

**APACA**

Australian  
Performing  
Arts  
Centres  
Association



# 2013 Economic Activity Report

## Contents

<b>EXECUTIVE SUMMARY .....</b>	<b>1</b>
Methodology .....	1
Findings .....	1
Conclusions.....	3
<b>INTRODUCTION .....</b>	<b>4</b>
<b>AIM .....</b>	<b>4</b>
<b>METHODOLOGY.....</b>	<b>4</b>
Response Rates.....	5
<b>FINDINGS.....</b>	<b>6</b>
Respondents.....	6
Capacity .....	8
Financial Snapshot.....	9
Turnover .....	10
Expenses .....	12
Funding.....	13
Venue Utilisation .....	14
Activity Levels .....	15
Programming .....	17
Genre .....	20
<b>APPENDIX A: GLOSSARY.....</b>	<b>21</b>
<b>APPENDIX B: QUESTIONNAIRES .....</b>	<b>22</b>

Cover Photo  
Photographer: Christophe Canato  
Performers: Stefan Karlsson and Sue Peacock  
Production: Sprung

## Table of Figures

<i>Figure 1: Respondents by State</i> .....	5
<i>Table 1: List of Respondents</i> .....	6/7
<i>Figure 2: Distribution of Respondents by Seating Capacity</i> .....	8
<i>Figure 3: Performance Spaces</i> .....	8
<i>Figure 4: Management Models</i> .....	9
<i>Table 2: Financial Overview</i> .....	9
<i>Figure 5: Average Turnover by Seating Capacity</i> .....	10
<i>Figure 6: Average Turnover by No. of Performance Spaces</i> .....	11
<i>Figure 7: Average Turnover by Distance from Nearest Capital City</i> .....	11
<i>Figure 8: Sources of Income</i> .....	12
<i>Figure 9: Expenditure Breakdown</i> .....	13
<i>Figure 10: Total Income from Government</i> .....	13
<i>Figure 11: Sources of Capital Expenditure</i> .....	14
<i>Table 3: Venue Utilisation by Performance Space</i> .....	14
<i>Table 4: Venue Activity Levels</i> .....	15
<i>Figure 12: Activity Type</i> .....	15
<i>Figure 13: Community vs Commercial Usage</i> .....	16
<i>Table 5: Community vs Commercial Productions</i> .....	16
<i>Table 6: Performing Arts Activity Levels</i> .....	17
<i>Figure 14: Performances Involving Financial Risk for Venue</i> .....	17
<i>Figure 15: Playing Australia Funded Seasons as a Percentage of Entrepreneurial (Risk)Seasons</i> .....	18
<i>Figure 16: Playing Australia Funded Seasons as a Percentage of Total Arts Events</i> .....	18
<i>Figure 17: Dedicated Programming Budgets</i> .....	19
<i>Figure 18: Attendance by Genre</i> .....	20
<i>Figure 19: Gross Box Office by Genre</i> .....	20

## EXECUTIVE SUMMARY

The Australian Performing Arts Centres Association is the national peak body servicing the needs and interests of performing arts centres and presenters in regional and metropolitan Australia. APACA's membership base is broad including performing arts centres, independent producers, small to medium dance and theatre companies, festivals, funding bodies, touring organisations, other industry associations and some of Australia's major performing arts companies.

68% of APACA's membership comprises professionally managed performing arts centres from the iconic Sydney Opera House to the remote Matt Dann Cultural Centre in Australia's vast North West.

The Economic Activity survey has now been conducted with fundamentally the same questions in 2006, 2009, 2011 and 2013.

The aim of this project was to measure the extent of operations and economic activity of performing arts centres across Australia.

### Methodology

The survey was carried out online through Survey Monkey ([www.surveymonkey.com](http://www.surveymonkey.com)) in two parts. The questionnaire was sent to Ordinary members only i.e. those members who managed performing arts venues.

There were 88 responses to Part 1 and 79 responses to Part 2 representing 75% and 67% respectively of the 118 ordinary members. 72 members (58%) responded in full to both parts. As response to each section was voluntary, the number of responses varies by question.

### Findings

- Almost two thirds (65%) of respondents manage venues with total capacities of between 261 and 1100 seats. A further quarter fall into the 1501 – 3000 seating capacity range. Less than 5% of centres had capacities of below 260 or greater than 3000.
- 63% of all centres are owned by Local Government which also directly manages 80% of these centres. This equates to about two thirds of the entire sample being owned and operated by Local Government.
- Of the total respondents, 37% operate a performing arts centre with only one performance space. 66% operate either one or two performance spaces. Centres with four or more venues make up only 9% of the sample.
- Financial information was supplied by 80 respondents resulting in a combined turnover of \$157.2M. Individual respondent turnover ranged from \$53K to \$10.39M.
- Turnover was found to maximise at three performance spaces. As with previous surveys, no discernible relationship was perceived between turnover and distance from the nearest capital city.

- Government subsidy represents just over one third of all income (34.8%). Respondents' Entrepreneurial program (Box Office) increased from 12% in 2011 to 13.8% in 2013. Venue Hire (9.8%) dropped slightly from 12% in 2011. Also dropping was Income from Food and Beverage (6.1%), Recoverables (8.2%) and Ticketing Services (6.1%).
- The predominant expense for centres remains labour (44.4%).
- Respondents spent just over \$22M purchasing and presenting their programs, with another \$7M spent on marketing these events and their venues.
- Local Government still represents the most significant government contribution among respondents at 78.9%, marginally up on 2011.
- 40% of funding for capital expenditure comes from Local Government with a further 43% coming from State/Territory levels, and increase from 34% in 2011.
- The average utilisation rate for all performance spaces is up to 58% from 55% in 2011, however the average utilisation rate for primary performance spaces is down to 59% from 61% in 2011.
- As cultural hubs in their respective communities, performing arts centres host a range of both arts and community events. In the year preceding this survey, more than six million people attended just over 29,000 events of some kind at the respondents' venues.
- In 2013 34% of arts centre activities were determined as non-arts events (down from 37% in 2011), which demonstrates the importance of performing arts venues as a resource for each community that fulfills a variety of needs that are not necessarily arts related.
- 65% of respondents' venue usage is attributed to community events that in this case refers to events produced by amateur groups, dance schools etc. (See Appendix 1 for definitions). This represents an increase from 55% in 2011.
- Seasons presented or co-presented by the respondents [that is where there is a financial risk to the presenter] make up 41% of the total performances presented.
- Of the total seasons on which respondents incurred full or part financial risk, Playing Australia supported 21%. This represents 6% of all performing arts performances in the respondents' venues.
- Of the respondents reporting on how an annual surplus is treated (n=42), only 14 (33%) stated that they were able to retain this amount within their operations.
- Of the 82 respondents to Part 2, 32 responded with data that allowed a study of dedicated programming budgets. 21 indicated they did not have a dedicated budget or chose to insert zero values.
- Attendances at performance events are dominated by Musical Theatre with 18.6% of attendances. The next highest attended genres are Dance with 15.8% and Non-classical Music 11.7%.
- Gross Box Office figures by genre mirror attendances with Musical Theatre generating 28.8% of GBO, Dance 15.6% and Non-classical Music 14.4%.

