken a leadership role in artist training and collaboration with the small to medium performing arts sector.

The MPA companies continue to reach out to a wide community, with more than 2 million attendances each year. The sector provides employment to more than 2,700 people annually, representing 60% of total employment in the Australian performing arts industry,<sup>1</sup> and generates earned income of \$228 million, an 84% increase since 2000.

In 2007 governments addressed negative trends in the MPA sector in terms of access, artist development and artform development by providing significant increases in ongoing base funding to 20 of the MPA companies, through the second Review of the MPAI Funding Model. The positive effects of these additional investments from the beginning of 2008 are evident in this report. **Access** to MPA company education programs had declined significantly in 2007 compared with 2006. This trend was reversed in 2008, with additional investments by governments resulting in attendances of 717,000 students at 4,383 performances, an increase of more than 68,000 attendances compared with 2007. In 2007 there had been evidence of a slowing of the presentation of **new works**. In 2008, while the total number of new works remained relatively static, new works presented in dance and theatre main stage subscription seasons increased 28% to an eight year high. In addition, the total Australian works presented rose 11%, from 209 in 2007 to 235 in 2008.

The **financial** results of the MPA companies demonstrated the skill of their Boards and management in achieving positive outcomes in the face of rapidly rising costs. Box office and fee income rose in 2008 to its highest level since 2001, as did private sector income. Over the seven years from 1999 to 2008, consolidated net assets for the sector have increased significantly, from \$17.1m to \$85.4 million.

The effect of global economic conditions became evident in the second half of 2008, particularly in Theatre and Orchestras. While the sector recorded a positive operating result of \$5.4 million for the year, this became a negative figure of nearly \$2 million when losses in interest earnings and abnormal items were taken into account.

**Touring** within Australia remained problematic for the MPA companies, due to the increasing costs of presentation of works outside their home cities. The number of regional seasons presented by MPA companies from 2001 to 2008 remained relatively static, although regional touring increased in 2008, largely owing to extensive touring of one popular commercial theatre production.

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<sup>1</sup> (a) Australian Bureau of Statistics, *Performing Arts 8697.0*, 2006-07.

In 2008 the Australian Government made an additional commitment to support the work of **Young and Emerging artists** and accordingly a new range of targeted initiatives is being implemented in 2009. These programs will support the work of, and pathways for, young and emerging artists to assist in the long term viability and success of the sector.

A number of the *Securing the Future 2001– 2008* report findings reflect the start of the global economic crisis, the effects of which have continued to be felt in 2009. This is a time of great challenge for the MPA companies, which are dependent on contributed income from commercial sponsors and individuals to bridge the gap between CPI and actual funding levels. Adverse economic circumstances threaten these sources of income in particular, and other earned income sources in general, including ticket sales. This has serious implications for the MPA companies in terms of access, education programs, young artist training and the companies' contribution to the wider performing arts sector.

The Major Performing Arts Board (MPAB) will continue to monitor company results and report to governments on its findings.



**R H Allert AO**  
Chairman  
Major Performing Arts Board



**Tony Grybowski**  
Executive Director  
Arts Organisations

## **2 INTRODUCTION**

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The *Securing the Future* update is an annual report tracking Australia's Major Performing Arts (MPA) companies' progress in the areas of artistic vibrancy, access and financial viability. These measures are sourced from the 1999 *Major Performing Arts Inquiry* (MPAI), a seminal study of the state of the Australian MPA sector that resulted in new funding arrangements for Australia's MPA companies.

Since 2006 the *Securing the Future* update has been expanded to include data on four additional areas of MPA activity: education, regional touring, international touring and artist development. These are used as additional indicators for tracking MPA company sustainability, impact and access.

### *Major Performing Arts Inquiry*

By 1997, a number of Australia's major performing arts organisations were exhibiting signs of financial and artistic stress. It became clear to governments that, without suitable intervention, Australia was in danger of losing a number of those organisations. Consequently, the Major Performing Arts Inquiry (MPAI) was initiated by the Australian Government with the support of all State governments through Cultural Ministers Council (CMC).

In 1999 the MPAI presented its findings and 95 recommendations to governments, 89 of which were accepted. These addressed major issues surrounding the companies with regard to:

- Artistic vibrancy
- Access
- Financial viability
- Transparency of funding

The government-agreed MPAI recommendations, including a base grant funding increase to the companies of \$10 million (12%) per annum, were implemented from 2000 to 2005, improving the companies' funding arrangements and significantly changing their business practices, with a resulting strengthening of the sector's financial position. Since 2001, the companies' box office and fee income and private sector income have increased at an average of over six per cent per annum, and the companies' consolidated net assets have almost trebled over the period. The implementation of the MPAI recommendations resulted in improved access and artistic vibrancy for the sector, and a significant increase in reserve funds held by the companies to address unexpected financial challenges.

### *Reviews of the MPAI Funding Model*

One of the MPAI recommendations included provision of a funding model for each of the major performing arts companies, which was used as a basis for determining the overall level of ongoing support for each company. The funding model is reviewed every three years, and the MPAB advises the CMC of any recommended adjustments to base funding levels.

The first review of the funding model, undertaken in 2002-03, argued for the removal of the Efficiency Dividend, and in 2005 Governments agreed to provide additional funding to compensate for the Efficiency Dividend from 2006.

The second Review of the Funding Model, undertaken using the MPAB companies' 2004 and 2005 calendar year data, demonstrated that the companies had met or exceeded the MPAI requirements. However, a number of MPAB companies expressed concern that these results did not reflect the total picture for the sector. While the companies had successfully increased their earned and contributed income and strengthened their financial positions, this had required compromises in terms of artistic quality and access. Within their base funding levels, the companies were finding it increasingly difficult to deliver some of the core outputs required under the MPAI designation and categorisation criteria. The areas reported to be under pressure included skills development and training for artists (including young artists), research and

development activity (creating and performing quality, new Australian works), domestic touring (particularly in regional areas), international touring, and education and access programs.

In 2007 the Australian and state governments responded to the second Review's findings through increases to the base grants of the 20 MPAB companies then under review<sup>2</sup>, in order to address the areas of artist development, artform development and access.

The third Review of the Funding Model was undertaken in 2009, using the 28 MPA companies' 2007 and 2008 financial information.

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<sup>2</sup> Funding for the six symphony orchestras, together with Orchestra Victoria and Opera Australia (including the Australian Opera and Ballet Orchestra), was not considered in the second Funding Model Review, since their ongoing funding had been addressed through the Review of Orchestras 2005 and subsequent Further Examination of Pit Services.

### 3 ARTISTIC VIBRANCY

#### 3.1 New Works

The total number of new works presented by MPA companies has been maintained at a relatively constant level since 2002. However, the 2008 results show an increase to a four year high of new works presented in dance and theatre mainstage subscription seasons, offset by fewer new works in non-mainstage seasons (see Exhibit 1). This is an outcome of the second Review of the MPAI Funding Model, which resulted in 2008 base grant increases to 20 of the MPA companies for increased artist and artform development, and access. For detail refer Appendix 2.

#### Exhibit 1: New Works by Artform

	2001	2002	2003	2004	2005	2006	2007	2008
<b>Theatre</b> <sup>3</sup>								
Subscription Season	26.5	20.5	15.33	28.7	10.7	15.3	14.3	18.5
Other Mainstage Season	7	10	3	7	6	11	8	7
<b>Theatre Total</b>	<b>33.5</b>	<b>30.5</b>	<b>18.33</b>	<b>35.7</b>	<b>16.7</b>	<b>26.3</b>	<b>22.3</b>	<b>25.5</b>
<b>Opera</b>								
Subscription Season	2	1	0	2	0	0	1	0
Other Mainstage Season	3	2	1	0	1	4	0	1
<b>Opera Total</b>	<b>5</b>	<b>3</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>4</b>	<b>1</b>	<b>1</b>
<b>Dance</b>								
Subscription Season								
<i>Ballet</i>	12	13	15	8	7	11	14	17
<i>Contemporary</i>	4	3	9	2	5	2	2	6
Subscription Season Total	16	16	24	10	12	13	16	23
Other Mainstage								
<i>Ballet</i>	16	6	14	13	7	22	20	7
<i>Contemporary</i>	20	0	4	0	1	0	0	0
Other Mainstage Total	36	6	18	13	8	22	20	7
<b>Dance Total</b>	<b>52</b>	<b>22</b>	<b>42</b>	<b>23</b>	<b>20</b>	<b>35</b>	<b>36</b>	<b>30</b>
<b>Chamber Music</b>								
Subscription Season	3	7	4	2	3	2	5	5
Other Mainstage Season	8	1	0	6	2	2	2	2
<b>Chamber Music Total</b>	<b>11</b>	<b>8</b>	<b>4</b>	<b>8</b>	<b>5</b>	<b>4</b>	<b>7</b>	<b>7</b>
<b>Total Subs</b>	<b>47.5</b>	<b>44.5</b>	<b>43.33</b>	<b>42.7</b>	<b>25.7</b>	<b>30.3</b>	<b>36.3</b>	<b>46.5</b>
<b>Total Other</b>	<b>54</b>	<b>19</b>	<b>22</b>	<b>26</b>	<b>17</b>	<b>39</b>	<b>30</b>	<b>17</b>
<b>Grand Total</b>	<b>101.5</b> <sup>4</sup>	<b>63.5</b>	<b>65.33</b>	<b>68.7</b>	<b>42.7</b>	<b>69.3</b>	<b>66.3</b>	<b>63.5</b>
<b>Symphony Orchestras</b>								
Subscription Season				9	15	24	12	15
Other Mainstage				10	10	12	9	6
<b>Orchestra Total</b>				<b>19</b>	<b>25</b>	<b>36</b>	<b>21</b>	<b>21</b>

<sup>3</sup> Theatre includes *Circus Oz* that uses a rolling show concept, developing between one third to two thirds of its show as new work each year.

<sup>4</sup> 2001 peak of 101.5 new works was due in part to Centenary of Federation activities.

### 3.2 Australian Works

In 2008 the total number of Australian works presented by MPA companies rose 12%, from 209 in 2007 to 235 in 2008. The number of Australian chamber music works increased substantially in 2008 due to the inaugural Musica Viva Sydney Festival. The other major increase was seen in the Theatre sector, which recorded a 22% increase in presentation of Australian works. (See Exhibit 2). For detail refer Appendix 3.

#### Exhibit 2: Total Australian Works by Artform<sup>5</sup>

Artform	2001	2002	2003	2004	2005	2006	2007	2008
<b>Theatre</b>	53	46	38	45	36	46	38	49
<b>Opera</b>	7	3	2	5	4	6	3	1
<b>Dance</b>	84	51	63	64	56	49	53	53
<b>Chamber Music</b>	31	58	40	32	47	33	60	76
<b>Total</b>	<b>175</b>	<b>158</b>	<b>143</b>	<b>146</b>	<b>143</b>	<b>134</b>	<b>154</b>	<b>179</b>
<b>Symphony Orchestras</b>				<b>50</b>	<b>62</b>	<b>60</b>	<b>55</b>	<b>56</b>
<b>Total including Orchestras</b>				<b>196</b>	<b>205</b>	<b>194</b>	<b>209</b>	<b>235</b>
<i>MVA Regional Touring and (from 2005) Carnivale<sup>6</sup></i>				61	102	175	138	174

<sup>5</sup> Excludes Australian works included in Education programs

<sup>6</sup> Musica Viva's regional and Carnivale programs include a large number of smaller Australian works which are reflected in these additional figures.

### 3.3 New Productions

The number of new productions presented by MPA companies in 2008 remained static compared with the previous year, but maintained the increase recorded from 2006 to 2007. Variations within artforms from 2007 to 2008 were minor (see Exhibit 3). While the total (new and existing) productions increased by 26, or 15%, from 2007 to 2008, the increase was reflected in revived productions rather than new productions. For detail refer Appendix 3.

**Exhibit 3: Profile of New and Existing Productions by Artform**

	2001		2002		2003		2004	
<b>Theatre <sup>7</sup></b>								
New	46.5	85%	54.5	66%	64.3	81%	66.7	81%
Existing	8.5	15%	27.5	34%	14.7	19%	15.3	19%
<b>Total</b>	<b>55</b>		<b>82</b>		<b>79</b>		<b>82</b>	
<b>Opera</b>								
New	18	55%	21	66%	15	36%	25	54%
Existing	15	45%	11	34%	27	64%	21	46%
<b>Total</b>	<b>33</b>		<b>32</b>		<b>42</b>		<b>46</b>	
<b>Dance</b>								
New	58	50%	22	26%	47	55%	38	43%
Existing	59	50%	64	74%	39	45%	50	57%
<b>Total</b>	<b>117</b>		<b>86</b>		<b>86</b>		<b>88</b>	
<b>Total</b>								
New	122.5	60%	97.5	49%	126.3	61%	129.7	60%
Existing	82.5	40%	102.5	51%	80.7	39%	86.3	40%
<b>Total</b>	<b>205</b>		<b>200</b>		<b>207</b>		<b>216</b>	

	2005		2006		2007		2008	
<b>Theatre</b>								
New	61.7	81%	59.3	69%	59.3	80%	56.5	63%
Existing	14.3	19%	26.7	31%	14.7	20%	33.5	37%
<b>Total</b>	<b>76</b>		<b>86</b>		<b>74</b>		<b>90</b>	
<b>Opera</b>								
New	12	38%	17	57%	21	54%	21	60%
Existing	20	63%	13	43%	18	46%	14	40%
<b>Total</b>	<b>32</b>		<b>30</b>		<b>39</b>		<b>35</b>	
<b>Dance</b>								
New	46	67%	39	55%	42	64%	46	58%
Existing	23	33%	32	45%	24	36%	34	43%
<b>Total</b>	<b>69</b>		<b>71</b>		<b>66</b>		<b>80</b>	
<b>Total</b>								
New	119.7	68%	115.3	62%	122.3	68%	123.5	60%
Existing	57.3	32%	71.7	38%	56.7	32%	81.5	40%
<b>Total</b>	<b>177</b>		<b>187</b>		<b>179</b>		<b>205</b>	

<sup>7</sup> Theatre includes Circus Oz that uses a rolling show concept, developing between one third to two thirds of its show as new work each year.

### 3.4 Artist Development

All MPAB companies are required to undertake artist development activities<sup>8</sup>. An analysis of 2008 reporting, by level of program provided in broad categories, demonstrates that:

- Nineteen of the 28 MPA companies have a dedicated annual artist development program involving selected external participants in company activities. (Many also include development opportunities for existing company artistic personnel.)
  - Theatre 8
  - Opera 3
  - Dance 2
  - Music 6
  
- The remaining nine MPA companies do not have dedicated artist development programs, but provide development opportunities for existing company artistic personnel and/or opportunities that assist artist development within the artform.
  - Theatre 1
  - Opera 1
  - Dance 3
  - Music 4

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<sup>8</sup> Designation requirements of an MPA company include demonstration of “an ongoing commitment to development of artists within the artform” (MPAI report Section 5.1).

## 4 BREADTH OF ACCESS

### 4.1 Mainstage Capital City Attendances

Over the 2001—08 period attendance levels for the MPAB companies have fluctuated between 2 million and 2.3 million. Attendances fell a total 7.6% in 2008 compared with the previous year. In 2008 there was a drop in theatre attendances when compared with 2007, partially due to increased ticket sales in 2007 for a commercial theatre attraction. In 2008 all other artform attendance figures decreased, with the exception of opera, with the presentation of a commercial musical production within that artform increasing attendances (see Exhibit 4). For details see Appendix 4.

