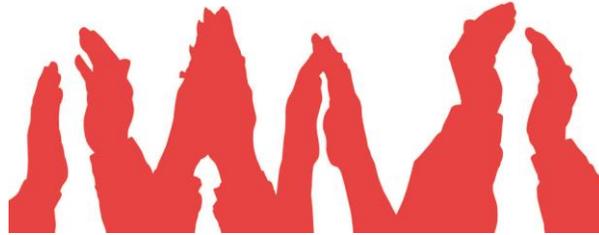
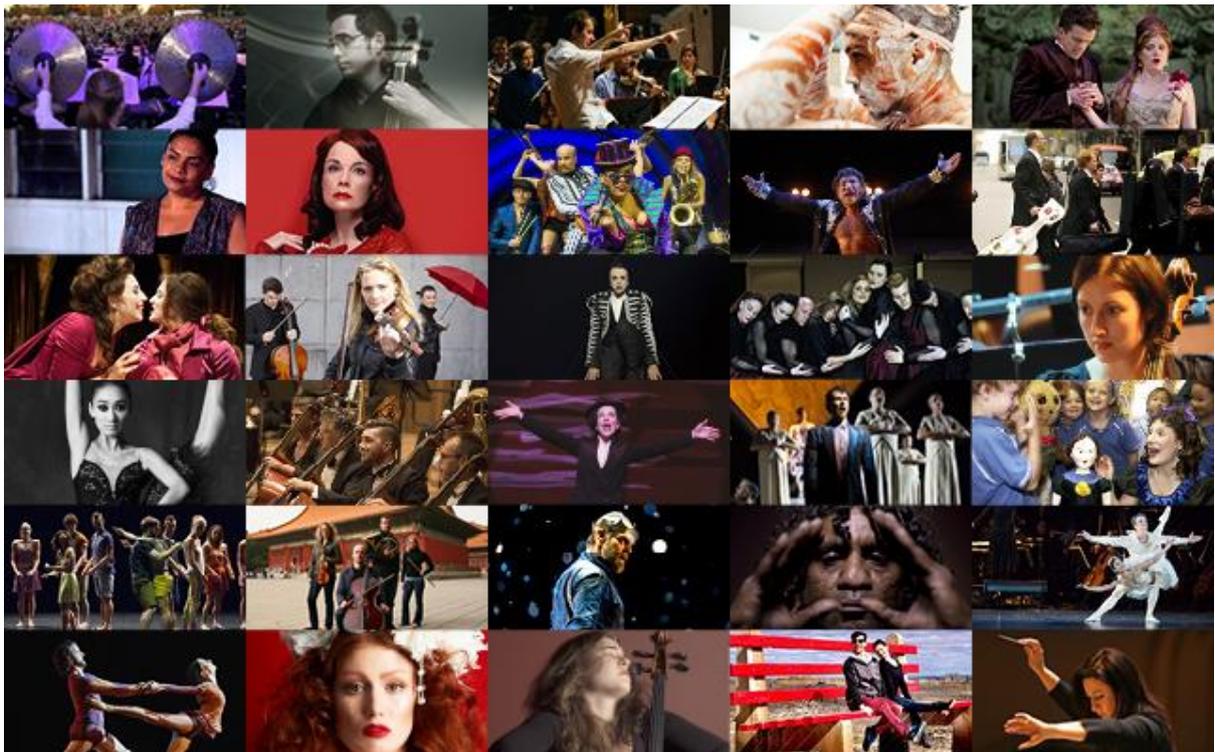


AMPAG



Australian Major Performing Arts Group

A SECTOR SNAPSHOT



www.ampag.com.au

September 2014

WHO WE ARE

The Australian Major Performing Arts Group, or AMPAG, is the umbrella group for Australia's major performing arts companies who inspire millions through theatre, circus, contemporary dance, classical ballet, classical music, opera, musicals and comedy.

OVERALL SECTOR AUDIENCE

- Overall attendance at live performance events increased by 10.2 per cent, from 14.1 million paid tickets in 2012 to 16.05 million in 2013.¹
- 17.93 million tickets (including paid, complimentary, sponsor and zero-priced tickets) for live performance industry events were issued in Australia in 2013 (16.27 million in 2012).
- 39 per cent of children attend performing arts events outside of school hours.²
- One-third of children are involved in cultural activities, such as singing, dancing, acting, playing an instrument, outside of school hours.
- Nearly half (47 per cent) of all women participated in at least one organised cultural activity, compared with 24 per cent of men.³
- The Australia Council's *Arts in Daily Life* tells us that people care about the arts:
 - 85 per cent of people agree that the arts make for a richer and more meaningful life
 - 90 per cent agree that 'people can enjoy both the arts and sport' and that 'artists make an important contribution to Australian society'
 - 89 per cent agree that the arts should be an important part of the education of every Australian.