## Conclusions

Despite the absence of useful or fulsome data from the larger, capital city centres from the sample, the respondents represented a wide range of performing arts centres, both in geographical spread and size of enterprise, demonstrating the breadth of the APACA membership.

Local government remains at the centre of the sector, playing a much greater role in the management and operational funding of performing arts centres. State and Territory Governments take up more of the capital expenditure funding load than either other tier.

Performing arts centres are increasingly taking on greater risk in order to better utilise their venues. They also continue to be important community resources, with high levels of subsidised community and non-arts related activity undertaken within these facilities.

Playing Australia funds have delivered a greater proportion of seasons into venues, and remains an integral aspect of entrepreneurial programs. Performing arts centres are also taking more risk than previously. This reflects the importance of self presented program activity which delivers significant economic and arts activity in the respondents' individual communities.

Playing Australia funds are a catalyst for programming and expenditure which reflects the importance of the fund in activating national touring. The respondent venues invested an additional \$29M in presenting and marketing events supported by Playing Australia. These events represented just under one fifth of all events in the respondents' entrepreneurial programs.

This suggests a significant economic impact, providing jobs and expenditure as well as arts activity within each community, partially triggered by the federal government's investment.

Consequently, performing arts centres are not simply generators of artistic endeavour, they are also valuable for the role they play as economic generators in their communities.

## INTRODUCTION

The Australian Performing Arts Centres' Association (APACA) represents 189 organisations throughout Australia. 62% of these members operate a professionally managed performing arts centres. Other members (38%) are from organisations that have substantially similar objectives to the Association and include producing companies, touring organisations and funding bodies. Our members operate predominantly in the subsidised sector. There are three members from New Zealand.

The performing arts centres' sector presents productions from a vast array of art forms from opera and classical music, to comedy and contemporary dance. Typically the sector operates with a limited resource base. Whilst members are geographically dispersed, technology facilitates regular communication that has developed the sector into a strong network.

## AIM

The purpose of this survey and report is twofold. In the first instance, it is to provide members with comparative data that will assist in decision making. Secondly, the report will provide information regarding the scale of operations of the sector.

Performing arts centres often work in isolation as a result of the relatively unique nature of the industry and their geographic location. Similarly, lean staff structures and resource limitations restrict the ability of organisations to undertake research to inform the management and operation of their organisations and provide an evidence base for decision making.

The overall aim of this project was to measure the extent of operations and economic activity of performing arts centres across Australia.

## METHODOLOGY

APACA undertook research into its members' economic activity for the first time in 2006, and again in 2009 and 2011. This is the fourth such survey. Primary research has been undertaken due to a lack of consistent, standardised and available secondary data. All iterations of the project have revealed an on-going problem for the industry which is one of definition. There are differing understandings of the terms commonly used. A glossary of how terms are used in respect of this research is provided at Appendix A. Each time this research is undertaken, APACA endeavours to further clarify usage, but there is still some way to go to achieve industry agreement on the use and definition of terms.

A review was undertaken prior to commencing the survey design in an attempt to clarify terminology and maximise participation in order to provide a strong representation of the sector.

Based on feedback, the geographic disparity of respondents and the extent of variables to be considered in the survey, an online survey tool was considered most effective in achieving high response rates. The questionnaires were distributed in August and September 2013 through Survey Monkey ([www.surveymonkey.com](http://www.surveymonkey.com)) to Ordinary members only, i.e. those members who manage performing arts venues.

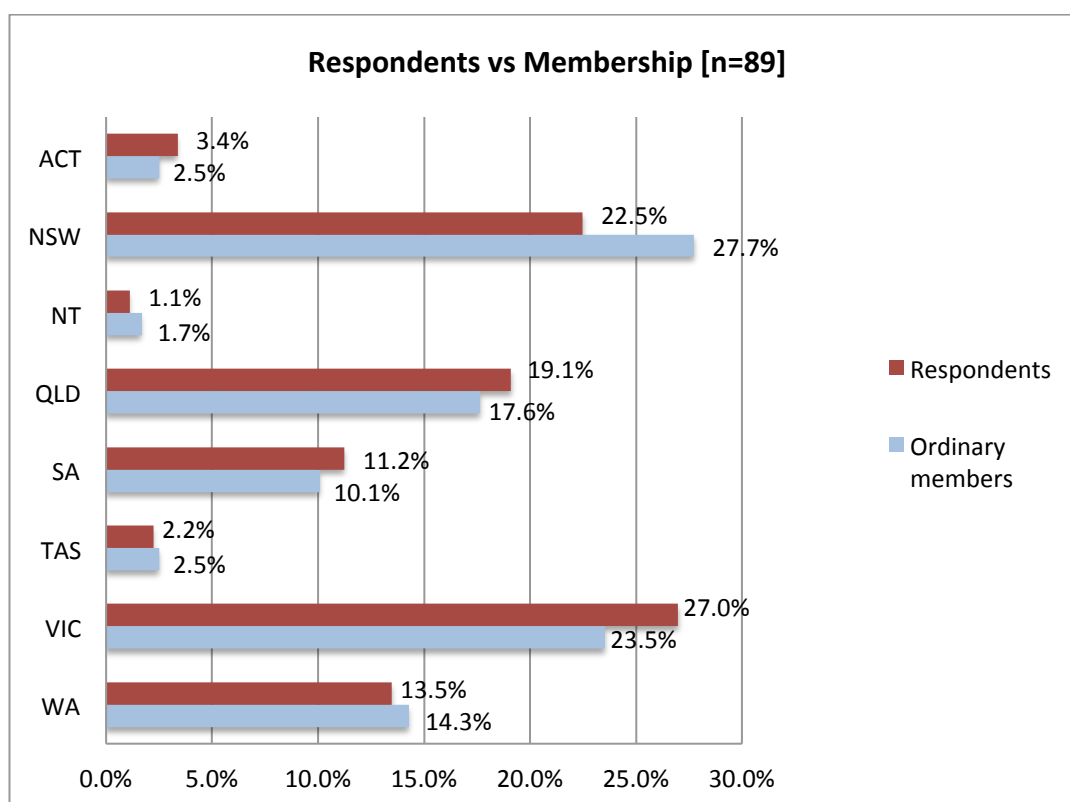
The survey tools can be found at Appendix B. Where possible, closed questions were asked requiring respondents to tick boxes or use drop down menus, however some questions required specific quantities and dollar values to be inserted by respondents. Conversely, for some questions it was important to provide an opportunity for respondents to clarify responses and opportunities for general comments were given. Not only did the questionnaires enable accurate collation of data, but also provided valuable insight for developing subsequent surveys.