#### Exhibit 4: Paid Mainstage Capital City Attendances by Artform

('000)	Dance	Opera	Theatre	Chamber Music	TOTAL	Symphony Orchestras	TOTAL including Orchestras
2001 <sup>9</sup>	296	316	899	144	1,655	508	2,163
2002	271	308	855	119	1,553	443	1,996
2003 <sup>10</sup>	350	336	932	143	1,761	448	2,209
2004	314	304	897	149	1,664	457	2,121
2005	323	365	823	166	1,677	443	2,120
2006	296	360	817	154	1,627	481	2,108
2007	331	367	924	152	1,774	522	2,296
2008	308	448	745	144	1,645	477	2,122

For details refer Appendix 4.

<sup>9</sup> Level of attendances due in part to additional Centenary of Federation activities.

<sup>10</sup> Increase in Chamber Music attendances largely due to ABO entering MPAB.

2008 saw decreased attendances compared with 2007 in all capitals except Brisbane and Canberra. The largest decrease of 22% was in Adelaide, more than half of which was due to less touring activity.<sup>11</sup> Perth, Canberra and Hobart results also result demonstrate different annual touring patterns in each city. For detail refer Appendices 4A-G and Appendix 5B.

**Exhibit 5: Paid Mainstage Capital City Attendances by City (including Orchestras)**

('000)	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total
2001	155	171	46	35	649	130	977	2,163
2002	120	176	46	19	616	108	911	1,996
2003	129	168	56	23	664	121	1,048	2,209
2004	146	176	39	27	618	131	984	2,121
2005	140	192	32	23	649	128	956	2,120
2006	131	189	58	29	630	134	937	2,108
2007	147	211	33	23	690	159	1,033	2,296
2008	115	209	38	22	659	133	946	2,122

Note: Canberra and Hobart particularly, and to a lesser extent Adelaide and Perth, fluctuate according to touring patterns

For detail refer Appendix 4.

Refer Appendix 5B for Paid Mainstage Capital City Attendances by City 1992-2008 (excluding Orchestras).

<sup>11</sup> Opera Australia presented a commercial season in Adelaide in 2007, but not in 2008.

Participation rates per capital city in 2008 showed little variation, although all capitals except Brisbane and Canberra had lower participation rates than in 2007. Canberra and Hobart rates are particularly affected by company touring patterns. For detail refer Appendices 4A-H.

**Exhibit 6: Participation Rates by Capital City**

	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>
Adelaide	18.2	14.1	15.2	17.2	16.5	15.4	18.0	13.9
Brisbane	13.7	14.1	13.5	14.1	15.4	15.2	15.7	13.6
Canberra	19.4	19.4	23.6	16.4	13.5	24.4	13.9	16.6
Hobart	23.9	13.0	15.7	18.4	15.7	19.7	15.7	14.8
Melbourne	24.4	23.1	24.9	23.2	24.4	23.6	25.1	24.7
Perth	12.4	10.3	11.5	12.5	12.2	12.8	14.8	12.6
Sydney	31.2	29.1	33.4	31.8	30.5	29.9	32.8	31.1
<b>Total (across all Capital Cities)</b>	<b>23.2</b>	<b>21.4</b>	<b>23.7</b>	<b>22.7</b>	<b>22.7</b>	<b>22.6</b>	<b>24.2</b>	<b>22.3</b>

#### 4.2 Capital city access to Major Performing Arts companies

From 2001 to 2008 MPA companies have presented touring seasons in all eight State and Territory capital cities. However, in 2008 the number of seasons was at its lowest level since 2001, reflecting increasing costs of touring outside the companies' home bases.

**Exhibit 7: Capital City Touring by Artform, Cities and Seasons**

Artform	2001		2002		2003		2004		2005		2006		2007		2008	
	Cities	Seasons	Cities	Seasons	Cities	Seasons	Cities	Seasons	Cities	Seasons	Cities	Seasons	Cities	Seasons	Cities	Seasons
<b>Theatre Total</b>	<b>8</b>	<b>21</b>	<b>6</b>	<b>22</b>	<b>7</b>	<b>23</b>	<b>8</b>	<b>25</b>	<b>8</b>	<b>14</b>	<b>6</b>	<b>20</b>	<b>8</b>	<b>22</b>	<b>6</b>	<b>13</b>
<b>Opera Total</b>	<b>2</b>	<b>10</b>	<b>3</b>	<b>12</b>	<b>1</b>	<b>9</b>	<b>3</b>	<b>14</b>	<b>4</b>	<b>12</b>	<b>4</b>	<b>10</b>	<b>4</b>	<b>11</b>	<b>4</b>	<b>11</b>
<b>Dance</b>																
Ballet	7	11	6	13	5	13	5	11	6	12	4	5	3	4	4	9
Contemporary	5	9	7	10	4	10	4	6	3	5	6	8	5	9	5	6
<b>Dance Total</b>	<b>7</b>	<b>20</b>	<b>8</b>	<b>23</b>	<b>7</b>	<b>23</b>	<b>8</b>	<b>17</b>	<b>6</b>	<b>17</b>	<b>7</b>	<b>13</b>	<b>6</b>	<b>13</b>	<b>6</b>	<b>15</b>
<b>Music</b>																
Chamber	7	82	7	78	7	84	7	95	7	105	7	92	7	80	7	83
Symphony Orchestras	2	2	2	3	0	0	0	0	0	0	1	3	1	3	1	3
<b>Music Total</b>	<b>7</b>	<b>84</b>	<b>7</b>	<b>81</b>	<b>7</b>	<b>84</b>	<b>7</b>	<b>95</b>	<b>7</b>	<b>105</b>	<b>7</b>	<b>95</b>	<b>8</b>	<b>83</b>	<b>8</b>	<b>86</b>
<b>TOTAL</b>	<b>8</b>	<b>135</b>	<b>8</b>	<b>138</b>	<b>8</b>	<b>139</b>	<b>8</b>	<b>151</b>	<b>8</b>	<b>148</b>	<b>8</b>	<b>138</b>	<b>8</b>	<b>129</b>	<b>8</b>	<b>125</b>

Note: Capital cities are counted only once in the Total lines, although they may be visited by multiple MPA companies across art forms

Capital city audiences continued to have a high level of access to MPAB companies, although with the exception of Canberra all had a decrease in visiting companies in 2008 over 2007 levels. Ten companies presented touring seasons outside their homestage city in 2008 (see Exhibit 8).

**Exhibit 8: Capital City Access to MPA Companies by City**

	2001	2002	2003	2004	2005	2006	2007	2008
<b>Adelaide</b>								
Homestage	3	3	3	3	3	3	3	3
Touring	6	6	3	6	5	8	8	5
<b>Total</b>	<b>9</b>	<b>9</b>	<b>6</b>	<b>9</b>	<b>8</b>	<b>11</b>	<b>11</b>	<b>7</b>
<b>Brisbane</b>								
Homestage	4	4	4	4	4	4	4	4
Touring	8	9	6	7	8	5	8	7
<b>Total</b>	<b>12</b>	<b>13</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>9</b>	<b>12</b>	<b>11</b>
<b>Canberra</b>								
Homestage	0	0	0	0	0	0	0	0
Touring	9	8	7	6	7	7	5	10
<b>Total</b>	<b>9</b>	<b>8</b>	<b>7</b>	<b>6</b>	<b>7</b>	<b>7</b>	<b>5</b>	<b>10</b>
<b>Darwin</b>								
Homestage	0	0	0	0	0	0	0	0
Touring	1	1	3	4	5	4	3	2
<b>Total</b>	<b>1</b>	<b>1</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>
<b>Hobart</b>								
Homestage	1	1	1	1	1	1	1	1
Touring	7	6	6	2	6	5	4	3
<b>Total</b>	<b>8</b>	<b>7</b>	<b>7</b>	<b>3</b>	<b>7</b>	<b>6</b>	<b>5</b>	<b>4</b>
<b>Melbourne</b>								
Homestage <sup>12</sup>	6	6	6	6	6	6	6	6
Touring	10	6	7	6	8	4	6	7
<b>Total</b>	<b>16</b>	<b>12</b>	<b>13</b>	<b>12</b>	<b>14</b>	<b>10</b>	<b>12</b>	<b>13</b>
<b>Perth</b>								
Homestage	4	4	4	4	4	4	4	4
Touring	4	3	5	5	4	4	9	3
<b>Total</b>	<b>8</b>	<b>7</b>	<b>9</b>	<b>9</b>	<b>8</b>	<b>8</b>	<b>13</b>	<b>7</b>
<b>Sydney<sup>13</sup></b>								
Homestage	9	9	10	10	10	10	10	10
Touring	6	4	3	2	4	2	3	3
<b>Total</b>	<b>15</b>	<b>13</b>	<b>13</b>	<b>12</b>	<b>14</b>	<b>12</b>	<b>13</b>	<b>14</b>
<b>Totals</b>								
<b>Homestage</b>	<b>27</b>	<b>27</b>	<b>28</b>	<b>28</b>	<b>28</b>	<b>28</b>	<b>28</b>	<b>28</b>
<b>Touring</b>	<b>51</b>	<b>43</b>	<b>40</b>	<b>38</b>	<b>47</b>	<b>39</b>	<b>46</b>	<b>40</b>

<sup>12</sup> Includes Orchestra Victoria

<sup>13</sup> Number of Sydney-based companies increased by one in 2003, with ABO joining MPAB.

Note : Companies are counted once only in Total lines.

### 4.3 Regional Access

#### 4.3.1 Regional Seasons

The number of regional seasons presented by MPA companies from 2001 to 2008 remained relatively static. However, regional touring increased in 2008, largely owing to extensive touring of one popular commercial theatre production. Ballet touring rose significantly against all previous years, with stronger regional activity also being shown by opera and pit orchestras. Chamber music regional touring fell to its lowest level over the period 2001-2008.

#### Exhibit 9: Regional Seasons by Artform: 2001-2008

	2001	2002	2003	2004	2005	2006	2007	2008
<b>Theatre Total</b>	<b>82</b>	<b>69</b>	<b>86</b>	<b>55</b>	<b>52</b>	<b>79</b>	<b>74</b>	<b>103</b>
<b>Opera Total</b>	<b>37</b>	<b>34</b>	<b>34</b>	<b>19</b>	<b>36</b>	<b>30</b>	<b>30</b>	<b>39</b>
<b>Dance Total</b>								
Ballet	31	30	28	26	33	32	18	48
Contemporary	4	14	11	19	13	12	19	9
<b>Dance Total</b>	<b>35</b>	<b>44</b>	<b>39</b>	<b>45</b>	<b>46</b>	<b>44</b>	<b>37</b>	<b>57</b>
<b>Music</b>								
Chamber Music	134	145	150	143	130	132	147	100
Symphony Orchestras	43	47	32	94 <sup>14</sup>	63	42	35	37
Pit Orchestras	1	4	7	16	10	14	9	20
<b>Music Total</b>	<b>178</b>	<b>196</b>	<b>189</b>	<b>253</b>	<b>203</b>	<b>188</b>	<b>191</b>	<b>154</b>
<b>Total</b>	<b>332</b>	<b>343</b>	<b>348</b>	<b>372</b>	<b>337</b>	<b>341</b>	<b>332</b>	<b>353</b>

<sup>14</sup> West Australian Symphony Orchestra presented an unusually large regional program in 2004.

### 4.3.2 Regional Centres

The number of regional centres visited by the MPA companies has remained constant over the period 2001-2008. Totals are affected by deliberate touring patterns of some companies which involve a larger numbers of smaller venues one year and a smaller number of larger venues another year. Numbers of centres visited are also affected by distances travelled. In 2008 both opera and dance reflected increases in numbers of centres visited (see Exhibit 10).

#### Exhibit 10: Regional Touring by Towns/Cities and Artform

	2001	2002	2003	2004	2005	2006	2007	2008
<b>Theatre Total</b>	<b>47</b>	<b>44</b>	<b>51</b>	<b>36</b>	<b>36</b>	<b>48</b>	<b>61</b>	<b>47</b>
<b>Opera Total</b>	<b>34</b>	<b>27</b>	<b>30</b>	<b>19</b>	<b>35</b>	<b>25</b>	<b>29</b>	<b>39</b>
<b>Dance</b>								
Ballet	28	21	23	20	24	30	18	37
Contemporary	4	13	9	19	12	12	16	9
<b>Dance Total</b>	<b>32</b>	<b>30</b>	<b>28</b>	<b>35</b>	<b>33</b>	<b>37</b>	<b>30</b>	<b>39</b>
<b>Music</b>								
Chamber Music	68	58	55	61	57	58	68	50
Symphony Orchestras	35	30	24	45	41	41	27	31
Pit Orchestras	1	4	7	6	5	10	9	8
<b>Music Total</b>	<b>87</b>	<b>79</b>	<b>72</b>	<b>99</b>	<b>86</b>	<b>87</b>	<b>79</b>	<b>70</b>
<b>TOTAL</b>	<b>127</b>	<b>107</b>	<b>125</b>	<b>127</b>	<b>121</b>	<b>123</b>	<b>142</b>	<b>119</b>

*Note:* Regional centres are counted only once in Total lines, although they may be visited by multiple MPA companies across artforms

### 4.3.3 Distribution of Regional Seasons

In 2008 the proportion of regional seasons in Queensland and NT was equal to or greater than those States' share of total Australian regional population, while in Victoria, SA, WA and Tasmania the percentage of seasons was within two per cent of the relevant per cent of the regional population. Compared to 2007, regional seasons in NSW, Victoria, Queensland and SA were greater than in 2006. (Exhibit 11) Some MPA companies have developed a cyclical (2-3 year) touring pattern which affects annual percentages.