MAJOR PERFORMING ARTS AUDIENCES

- 4.035 million Australians attended a performance, school activity or workshop by an MPA company in 2013—an increase of 58,000 on 2012.⁴
- Of these, 3.145 million people attended a performance—that is, 8600 people attended a performance by a major performing arts company every night of the year.
- The MPAs provide free outdoor performances individually and within major city festivals, as well as special artist talks, rehearsal sneak peeks, free ticket performance days for the unwaged and free live remote telecasts of mainstage performances.
- Around 550,000 children attended MPA school programs in regional and metropolitan areas in 2013.

¹ <http://reports.liveperformance.com.au/ticket-survey-2013/#intro>

² Australian Bureau of Statistics, *Children's Participation in Cultural and Leisure Activities*, Australia, April 2012 (cat. no. 4901.0)

³ *Ibid.*

⁴ The Australia Council

- About 50,000 people attended MPA workshops in regional and metropolitan areas in 2013.

REGIONAL AUDIENCES

The Australia Council's *Arts in Daily Life* says:

- Creative participation has risen among regional Australians, from 39 per cent in 2009 to 49 per cent in 2013. Now people living in regional areas creatively participate at about the same level as those in metropolitan Australia: 49 per cent in regional Australia; 47 per cent for those living in metropolitan areas.
- Yet some survey findings for regional Australians reveal more limited opportunities to attend and participate in the arts than for people in metropolitan areas—66 per cent of people living in regional areas attended at least one arts event in the previous 12 months, compared to 74 per cent of people living in metropolitan areas.
- Regional attitudes to the arts differ only marginally from those of people living in metropolitan areas but the points of difference are informative to levels of participation:
 - 66 per cent of people living in the regions agree that 'there are plenty of opportunities to get involved in the arts', compared with 75 per cent of people in metropolitan areas
 - 59 per cent of regional dwellers see the arts as having a big impact on 'helping us manage stress, anxiety and depression', compared with 55 per cent of people in metropolitan areas
 - 46 per cent perceive the potential of the arts in 'bringing visitors to our community', compared with 42 per cent of people in metropolitan areas.

OVERALL PERFORMING ARTS REVENUE

- Overall revenue for the industry increased steadily, from \$1.205 billion in 2012 to \$1.479 billion in 2013—an increase of 22.7 per cent and the highest revenue recorded since the LPA Survey began. Growth in revenue reflects an increase in both total number of paid tickets and the average ticket price.⁵
- The sector generates wealth and creates jobs through the utilisation and commercialisation of its intellectual property.⁶
- Cultural tourism has been identified as a new growth area for Australian tourism, attracting increasing numbers of domestic and international visitors (CRC for Sustainable Tourism (2008)).
- The arts and culture sector contributes to business activity across many industries, from manufacturing and construction to retailing and entertainment. The arts and culture sector adds value to production through design, technical performance, packaging, branding and creative skills.

⁵ Ibid.

⁶ Economic Impact of the Victorian Arts and Cultural Sector 2013 Arts Victoria

- A 2013 report from the UK's Local Government Association identified five key ways that arts and culture can boost local economies:
 - attracting visitors
 - creating jobs and developing skills
 - attracting and retaining businesses
 - revitalising places
 - developing talent.

MPA REVENUE

- In 2013 MPA companies earned a total of almost \$305 million in income, of which \$203 million was box office income. The remainder was private sector support and other earned income.
- An analysis of the Australian films released in cinemas in 2013 revealed:
 - total cinema box office for Australian new release films and documentaries was \$38.88 million
 - total theatre box office of the MPA theatre companies alone: \$57.46 million (total theatre earned income was \$86.5 million)
- The MPAs received almost \$165 million in government funding from both federal and state governments.
- The average subsidy from government is 30 per cent with some companies as low as 8 per cent.
- In 2013 total cinema box office from 26 local films and documentaries was \$38.88 million

PRIVATE SECTOR SUPPORT

- Since 2001 total revenue from the private sector has increased \$41 million (135.4 per cent) and continues to track well ahead of CPI.
- Revenue from private giving, corporate sponsorship and fundraising events in the MPA sector continued to grow in 2013, increasing by 11.3 per cent (\$7.2 million) compared to 2012 to \$71.3 million.
- Of this, 55 per cent (\$39 million) was private giving (that is, philanthropy) which grew by 24.5 per cent (\$7.7 million).
- Total private sector support now comprises 15 per cent of total income for the companies, with 43 per cent from box office, 30 per cent government grants for core funding, 4 per cent grants for specific initiatives and 8 per cent other income.

