Australian Government | Australia Council for the Arts

Snapshot of MPA company key trends from 2012 data

July 2013

About the Australia for the Arts

The Australia Council for the Arts is the Australian Government's arts funding and advisory body. The Australia Council support Australia's arts through funding, strengthening and developing the arts sector.

We collaborate to build new audiences, foster philanthropic support and deepen our understanding of the arts through research.

Each year, we deliver more than $180 million in funding for arts organisations and individual artists across the country.

Disclaimer

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Introduction

This report is a preliminary analysis of the 2012 annual reporting from the Major Performing Arts (MPA) sector. A more detailed analysis will be published in August.

The MPA sector comprises 28[1] leading Australian companies in the fields of dance, theatre, opera and orchestral and chamber music. 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.

These companies are funded jointly by the Australian Government, through the Australia Council for the Arts, and by the relevant State governments. In 2012 the Australian government provided $96 million in annual funding to this group of companies and state governments provided a further $44 million[2] in annual funding.

Notes on following analysis

- Analysis is on a calendar year basis and compiled from annual data received from organisations.
- Data is subject to verification checks to ensure that it is as accurate as possible. The verification process involves cross-checking an organisation's prior year reports and comparing data with other organisations to identify any large or unexpected year-on-year changes. Financial data is checked against audited accounts.
- Abbreviations are used to refer to specific companies. A list of companies and abbreviations is at the end of the report.
- There is a glossary of terms at the end of the report.

[1] There is a list of companies in Appendix 2: List of companies and abbreviations used .

[2] In 2012 the companies also received an additional $21.6m in project and capital works grants.

Highlights from 2012 companies' results

Financial

- MPA companies have survived the year well with combined surplus of $12.7 million despite unsettling trading conditions.
- Combined total income was $472 million of which 65% or $306 million was earned through performances, private sector, interest earnings and other activities.
- Combined performance income increased by $28 million to $203 million, with all art forms except theatre reporting increases.
- Combined private sector (sponsorship and philanthropy) income was $65 million, a small 1.5% decrease compared to 2011, but still a 25% increase compared to 2010.

Access

- 3.6 million Australians attended a performance, school activity or workshop by a MPA company in 2012, a small increase of 118,000 compared to 2011.
- Audiences of nearly 3.2 million at 5,900 performances in Australia and overseas.
- 308,000 people were social media friends or followers, an increase of 51% from 2010.
- Nearly 8 million people listened or watched a radio broadcast, TV or cinema screening of performances by MPA companies.

Sector Development

- 108 Australian works and a further 52 overseas works were presented for the first time in Australia.
- 8,400 people employed by the companies including 4,600 artists (in 1,400 positions).
- 537,000 school children and teachers attended 6,000 schools performances.

Participation trends

As the following table indicates participation in MPA companies' activities remained steady over the past three years. Regional participation in 2012 remained steady at 291,000.