#### Exhibit 11: Regional Access: Distribution of Seasons by Artform

(percent of total number of regional seasons per artform)

	% of regional Population	Dance	Music	Opera	Theatre	TOTAL
<b>2001</b>						
NSW	34.1	8.6	<b>39.5</b>	8.1	18.3	18.7
VIC	18.2	<b>17.1</b>	<b>24.3</b>	<b>18.9</b>	<b>31.7</b>	<b>23.1</b>
QLD	29.6	<b>37.1</b>	19.2	<b>45.9</b>	9.8	<b>28.1</b>
SA	5.7	<b>14.3</b>	0.6	0.0	<b>15.9</b>	<b>7.7</b>
WA	7.2	<b>17.1</b>	<b>7.9</b>	<b>18.9</b>	<b>20.7</b>	<b>16.2</b>
TAS	3.8	<b>2.9</b>	<b>6.8</b>	<b>2.7</b>	<b>2.4</b>	<b>3.7</b>
NT	1.4	<b>2.9</b>	<b>1.7</b>	<b>5.4</b>	<b>1.2</b>	<b>2.8</b>
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>2002</b>						
NSW	34.9	15.9	<b>50.0</b>	0.0	20.3	<b>34.7</b>
VIC	19.0	<b>20.5</b>	<b>18.9</b>	<b>29.4</b>	<b>36.2</b>	<b>23.6</b>
QLD	28.4	<b>34.1</b>	14.8	23.5	21.7	19.5
SA	5.7	<b>11.4</b>	1.0	<b>41.2</b>	0.0	<b>6.1</b>
WA	7.0	<b>11.4</b>	<b>7.1</b>	2.9	<b>17.4</b>	<b>9.3</b>
TAS	3.9	<b>4.5</b>	<b>7.7</b>	<b>2.9</b>	<b>2.9</b>	<b>5.8</b>
NT	1.1	<b>2.3</b>	<b>0.5</b>	0.0	<b>1.4</b>	<b>0.9</b>
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>2003</b>						
NSW	33.7	25.6	<b>55.0</b>	29.4	15.0	<b>39.4</b>
VIC	19.1	10.3	<b>22.0</b>	5.8	<b>30.0</b>	<b>21.3</b>
QLD	29.0	<b>53.8</b>	13.0	<b>61.7</b>	5.8	19.8
SA	5.8	0.0	0.5	0.0	<b>18.6</b>	<b>4.9</b>
WA	6.3	<b>5.1</b>	3.0	2.9	<b>19.7</b>	<b>7.5</b>
TAS	4.0	<b>2.6</b>	<b>6.0</b>	0.0	<b>9.3</b>	<b>6.0</b>
NT	2.0	<b>2.6</b>	<b>1.0</b>	0.0	<b>1.2</b>	<b>1.5</b>
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>2004</b>						
NSW	34.5	17.8	<b>40.9</b>	0.0	27.3	<b>33.3</b>
VIC	18.9	11.1	<b>23.2</b>	0.0	<b>38.2</b>	<b>22.7</b>
QLD	28.9	<b>33.3</b>	14.5	<b>36.8</b>	14.5	18.3
SA	5.7	<b>13.3</b>	2.7	<b>5.3</b>	<b>9.1</b>	<b>5.3</b>
WA	7.1	<b>22.2</b>	<b>10.9</b>	<b>47.4</b>	<b>9.1</b>	<b>14.2</b>
TAS	3.9	0.0	<b>5.5</b>	0.0	0.0	<b>3.5</b>
NT	1.1	<b>2.2</b>	<b>2.3</b>	<b>10.5</b>	<b>1.8</b>	<b>2.7</b>
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Exhibit 11: Regional Access: Distribution of Seasons by Artform***Continued* (percent of total number of regional seasons per artform)

	Percent of Regional Population	Dance	Music	Opera	Theatre	TOTAL
<b>2005</b>						
NSW	34.5	17.0	<b>46.2</b>	5.5	17.3	<b>32.8</b>
VIC	18.9	<b>34.0</b>	<b>22.0</b>	<b>30.6</b>	<b>32.7</b>	<b>26.5</b>
QLD	28.9	21.3	17.8	<b>55.6</b>	<b>36.6</b>	25.5
SA	5.7	<b>10.6</b>	<b>6.5</b>	<b>5.5</b>	<b>9.6</b>	<b>7.5</b>
WA	7.1	<b>15.0</b>	1.1	0.0	0.0	2.8
TAS	3.9	<b>2.1</b>	<b>4.8</b>	<b>2.8</b>	<b>1.9</b>	<b>3.7</b>
NT	1.1	0.0	<b>1.6</b>	0.0	<b>1.9</b>	<b>1.2</b>
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>2006</b>						
NSW	36.0	16.0	<b>49.0</b>	<b>37.0</b>	<b>39.0</b>	<b>42.0</b>
VIC	20.0	9.0	<b>21.0</b>	3.0	<b>27.0</b>	<b>19.0</b>
QLD	26.0	<b>53.0</b>	16.0	17.0	16.0	21.0
SA	6.0	0.0	2.0	<b>37.0</b>	<b>8.0</b>	<b>6.0</b>
WA	7.0	<b>19.0</b>	<b>5.0</b>	<b>7.0</b>	<b>9.0</b>	<b>8.0</b>
TAS	4.0	0.0	<b>4.0</b>	0.0	1.0	<b>3.0</b>
NT	1.0	<b>2.0</b>	<b>2.0</b>	0.0	0.0	<b>1.0</b>
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>2007</b>						
NSW	36.0	33.0	<b>36.0</b>	0.0	24.0	30.0
VIC	20.0	<b>25.0</b>	<b>30.0</b>	3.0	16.0	<b>24.0</b>
QLD	26.0	14.0	17.0	<b>40.0</b>	<b>28.0</b>	21.0
SA	6.0	<b>11.0</b>	0.0	0.0	<b>7.0</b>	3.0
WA	7.0	<b>14.0</b>	3.0	<b>47.0</b>	<b>22.0</b>	<b>12.0</b>
TAS	4.0	<b>3.0</b>	<b>12.0</b>	0.0	1.0	<b>8.0</b>
NT	1.0	0.0	<b>2.0</b>	<b>10.0</b>	<b>1.0</b>	<b>2.0</b>
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>2008</b>						
NSW	36.0	9.0	<b>42.0</b>	<b>36.0</b>	<b>34.0</b>	33.0
VIC	20.0	7.0	<b>35.0</b>	<b>28.0</b>	<b>25.0</b>	<b>27.0</b>
QLD	26.0	<b>70.0</b>	10.0	21.0	<b>29.0</b>	<b>27.0</b>
SA	6.0	<b>5.0</b>	2.0	<b>15.0</b>	2.0	<b>4.0</b>
WA	7.0	<b>5.0</b>	4.0	0.0	<b>9.0</b>	<b>5.0</b>
TAS	4.0	0.0	<b>6.0</b>	0.0	1.0	<b>3.0</b>
NT	1.0	<b>4.0</b>	<b>1.0</b>	0.0	0.0	<b>1.0</b>
<b>TOTAL</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

The percentage of regional seasons for each art-form per state is compared to each state's percentage of total Australian regional population as a measure of regional access by the MPAB companies.

**Bold** type denotes that the percent of seasons is equal to or greater than the relevant percent of the population.

**Bold Italics** type denotes that the percent of seasons is no more than 2% less than the relevant percent of the population.

#### 4.4 Education activities

This data documents education activities undertaken by the MPA companies from 2006. Fluctuations in attendance figures reflect the size of schools visited in any one year.

Five MPAB companies<sup>15</sup> are funded to undertake education activities with a national focus. The remaining companies categorised as 'State Flagship' (9 companies) are required to undertake state-based education activities. Australian Flagship (7 companies) and Specialist companies (6 companies) are not required to undertake education activity, but many do.

In 2008 company education activities were as follows:

- 5 companies have a dedicated education program of performances managed by specialist staff, involving extensive multi-state touring.
- 17 companies have a dedicated education program of performances, some managed by specialist staff, often involving single-state touring.
- 5 companies provide educational opportunities offered solely within mainstage home-city activity or mainstage touring, in conjunction with on-line education resources.
- 1 company reported no education activity.

The number of education performances and attendances in 2006-2008 is detailed in Exhibit 12. Total attendances at education performances rose 11% in 2008 compared with 2007, with 730,000 students attending 4,386 performances throughout Australia.

#### Exhibit 12: Education Activity by Artform

	2006		2007		2008	
	Attendances ('000)	Performances	Attendances ('000)	Performances	Attendances ('000)	Performances
<b>Theatre Total</b>	<b>121</b>	<b>1,137</b>	<b>108</b>	<b>849</b>	<b>216</b>	<b>1,225</b>
<b>Opera Total</b>	<b>98</b>	<b>600</b>	<b>113</b>	<b>636</b>	<b>97</b>	<b>555</b>
<b>Dance Total</b>	<b>10</b>	<b>262</b>	<b>8</b>	<b>354</b>	<b>26</b>	<b>379</b>
<b>Music</b>						
Chamber Music	392	2,170	351	2,108	325	2,074
Orchestras	88	255	77	189	66	153
<b>Music Total</b>	<b>480</b>	<b>2,425</b>	<b>428</b>	<b>2,297</b>	<b>391</b>	<b>2,227</b>
<b>TOTAL</b>	<b>708</b>	<b>4,424</b>	<b>657</b>	<b>4,136</b>	<b>730</b>	<b>4,386</b>

<sup>15</sup> Bell Shakespeare (Theatre), Opera Queensland and Opera Australia (Opera), The Australian Ballet (Dance) and Musica Viva (Music).

#### 4.5 International activities

This data documents international activities undertaken by the MPA companies since 2006.

Three MPAB companies<sup>16</sup> categorised through the MPAA as International were required to meet specific criteria relating to international activity. A fourth company, Bangarra Dance Theatre, changed categorisation from Specialist to International from 1 January 2008. A further seven MPA companies undertook international performances in 2008 (see Exhibit 13).

In 2008 these 11 MPA companies presented 211 performances in 19 countries – Austria, Brunei, Canada, China, England, France, Germany, Italy, Japan, Laos, Luxembourg, Malaysia, New Zealand, Scotland, Slovenia, Thailand, The Philippines, USA and Wales. Theatre companies were the largest international presenters. Total international presentations rose 17%, from 176 in 2007 to 211 in 2008.

#### Exhibit 13: International Activity by Artform

	2006		2007		2008	
	No of Companies	No of Performances	No of Companies	No of Performances	No of Companies	No of Performances
<b>Theatre Total</b>	<b>4</b>	<b>87</b>	<b>3</b>	<b>109</b>	<b>4</b>	<b>129</b>
<b>Opera Total<sup>17</sup></b>	<b>1</b>		<b>1</b>		<b>1</b>	
<b>Dance Total</b>	<b>4</b>	<b>28</b>	<b>3</b>	<b>32</b>	<b>3</b>	<b>28</b>
<b>Music</b>						
Chamber Music	2	40	2	27	2	46
Orchestras	2	7	1	8	1	8
<b>Music Total</b>	<b>4</b>	<b>47</b>	<b>3</b>	<b>35</b>	<b>3</b>	<b>54</b>
<b>TOTAL</b>	<b>12</b>	<b>162</b>	<b>12</b>	<b>176</b>	<b>11</b>	<b>211</b>

<sup>16</sup> Australian Chamber Orchestra, Circus Oz and Sydney Dance Company

<sup>17</sup> Opera Australia regularly hires productions to overseas companies and enters into co-production agreements with international companies for works that may premiere overseas and subsequently presented in Australia.

#### **4.6 Other access activities**

This data deals with access activities undertaken by the MPA companies not included elsewhere in this report.

In 2008 additional access activity, other than regional touring and education, was undertaken by all 28 MPA companies as follows:

- 9 companies presented dedicated performances in diverse venues providing broader community access, in addition to core activity in their own venues, in locations such as community centres, shopping centres, retirement villages etc. Includes companies undertaking live relays of performances to regional and metropolitan audiences.
- 15 companies offered concession or free attendance to mainstage performances to audience members disadvantaged financially, developmentally or geographically, sometimes including training workshops.
- 4 companies offered access through electronic media including broadcasts, recordings, websites and occasional special performances.

## 5 FINANCIAL RESULTS

### 5.1 Box Office / Fee Income

In 2008 the companies' box office and fee income rose 4.3% from 2007 levels, representing a slowing in these revenues compared with the average 6.10% growth over 2001–2008. Results varied considerably by artform and state.

#### 5.1.1 Box Office / Fee Income by Artform

Theatre, Dance and Symphony Orchestras each recorded small falls in income in 2008, while Chamber Music remained relatively static. Opera recorded an increase in income of 23% compared with 2007, owing to an increase in commercial presentation by Opera Australia.

#### Exhibit 14: Aggregate Box Office and Fees by Artform

\$'000	2001	2002	2003	2004	2005	2006	2007	2008	% Average Growth
<b>Theatre</b>	35,093	35,418	37,426	40,536	41,396	43,896	51,671	50,636	<b>5.38</b>
<b>Opera<sup>18</sup></b>	31,596	33,095	36,585	33,633	44,603	42,358	42,695	52,879	<b>7.63</b>
<b>Dance<sup>19</sup></b>	18,134	17,061	19,937	20,008	21,304	20,219	24,426	23,346	<b>3.68</b>
<b>Chamber Music<sup>20</sup></b>	8,151	8,612	10,146	10,914	10,777	12,277	12,182	12,571	<b>6.38</b>
<b>Orchestra</b>	22,656	23,041	26,637	28,587	33,360	35,395	36,820	35,606	<b>6.67</b>
<b>TOTAL</b>	<b>115,630</b>	<b>117,227</b>	<b>130,731</b>	<b>133,678</b>	<b>151,440</b>	<b>154,145</b>	<b>167,794</b>	<b>175,038</b>	<b>6.10</b>

<sup>18</sup> 2004 SOSA reduced activity prior to 2004 *Ring Cycle* (reported in 2005).

<sup>19</sup> 2006 BDT and TAB presented a joint season

<sup>20</sup> ABO included from 2003

**5.1.2 Box Office / Fee Income by State**

Comparisons by State (see Exhibit 15) show that Western Australia, South Australia and Queensland have had the strongest income growth from 2001–2008. It should be noted, however, that these comparisons are made from much smaller bases than those of New South Wales and Victoria<sup>21</sup>. NSW/Victorian companies<sup>22</sup> increased income by 20%, owing to an increase in commercial presentation by Opera Australia.

Three states recorded income falls in 2008 compared with 2007. Income fell 19% in South Australia, 17% in Queensland and three per cent in New South Wales. The South Australian result was the result of fewer performances.

**Exhibit 15: Aggregate Box Office and Fees by State**

\$'000	2001	2002	2003	2004	2005	2006	2007	2008	% Average Growth
<b>New South Wales<sup>23</sup></b>	39,645	39,336	45,437	47,946	47,117	52,042	59,648	57,659	<b>5.50</b>
<b>New South Wales/Victoria</b>	43,772	42,582	47,248	44,869	50,511	53,625	54,397	65,088	<b>5.83</b>
<b>Victoria</b>	17,868	19,568	20,556	22,420	26,377	24,170	25,563	26,424	<b>5.75</b>
<b>Queensland</b>	5,691	5,700	6,087	6,887	8,163	8,808	11,667	9,649	<b>7.83</b>
<b>South Australia<sup>24</sup></b>	3,441	4,658	4,894	4,231	10,276	5,941	7,008	5,709	<b>7.50</b>
<b>Western Australia</b>	4,012	4,474	5,491	6,097	7,619	8,138	8,287	9,281	<b>12.73</b>
<b>Tasmania</b>	1,201	909	1,018	1,228	1,377	1,421	1,224	1,228	<b>0.32</b>
<b>TOTAL</b>	<b>115,630</b>	<b>117,227</b>	<b>130,731</b>	<b>133,678</b>	<b>151,440</b>	<b>154,145</b>	<b>167,794</b>	<b>175,038</b>	<b>6.10</b>

<sup>21</sup> NSW, Victorian and Victorian/NSW companies generated 85% of the total income for the sector.

<sup>22</sup> NSW/Victorian companies are Opera Australia and The Australian Ballet

<sup>23</sup> ABO included from 2003

<sup>24</sup> 2004 SOSA reduced activity prior to 2004 *Ring Cycle* (reported in 2005).

## 5.2 Private Sector Income

In 2008 the sector recorded a 9% increase in private sector income compared with 11% in 2007, maintaining the average growth of 7.2% over 2001–2008. There is variability of results within the sector, with 14 companies achieving growth above CPI level, and 14 companies achieving only minimal growth levels or failing to reach their 2007 level of private sector income.