## Response Rates

There were 88 useful responses to Part 1 and 79 useful responses to Part 2 representing 75% and 67% respectively of the 118 ordinary membership. 77 members (58%) responded to both parts. As response to each section was voluntary, the number of responses varies by question. For consistency, all analysis is given as a percentage of those responding with n (the number responding shown for each part of the analysis).

Respondent numbers were slightly higher than in previous surveys however detailed or useful data from the largest capital city centres is again notably absent from the respondent sample. This has affected data and analysis in various areas of the survey and will be discussed as needed.

State by state respondents are shown in Figure 1 against Ordinary Membership (as this represents the vast majority of the respondents, but also the full membership including Associate Members).



**Figure 1: Respondents by State**



## FINDINGS

### Respondents

The following centres responded to the survey:

	Centre	Managed By	Pop'n Served	Dist From Capital City (km)	No. of Perf Spaces	Total Capacity
ACT	Canberra Theatre Centre	Bus Unit of Govt	800,000	0	3	1,954
	Tuggeranong Arts Centre	-	-	-	2	172
	The Street Theatre	-	400,000	-	3	400
New South Wales	Illawarra Performing Arts Centre	Company	649,937	95	3	801
	Joan Sutherland Performing Arts Centre	Company	-	-	3	-
	NORPA, Northern Rivers Performing Arts	Contract Mgt	45,000	197	2	734
	City Recital Hall Angel Place	Contract Mgt	5,000,000	-	1	1,238
	Sutherland Entertainment Centre	Local Govt	205,000	18	2	1,214
	Dubbo Regional Theatre and Convention Centre	Local Govt	160,000	500	2	1,250
	Casula Powerhouse	Local Govt	191,142	40	2	426
	Riverside Theatres Parramatta	Local Govt	200,000	20	3	1,072
	Bathurst Memorial Entertainment Centre	Local Govt	40,000	200	2	1,550
	Orange Civic Theatre	Local Govt	150,000	264	1	1,500
	Civic Precinct Theatre - Newcastle	Local Govt	250,000	140	3	2,534
	Griffith Regional Theatre	Local Govt	26,662	573	2	626
	Capitol Theatre Tamworth	Local Govt	60,000	397	1	402
	Shoalhaven Entertainment Centre	Local Govt	100,000	200	2	1,106
	The Glasshouse Arts Conference and Ent. Centre	Local Govt	140,000	380	2	694
	Zenith Theatre & Convention Centre	Local Govt	525,000	8	4	251
	Manning Entertainment Centre	Local Govt	60,000	608	1	505
	Glen Street Theatre	Local Govt	145,000	30	1	400
	Albury Entertainment Centre	Local Govt	175,000	351	2	818
NT	Araluen Arts Centre	Bus Unit of Govt	30,000	1,500	1	487
Queensland	Judith Wright Centre of Contemporary Arts	Bus Unit of Govt	3,000,000	5	3	460
	Centre of Contemporary Arts Cairns	Bus Unit of Govt	-	1,700	2	368
	The Arts Centre Gold Coast	Company	600,000	75	4	2,020
	Empire Theatre	Company	255,000	126	3	1,965
	The Events Centre	Company	300,000	110	2	1,600
	Burdekin Cultural Complex	Contract Mgt	18,500	-	0	-
	Cairns Civic Theatre	Local Govt	180,000	1,700	1	669
	Brisbane Powerhouse	Local Govt	2,000,000	4	3	-
	Gladstone Entertainment Centre	Local Govt	60,000	600	1	400
	Mackay Entertainment & Convention Centre	Local Govt	120,000	900	5	3,025
	Redland Performing Arts Centre	Local Govt	146,000	30	3	949
	Brolga Theatre	Local Govt	120,000	250	2	1,000
	Townsville Civic Theatre	Local Govt	190,000	1,370	3	1,600
	Mount Isa Civic Theatre	Local Govt	23,000	1,600	2	1,006
	Pilbeam Theatre	Local Govt	110,000	640	1	972
	Queensland Performing Arts Centre	Stat Aut	-	5	4	5,194
	Roundhouse Theatre	-	2,000,000	-	2	440