Table 1: Participation trends in Australia

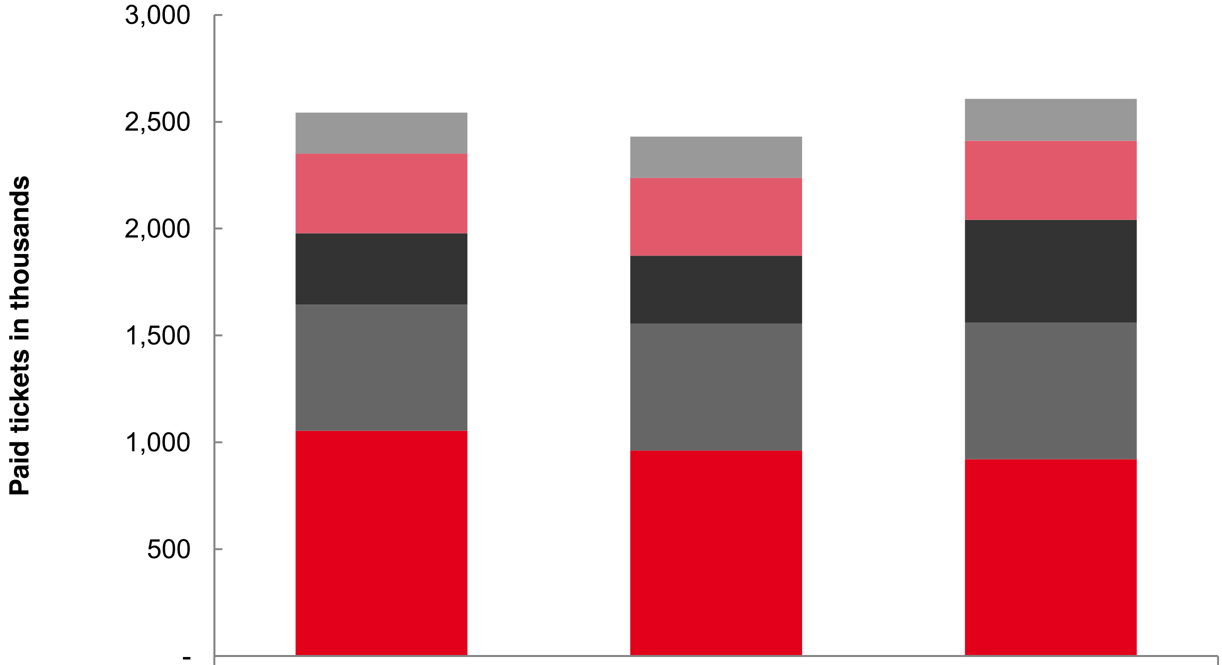
Participation	Metro or Regional	Calendar Year 2010	2011	2012
At performances	M	2,980	2,843	2,975
	R	104	101	118
Young people in schools	M	383	395	367
	R	193	177	170
In workshops	M	20	27	29
	R	2	1	3
Total attendances at performances		3,083	2,943	3,092
Total young people in schools		576	571	537
Total attendances at workshops		22	28	33

Paid attendance trends

There were 2.6 million ticket sales in 2012. All artform sectors recorded increased ticket sales in 2012 with the exception of theatre. Opera reported a 164,000 increase due mainly to increased activity by Opera Australia and West Australian Opera. Orchestras' increase was mainly due to reopening of Hamer Hall in Melbourne.

There were increased attendances in NSW, Victoria and West Australia. The 2012 decrease in South Australia audiences is due to 2010 being an exceptional year for touring by Circus Oz, The Australian Ballet and Belvoir, and the Adelaide Festival in 2011.