EMPLOYMENT

- The MPAs employed nearly 9000 people in 2013, including 4900 artists and a further 2500 creatives and technical staff.

- MPA activities generate employment for venue front-of-house staff and technicians, ticket services, catering, marketing and administration.
- Performances help to activate public spaces contributing to demand for transport, food and beverage services and overnight accommodation, thereby stimulating employment across the economy.
- The performing arts sector is a creative incubator where we train, we nurture, we invite, we show and we tell.

NEW AUDIENCES

- In 2012 digital radio, cinema and television broadcasts by AMPAG companies reached around 12 million Australians.
- The majors have partnered with national broadcasters ABC and SBS to record and broadcast their live performances for radio and television.
- The majors have developed additional digital content for cinema screenings, live digital simulcasts around regional Australia and are offering program and behind the scenes interview downloads on the internet.
- 527 502 people were social media friends or followers in 2013, an increase of 71 per cent from 2012 and growing.
- The companies are using digital media in new and innovative ways—for example:
 - Musica Viva has developed interactive whiteboard education software
 - Circus Oz has created a dynamic online performing arts archive of videos stretching back more than 30 years
 - The ACO has launched a world first fully interactive 3D orchestral experience
 - Bell Shakespeare's digital education incursions, developed in partnership with Sydney Opera House as well as partnering with ABC's SPALSH providing education resources online
 - Circus Oz has created a digital Living Archive
 - Black Swan State Theatre broadcasts an annual simulcast to regional theatres of a mainstage performance.
 - The Australian Ballet's live stream of World Ballet Day in October 2014
- A fifth of Opera Australia's audiences are now online.⁷

INTERNATIONAL PERFORMANCES AND TOURS

- In 2014 the major performing arts companies toured all over the world, including to the US, Britain, Canada, the Netherlands, Germany, Sweden, China and Ireland.
- The companies are world standard, as defined by overseas critics.

⁷ Boston Consulting Group 2012 Cultural boom How digital media are invigorating Australia

This ensemble truly is everything you could want to represent a colorful group of characters with humor, pizzaz, and memorable versatility. —CD Metro Theater Arts, 13 March 2014 (about **Melbourne Theatre Company's** *Rupert*)

From the Ground Up ... is overflowing with goodwill, unleashes a thunderous energy, and makes the whole theatre burst into laughter with its amusing gags. **Circus Oz**, dynamite on stage. — Planet Quebec Review, March 2014

Stone measures out the tension like a DJ, building up to the unbearable climax. We know what is coming. But because of the smart, exasperating build-up, the shock is still unprecedented. NR Handelsblad (About **Belvoir's** *Thyestes*)

... the verve of Melbourne's output was among the best heard in some fifty years of concert-going. Andrew Davis enthused the musicians while giving full regard to the interplay of the various sections. The brightness of brass and apposition of mellow woodwinds were carefully gauged. —Ian Gilmour, Edinburgh Guide (about the **Melbourne Symphony Orchestra's** tour to the Edinburgh Festival)

The cast is exceptional, throwing itself into the demands of the show with a sense of almost reckless courage ... —The Guardian (about **Malthouse Theatre's** *The Good Person of Szechuan*)

Mesmerising beauty, sheer poetry and spiritual power —Dance Europe (about **Bangarra's** performance at the Holland Dance Festival)

a superb production of *The Maids* ... this is the best we're ever likely to get. —Jesse Green, New York Magazine (about **Sydney Theatre Company's** *The Maids*)

- In 2012 the MPAs performed 259 times in Asia, Europe and US to 97,000 people.⁸

HEALTH AND WELL-BEING

- The physical and psychological benefits of dance for older participants are well-researched and include quicker reaction times and cognitive performance, better vascular health, strength, flexibility and improved balance and gait. (BUPA, 2011)
- It is widely documented in the US, Canada, the UK, Europe and Australia (*The Arts and Australian Education: Realising potential*, Robyn Ewing) that students whose learning is embedded in the arts:
 - achieve better grades and overall test scores
 - are less likely to leave school early
 - rarely report boredom
 - have a more positive self-concept than students who are deprived of arts experiences
 - are more likely to become involved in community service.
- Taking part in drama and library activities improves attainment in literacy (Cultural Learning Alliance, 2011).
- Taking part in structured music activities improves attainment in maths, early language acquisition and early literacy (Cultural Learning Alliance, 2011).