	Centre	Managed By	Pop'n Served	Dist From Capital City (km)	No. of Perf Spaces	Total Capacity
South Australia	Barossa Arts & Convention Centre	Educ Inst	45,000	80	2	1,161
	The Hopgood Theatre	Bus Unit of Govt	200,000	5	1	492
	Marion Cultural Centre	Local Govt	85,000	10	1	255
	Murray Bridge Town Hall	Local Govt	30,000	70	1	300
	Playford Civic Centre	Local Govt	150,000	35	3	1,197
	Middleback Theatre	Stat Aut	25,000	384	1	478
	Northern Festival Centre	Stat Aut	25,000	220	5	495
	Chaffey Theatre	Stat Aut	30,000	253	5	800
	Sir Robert Helpmann Theatre	Stat Aut	60,000	460	1	524
	Adelaide Festival Centre	Stat Aut	-	0	-	-
TAS	Devonport Entertainment and Convention Centre	Local Govt	65,000	460	1	472
	Theatre Royal	Stat Aut	250,000	-	1	700
Victoria	Melbourne Theatre Company	Educ Inst	-	1	2	709
	Monash University Academy of Performing Arts	Educ Inst	1,500,000	20	3	2,532
	Geelong Performing Arts Centre	Bus Unit of Govt	284,193	75	3	2,655
	Melbourne Recital Centre	Company	-	3	2	1,140
	Malthouse Theatre	Contract Mgt	-	-	3	814
	ESSO BHP Billiton Wellington Entertainment Centre	Local Govt	44,000	230	5	400
	Karalyka Centre	Local Govt	103,000	20	1	430
	Her Majesty's Theatre - Ballarat	Local Govt	110,000	110	1	959
	Lighthouse Theatre	Local Govt	60,000	300	2	724
	Kingston Arts Centre	Local Govt	385,600	20	3	1,261
	Drum Theatre	Local Govt	135,000	32	1	521
	Swan Hill Town Hall Perf. Arts & Convention Centre	Local Govt	36,300	336	1	860
	The Capital - Bendigo's Performing Arts Centre	Local Govt	200,000	150	3	705
	Kyneton Arts Centre	Local Govt	440,000	85	3	650
	Eastbank Centre - Riverlinks Venues	Local Govt	60,000	185	2	1,250
	Frankston Arts Centre	Local Govt	250,000	40	3	1,500
	Colac Otway Performing Arts and Cultural Centre	Local Govt	22,000	150	2	544
	Clocktower Centre	Local Govt	110,000	8	1	503
	Whitehorse Performing Arts Centre	Local Govt	157,000	20	1	408
	The Cube Wodonga	Local Govt	100,000	300	1	410
	Wyndham Cultural Centre	Local Govt	191,000	20	1	477
	Mildura Arts Centre	Local Govt	52,000	400	1	444
	Hamilton Performing Arts Centre	Local Govt	16,000	300	1	500
	Darebin Arts and Entertainment Centre	Local Govt	180,000	10	1	395
Western Australia	Mandurah Performing Arts Centre	Inc. Assoc.	250,000	60	2	944
	University Theatres - University of Western Australia	Educ Inst	1,500,000	-	5	4,350
	Bunbury Regional Entertainment Centre	Contract Mgt	100,000	190	1	810
	Matt Dann Cultural Centre	Local Govt	2,000	1,648	1	302
	Kalamunda Performing Arts Centre	Local Govt	60,000	20	3	557
	Broome Civic Centre	Local Govt	15,000	1,870	3	350
	Carnarvon Civic Centre	Local Govt	7,000	900	2	759
	Queens Park Theatre	Local Govt	60,000	464	2	1,023
	Don Russell Performing Arts Centre	Local Govt	110,000	17	1	216
	Esperance Civic Centre	Local Govt	15,000	720	2	750
	Arts Margaret River Margaret River Cultural Centre	Stat Aut	15,000	300	1	338
	Koorliny Arts Centre	Stat Aut	100,000	37	3	1,304

Table 1: List of Respondents

## Capacity

Figure 2 shows that almost two thirds of the respondents (65%) manage performing arts centres which have a capacity of between 261 and 1100. The venue size parameters have been decided arbitrarily and are consistent with previous years' parameters.

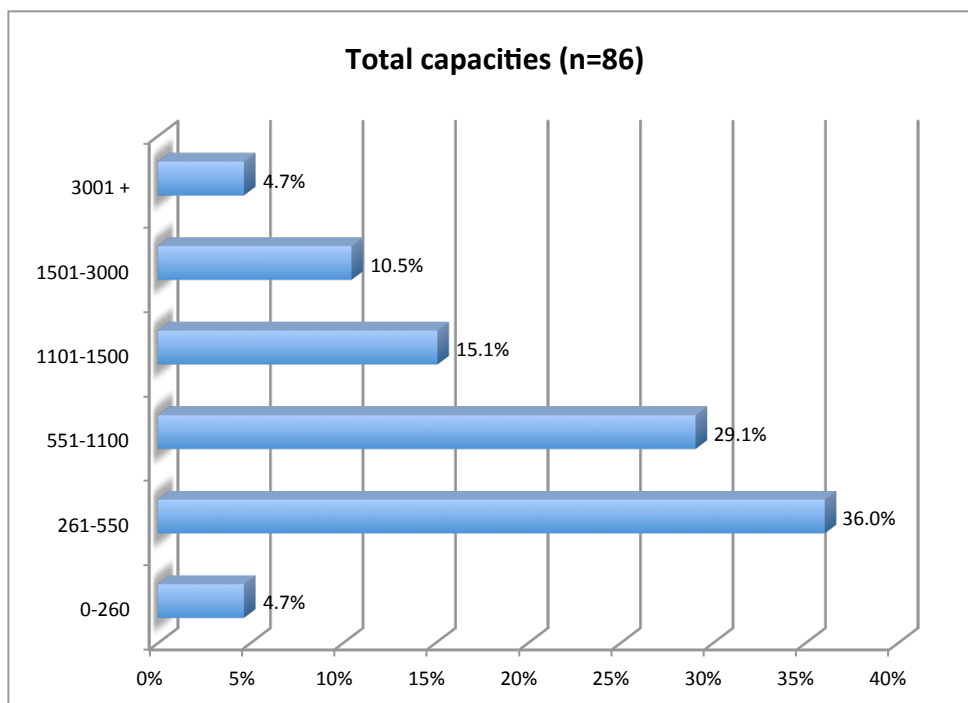


Figure 2: Distribution of Respondents by Seating Capacity

66% of respondents' operate performing arts centres with either one or two performance spaces as show in Figure 3 below. Only 9% have four or more spaces.

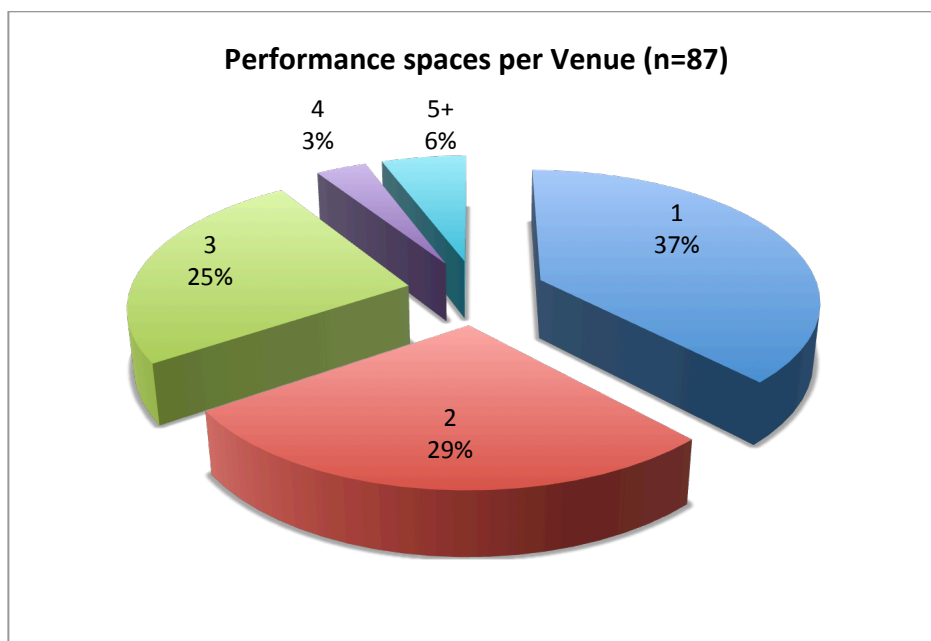


Figure 3: Performance Spaces

Figure 4 below shows that almost two thirds (63%), of respondents' venues are managed directly by local government. In terms of ownership, local government's role is broader still (reaching 80%), as a number of venues managed by separate legal entities are also owned by local government.