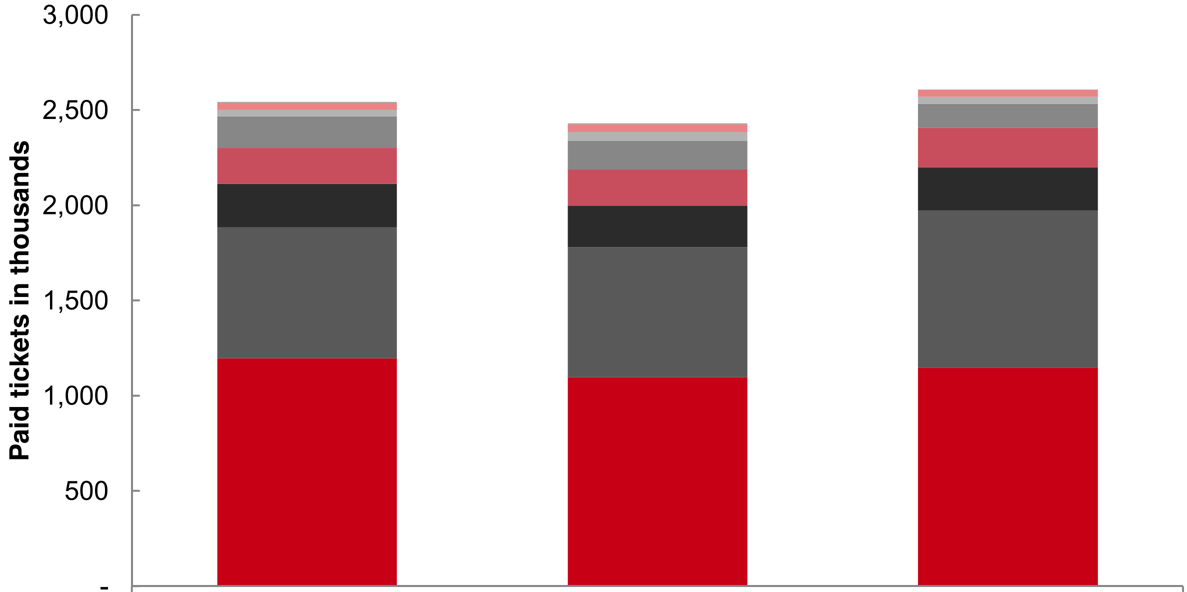
Table 2: Paid attendances by artform



	2010	2011	2012
Chamber Music	191	193	196
Dance	373	364	370
Opera	335	317	481
Orchestras	589	594	639
Theatre	1,055	962	922

Theatre Orchestras Opera Dance Chamber Music

Table 3: Paid attendance trends for performances in each State and Territory



	2010	2011	2012
NT	5	6	2
TAS	37	40	36
ACT	34	46	38
SA	167	150	126
WA	187	190	208
QLD	229	218	225
VIC	688	683	827
NSW	1,195	1,096	1,145

NSW VIC QLD WA SA ACT TAS NT

Australian or New Works

Number of new Australian works presented by MPA companies continued to increase in 2012, as did overseas works presented for the first time in Australia.

Appendix 1: Further analysis of works by artform, indicates that most of the increases were in Theatre and Dance.

Table 4: Trends in new works and productions

Works	Works Category	2010	2011	2012
Australian Work	New Australian Work - World Premiere	90	103	108
	Existing Australian Work – Existing	128	145	111
	Existing Australian Work – New Production	13	12	20
	Total	231	260	239
New Non-Australian Work	Non-Australian Work - Australian Premiere	23	22	47
	Non-Australian Work - World Premiere	11	5	5
	Total	34	27	52
Grand Total		265	287	291

Sector Development

International Audiences

According to Table 5, 97,000 people attended 259 overseas performances[3]. There was more overseas touring in 2012 compared to 2011 but lower audience numbers. The increased touring was mainly in North America due to STC performing Uncle Vanya and The Australian Ballet's 50th anniversary tour.

Table 5: Trends in overseas activity

Artform	Number of Performances	Attendance in Asia 000s	Attendance in Europe 000s	Attendance in Nth America 000s	Total 000s
Chamber Music	36	6	6	6	18
Dance	54	1	2	11	13
Orchestras	6	14			14
Theatre	163		3	50	52
2012	259	21	10	66	97
2011	216	33	55	33	121
2010	111	21	37	10	68

Employment

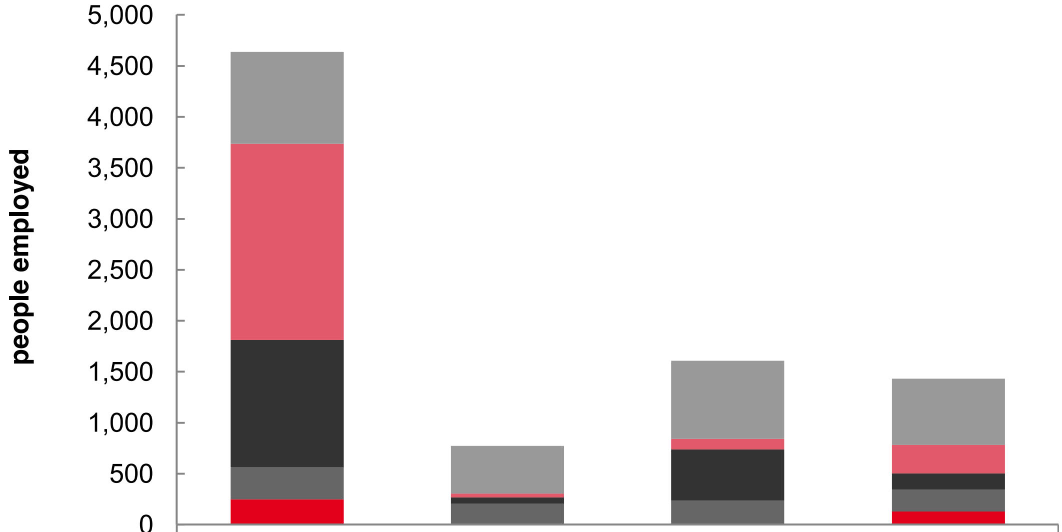
8,400 people were employed in 2012, a slight increase on 2011. 4,638 artists were employed in 1,411 positions reflecting the casualised nature of artists' employment in the performing arts.