### 5.2.1 Private Sector Income by Artform

The Dance sector achieved a 30% growth in private sector income in 2008 after a 12% fall in 2007. Orchestras, Chamber Music and Theatre have achieved the greatest average growth of nearly 10% per annum over the last eight years, with Theatre doubling this average between 2007 and 2008. Chamber Music and Opera both fell 4%.

#### Exhibit 16: Aggregate Private Sector Income by Artform<sup>25</sup>

\$'000	2001	2002	2003	2004	2005	2006	2007	2008	% Average Growth
<b>Theatre</b>	6,255	7,002	6,866	7,054	8,155	8,228	10,025	11,998	<b>9.75</b>
<b>Opera<sup>26</sup></b>	7,033	7,979	7,085	6,058	5,759	6,040	7,411	7,116	<b>0.17</b>
<b>Dance</b>	5,245	5,859	6,348	6,508	9,595	7,235	6,354	8,229	<b>6.65</b>
<b>Chamber Music<sup>27</sup></b>	3,680	3,941	3,954	4,864	6,036	5,980	7,428	7,132	<b>9.91</b>
<b>Orchestra</b>	6,150	6,031	7,968	8,380	9,140	10,696	11,267	11,840	<b>9.81</b>
<b>TOTAL</b>	<b>28,363</b>	<b>30,812</b>	<b>32,221</b>	<b>32,864</b>	<b>38,685</b>	<b>38,179</b>	<b>42,485</b>	<b>46,315</b>	<b>7.26</b>

<sup>25</sup> Part of the reported growth in private sector income over 2001–2008 reflects changes in companies' accounting practices in this period through recognition of in-kind sponsorships as income.

<sup>26</sup> 2004 SOSA reduced activity prior to 2004 *Ring Cycle* (reported in 2005).

<sup>27</sup> ABO included from 2003

### 5.2.2 Private Sector Income by State

The strongest private sector income growth from 2001-2008, occurred in Western Australia. This reflected boom economic conditions in the first part of the year. New South Wales, Victorian and New South Wales/Victorian companies recorded a total 9% increase from 2007 to 2008. New South Wales, with the highest base, achieved a 11% growth in private sector income between 2007 and 2008, compared with a 23.5% increase from 2006 to 2007. Queensland companies recorded an 8% drop in income between 2007 and 2008, with South Australia and Tasmanian results reporting small declines.

#### Exhibit 17: Aggregate Private Sector Income by State

\$'000	2001	2002	2003	2004	2005	2006	2007	2008	% Average Growth
<b>New South Wales<sup>28</sup></b>	11,507	10,752	11,717	13,123	16,073	15,299	18,890	21,000	<b>8.97</b>
<b>New South Wales / Victoria</b>	8,986	9,921	9,567	9,002	10,839	9,993	9,697	10,034	<b>1.59</b>
<b>Victoria</b>	3,179	3,870	4,318	3,692	4,148	4,700	4,626	5,007	<b>6.70</b>
<b>Queensland</b>	1,295	1,428	1,495	1,404	1,668	1,929	2,308	2,117	<b>7.27</b>
<b>South Australia<sup>29</sup></b>	1,085	2,572	1,812	1,932	2,058	1,521	1,590	1,538	<b>5.11</b>
<b>Western Australia</b>	2,095	2,084	3,125	3,438	3,576	4,282	4,787	6,045	<b>16.34</b>
<b>Tasmania</b>	216	185	187	273	323	455	587	574	<b>14.98</b>
<b>TOTAL</b>	<b>28,363</b>	<b>30,812</b>	<b>32,221</b>	<b>32,864</b>	<b>38,685</b>	<b>38,179</b>	<b>42,485</b>	<b>46,315</b>	<b>7.26</b>

<sup>28</sup> ABO included from 2003

<sup>29</sup> 2004 SOSA reduced activity prior to 2004 *Ring Cycle* (reported in 2005).

### **5.3 Annual Results**

In the years preceding the implementation of the MPAI's recommendations, the sector (excluding the Orchestras which were part of the ABC or other organisations during some or all of this period) regularly returned aggregate deficit annual operating results. Over the period 1992-1998, the sector incurred a cumulative deficit of \$(12.9) million.

Since the implementation of MPAI recommendations, the sector has returned to a generally stable operating base. It has recorded only one cumulative negative operating result over the period 2001–2008, and this was in 2002. Exhibit 19 shows that the cumulative positive operating result slowed nearly 30% in 2008 after an seven-year high in 2007, when favourable economic conditions prevailed<sup>30</sup>.

However, the effects of adverse economic conditions in the second half of 2008 were keenly felt by the sector, and their effects can be seen in the Abnormal Items figures in Exhibit 19. The positive operating result became nearly \$2 million deficit mainly because of losses on investments.

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<sup>30</sup> It should also be noted that since 2002 the aggregate net result has included grants paid under the Reserves Incentive Scheme (RIS) by the Australian and state governments, and special government funding in line with the Orchestras Review 2005 recommendations and other government initiatives.

### 5.3.1 Annual Results by Artform

2008 operating results for the sector show a considerable improvement over 2007 in the Dance sector, with the Opera sector returning to its 2006 six-year high. Operating results for Theatre and Orchestras revealed major financial strain in these two artforms.

#### Exhibit 18: Aggregate Net Results by Artform

\$'000	2001	2002	2003	2004	2005	2006	2007	2008
<b>Theatre</b>	1,246	1,105	-211	889	-638	118	3,987	1,081
<b>Opera</b>	1,186	-2,308	559	552	-1,341	1,826	1,736	1,865
<b>Dance</b>	804	-103	-675	630	3,270	123	-2,470	137
<b>Chamber Music</b>	262	-370	317	956	1,772	1,434	1,781	1,525
<b>Orchestra<sup>31</sup></b>	-981	483	-36	539	1,943	3,302	2,671	835
<b>TOTAL OPERATING RESULT</b>	<b>2,517</b>	<b>-1,193</b>	<b>-46</b>	<b>3,566</b>	<b>5,006</b>	<b>6,803</b>	<b>7,705</b>	<b>5,443</b>
<b>Included in above</b>								
<b>RIS Funding</b>		94	1,240	4,496	20	1,249		55
<b>Extinguish Debt Funding</b>						5,744	1,500	
<b>Other Abnormal Items</b>	2,698	3,533	1,336	5,003	355	1,772	2,260	-7,431
<b>TOTAL NET RESULT</b>	<b>5,215</b>	<b>2,434</b>	<b>2,530</b>	<b>13,065</b>	<b>5,381</b>	<b>15,568</b>	<b>11,465</b>	<b>-1,933</b>

<sup>31</sup> 2006 Orchestras result includes special one-off Orchestras Review funding (\$5.1m) and the first year of additional on-going Orchestras Review funding.

### 5.3.2 Annual Results by State

Companies in Queensland and Western Australia were the most affected by economic conditions in the second half of 2008, followed by companies in South Australia, Victoria and New South Wales.

#### Exhibit 19: Aggregate Net Results by State

\$'000	2001	2002	2003	2004	2005	2006	2007	2008
<b>New South Wales</b>	1,697	-556	441	410	1,396	164	4,049	1,393
<b>New South Wales/Victoria</b>	512	-3,410	-878	1,190	5,370	2,582	-775	2,644
<b>Victoria</b>	-45	1,572	621	1,480	1,220	735	1,217	421
<b>Queensland</b>	-470	118	-141	-266	378	545	1,467	-494
<b>South Australia</b>	-292	44	-674	358	-4,027	1,591	1,271	779
<b>West Australia</b>	684	766	592	339	656	710	138	-151
<b>Tasmania</b>	431	273	-7	55	13	476	338	851
<b>TOTAL OPERATING RESULT</b>	<b>2,517</b>	<b>-1,193</b>	<b>-46</b>	<b>3,566</b>	<b>5,006</b>	<b>6,803</b>	<b>7,705</b>	<b>5,443</b>
<b>Included in above</b>								
<b>RIS Funding</b>		94	1,240	4,496	20	1,249		55
<b>Extinguish Debt Funding</b>						5,744	1,500	
<b>Other Abnormal Items</b>	2,698	3,533	1,336	5,003	355	1,772	2,260	-7,431
<b>TOTAL NET RESULT</b>	<b>5,215</b>	<b>2,434</b>	<b>2,530</b>	<b>13,065</b>	<b>5,381</b>	<b>15,568</b>	<b>11,465</b>	<b>-1,933</b>

#### **5.4 Levels of Net Assets**

Exhibit 20 demonstrates that over the seven years from 1999 to 2008, consolidated net assets for the sector have increased significantly, from \$3.7 million to \$85.6 million (\$89.1m in 2007). However, the 2008 result shows a \$3.5 million fall in the value of the companies' net assets compared with 2007 (when they were \$89.1 million), as a result of unfavourable financial conditions.

The number of companies with positive net assets greater than \$1m has increased from six in 1999 to 20 in 2008, with a 340% growth in total net assets of this category of companies from \$18.9 million to \$83 million.

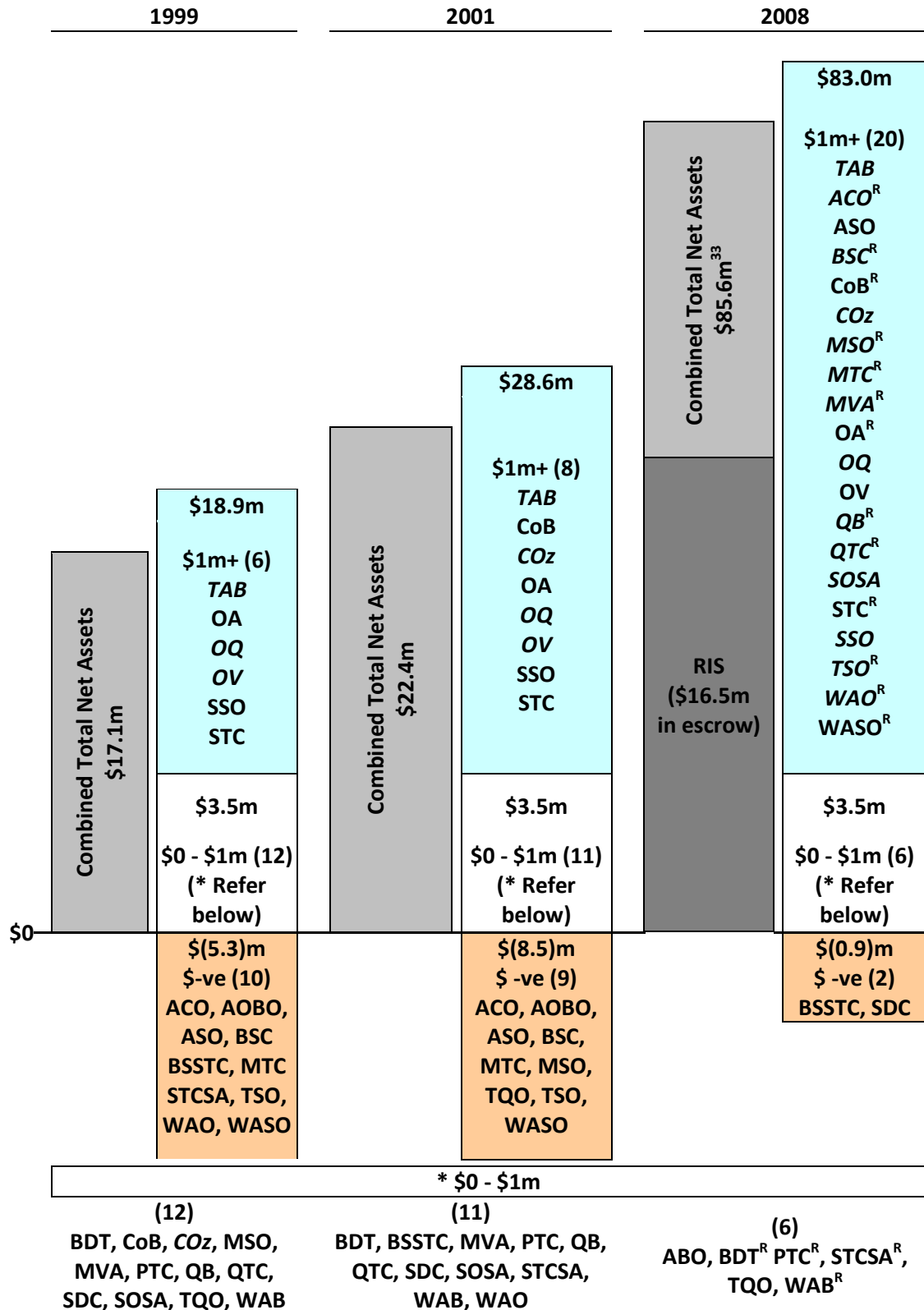
Conversely, the number of companies with negative net assets has reduced from 10 in 1999 to two in 2008.

In 1999 three companies had accumulated reserves in excess of the recommended 20% of annual expenditure. By 2008, 13 companies<sup>32</sup> had achieved this target.

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<sup>32</sup> If the additional expenditure as a result of the successful *Keating!* tour were adjusted in CoB's calculation it would also be included in this group.

Exhibit 20: Consolidated Net Assets



Note: Not to scale above chart areas indicative only.

<sup>R</sup> indicates company is in receipt of all or part of its RIS entitlement.

Companies in ***bold italics*** have reserves in excess of 20% annual expenditure.

<sup>33</sup> 2007 and 2008 data now includes the Opera Australia Capital Fund. AOBO's figure is now absorbed in OA.



## APPENDICES

## Appendix 1: Current Major Performing Arts Companies

	State	Category
Adelaide Symphony Orchestra (ASO)	SA	Orchestra
The Australian Ballet (TAB)	VIC	Dance
Australian Brandenburg Orchestra (ABO) *	NSW	Chamber
Australian Chamber Orchestra (ACO)	NSW	Chamber
Bangarra Dance Theatre (BDT)	NSW	Dance
Bell Shakespeare Company (BSC)	NSW	Theatre
Black Swan State Theatre Company (BSSTC)	WA	Theatre
Circus Australia (COz)	VIC	Theatre
Company B Ltd (CoB)	NSW	Theatre
Melbourne Symphony Orchestra (MSO)	VIC	Orchestra
Melbourne Theatre Company (MTC)	VIC	Theatre
Musica Viva Australia (MVA)	NSW	Chamber
Orchestra Victoria (OV)	VIC	Orchestra
Opera Australia (OA) including Australian Opera & Ballet Orchestra (AOBO) **	NSW	Opera
Opera Queensland (OQ)	QLD	Opera
Playbox Theatre Company trading as Malthouse Theatre (PTC)	VIC	Theatre
Queensland Ballet (QB)	QLD	Dance
The Queensland Orchestra (TQO)	QLD	Dance
Queensland Theatre Company (QTC)	QLD	Theatre
State Opera of South Australia (SOSA)	SA	Opera
State Theatre Company of South Australia (STCSA)	SA	Theatre
Sydney Dance Company (SDC)	NSW	Dance
Sydney Symphony Orchestra (SSO)	NSW	Orchestra
Sydney Theatre Company (STC)	NSW	Theatre
Tasmanian Symphony Orchestra (TSO)	TAS	Opera
West Australian Ballet (WAB)	WA	Dance
West Australian Opera (WAO)	WA	Opera
West Australian Symphony Orchestra (WASO)	WA	Orchestra

\* ABO joined MPAB in 2003 and, unless noted otherwise, is only included from that time.