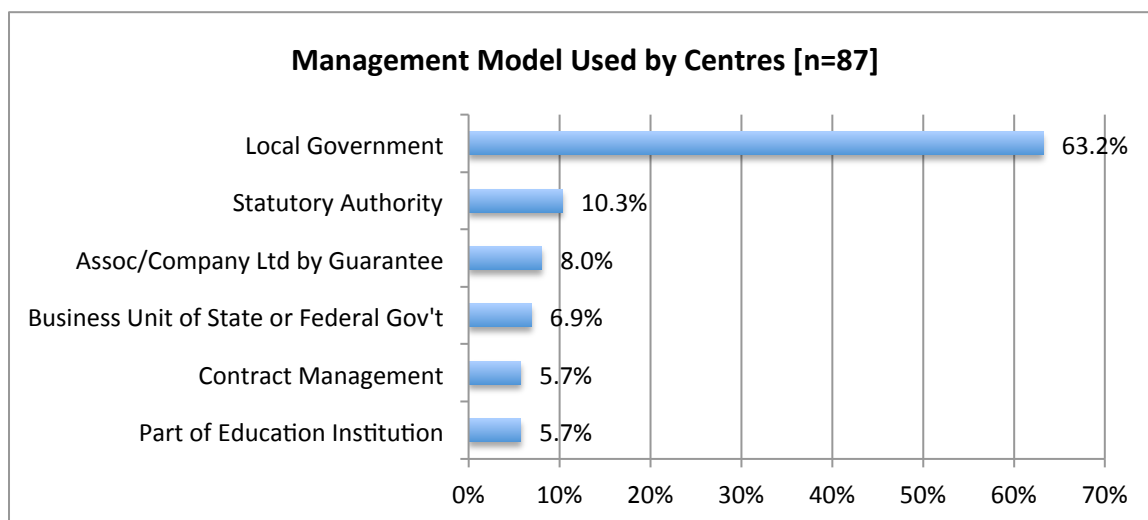


Figure 4: Management Models

## Financial Snapshot

FINANCIAL OVERVIEW (n=80)		
INCOME		%age of Total
Box Office	\$21,561,644	13.7%
Ticketing Services	\$9,657,509	6.1%
Contract Performance Fees	\$1,283,972	0.8%
Venue Hire	\$15,393,624	9.8%
Recoverables	\$12,824,624	8.2%
Food and Beverage	\$9,608,518	6.1%
Merchandise	\$273,392	0.2%
Interest	\$634,848	0.4%
Other earned Income	\$11,103,323	7.1%
<b>Sub-total Earned Income</b>	<b>\$82,341,453</b>	<b>52.3%</b>
Federal Funding	\$2,032,068	1.3%
State/Territory Funding	\$13,746,174	8.7%
Local Govt Funding	\$54,762,354	34.8%
<b>Sub-total Funding</b>	<b>\$70,540,596</b>	<b>44.8%</b>
Philanthropic Trusts	\$1,607,003	1.0%
Sponsorship (Monetary)	\$1,600,444	1.0%
Sponsorship (In-kind)	\$887,678	0.6%
Donations/Fundraising	\$355,450	0.2%
<b>Sub-total Private Support</b>	<b>\$4,450,575</b>	<b>2.8%</b>
<b>TOTAL INCOME</b>	<b>\$157,332,624</b>	
EXPENDITURE		
Labour Costs	\$57,510,721	44.4%
Marketing/Promotions	\$7,016,380	5.4%
Show Purchases	\$12,866,336	9.9%
Program Expenditure	\$9,335,980	7.2%
Food and Beverage Costs	\$5,528,308	4.3%
Administration	\$13,645,388	10.5%
Repairs and Maintenance	\$5,682,581	4.4%
Other Expenses	\$17,981,587	13.9%
<b>TOTAL EXPENDITURE</b>	<b>\$129,567,281</b>	
<b>NET RESULT</b>	<b>\$27,765,344</b>	

Table 2: Financial Overview

In order to understand the indicative scope of financial activity in the sector, respondents were asked to provide their last annual financial statement. Table 2 represents a total of 80 respondents with a combined turnover of \$157.3M. There are some difficulties in collating financial data in this form, as local government venues often show their operating deficit as an adjusted local government contribution under income, while those managed by separate legal entities have a final deficit or surplus that is taken up in their own separate balance sheets.

Of the 42 respondents reporting on how a surplus is treated, only 14 (33%) stated that they were able to retain this amount. Of these retained surplus amounts it was evenly split between those that were transferred into general purpose or capital reserves, and those made into available funds for the following year.

The income figure is constant with the 2011 Survey, however expenditure figures are considerably lower than in previous surveys: net surplus is considerably higher.

## Turnover

Turnover ranged from \$53,100 to \$10.39M; the extremities of the range are lower than in previous surveys; mostly due to their being no major capital city arts centre turnover data included. The following figures required collated data from both Parts 1 and 2 of the survey and, as such, have a low number of respondents (53-55). Despite this, findings are in line with previous Survey results – especially given the ongoing absence of the large, capital city centres.