Artists' employment in 2012 remained steady compared to 4,596 people employed in 2011 and 4,755 in 2010.

Admin and Management employment increased in 2012 due to changes in venue operations for several companies.

[3] Compared to 121,000 people attending 216 overseas performances in 2011.

Table 6: People employed in 2012 (headcount)



	Artists	Creatives	Technical Support	Admin & Management
Theatre	901	467	767	651
Orchestras	1,926	38	105	279
Opera	1,249	61	502	158
Dance	313	196	232	215
Chamber Music	249	10	3	129

Chamber Music Dance Opera Orchestras Theatre

Table 7: Employment trends based on number of positions

FTE		Calendar		
Role	Art Form	2010	2011	2012
Artists		1,411	1,363	1,406
	Chamber Music	41	36	39
	Dance	176	182	183
	Opera	323	333	389
	Orchestras	720	652	647
	Theatre	152	160	149
Creatives		164	142	164
Technical Support		501	552	492
Admin and Management		695	687	738
Grand Total		2,772	2,744	2,801

Financial Viability

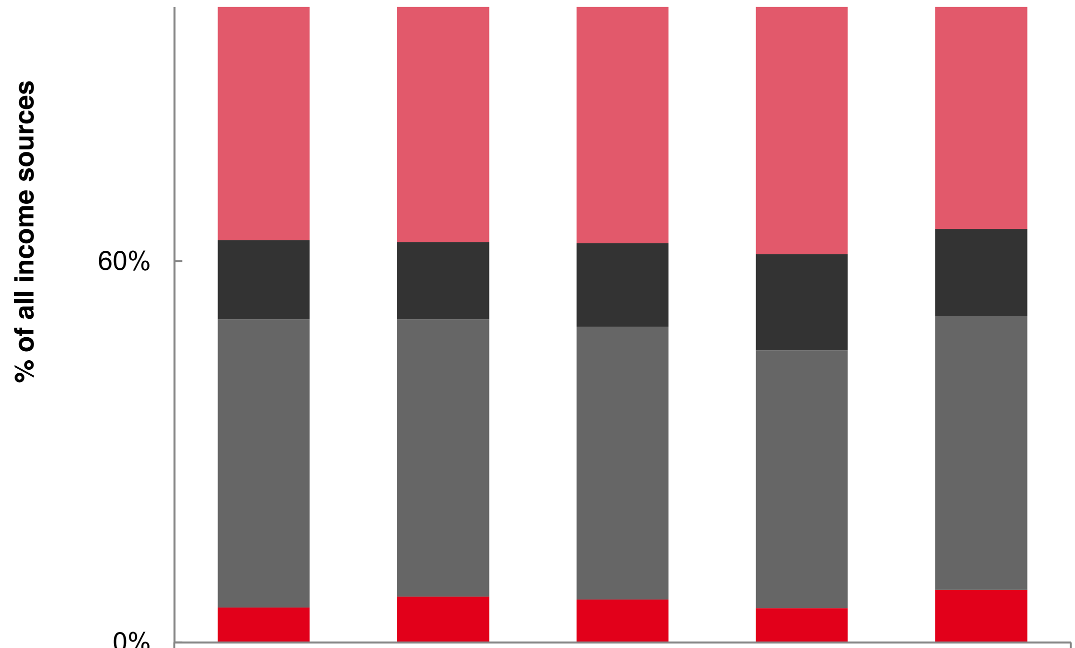
Despite unsettling trading conditions, 2012 audited results indicate that MPA companies have survived the year well with combined operating surplus of $12.7 million. Combined reserves increased by 9% or $12 million.