⁸ Australia Council for the Arts, 2012 Snapshot of MPA company trends.

- Culture and sport volunteers are more likely than average to be involved and influential in their communities (BOP Consulting, 2012)
- An Arts Council of England 2013 report, *The value of Arts and Culture to People and Society*, places a monetary value on the wellbeing generated by people who engage in arts and culture. Taking all variables into account:
 - the wellbeing value of participating in the arts is around £1500 per person per year—approximately \$A2700
 - the wellbeing value of being an audience member to the arts is about £2000 per person per year —approximately \$A3600

NEW WORKS

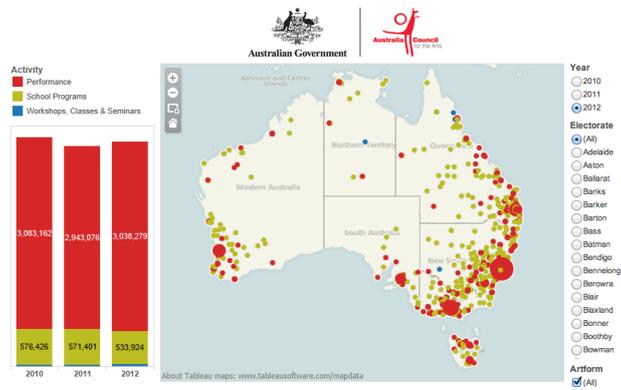
- In 2013 MPA companies presented more than 110 new Australian works and new productions and 60 Australian premieres of overseas works.
- Since 2011 AMPAG companies have presented 485 new works—which is a new production every 2 days—315 of which were Australian.

AWARDS

- In 2014, of the 41 **Helpmann awards** on offer, the MPAs were involved in 23, mostly in their own right and sometimes in joint productions.
 - Opera Australia collected nine awards, including six for *The Ring Cycle* and three for the *King and I*.
 - Sydney Theatre Company won five awards—two for *Waiting for Godot*, two for *Rosencrantz and Guildenstern are Dead* and one for *The Maids*.
 - Other MPA winners included Sydney Symphony Orchestra, State Theatre Company of South Australia, the Tasmanian Symphony Orchestra, Belvoir, Malthouse Theatre, The Australian Ballet and Sydney Dance Company.
- In the 2014 **Art Music Awards**, several MPAs were represented:
 - Work of the Year: Orchestral award to James Ledger for violin concerto *Golden Years* (2013), commissioned and premiered by the West Australian Symphony Orchestra
 - Performance of the Year to the Melbourne Symphony Orchestra and Chorus, for Brett Dean and Graeme Ellis's *The Last Days of Socrates* (2012)
 - Excellence by an Individual to Dr Catherine Crock for the Hush Collection, featuring the Tasmanian Symphony Orchestra playing new orchestral works by twelve Australian composers, conducted by Benjamin Northey.
 - New South Wales State Award to Kim Waldock from Sydney Symphony Orchestra in the category Excellence in Music Education.
- Musica Viva In Schools' interactive whiteboard and digital learning resources were included in The Guardian's list of **ten global R&D projects** that are changing arts and culture.
- Several MPA companies are nominated for awards in the 2014 **Australian Dance Awards** (to be announced in November 2014). In the 2013 Australian Dance Awards:
 - Outstanding Achievement in Choreography: Rafael Bonachela, Sydney Dance Company
 - Outstanding Performance by a Company: *2 One Another*, Sydney Dance Company
 - Outstanding Performance by a Female Dancer: Charmene Yap, in *2 One Another* (SDC)
- The Australian Chamber Orchestra and Dawn Upshaw won three awards at the 56th **Grammy awards** ceremony in Los Angeles in 2014 for their recording of Maria Schneider's song cycle *Winter Morning Walks*—Best Classical Vocal Solo, Best Contemporary Classical Composition and Best Engineered Album (Classical) award.

REGIONAL TOURS

- The companies tour across Australia to regional and remote communities in all states and territories. (You can visit the dynamic interactive touring map on the AMPAG website www.ampag.com.au)



- In 2013 the MPA companies performed to 136,000 people in regional areas, engaged with 149,000 regional students and ran regional workshops for about 5,000 people.

AMPAG MEMBER COMPANIES AND THEIR LOCATION

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