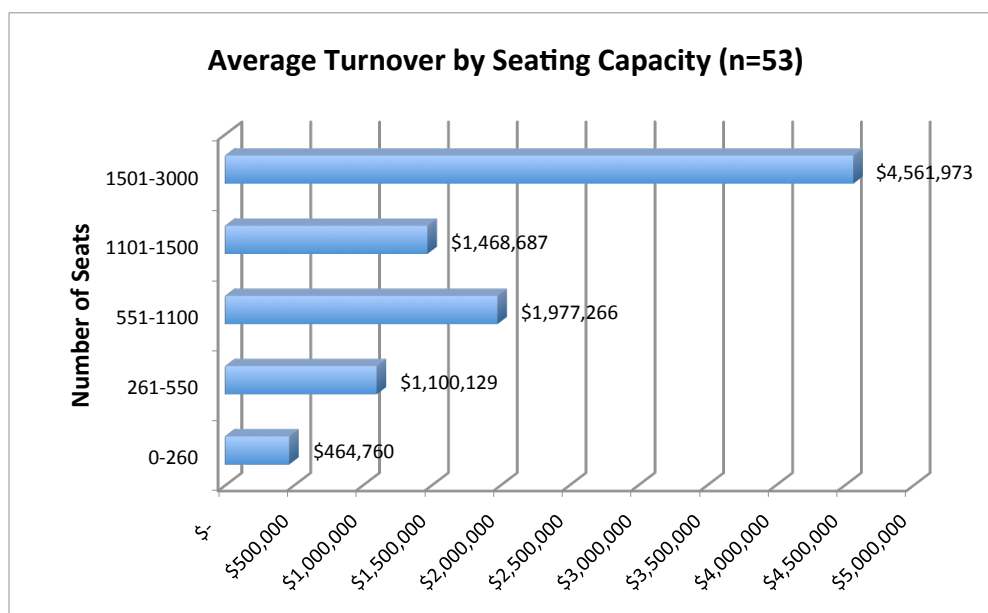


Figure 5: Average Turnover by Seating Capacity

Figure 6 below shows a change from the previous Survey where the 4+ Spaces category was showing average turnover of greater than \$13M. Given that none of the major capital city centres have data in this analysis, that some smaller regional venues have four or five spaces but with a low turnover, and, that a couple of producing ordinary members with three Spaces are included, it is the three Space category that shows the most significant turnover.

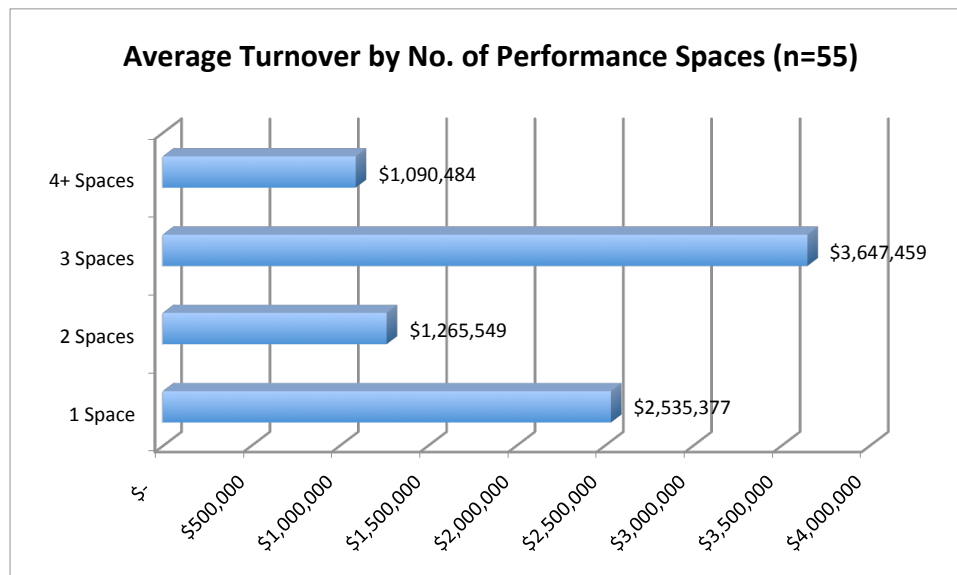


Figure 6: Average Turnover by No. of Performance Spaces

Figure 7 shows the effect on turnover of a centre's distance from the nearest capital city. While it displays no obvious trend as such, it does suggest that there are certain "sweet spots" geographically. City and Metropolitan venues, remembering that the country's largest arts centres are not included in this, demonstrate the greatest turnover. Respondents operating venues furthest from a capital city are located in Broome, Alice Springs, Cairns, Mt Isa and Port Hedland.

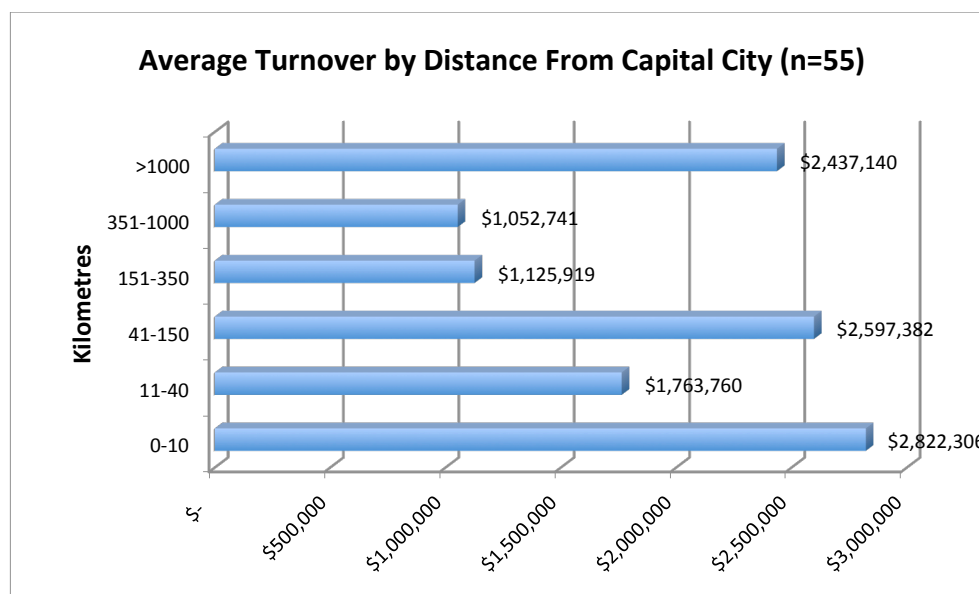


Figure 7: Average Turnover by Distance from the Nearest Capital City

Local Government subsidy represents the largest source of income at just over one third (34.8%) of all revenue. Income from venues' entrepreneurial program (Box Office 13.7%) and venue hire (9.8%) have collectively increased slightly since the 2011 figures, Food and Beverage income has decreased by around a half (from 12.1% in 2011) to 6.1% in the current survey, and income from the provision of ticketing services has also dropped more than a quarter to 6.1% (from 8.4% in 2011). Sponsorship appears to have remained constant (with the 2013 Survey asking for a breakdown of in-kind, monetary sponsorship and donations rather than 2011's combined category) at 1.8% (1.9% in 2011).