Combined performance income increased by $28 million to $203 million in 2012, with all art forms except theatre reporting increases. Opera accounted for $20 million increase mainly due to extra activity by Opera Australia and West Australian Opera. Orchestras' increases were due to reopening of Hamer Hall. The theatre sector reported an overall decrease for a second year, even if by a small $661,000 decline.

Whilst companies reported a small 1.5% decrease in private sector income compared to 2011, there was still a 25% increase in 2012 compared to 2010. Both 2011 and 2012 had significant fundraising for new buildings, Fortescue Mining share donations to West Australian companies and other large one-off donations. Excluding the companies with capital fundraising strategies, seven companies reported more than 25% growth in private sector income in 2012 compared to 2011.

Combined non-government income increased slightly in 2012 to 65% of total income. Government income declined in 2012 because 2011 included a significant amount of grants for new buildings.

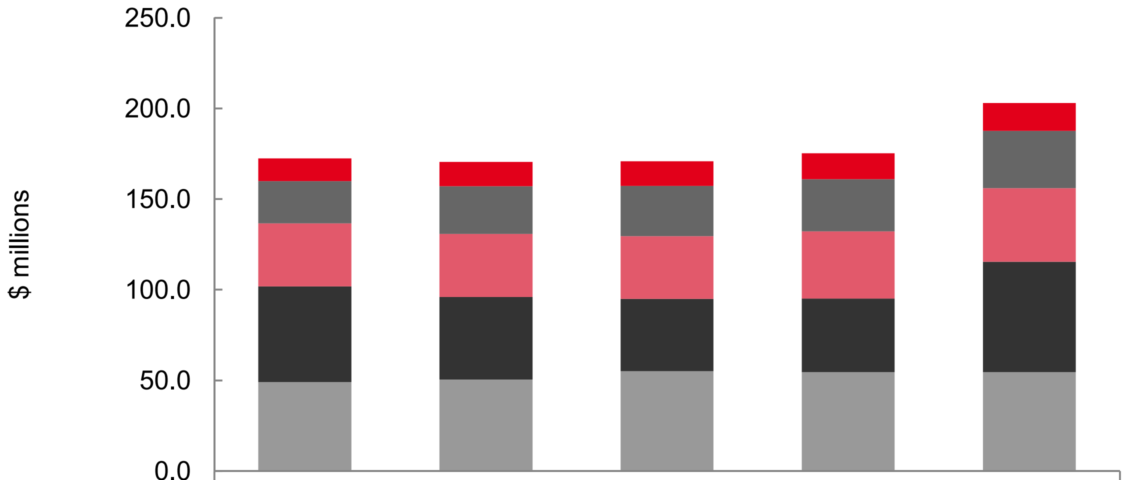
Table 8: Trends in income sources in $ millions unadjusted by CPI



	2008	2009	2010	2011	2012
Government Income	140.1	145.5	148.7	168.9	164.8
Private sector income	47.6	47.9	52.6	65.8	64.8
Performance Income	173.4	171.5	171.8	176.2	203.0
Other Income	20.9	28.4	27.0	23.3	39.0