\*\* AOBO has been consolidated as part of OA since 2007.

*Note:* Australian Dance Theatre left the MPAB in 2002. ADT has been omitted from all figures in this report.

**Appendix 2: Profile of Works by Artform and Origin of Work: 2001-2008**

	2001					2002				
	Australian Works			O/s Works	Total Works	Australian Works			O/s Works	Total Works
	New	Exist	Total			New	Exist	Total		
<b>Theatre/ Circus*</b>										
Subscription Season	26.5	18.5	45	28	73	20.5	9.5	30	29	59
Other Mainstage Season	7.0	1.0	8	3	11	10	6	16	5	21
<b>Theatre/ Circus Total</b>	<b>33.5</b>	<b>19.5</b>	<b>53</b>	<b>31</b>	<b>84</b>	<b>30.5</b>	<b>16</b>	<b>46</b>	<b>34</b>	<b>80</b>
<b>Opera</b>										
Subscription Season	2	0	2	26	28	1	0	1	23	24
Other Mainstage Season	3	2	5	7	12	2	0	2	6	8
<b>Opera Total</b>	<b>5</b>	<b>2.0</b>	<b>7</b>	<b>33</b>	<b>40</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>29</b>	<b>32</b>
<b>Dance</b>										
Subscription Season										
Ballet	12	11	23	30	53	13	9	22	24	46
Contemporary	4	2	6	0	6	3	1	4	0	4
Subscription Season Total	16	13	29	30	59	16	10	26	24	50
Other Mainstage										
Ballet	16	17	33	9	42	6	12	18	9	27
Contemporary	20	2	22	0	22	0	7	7	0	7
Other Mainstage Total	36	19	55	9	64	6	19	25	9	34
<b>Dance Total</b>	<b>52</b>	<b>32</b>	<b>84</b>	<b>39</b>	<b>123</b>	<b>22</b>	<b>29</b>	<b>51</b>	<b>33</b>	<b>84</b>
<b>Chamber Music</b>										
Subscription Season	3	3	6	220	226	7	32	39	156	195
Other Mainstage Season	8	17	25	79	104	1	18	19	58	77
Regional/Carnivale	11	20	31	299	330	8	50	58	214	272
<b>Chamber Music Total</b>	<b>11</b>	<b>20</b>	<b>31</b>	<b>299</b>	<b>330</b>	<b>8</b>	<b>50</b>	<b>58</b>	<b>214</b>	<b>272</b>
<b>TOTAL</b>	<b>101.5</b>	<b>73.5</b>	<b>175</b>	<b>402</b>	<b>577</b>	<b>63.5</b>	<b>94.5</b>	<b>158</b>	<b>310</b>	<b>468</b>
<b>Percentage total</b>	<b>17.6%</b>	<b>12.7%</b>	<b>30.3%</b>	<b>69.7%</b>		<b>13.6%</b>	<b>20.2%</b>	<b>33.8%</b>	<b>66.2%</b>	

Appendix 2 continued over..

Note: Generally works for Opera and Theatre are full evening works. Dance features both full length and shorter works while works presented by Chamber Music are all shorter / part evening works.

Appendix 2 continued over -

Appendix 2: Profile of Works by Artform and Origin of Work: 2001-2008 *continued*

	2003					2004				
	Australian Works			O/s Works	Total Works	Australian Works			O/s Works	Total Works
	New	Exist	Total			New	Exist	Total		
<b>Theatre/Circus*</b>										
Subscription Season	15.33	16.67	32	37	69	28.7	5.3	34	28	62
Other Mainstage Season	3	3	6	3	9	7.0	4.0	11	9	20
<b>Theatre/ Circus Total</b>	<b>18.33</b>	<b>19.7</b>	<b>38</b>	<b>40</b>	<b>78</b>	<b>35.7</b>	<b>9</b>	<b>45</b>	<b>37</b>	<b>82</b>
<b>Opera</b>										
Subscription Season	0	0	0	23	23	2	1	3	25	28
Other Mainstage Season	1	1	2	16	18	0	2	2	17	19
<b>Opera Total</b>	<b>1</b>	<b>1.0</b>	<b>2</b>	<b>39</b>	<b>41</b>	<b>2</b>	<b>3.0</b>	<b>5</b>	<b>42</b>	<b>47</b>
<b>Dance</b>										
<i>Subscription Season</i>										
Ballet	15	7	22	18	40	8	4	12	23	35
Contemporary	9	3	12	1	13	2	3	5	0	5
<i>Subscription Season Total</i>	<i>24</i>	<i>10</i>	<i>34</i>	<i>19</i>	<i>53</i>	<i>10</i>	<i>7</i>	<i>17</i>	<i>23</i>	<i>40</i>
<i>Other Mainstage</i>										
Ballet	14	8	22	6	28	13	18	31	3	34
Contemporary	4	3	7	0	7	0	16	16	0	16
<i>Other Mainstage Total</i>	<i>18</i>	<i>11</i>	<i>29</i>	<i>6</i>	<i>35</i>	<i>13</i>	<i>34</i>	<i>47</i>	<i>3</i>	<i>50</i>
<b>Dance Total</b>	<b>42</b>	<b>21</b>	<b>63</b>	<b>25</b>	<b>88</b>	<b>23</b>	<b>41</b>	<b>64</b>	<b>26</b>	<b>90</b>
<b>Chamber Music</b>										
Subscription Season	4	12	16	147	163	2	4	6	108	114
Other Mainstage Season	0	24	24	92	116	6	20	26	194	220
Regional/ <i>Carnivale</i>	4	36	40	239	279	8	24	32	302	334
<b>Chamber Music Total</b>	<b>4</b>	<b>36</b>	<b>40</b>	<b>239</b>	<b>279</b>	<b>8</b>	<b>85</b>	<b>93</b>	<b>629</b>	<b>722</b>
<b>TOTAL</b>	<b>65.3</b>	<b>77.7</b>	<b>143</b>	<b>343</b>	<b>486</b>	<b>68.7</b>	<b>138.3</b>	<b>207</b>	<b>734</b>	<b>941</b>
<b>Percentage total</b>	<b>13.4%</b>	<b>16.0%</b>	<b>29.4%</b>	<b>70.6%</b>		<b>7.3%</b>	<b>14.7%</b>	<b>22.0%</b>	<b>78.0%</b>	

\* Theatre includes Circus Oz, which uses a rolling show concept, developing new material for half of its 2001 and 2002 shows, one third of its 2003 show and two thirds of its 2004 show.

\*\* Regional touring programs included from 2004 to ensure consistency with other artforms.

\*\*\* If Chamber Music regional programs are excluded, percentage of Australian:overseas works in 2004 is 26:77%

Appendix 2 continued over -

Appendix 2: Profile of Works by Artform and Origin of Work: 2001-2008 *continued*

	2005					2006				
	Australian Works			O/s Works	Total Works	Australian Works			O/s Works	Total Works
	New	Exist	Total			New	Exist	Total		
<b>Theatre/ Circus</b>										
Subscription Season	10.7	17.3	28	34	62	15.3	15.7	31	36	67
Other Mainstage Season	6.0	2.0	8	6	14	11	4	15	4	19
<b>Theatre/ Circus Total</b>	<b>16.7</b>	<b>19.3</b>	<b>36</b>	<b>40</b>	<b>76</b>	<b>26.3</b>	19.7	<b>46</b>	<b>40</b>	<b>86</b>
<b>Opera</b>										
Subscription Season	0	0	0	20	20	0	1	1	20	21
Other Mainstage Season	1	3	4	10	14	4	0	4	5	9
<b>Opera Total</b>	<b>1</b>	<b>3</b>	<b>4</b>	<b>30</b>	<b>34</b>	<b>4</b>	1	<b>5</b>	<b>25</b>	<b>30</b>
<b>Dance</b>										
<i>Subscription Season</i>										
Ballet	7	8	15	12	27	11	4	15	13	28
Contemporary	5	0	5	1	6	2	3	5	1	6
<i>Subscription Season Total</i>	12	8	20	13	33	13	7	20	14	34
<i>Other Mainstage</i>										
Ballet	7	24	31	2	33	22	7	29	5	34
Contemporary	1	2	3	0	3	0	0	0	0	0
<i>Other Mainstage Total</i>	8	26	34	3	36	22	7	29	5	34
<b>Dance Total</b>	<b>20</b>	<b>34</b>	<b>54</b>	<b>15</b>	<b>69</b>	<b>35</b>	<b>14</b>	<b>49</b>	<b>19</b>	<b>68</b>
<b>Chamber Music</b>										
Subscription Season	3	9	12	125	137	2	2	4	108	112
Other Mainstage Season	2	33	35	120	155	2	27	29	150	179
	5	42	47	245	292	4	29	33	258	291
Regional/ <i>Carnivale</i>	0	102		870		0	175		767	
<b>Chamber Music Total</b>	<b>5</b>	<b>144</b>	<b>47</b>	<b>1,115</b>	<b>292</b>	<b>4</b>	<b>204</b>	<b>33</b>	<b>1,025</b>	<b>291</b>
<b>TOTAL</b>	<b>42.7</b>	<b>200.3</b>	<b>141</b>	<b>1,200</b>	<b>471</b>	<b>69.3</b>	<b>238.7</b>	<b>133</b>	<b>1,109</b>	<b>475</b>
<b>Percentage total</b>	<b>9.0%</b>	<b>42.5%</b>	<b>29.9%</b>	<b>254.8%</b>		<b>14.6%</b>	<b>50.3%</b>	<b>28.0%</b>	<b>233.5%</b>	

Note: Generally works for Opera and Theatre are full evening works. Dance features both full length and shorter works while works presented by Chamber Music are all shorter / part evening works.

Appendix 2 continued over –

Appendix 2: Profile of Works by Artform and Origin of Work: 2001-2008 *continued*

	2007					2008				
	Australian Works			O/s Works	Total Works	Australian Works			O/s Works	Total Works
	New	Exist	Total			New	Exist	Total		
<b>Theatre/ Circus*</b>										
Subscription Season	14.3	12.7	27	33	60	18.5	17.5	36	37	73
Other Mainstage Season	8	3	11	6	17	7	6	13	4	17
<b>Theatre/ Circus Total</b>	<b>22.3</b>	<b>15.7</b>	<b>38</b>	<b>39</b>	<b>77</b>	<b>25.5</b>	<b>23.5</b>	<b>49</b>	<b>41</b>	<b>90</b>
<b>Opera</b>										
Subscription Season	1	1	2	26	28	0	0	0	23	23
Other Mainstage Season	0	2	2	7	9	1	0	1	11	12
<b>Opera Total</b>	<b>1</b>	<b>3</b>	<b>4</b>	<b>33</b>	<b>37</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>34</b>	<b>35</b>
<b>Dance</b>										
<i>Subscription Season</i>										
Ballet	14	1	15	20	35	17	6	23	27	50
Contemporary	2	12	14	0	14	6	0	6	0	6
<i>Subscription Season Total</i>	16	13	29	20	49	23	6	29	27	56
<i>Other Mainstage</i>										
Ballet	20	2	22	9	31	7	15	22	0	22
Contemporary	0	2	2	0	2	0	2	2	0	2
<i>Other Mainstage Total</i>	20	4	24	9	33	7	17	24	0	24
<b>Dance Total</b>	<b>36</b>	<b>17</b>	<b>53</b>	<b>29</b>	<b>82</b>	<b>30</b>	<b>23</b>	<b>53</b>	<b>27</b>	<b>80</b>
<b>Chamber Music</b>										
Subscription Season	5	15	20	147	167	5	4	9	115	124
Other Mainstage Season	2	39	41	189	230	2	22	24	192	216
	<b>7</b>	<b>54</b>	<b>61</b>	<b>336</b>	<b>397</b>	<b>7</b>	<b>26</b>	<b>33</b>	<b>307</b>	<b>340</b>
Regional/ <i>Carnivale</i>	0	231	231	998	1229	0	174	174	779	953
New Festival activity	0					0	43	43	95	138
<b>Chamber Music Total</b>	<b>7</b>	<b>285</b>	<b>292</b>	<b>1,334</b>	<b>1,626</b>	<b>7</b>	<b>200</b>	<b>207</b>	<b>1,086</b>	<b>1,293</b>
<b>TOTAL</b>	<b>66.3</b>	<b>320.7</b>	<b>387</b>	<b>1,435</b>	<b>1,822</b>	<b>63.5</b>	<b>246.5</b>	<b>310</b>	<b>1,188</b>	<b>1,498</b>
<b>Percentage total</b>	<b>3.6%</b>	<b>17.6%</b>	<b>21.2%</b>	<b>78.8%</b>		<b>4.2%</b>	<b>16.5%</b>	<b>20.7%</b>	<b>79.3%</b>	

\*\* Regional touring programs included from 2004 to ensure consistency with other artforms

\*\*\* If Chamber Music regional programs are excluded, percentage of Australian:overseas in 2005 is 30%:70%, 2006 is 28%:78%; 2007 is 25%:75%; and 2008 is 26%:74%.

Note: Generally works for Opera and Theatre are full evening works. Dance features both full length and shorter works while works presented by Chamber Music are all shorter-part evening works.

\*\*\*\* Inaugural Musica Viva Sydney Festival held in 2008.

Appendix 3: Profile of New and Existing Production: 2001-2008

	2001			2002			2003			2004		
	New	Existing	Total	New	Existing	Total	New	Existing	Total	New	Existing	Total
<b>Theatre *</b>												
Subscription Season	38.5	7.5	46	41.5	19.5	61	57.3	12.7	70	51.7	10.3	62
Other Mainstage Season	8	1	9	13	8	21	7	2	9	15	5	20
<b>Theatre Total</b>	<b>46.5</b>	<b>8.5</b>	<b>55</b>	<b>54.5</b>	<b>27.5</b>	<b>82</b>	<b>64.3</b>	<b>14.7</b>	<b>79</b>	<b>66.7</b>	<b>15.3</b>	<b>82</b>
<b>Opera</b>												
Subscription Season	14	14	28	13	11	24	5	19	24	13	15	28
Other Mainstage Season	4	1	5	8	0	8	10	8	18	12	6	18
<b>Opera Total</b>	<b>18</b>	<b>15</b>	<b>33</b>	<b>21</b>	<b>11</b>	<b>32</b>	<b>15</b>	<b>27</b>	<b>42</b>	<b>25</b>	<b>21</b>	<b>46</b>
<b>Dance</b>												
<i>Subscription Season</i>												
Ballet	13	37	50	13	35	48	18	21	39	14	19	33
Contemporary	4	2	6	3	1	4	11	1	12	2	3	5
<i>Subscription Season Total</i>	<i>17</i>	<i>39</i>	<i>56</i>	<i>16</i>	<i>36</i>	<i>52</i>	<i>29</i>	<i>22</i>	<i>51</i>	<i>16</i>	<i>22</i>	<i>38</i>
<i>Other Mainstage</i>												
Ballet	19	20	39	6	21	27	14	14	28	22	12	34
Contemporary	22	0	22	0	7	7	4	3	7	0	16	16
<i>Other Mainstage Total</i>	<i>41</i>	<i>20</i>	<i>61</i>	<i>6</i>	<i>28</i>	<i>34</i>	<i>18</i>	<i>17</i>	<i>35</i>	<i>22</i>	<i>28</i>	<i>50</i>
<b>Dance Total</b>	<b>58</b>	<b>59</b>	<b>117</b>	<b>22</b>	<b>64</b>	<b>86</b>	<b>47</b>	<b>39</b>	<b>86</b>	<b>38</b>	<b>50</b>	<b>88</b>
<b>TOTAL</b>	<b>123</b>	<b>82.5</b>	<b>205</b>	<b>97.5</b>	<b>103</b>	<b>200</b>	<b>126.3</b>	<b>80.7</b>	<b>207</b>	<b>129.7</b>	<b>86.3</b>	<b>216</b>
<b>Percentage Total</b>	<b>60%</b>	<b>40%</b>		<b>49%</b>	<b>51%</b>		<b>61%</b>	<b>39%</b>		<b>60%</b>	<b>40%</b>	

Appendix 3 continued over ...