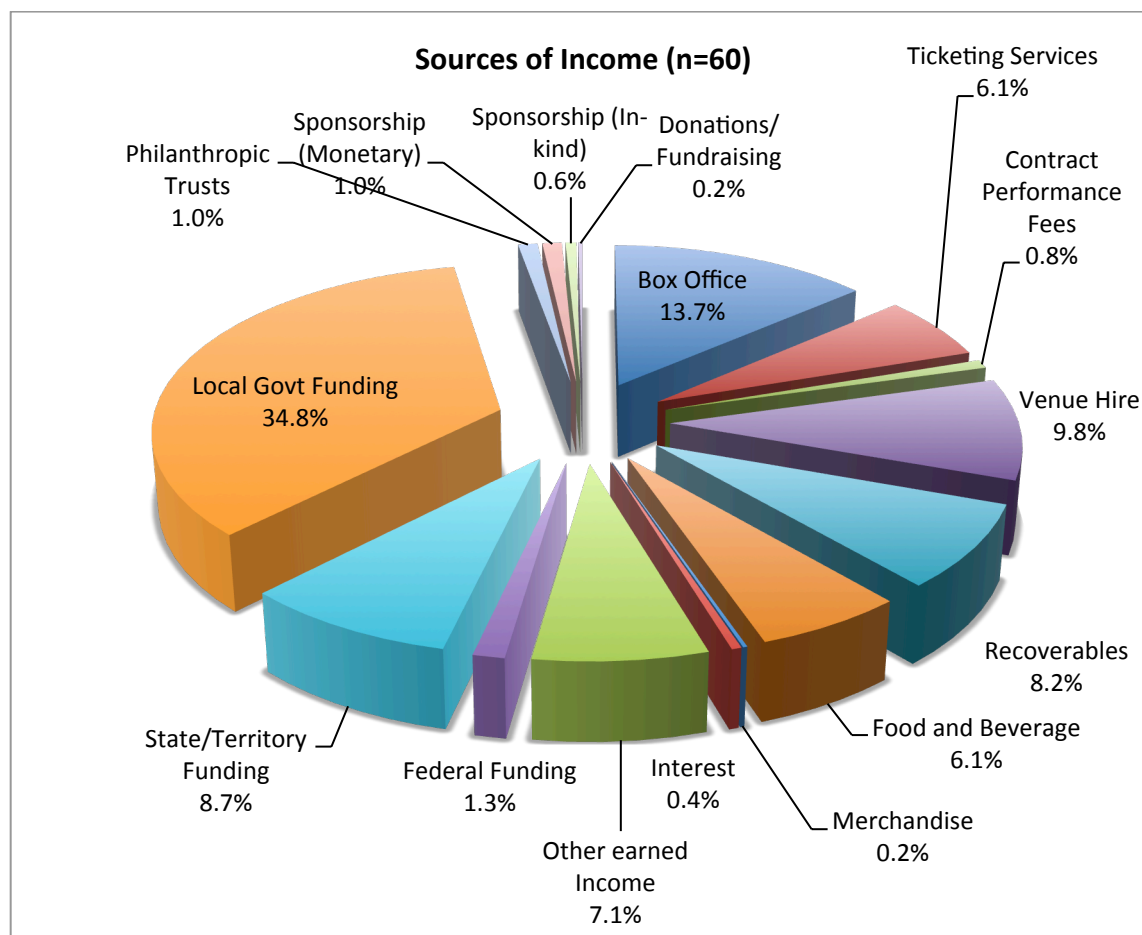


Figure 8: Sources of Income

## Expenses

Labour costs remain the largest expense for respondents (44.5%). Expenditure on entrepreneurial programming (show purchases 9.9% and program expenditure 7.2%) is higher again in than in 2009 (13% combined) and 2011 (15.8% combined).

Respondents spent just over \$22M purchasing and presenting their programs, with another \$7M spent on marketing these events and their venues. These are lower than last Survey's figures of \$24M for purchase and presentation of programs, and \$8.2M for marketing.

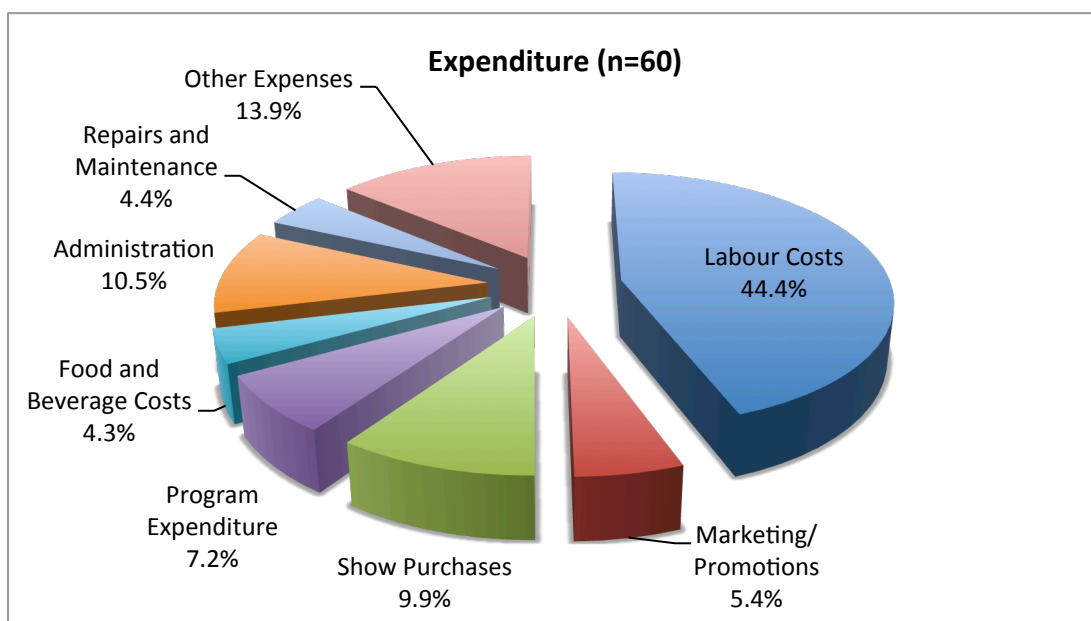


Figure 9: Expenditure Breakdown

## Funding

Figure 10 represents the breakdown of total operational government funding received by respondents. It shows an increase in Federal Government Funding from 0.3% to 1.3%. As a rate of increase this is high, as an increase in real terms it is slight. The reality is that distribution of funding sources is reasonably static.