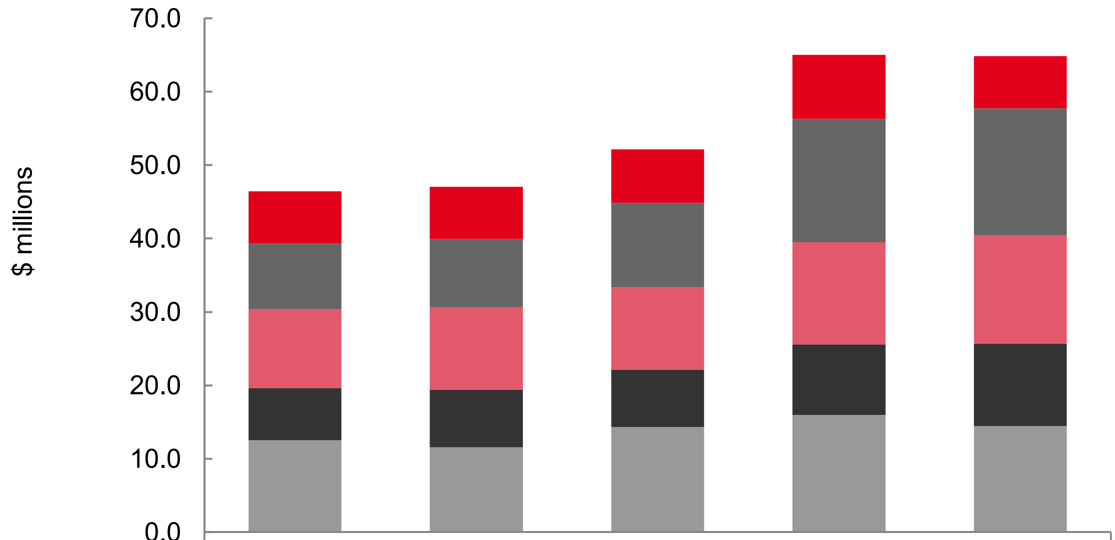
■ Other Income ■ Performance Income ■ Private sector income ■ Government Income

Table 9: Performance income growth by artform in $ millions unadjusted by CPI



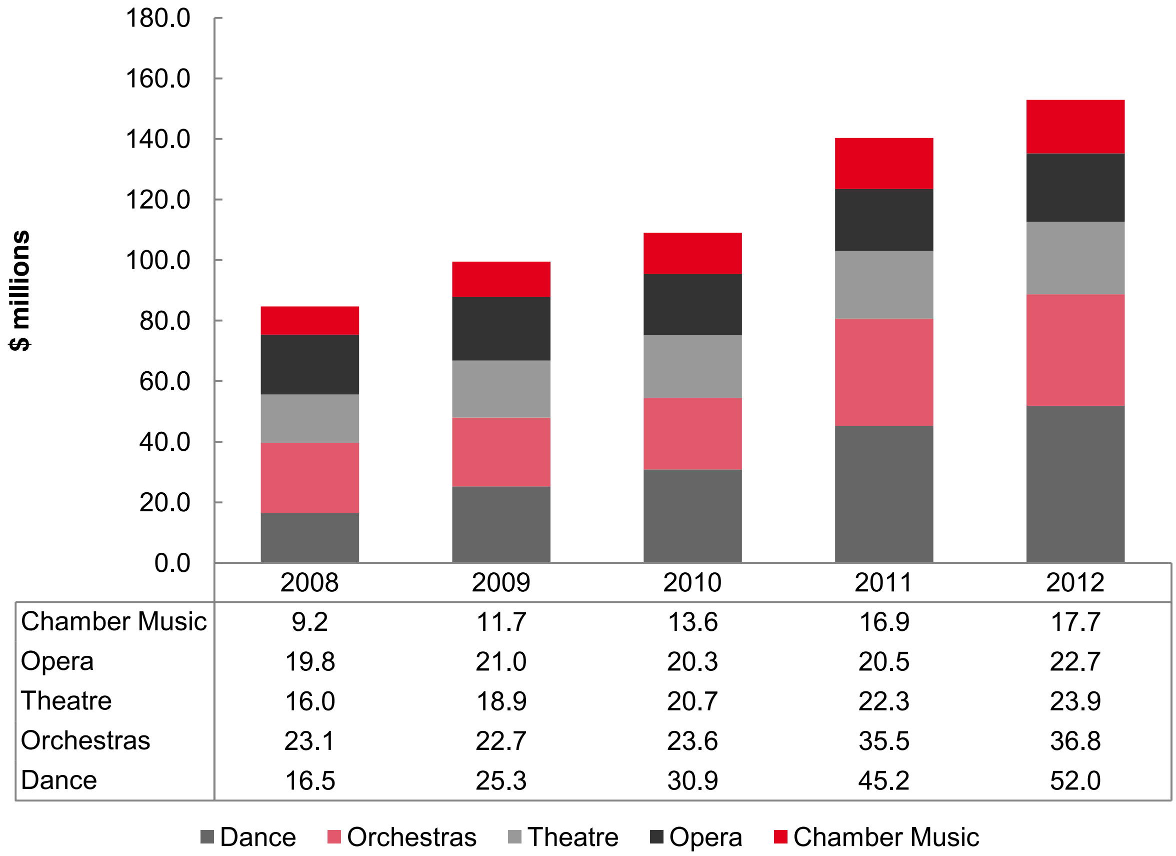
	2008	2009	2010	2011	2012
Chamber Music	12.5	13.5	13.5	14.2	15.4
Dance	23.3	26.2	27.7	28.9	31.7
Orchestras	34.7	34.8	34.5	37.0	40.5
Opera	52.9	45.5	40.0	40.6	61.0
Theatre	49.0	50.5	55.0	54.6	54.5