Appendix 3 continued over -

**Appendix 3: Profile of New and Existing Production: 2001-2008**

*Continued*

	2005			2006			2007			2008		
	New	Existing	Total	New	Existing	Total	New	Existing	Total	New	Existing	Total
<b>Theatre *</b>												
Subscription Season	49.7	12.8	62.5	46.3	20.7	67	49.3	12.7	62	46.5	26.5	73
Other Mainstage Season	12	2	14	13	6	19	10	2	12	10	7	17
<b>Theatre Total</b>	<b>61.7</b>	<b>14.3</b>	<b>76</b>	<b>59.3</b>	<b>26.7</b>	<b>86</b>	<b>59.3</b>	<b>14.7</b>	<b>74</b>	<b>56.5</b>	<b>33.5</b>	<b>90</b>
<b>Opera</b>												
Subscription Season	9	13	22	8	13	21	12	14	26	10	14	24
Other Mainstage Season	3	7	10	9	0	9	9	4	13	11	0	11
<b>Opera Total</b>	<b>12</b>	<b>20</b>	<b>32</b>	<b>17</b>	<b>13</b>	<b>30</b>	<b>21</b>	<b>18</b>	<b>39</b>	<b>21</b>	<b>14</b>	<b>35</b>
<b>Dance</b>												
<i>Subscription Season</i>												
Ballet	11	18	29	13	16	29	18	7	25	32	18	50
Contemporary	6	0	6	2	3	5	4	2	6	6	0	6
<i>Subscription Season Total</i>	<i>17</i>	<i>18</i>	<i>35</i>	<i>15</i>	<i>19</i>	<i>34</i>	<i>22</i>	<i>9</i>	<i>31</i>	<i>38</i>	<i>18</i>	<i>56</i>
<i>Other Mainstage</i>												
Ballet	28	3	31	24	13	37	20	13	33	8	14	22
Contemporary	1	2	3	0	0	0	0	2	2	0	2	2
<i>Other Mainstage Total</i>	<i>29</i>	<i>5</i>	<i>34</i>	<i>24</i>	<i>13</i>	<i>37</i>	<i>20</i>	<i>15</i>	<i>35</i>	<i>8</i>	<i>16</i>	<i>24</i>
<b>Dance Total</b>	<b>46</b>	<b>23</b>	<b>69</b>	<b>39</b>	<b>32</b>	<b>71</b>	<b>42</b>	<b>24</b>	<b>66</b>	<b>46</b>	<b>34</b>	<b>80</b>
<b>TOTAL</b>	<b>120</b>	<b>57.3</b>	<b>177</b>	<b>115</b>	<b>71.7</b>	<b>187</b>	<b>122</b>	<b>56.7</b>	<b>179</b>	<b>124</b>	<b>81.5</b>	<b>205</b>
<b>Percentage Total</b>	<b>68%</b>	<b>32%</b>		<b>62%</b>	<b>38%</b>		<b>68%</b>	<b>32%</b>		<b>60%</b>	<b>40%</b>	

\*Theatre includes Circus Oz, which uses a rolling show concept, developing new material for one third to one half of its program each year

Note: Chamber Music/Orchestras are not included as the companies present concerts, not productions

Appendix 4: Paid Mainstage Capital City Attendances by Company: 2001-2008

Appendix 4A: Paid Mainstage Capital City Attendances by Company: 2001

('000)

Rank	Company	Home City	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total	Total %
1	OA <sup>(b)</sup>	Sydney	-	-	-	-	<b>78</b>	-	178	<b>256</b>	<b>11.84</b>
2	STC	Sydney	-	-	<b>7</b>	-	<i>(a)</i>	-	229	<b>236</b>	<b>10.91</b>
3	MTC	Melbourne	<i>(a)</i>	-	<b>4</b>	<b>2</b>	222	-	<b>4</b>	<b>232</b>	<b>10.73</b>
4	TAB	Melbourne	<b>8</b>	<b>5</b>	<b>3</b>	<b>2</b>	75	-	<b>120</b>	<b>213</b>	<b>9.85</b>
5	SSO	Sydney	-	-	-	-	-	-	207	<b>207</b>	<b>9.57</b>
6	MSO	Melbourne	-	-	-	-	133	-	-	<b>133</b>	<b>6.15</b>
7	CoB	Sydney	<b>9</b>	<b>3</b>	-	-	<b>3</b>	-	91	<b>106</b>	<b>4.90</b>
8	Bell	Sydney	-	-	<b>14</b>	<b>3</b>	<b>18</b>	<b>5</b>	49	<b>89</b>	<b>4.11</b>
9	ACO	Sydney	<b>5</b>	<b>7</b>	<b>8</b>	-	<b>17</b>	<b>4</b>	37	<b>78</b>	<b>3.61</b>
10	QTC	Brisbane	-	69	-	-	-	-	-	<b>69</b>	<b>3.19</b>
11	WASO	Perth	-	-	-	-	-	66	-	<b>66</b>	<b>3.05</b>
11	MVA	Sydney	<b>9</b>	<b>5</b>	<b>5</b>	<b>1</b>	<b>15</b>	<b>7</b>	24	<b>66</b>	<b>3.05</b>
13	Playbox	Melbourne	-	-	<b>2</b>	-	49	-	<b>10</b>	<b>61</b>	<b>2.82</b>
14	STCSA	Adelaide	55	-	-	-	<i>(a)</i>	-	-	<b>55</b>	<b>2.54</b>
15	ASO	Adelaide	44	-	-	-	-	-	-	<b>44</b>	<b>2.03</b>
16	SDC	Sydney	<b>4</b>	<b>5</b>	<b>3</b>	-	<b>11</b>	-	18	<b>41</b>	<b>1.90</b>
17	TQO	Brisbane	-	33	-	-	-	-	-	<b>33</b>	<b>1.53</b>
18	COz	Melbourne	-	-	-	<b>3</b>	25	-	<b>2</b>	<b>30</b>	<b>1.39</b>
19	OQ	Brisbane	-	28	-	-	-	-	-	<b>28</b>	<b>1.29</b>
20	TSO	Hobart	-	-	-	24	-	-	<b>1</b>	<b>25</b>	<b>1.16</b>
21	SOSA	Adelaide	21	-	-	-	-	-	-	<b>21</b>	<b>0.97</b>
21	BSTC	Perth	-	<i>(a)</i>	-	-	-	21	<i>(a)</i>	<b>21</b>	<b>0.97</b>
23	WAB	Perth	-	-	-	-	-	16	-	<b>16</b>	<b>0.74</b>
25	QB	Brisbane	-	13	-	-	-	-	-	<b>13</b>	<b>0.60</b>
25	Bangarra	Sydney	-	<b>3</b>	-	-	<b>3</b>	-	7	<b>13</b>	<b>0.60</b>
26	WAO	Perth	-	-	-	-	-	11	-	<b>11</b>	<b>0.51</b>
<b>Total Home Stage</b>			<b>120</b>	<b>143</b>	<b>0</b>	<b>24</b>	<b>504</b>	<b>114</b>	<b>840</b>	<b>1,745</b>	<b>80.67</b>
<b>Total Touring</b>			<b>35</b>	<b>28</b>	<b>46</b>	<b>11</b>	<b>145</b>	<b>16</b>	<b>137</b>	<b>418</b>	<b>19.33</b>
<b>Total</b>			<b>155</b>	<b>171</b>	<b>46</b>	<b>35</b>	<b>649</b>	<b>130</b>	<b>977</b>	<b>2,163</b>	<b>100</b>

Percentage capital city

Participation rate <sup>(c)</sup>	18.2	13.7	19.4	23.9	24.4	12.4	31.2	23.2
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(a) Company's production / co-production performed as part of another company's mainstage season.

(b) Opera Australia's productions are hired by OQ, SOSA and WAO and presented within those companies' seasons.

(c) Attendances divided by capital city population over 18 years, assuming each person attended only once.

Note: Paid Attendances to self presented capital city mainstage performances.

**Bold italics** denote attendances for touring companies.

Excludes pit orchestras (AOBO, OV).

## Appendix 4B: Paid Mainstage Capital City Attendances by Company: 2002

('000)

Rank	Company	Home City	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total	Total %
1	OA <sup>(b)</sup>	Sydney	-	-	-	-	<b>70</b>	-	193	<b>263</b>	<b>13.18</b>
2	MTC	Melbourne	-	<b>6</b>	-	<b>1</b>	244	-	<b>(a)</b>	<b>251</b>	<b>12.58</b>
3	STC	Sydney	<b>(a)</b>	-	<b>10</b>	-	<b>(a)</b>	-	233	<b>243</b>	<b>12.86</b>
4	TAB	Melbourne	<b>12</b>	<b>7</b>	<b>6</b>	<b>1</b>	73	<b>3</b>	<b>100</b>	<b>202</b>	<b>10.12</b>
5	SSO	Sydney	-	-	-	-	-	-	189	<b>189</b>	<b>9.47</b>
6	MSO	Melbourne	-	-	-	-	118	-	-	<b>118</b>	<b>5.91</b>
7	Bell	Sydney	-	<b>11</b>	<b>16</b>	-	<b>19</b>	-	37	<b>83</b>	<b>4.16</b>
8	ACO	Sydney	<b>5</b>	<b>8</b>	<b>8</b>	-	<b>16</b>	<b>6</b>	33	<b>76</b>	<b>3.81</b>
9	COz	Melbourne	-	<b>10</b>	-	-	21	-	<b>26</b>	<b>57</b>	<b>2.86</b>
10	Co B	Sydney	-	-	-	-	-	-	55	<b>55</b>	<b>2.76</b>
11	QTC	Brisbane	-	54	-	-	<b>(a)</b>	-	-	<b>54</b>	<b>2.71</b>
12	Playbox	Melbourne	<b>4</b>	<b>3</b>	-	-	39	-	<b>7</b>	<b>53</b>	<b>2.66</b>
12	WASO	Perth	-	-	-	-	-	53	-	<b>53</b>	<b>2.66</b>
14	STCSA	Adelaide	46	-	-	-	-	-	-	<b>46</b>	<b>2.30</b>
15	MVA	Sydney	<b>6</b>	<b>3</b>	<b>3</b>	<b>1</b>	<b>10</b>	<b>5</b>	15	<b>43</b>	<b>2.15</b>
16	TQO	Brisbane	-	35	-	-	-	-	-	<b>35</b>	<b>1.75</b>
17	ASO	Adelaide	34	-	-	-	-	-	-	<b>34</b>	<b>1.70</b>
18	SDC	Sydney	-	<b>3</b>	<b>3</b>	<b>2</b>	<b>3</b>	-	19	<b>30</b>	<b>1.50</b>
19	OQ	Brisbane	-	19	-	-	-	-	-	<b>19</b>	<b>0.95</b>
20	WAB	Perth	-	-	-	-	-	15	-	<b>15</b>	<b>0.75</b>
20	QB	Brisbane	-	15	-	-	-	-	-	<b>15</b>	<b>0.75</b>
22	TSO	Hobart	-	-	-	14	-	-	-	<b>14</b>	<b>0.70</b>
22	WAO	Perth	-	-	-	-	-	14	-	<b>14</b>	<b>0.70</b>
24	BSTC	Perth	<b>1</b>	-	-	-	-	12	-	<b>13</b>	<b>0.65</b>
25	SOSA	Adelaide	12	-	-	-	-	-	-	<b>12</b>	<b>0.60</b>
26	Bangarra	Sydney	-	<b>2</b>	-	-	<b>3</b>	-	4	<b>9</b>	<b>0.45</b>
<b>Total Home Stage</b>			<b>92</b>	<b>123</b>	<b>0</b>	<b>14</b>	<b>495</b>	<b>94</b>	<b>778</b>	<b>1,596</b>	<b>79.96</b>
<b>Total Touring</b>			<b>28</b>	<b>53</b>	<b>46</b>	<b>5</b>	<b>121</b>	<b>14</b>	<b>133</b>	<b>400</b>	<b>20.04</b>
<b>Total</b>			<b>120</b>	<b>176</b>	<b>46</b>	<b>19</b>	<b>616</b>	<b>108</b>	<b>911</b>	<b>1,996</b>	<b>100</b>

## Percentage capital city

Participation rate<sup>(c)</sup>                      **14.1**    **14.1**    **19.4**    **13**    **23.1**    **10.3**    **29.1**    **21.4**

(a) Company's production / co-production performed as part of another company's mainstage season.

(b) Opera Australia's productions are hired by OQ, SOSA and WAO and presented within those companies' seasons.

(c) Attendances divided by capital city population over 18 years, assuming each person attended only once.

Note: Paid Attendances to self presented capital city mainstage performances.

**Bold italics** denote attendances for touring companies.

Excludes pit orchestras (AOBO, OV).