Table 10: Private sector income growth by artform in $ millions unadjusted by CPI



	2008	2009	2010	2011	2012
Chamber Music	7.1	7.1	7.3	8.7	7.1
Dance	9.0	9.3	11.5	16.8	17.3
Orchestras	10.7	11.2	11.2	13.9	14.8
Opera	7.1	7.8	7.8	9.6	11.2
Theatre	12.5	11.6	14.3	16.0	14.4

Table 11: Reserves (net assets) growth by artform in $ millions unadjusted by CPI



	2008	2009	2010	2011	2012
Chamber Music	9.2	11.7	13.6	16.9	17.7
Opera	19.8	21.0	20.3	20.5	22.7
Theatre	16.0	18.9	20.7	22.3	23.9
Orchestras	23.1	22.7	23.6	35.5	36.8
Dance	16.5	25.3	30.9	45.2	52.0

Appendix 1: Further analysis of works by artform

Dance

Works	Works Category	2010	2011	2012
Australian Work	New Australian Work - World Premiere	29	26	30
	Existing Australian Work - Existing	12	10	12
	Existing Australian Work – New Production	1		1
Australian Work Total		42	36	43
New Non-Australian Work	Non-Australian Work - Australian Premiere		1	2
	Non-Australian Work - World Premiere	4	3	2
New Non-Australian Work Total		4	4	4
Grand Total		46	40	47

Theatre

Works	Works Category	2010	2011	2012
Australian Work	New Australian Work - World Premiere	28	37	47
	Existing Australian Work - Existing	14	13	13
	Existing Australian Work – New Production	10	12	19
Australian Work Total		52	62	79
New Non-Australian Work	Non-Australian Work - Australian Premiere	4	1	1
	Non-Australian Work - World Premiere	2		
New Non-Australian Work Total		6	1	1
Grand Total		58	63	80

Music

Orchestras

Works	Works Category	2010	2011	2012
Australian Work	New Australian Work - World Premiere	21	24	20
	Existing Australian Work - Existing	66	60	52
Australian Work Total		87	84	72
New Non-Australian Work	Non-Australian Work - Australian Premiere	16	5	24
	Non-Australian Work - World Premiere	4	1	1
New Non-Australian Work Total		20	6	25
Grand Total		107	90	97

Opera

Works	Works Category	2010	2011	2012
Australian Work	New Australian Work - World Premiere	2	1	1
	Existing Australian Work - Existing	2	1	
	Existing Australian Work – New Production	2		
Australian Work Total		6	2	1
New Non-Australian Work	Non-Australian Work - Australian Premiere		1	
New Non-Australian Work Total			1	
Grand Total		6	3	1

Chamber Music

Works	Works Category	2010	2011	2012
Australian Work	New Australian Work - World Premiere	8	15	11
	Existing Australian Work - Existing	36	61	33
Australian Work Total		44	76	44
New Non-Australian Work	Non-Australian Work - Australian Premiere	3	14	20
	Non-Australian Work - World Premiere	1	1	2
New Non-Australian Work Total		4	15	22
Grand Total		48	91	66

Appendix 2: List of companies and abbreviations used

Artform	Abbreviation	Company	State
Chamber music	ABO	Australian Brandenburg Orchestra	NSW
	ACO	Australian Chamber Orchestra	NSW
	MVA	Musica Viva Australia	NSW
Dance	BDT	Bangarra Dance Theatre	NSW
	QB	Queensland Ballet	QLD
	SDC	Sydney Dance Company	NSW
	TAB	Australian Ballet	NSW
	WAB	West Australian Ballet	WA
Opera	OA	Opera Australia	NSW
	OQ	Opera Queensland	QLD
	SOSA	State Opera of SA	SA
	WAO	West Australian Opera	WA
Orchestra	ASO	Adelaide Symphony Orchestra	SA
	MSO	Melbourne Symphony Orchestra	VIC
	OV	Orchestra Victoria	VIC
	QSO	Queensland Symphony Orchestra	QLD
	SSO	Sydney Symphony Orchestra	NSW
	TSO	Tasmanian Symphony Orchestra	TAS
	WASO	West Australian Symphony Orchestra	WA
Theatre	BSC	Bell Shakespeare Company	NSW
	BSSTC	Black Swan State Theatre Company	WA
	CoB	Belvoir (Company B)	NSW
	COz	Circus Oz	VIC
	MTC	Melbourne Theatre Company	VIC
	PTC	Malthouse (Playbox) Theatre Company	VIC
	QTC	Queensland Theatre Company	QLD
	STC	Sydney Theatre Company	NSW
	STCSA	State Theatre Company of SA	SA

Appendix 3: Glossary of terms

Attendances

- Paid attendance includes ticket sales for self-presented or joint performances.
- Unpaid attendance includes complimentary tickets and attendances at performances where the company receives a fee to produce/present and receives no performance takings (usually performances that are toured into other venues on a fee basis).

Location of Activity

- Metropolitan is an area with a population density of 100,000 people or greater (excluding Townsville and Cairns, which are defined as regional)
- Regional is any area that is not metropolitan

Works and Productions

- Existing productions are presentation of already existing work or remounts.
- 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

Employment classifications

- Artistic and Production groups Artists, Creatives and Technical Support
  - Artists can include: actor and theatre director, dancer and choreographer, musician (singer, instrumental musician and music director), composer (including songwriters, arrangers, and librettist), writer (including playwright, author, poet, book editor, script editor).
  - Creatives can include: artistic and associate director, librarian, curatorial staff, designer (set, costumes, lighting, sound, fashion, graphic, software and website), dramaturg, instrument tuner, teachers and tutors (dance, music, art, drama).
  - Technical Support – production staff including stage management, operators, stage staff, workshop, wardrobe and technical staff; recording engineers, producers and mechanists; publishing production staff; exhibition mounting staff; gallery staff; and if operate a venue performance, front of house, food and beverage staff.
- Admin / management or Other Arts Support – all other staff not included elsewhere in artists, creatives and technical. Includes marketing and administrative staff.

Income items

- Government income
  - Annual Funding is contracted annual funding from the Australia Council and state governments.
  - Other Government Income includes state, local government and other commonwealth one-off project and capital grants.
- Earned Income -

- Performance Income includes performance, contract fee, commercial hire and merchandising income.
- Private Sector Income includes cash and in-kind sponsorship, individual and corporate philanthropy, events fundraising (net of costs) and private foundations.
- Other Income includes workshops, dance classes, publications and products for sale, beverage and food sales, venue hire, instrument and costume hire, interest on investments, gains or losses on investments and sales of assets, changes to value of shares and other non-cash investments and changes to value of other assets such as buildings.

Surplus (or Net Result) is income minus expenditure including depreciation, building amortisation, changes to value of shares and other non-cash investments and changes to value of other assets such as buildings

Reserves (or Net Assets) are assets minus liabilities. Reserves Ratio is a standard ratio used in the arts sector to measure financial well-being of arts organisations. The ratio is net assets over total expenditure expressed as a percentage. Securing the Future recommended a benchmark of 20 percent reserves for the arts sector as the minimum standard. Australian governments encourage arts organisations to build their reserves so they can respond to opportunities and withstand unforeseen financial shocks.