Appendix 4C: Paid Mainstage Capital City Attendances by Company: 2003

('000)

Rank	Company	Home City	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total	Total %
1	OA <sup>(b)</sup>	Sydney	-	-	-	-	<b>82</b>	-	202	<b>284</b>	<b>12.86</b>
2	STC	Sydney	-	<b>(a)</b>	<b>4</b>	<b>1</b>	<b>1</b>	<b>1</b>	267	<b>274</b>	<b>12.40</b>
3	MTC	Melbourne	-	-	-	-	258	<b>(a)</b>	<b>(a)</b>	<b>258</b>	<b>11.68</b>
4	TAB	Melbourne	<b>16</b>	<b>7</b>	<b>8</b>	-	87	-	<b>118</b>	<b>236</b>	<b>10.68</b>
5	SSO	Sydney	-	-	-	-	-	-	191	<b>191</b>	<b>8.65</b>
6	MSO	Melbourne	-	-	-	-	106	-	-	<b>106</b>	<b>4.80</b>
7	Bell	Sydney	-	<b>4</b>	<b>15</b>	<b>3</b>	<b>24</b>	<b>2</b>	40	<b>88</b>	<b>3.98</b>
8	ACO	Sydney	<b>6</b>	<b>6</b>	<b>9</b>	-	<b>17</b>	<b>6</b>	35	<b>79</b>	<b>3.58</b>
9	CoB	Sydney	-	-	-	-	-	-	73	<b>73</b>	<b>3.30</b>
9	COz	Melbourne	-	-	<b>13</b>	-	31	-	<b>29</b>	<b>73</b>	<b>3.30</b>
11	QTC	Brisbane	<b>(a)</b>	69	-	-	-	-	-	<b>69</b>	<b>3.12</b>
12	SDC	Sydney	-	<b>6</b>	-	-	<b>9</b>	-	46	<b>61</b>	<b>2.76</b>
13	WASO	Perth	-	-	-	-	-	58	-	<b>58</b>	<b>2.63</b>
14	ASO	Adelaide	47	-	-	-	-	-	-	<b>47</b>	<b>2.13</b>
15	STCSA	Adelaide	43	<b>(a)</b>	-	-	-	-	-	<b>43</b>	<b>1.95</b>
15	MVA	Sydney	<b>6</b>	<b>3</b>	<b>4</b>	<b>1</b>	<b>12</b>	<b>5</b>	12	<b>43</b>	<b>1.95</b>
17	Playbox	Melbourne	-	-	-	-	29	-	-	<b>29</b>	<b>1.31</b>
18	TQO	Brisbane	-	28	-	-	-	-	-	<b>28</b>	<b>1.27</b>
19	OQ	Brisbane	-	25	-	-	-	-	-	<b>25</b>	<b>1.13</b>
19	BSTC	Perth	-	-	-	-	-	17	<b>8</b>	<b>25</b>	<b>1.13</b>
21	ABO	Sydney	-	-	-	-	-	-	21	<b>21</b>	<b>0.95</b>
23	WAB	Perth	-	-	-	-	-	18	-	<b>18</b>	<b>0.81</b>
23	TSO	Hobart	-	-	-	18	-	-	-	<b>18</b>	<b>0.81</b>
23	Bangarra	Sydney	-	<b>3</b>	<b>3</b>	-	<b>6</b>	-	6	<b>18</b>	<b>0.81</b>
25	QB	Brisbane	-	17	-	-	-	-	-	<b>17</b>	<b>0.77</b>
26	WAO	Perth	-	-	-	-	-	14	-	<b>14</b>	<b>0.63</b>
27	SOSA	Adelaide	11	-	-	-	<b>2</b>	-	-	<b>13</b>	<b>0.59</b>
<b>Total Home Stage</b>			<b>101</b>	<b>139</b>	<b>0</b>	<b>18</b>	<b>511</b>	<b>107</b>	<b>893</b>	<b>1,769</b>	<b>80.08</b>
<b>Total Touring</b>			<b>28</b>	<b>29</b>	<b>56</b>	<b>5</b>	<b>153</b>	<b>14</b>	<b>155</b>	<b>440</b>	<b>19.92</b>
<b>Total</b>			<b>129</b>	<b>168</b>	<b>56</b>	<b>23</b>	<b>664</b>	<b>121</b>	<b>1,048</b>	<b>2,209</b>	<b>100</b>

Percentage capital city

Participation rate <sup>(c)</sup>	15.2	13.5	23.6	15.7	24.9	11.5	33.4	23.7
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(a) Company's production / co-production performed as part of another company's mainstage season.

(b) Opera Australia's productions are hired by OQ, SOSA and WAO and presented within those companies' seasons.

(c) Attendances divided by capital city population over 18 years, assuming each person attended only once.

Note: Paid Attendances to self presented capital city mainstage performances.

**Bold italics** denote attendances for touring companies.

Excludes pit orchestras (AOBO, OV).

Appendix 4D: Paid Mainstage Capital City Attendances by Company: 2004

('000)

Rank	Company	Home City	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total	Total %
1	STC	Sydney	-	<i>(a)</i>	6	-	<i>(a)</i>	-	269	275	12.97
2	OA <sup>(b)</sup>	Sydney	-	-	-	-	51	-	193	244	11.50
3	MTC	Melbourne	-	-	-	-	240	-	<i>(a)</i>	240	11.32
4	TAB	Melbourne	11	5	3	-	84	2	105	210	9.90
5	SSO	Sydney	-	-	-	-	-	-	182	182	8.58
6	MSO	Melbourne	-	-	-	-	116	-	-	116	5.47
7	Bell	Sydney	4	3	17	2	21	4	38	89	4.20
8	ACO	Sydney	5	8	8	-	18	6	35	80	3.77
9	QTC	Brisbane	-	75	-	-	-	-	-	75	3.54
10	COz	Melbourne	16	-	-	-	36	-	22	74	3.49
11	CoB	Sydney	-	<i>(a)</i>	-	-	-	-	69	69	3.25
12	WASO	Perth	-	-	-	-	-	60	-	60	2.83
13	MVA	Sydney	5	3	3	1	11	5	16	44	2.07
14	ASO	Adelaide	43	-	-	-	-	-	-	43	2.03
15	STCSA	Adelaide	39	-	-	-	<i>(a)</i>	-	-	39	1.84
16	SDC	Sydney	-	3	2	-	8	2	19	34	1.60
17	TQO	Brisbane	-	32	-	-	-	-	-	32	1.51
18	WAB	Perth	-	-	-	-	-	29	-	29	1.37
19	Playbox	Melbourne	<i>(a)</i>	-	-	-	27	-	-	27	1.27
20	ABO	Sydney	-	-	-	-	-	-	25	25	1.18
20	OQ	Brisbane	-	25	-	-	-	-	-	25	1.18
22	TSO	Hobart	-	-	-	24	-	-	-	24	1.13
23	Bangarra	Sydney	2	4	-	-	6	-	11	23	1.08
24	SOSA	Adelaide	21	-	-	-	-	-	-	21	0.99
25	QB	Brisbane	-	18	-	-	-	-	-	18	0.85
26	WAO	Perth	-	-	-	-	-	14	-	14	0.66
27	BSTC	Perth	-	-	-	-	<i>(a)</i>	9	-	9	0.42
<b>Total Home Stage</b>			<b>103</b>	<b>150</b>	<b>0</b>	<b>24</b>	<b>503</b>	<b>112</b>	<b>857</b>	<b>1,749</b>	<b>82.46</b>
<b>Total Touring</b>			<b>43</b>	<b>26</b>	<b>39</b>	<b>3</b>	<b>115</b>	<b>19</b>	<b>127</b>	<b>372</b>	<b>17.54</b>
<b>Total</b>			<b>146</b>	<b>176</b>	<b>39</b>	<b>27</b>	<b>618</b>	<b>131</b>	<b>984</b>	<b>2,121</b>	<b>100</b>

Percentage capital city

Participation rate <sup>(c)</sup>	17.2	14.1	16.4	18.4	23.2	12.5	31.8	22.7
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(a) Company's production / co-production performed as part of another company's mainstage season.

(b) Opera Australia's productions are hired by OQ, SOSA and WAO and presented within those companies' seasons.

(c) Attendances divided by capital city population over 20 years, assuming each person attended only once.

Note: Paid Attendances to self presented capital city mainstage performances.

**Bold italics** denote attendances for touring companies.

Excludes pit orchestras (AOBO, OV).

Appendix 4E: Paid Mainstage Capital City Attendances by Company: 2005

('000)

Rank	Company	Home City	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total	Total %
1	OA <sup>(b)</sup>	Sydney	-	-	-	-	<b>89</b>	-	217	<b>306</b>	<b>14.43</b>
2	MTC	Melbourne	<b>(a)</b>	<b>(a)</b>	<b>(d)</b>	-	234	-	<b>(a)</b>	<b>234</b>	<b>11.04</b>
3	STC	Sydney	<b>(a)</b>	-	<b>(d)</b>	-	<b>(a)</b>	-	224	<b>224</b>	<b>10.57</b>
4	TAB	Melbourne	<b>10</b>	<b>13</b>	<b>5</b>	-	85	-	<b>104</b>	<b>217</b>	<b>10.24</b>
5	SSO	Sydney	-	-	-	-	-	-	186	<b>186</b>	<b>8.77</b>
6	MSO	Melbourne	-	-	-	-	102	-	-	<b>102</b>	<b>4.81</b>
7	ACO	Sydney	<b>6</b>	<b>8</b>	<b>8</b>	-	<b>20</b>	<b>7</b>	36	<b>85</b>	<b>4.01</b>
8	QTC	Brisbane	-	71	-	-	-	-	-	<b>71</b>	<b>3.35</b>
9	CoB	Sydney	-	<b>(a)</b>	-	-	<b>(a)</b>	-	65	<b>65</b>	<b>3.07</b>
10	STCSA	Adelaide	58	-	-	-	-	-	<b>(a)</b>	<b>58</b>	<b>2.74</b>
11	Playbox	Melbourne	-	-	-	-	56	-	<b>(a)</b>	<b>56</b>	<b>2.64</b>
11	WASO	Perth	-	-	-	-	-	56	-	<b>56</b>	<b>2.64</b>
13	COz	Melbourne	-	<b>8</b>	-	-	24	-	<b>22</b>	<b>54</b>	<b>2.55</b>
14	MVA	Sydney	<b>6</b>	<b>4</b>	<b>4</b>	<b>1</b>	<b>14</b>	<b>6</b>	16	<b>51</b>	<b>2.41</b>
15	Bell	Sydney	-	-	<b>11</b>	-	<b>11</b>	-	28	<b>50</b>	<b>2.36</b>
16	ASO	Adelaide	47	-	-	-	-	-	-	<b>47</b>	<b>2.22</b>
17	SDC	Sydney	-	<b>5</b>	<b>4</b>	-	<b>6</b>	-	18	<b>33</b>	<b>1.56</b>
18	TQO	Brisbane	-	31	-	-	-	-	-	<b>31</b>	<b>1.46</b>
19	ABO	Sydney	-	<b>1</b>	-	-	<b>1</b>	<b>1</b>	27	<b>30</b>	<b>1.42</b>
20	WAB	Perth	-	-	<b>(d)</b>	-	<b>(a)</b>	29	-	<b>29</b>	<b>1.37</b>
21	OQ	Brisbane	-	28	-	-	-	-	-	<b>28</b>	<b>1.32</b>
22	Bangarra	Sydney	-	<b>5</b>	-	-	<b>7</b>	-	11	<b>23</b>	<b>1.08</b>
23	TSO	Hobart	-	-	-	21	-	-	-	<b>21</b>	<b>0.99</b>
23	QB	Brisbane	-	18	-	<b>1</b>	-	-	<b>2</b>	<b>21</b>	<b>0.99</b>
25	WAO	Perth	-	-	-	-	-	18	-	<b>18</b>	<b>0.85</b>
26	SOSA	Adelaide	13	-	-	-	-	-	-	<b>13</b>	<b>0.61</b>
27	BSTC	Perth	-	-	-	-	<b>(a)</b>	11	-	<b>11</b>	<b>0.52</b>
<b>Total Home Stage</b>			<b>118</b>	<b>148</b>	<b>0</b>	<b>21</b>	<b>501</b>	<b>114</b>	<b>828</b>	<b>1,730</b>	<b>81.60</b>
<b>Total Touring</b>			<b>22</b>	<b>44</b>	<b>32</b>	<b>2</b>	<b>148</b>	<b>14</b>	<b>128</b>	<b>390</b>	<b>18.40</b>
<b>Total</b>			<b>140</b>	<b>192</b>	<b>32</b>	<b>23</b>	<b>649</b>	<b>128</b>	<b>956</b>	<b>2,120</b>	<b>100</b>

Percentage capital city

Participation rate <sup>(c)</sup>	<b>16.5</b>	<b>15.4</b>	<b>13.5</b>	<b>15.7</b>	<b>24.4</b>	<b>12.2</b>	<b>30.5</b>	<b>22.7</b>
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(a) Company's production / co-production performed as part of another company's mainstage season.

(b) Opera Australia's productions are hired by OQ, SOSA and WAO and presented within those companies' seasons.

(c) Attendances divided by capital city population over 20 years, assuming each person attended only once.

Note: Paid Attendances to self presented capital city mainstage performances.

**Bold italics** denote attendances for touring companies.

Excludes pit orchestras (AOBO, OV).

## Appendix 4F: Paid Mainstage Capital City Attendances by Company: 2006

('000)

Rank	Company	Home City	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total	Total %
1	OA <sup>(b)</sup>	Sydney	<b>(a)</b>	<b>18</b>	<b>12</b>	-	<b>77</b>	-	206	<b>313</b>	<b>14.85</b>
2	STC	Sydney	-	-	-	<b>1</b>	<b>(a)</b>	-	230	<b>231</b>	<b>10.96</b>
3	MTC	Melbourne	-	-	-	-	225	-	<b>(a)</b>	<b>225</b>	<b>10.67</b>
4	SSO	Sydney	-	-	-	-	-	-	196	<b>196</b>	<b>9.30</b>
5	TAB	Melbourne	<b>6</b>	<b>11</b>	-	-	85	-	<b>78</b>	<b>180</b>	<b>8.54</b>
6	MSO	Melbourne	-	-	-	-	133	-	-	<b>133</b>	<b>6.31</b>
7	Bell	Sydney	-	<b>7</b>	<b>16</b>	-	<b>19</b>	<b>2</b>	42	<b>86</b>	<b>4.08</b>
8	ACO	Sydney	<b>5</b>	<b>8</b>	<b>7</b>	-	<b>18</b>	<b>6</b>	30	<b>74</b>	<b>3.51</b>
9	QTC	Brisbane	<b>(a)</b>	70	-	-	-	-	<b>(a)</b>	<b>70</b>	<b>3.32</b>
10	CoB	Sydney	-	-	-	-	<b>(a)</b>	-	68	<b>68</b>	<b>3.23</b>
11	WASO	Perth	-	-	-	-	-	58	-	<b>58</b>	<b>2.75</b>
12	STCSA	Adelaide	54	<b>(a)</b>	-	-	-	-	<b>(a)</b>	<b>54</b>	<b>2.56</b>
13	MVA	Sydney	<b>6</b>	<b>4</b>	<b>5</b>	<b>1</b>	<b>14</b>	<b>6</b>	14	<b>50</b>	<b>2.37</b>
14	COz	Melbourne	<b>6</b>	-	<b>12</b>	<b>2</b>	23	-	-	<b>43</b>	<b>2.04</b>
15	ASO	Adelaide	41	-	-	-	-	-	-	<b>41</b>	<b>1.94</b>
16	SDC	Sydney	-	<b>3</b>	<b>3</b>	<b>1</b>	<b>6</b>	<b>3</b>	19	<b>35</b>	<b>1.66</b>
17	WAB	Perth	-	-	-	-	-	32	-	<b>32</b>	<b>1.52</b>
18	Bangarra	Sydney	-	-	<b>3</b>	<b>1</b>	-	-	26	<b>30</b>	<b>1.42</b>
19	Playbox	Melbourne	-	-	-	-	30	<b>(a)</b>	<b>(a)</b>	<b>30</b>	<b>1.42</b>
19	ABO	Sydney	<b>1</b>	<b>1</b>	-	-	-	<b>1</b>	27	<b>30</b>	<b>1.42</b>
21	TQO	Brisbane	-	29	-	-	-	-	-	<b>29</b>	<b>1.38</b>
22	TSO	Hobart	-	-	-	23	-	-	<b>1</b>	<b>24</b>	<b>1.14</b>
23	OQ	Brisbane	-	19	-	-	-	-	-	<b>19</b>	<b>0.90</b>
23	QB	Brisbane	-	19	-	-	-	-	-	<b>19</b>	<b>0.90</b>
25	WAO	Perth	-	-	-	-	-	16	-	<b>16</b>	<b>0.76</b>
26	SOSA	Adelaide	12	-	-	-	-	-	-	<b>12</b>	<b>0.57</b>
27	BSTC	Perth	-	-	-	-	-	10	-	<b>10</b>	<b>0.47</b>
<b>Total Home Stage</b>			<b>107</b>	<b>137</b>	<b>0</b>	<b>23</b>	<b>496</b>	<b>116</b>	<b>858</b>	<b>1,737</b>	<b>82.40</b>
<b>Total Touring</b>			<b>24</b>	<b>52</b>	<b>58</b>	<b>6</b>	<b>134</b>	<b>18</b>	<b>79</b>	<b>371</b>	<b>17.60</b>
<b>Total</b>			<b>131</b>	<b>189</b>	<b>58</b>	<b>29</b>	<b>630</b>	<b>134</b>	<b>937</b>	<b>2,108</b>	<b>100</b>

## Percentage capital city

Participation rate <sup>(c)</sup>	15.4	15.2	24.4	19.7	23.6	12.8	29.9	22.6
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(a) Company's production / co-production performed as part of another company's mainstage season.

(b) Opera Australia's productions are hired by OQ, SOSA and WAO and presented within those companies' seasons.

(c) Attendances divided by capital city population over 20 years, assuming each person attended only once.

Note: Paid Attendances to self presented capital city mainstage performances.

**Bold italics** denote attendances for touring companies.

Excludes pit orchestras (AOBO, OV).

Appendix 4G: Paid Mainstage Capital City Attendances by Company: 2007

('000)

Rank	Company	Home City	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total	Total %
1	OA <sup>(b)</sup>	Sydney	<b>18</b>	-	-	-	<b>87</b>	-	205	<b>310</b>	<b>13.51</b>
2	TAB	Melbourne	<b>10</b>	<b>9</b>	-	-	92	-	<b>108</b>	<b>219</b>	<b>9.55</b>
4	SSO	Sydney	-	-	-	-	-	-	218	<b>218</b>	<b>9.5</b>
3	MTC	Melbourne	-	-	-	-	217	-	<b>(a)</b>	<b>217</b>	<b>9.46</b>
5	STC	Sydney	<b>(a)</b>	<b>(a)</b>	-	<b>(a)</b>	<b>(a)</b>	-	211	<b>211</b>	<b>9.2</b>
5	CoB	Sydney	-	-	<b>4</b>	-	<b>43</b>	<b>4</b>	135	<b>186</b>	<b>8.11</b>
7	MSO	Melbourne	-	-	-	-	130	-	-	<b>130</b>	<b>5.66</b>
8	QTC	Brisbane	<b>(a)</b>	81	-	-	-	-	-	<b>81</b>	<b>3.53</b>
9	ACO	Sydney	<b>6</b>	<b>8</b>	<b>7</b>	-	<b>19</b>	<b>6</b>	29	<b>75</b>	<b>3.27</b>
10	Bell	Sydney	-	-	<b>13</b>	-	<b>13</b>	-	47	<b>73</b>	<b>3.18</b>
11	WASO	Perth	-	-	-	-	-	58	-	<b>58</b>	<b>2.53</b>
12	COz	Melbourne	-	-	-	-	24	<b>15</b>	<b>18</b>	<b>57</b>	<b>2.48</b>
13	MVA	Sydney	<b>7</b>	<b>5</b>	<b>4</b>	<b>1</b>	<b>12</b>	<b>7</b>	15	<b>51</b>	<b>2.22</b>
14	ASO	Adelaide	48	-	-	-	-	-	-	<b>48</b>	<b>2.09</b>
15	TQO	Brisbane	-	45	-	-	-	-	-	<b>45</b>	<b>1.96</b>
16	STCSA	Adelaide	44	-	-	-	-	-	-	<b>44</b>	<b>1.92</b>
17	Playbox	Melbourne	<b>(a)</b>	-	-	-	42	-	<b>(a)</b>	<b>42</b>	<b>1.83</b>
18	WAB	Perth	-	-	-	-	-	34	-	<b>34</b>	<b>1.48</b>
19	QB	Brisbane	-	28	-	-	-	-	-	<b>28</b>	<b>1.22</b>
20	OQ	Brisbane	-	27	-	-	<b>(a)</b>	<b>(a)</b>	-	<b>27</b>	<b>1.18</b>
21	ABO	Sydney	<b>(d)</b>	<b>(d)</b>	-	-	-	<b>1</b>	25	<b>26</b>	<b>1.13</b>
21	SDC	Sydney	<b>2</b>	<b>3</b>	<b>2</b>	-	<b>6</b>	<b>3</b>	10	<b>26</b>	<b>1.13</b>
23	Bangarra	Sydney	-	<b>5</b>	<b>3</b>	-	<b>6</b>	-	10	<b>24</b>	<b>1.05</b>
24	TSO	Hobart	-	-	-	22	-	-	<b>1</b>	<b>23</b>	<b>1</b>
25	WAO	Perth	-	<b>(a)</b>	-	-	<b>(a)</b>	18	-	<b>18</b>	<b>0.78</b>
26	BSTC	Perth	-	-	-	-	-	13	-	<b>13</b>	<b>0.57</b>
27	SOSA	Adelaide	12	-	-	-	-	-	-	<b>12</b>	<b>0.52</b>
<b>Total Home Stage</b>			<b>104</b>	<b>180</b>	<b>0</b>	<b>22</b>	<b>504</b>	<b>123</b>	<b>905</b>	<b>1,840</b>	<b>80.14</b>
<b>Total Touring</b>			<b>43</b>	<b>30</b>	<b>33</b>	<b>1</b>	<b>186</b>	<b>36</b>	<b>127</b>	<b>456</b>	<b>19.86</b>
<b>Total</b>			<b>147</b>	<b>210</b>	<b>33</b>	<b>23</b>	<b>690</b>	<b>159</b>	<b>1,032</b>	<b>2,296</b>	<b>100</b>

Percentage capital city

Participation rate <sup>(c)</sup>                      **17.3**    **16.9**    **13.9**    **15.7**    **25.9**    **15.2**    **32.9**    **24.6**

(a) Company's production / co-production performed as part of another company's mainstage season.

(b) Opera Australia's productions are hired by OQ, SOSA and WAO and presented within those companies' seasons.

(c) Attendances divided by capital city population over 20 years, assuming each person attended only once.

(d) Company performed with audiences below 1,000.

Note: Paid Attendances to self presented capital city mainstage performances.

**Bold italics** denote attendances for touring companies.

Excludes pit orchestras (AOBO, OV).

Appendix 4H: Paid Mainstage Capital City Attendances by Company: 2008

('000)

Rank	Company	Home City	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney	Total	Total %
1	OA <sup>(b)</sup>	Sydney	-	<b>32</b>	<b>15</b>	-	<b>95</b>	-	246	<b>388</b>	<b>18.29</b>
2	MTC	Melbourne	-	-	-	-	222	-	-	<b>222</b>	<b>10.47</b>
3	TAB	Melbourne	<b>8</b>	<b>10</b>	-	-	83	-	<b>108</b>	<b>209</b>	<b>9.85</b>
5	SSO	Sydney	-	-	-	-	-	-	194	<b>194</b>	<b>9.15</b>
4	STC	Sydney	<b>(a)</b>	-	-	-	<b>(a)</b>	<b>(a)</b>	187	<b>187</b>	<b>8.82</b>
6	MSO	Melbourne	-	-	-	-	132	-	-	<b>132</b>	<b>6.22</b>
7	ACO	Sydney	<b>5</b>	<b>7</b>	<b>7</b>	-	<b>21</b>	<b>8</b>	32	<b>80</b>	<b>3.77</b>
8	Bell	Sydney	-	-	<b>9</b>	-	<b>22</b>	-	43	<b>74</b>	<b>3.49</b>
9	QTC	Brisbane	-	70	-	-	-	-	-	<b>70</b>	<b>3.30</b>
10	Comp B	Sydney	-	-	-	-	-	-	68	<b>68</b>	<b>3.21</b>
11	WASO	Perth	-	-	-	-	-	56	-	<b>56</b>	<b>2.64</b>
12	ASO	Adelaide	39	-	-	-	-	-	-	<b>39</b>	<b>1.84</b>
12	STCSA	Adelaide	39	-	-	-	-	-	-	<b>39</b>	<b>1.84</b>
14	Playbox	Melbourne	-	-	-	-	38	-	-	<b>38</b>	<b>1.79</b>
15	MVA	Sydney	<b>5</b>	<b>3</b>	<b>3</b>	-	<b>9</b>	<b>4</b>	9	<b>33</b>	<b>1.56</b>
19	TQO	Brisbane	-	32	-	-	-	-	-	<b>32</b>	<b>1.51</b>
16	ABO	Sydney	-	<b>(d)</b>	-	-	<b>(d)</b>	<b>(d)</b>	31	<b>31</b>	<b>1.46</b>
17	Circ Oz	Melbourne	-	-	-	-	30	-	-	<b>30</b>	<b>1.41</b>
18	WAB	Perth	-	-	<b>(e)</b>	-	-	28	-	<b>28</b>	<b>1.32</b>
20	SDC	Sydney	-	<b>3</b>	<b>2</b>	-	<b>2</b>	-	19	<b>26</b>	<b>1.23</b>
22	OQ	Brisbane	-	25	-	-	-	-	-	<b>25</b>	<b>1.18</b>
21	QB	Brisbane	-	24	-	-	-	-	-	<b>24</b>	<b>1.13</b>
23	TSO	Hobart	-	-	-	22	-	-	<b>1</b>	<b>23</b>	<b>1.08</b>
24	Bangarra	Sydney	<b>2</b>	<b>3</b>	<b>2</b>	-	<b>5</b>	-	9	<b>21</b>	<b>0.99</b>
25	WAO	Perth	-	-	-	-	-	18	-	<b>18</b>	<b>0.85</b>
26	BSTC	Perth	-	-	-	-	-	17	-	<b>17</b>	<b>0.80</b>
26	SOSA	Adelaide	17	-	-	-	-	-	-	<b>17</b>	<b>0.80</b>
<b>Total Home Stage</b>			<b>95</b>	<b>151</b>	<b>0</b>	<b>22</b>	<b>505</b>	<b>119</b>	<b>838</b>	<b>1,730</b>	<b>81.57</b>
<b>Total Touring</b>			<b>20</b>	<b>58</b>	<b>38</b>	<b>0</b>	<b>154</b>	<b>12</b>	<b>109</b>	<b>391</b>	<b>18.43</b>
<b>Total</b>			<b>115</b>	<b>209</b>	<b>38</b>	<b>22</b>	<b>659</b>	<b>131</b>	<b>947</b>	<b>2,121</b>	<b>100</b>

Percentage capital city

Participation rate <sup>(c)</sup>	<b>13.5</b>	<b>16.8</b>	<b>16.0</b>	<b>15.0</b>	<b>24.7</b>	<b>12.5</b>	<b>30.2</b>	<b>22.7</b>
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(a) Company's production / co-production performed as part of another company's mainstage season.

(b) Opera Australia's productions are hired by OQ, SOSA and WAO and presented within those companies' seasons.

(c) Attendances divided by capital city population over 20 years, assuming each person attended only once.

(d) Company performed with audiences below 1,000.

(e) Company presented by a venue in another city.

Note: Paid Attendances to self presented capital city mainstage performances.

**Bold italics** denote attendances for touring companies.

Excludes pit orchestras (AOBO, OV).

**Appendix 5: Paid Mainstage Capital City Attendances: 1992-2008**

**Appendix 5A: Paid Mainstage Capital City Attendances by Artform: 1992-2008**

<b>('000)</b>	<b>Dance</b>	<b>Opera</b>	<b>Theatre</b>	<b>Chamber Music</b>	<b>TOTAL</b>	<b>Symphony Orchestras</b>	<b>TOTAL including Orchestras</b>
<b>1992</b>	287	345	722	112	<b>1,466</b>	n/a	<b>n/a</b>
<b>1993</b>	318	335	837	76	<b>1,566</b>	n/a	<b>n/a</b>
<b>1994</b>	290	354	723	67	<b>1,434</b>	n/a	<b>n/a</b>
<b>1995</b>	312	372	661	117	<b>1,462</b>	n/a	<b>n/a</b>
<b>1996</b>	286	339	631	124	<b>1,380</b>	n/a	<b>n/a</b>
<b>1997</b>	309	354	728	132	<b>1,523</b>	n/a	<b>n/a</b>
<b>1998</b>	290	317	705	119	<b>1,431</b>	n/a	<b>n/a</b>
<b>1999</b>	238	361	787	137	<b>1,523</b>	527	<b>2,050</b>
<b>2000</b> *	333	313	798	144	<b>1,588</b>	547	<b>2,135</b>
<b>2001</b> **	303	316	899	144	<b>1,662</b>	508	<b>2,170</b>
<b>2002</b> ***	271	308	855	119	<b>1,553</b>	443	<b>1,996</b>
<b>2003</b> ****	350	336	932	143	<b>1,761</b>	448	<b>2,209</b>
<b>2004</b>	314	304	897	149	<b>1,664</b>	457	<b>2,121</b>
<b>2005</b>	323	365	823	166	<b>1,677</b>	443	<b>2,120</b>
<b>2006</b>	296	360	817	154	<b>1,627</b>	481	<b>2,108</b>
<b>2007</b>	331	367	924	152	<b>1,774</b>	522	<b>2,296</b>
<b>2008</b>	308	448	745	144	<b>1,645</b>	477	<b>2,122</b>

\* Relative changes are due in part to Olympic season programming.

\*\* Relative changes are due in part to Centenary of Federation activities.

\*\*\* Decrease in Dance attendances largely due to ADT leaving MPAB.

\*\*\*\* Increase in Chamber Music attendances largely due to ABO entering MPAB.

**Appendix 5: Paid Mainstage Capital City Attendances: 1992-2008**

**Appendix 5B : Paid Mainstage Capital City Attendances by City : 1992-2008**

(excluding Orchestras)

(‘000)	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney
1992	107	150	25	3	463	55	663
1993	142	162	33	4	508	86	630
1994	93	144	29	7	471	53	637
1995	100	155	36	3	445	53	670
1996	87	129	33	4	404	67	657
1997	85	131	36	5	491	53	724
1998	62	135	33	2	442	76	681
1999	100	130	35	2	430	77	749
2000	111	107	39	5	445	82	800
2001	113	139	48	11	516	64	773
2002	86	141	46	5	498	55	722
2003	82	140	56	5	558	63	857
2004	103	144	39	3	502	71	802
2005	93	161	32	2	547	72	770
2006	90	160	58	6	497	76	740
2007	99	166	33	1	561	101	813
2008	76	177	38	0	527	76	751

**Note:** Canberra and Hobart fluctuate annually according to touring patterns. Irregular touring patterns also affect other capitals.

## Appendix 6: Definitions

Australian works are works conceived and developed by Australian composers, writers and choreographers.

Mainstage performances are those presented as core business activity of companies, including a company's subscription season, excluding regional touring.

New productions are newly-conceived stage presentations of theatre, dance or opera that have not been seen before, whether or not the work itself is new. Music is not included, since concert performances are not regarded as stage productions.

New works are those being presented for the first time as World Premieres.

Participation rates are attendances divided by capital city population over 18 years (until 2003) and over 20 years (from 2004), assuming each person attended only once.

Touring season is a performance run of a production / concert by a company in a capital city other than the company's home city or in a regional centre.