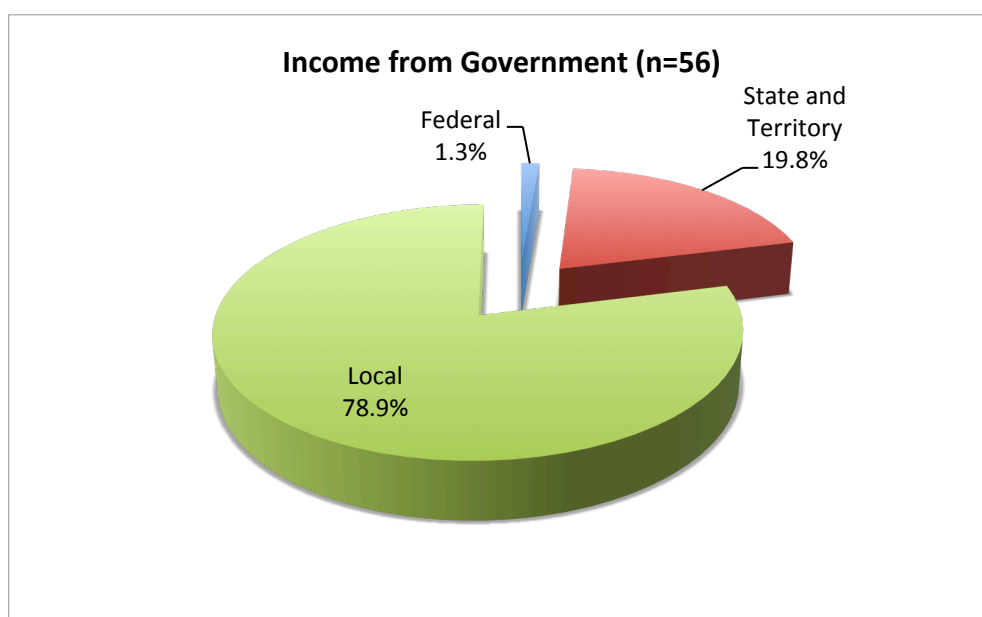
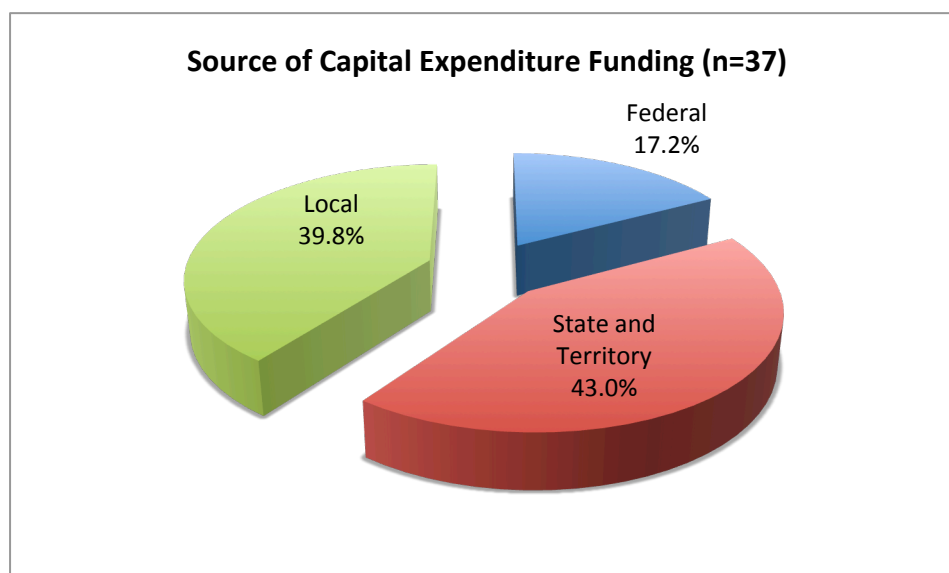


Figure 10: Total Income from Government

The breakdown of funding sources for capital expenditure is shown at Figure 11. This is perhaps skewed by the absence of the financial data from the major capital city centres, which would increase state level funding if they were included. At 17.2% Federal funding is higher than in previous surveys (11% in 2011). State and Territory contributions are up from 34% in 2011 to 43% in 2013 and Local Government down from 51% in 2011 to 40% in 2013.





**Figure 11: Sources of Capital Expenditure Funding**

## Venue Utilisation

The average Utilisation rate for all spaces is 58% (up from 54.7% in 2009) however the average occupancy rate for the respondents' primary venue is 59% slightly lower than 2011 (61%).

	Perf Space 1	Perf Space 2	Perf Space 3	Perf Space 4	Perf Space 5	All Spaces
<b>Utilisation</b>	59%	57%	60%	63%	18%	58%
<b>Ave # Seats</b>	659	358	272	410	350	-
<b>Ave # Days Available</b>	319	306	320	361	365	316
<b>Average # Days Unused</b>	131	131	127	133	300	132
<b>Number Sampled (n=)</b>	77	41	21	3*	1*	-

**Table 3: Venue Utilisation by Performance Space**

\*Data for performance spaces 4 and 5 are virtually redundant due to the small sample size

## Activity Levels

As cultural hubs in their respective communities, performing arts centres host a range of both arts and community events. Table 4 demonstrates the respondents' overall level of activity. While it doesn't include all venue members, it begins to give an indication of the total volume of activity being undertaken. Significant numbers of people are attending performing arts centres in Australia, the sample venue members attracting almost seven million attendances. The number of performances is up significantly from 8,495 (n=72) in 2011 to 13,116 in 2013. Interestingly these additional performances delivered a smaller Performance audience as from 64 respondents in 2009 there was over 4.5M Performance Attendances as opposed to 4.23M in 2013. The omission of the major capital city venues from the sample is likely to contribute to this result.

	Total Perfs n=76	Total Attendance at Perfs n=67	Total all Activities n=66	Attendance at all Activities n=64	Total Non-Arts Activities n=66	%age Non-Arts Activities
<b>ACT</b>	464	191,669	685	193,096	17	2%
<b>NSW</b>	3,784	727,060	6,275	1,423,521	1,196	19%
<b>NT</b>	88	24,994				
<b>QLD</b>	2,449	1,668,048	5,962	2,016,807	1,272	21%
<b>SA</b>	820	179,141	4,057	315,320	2,678	66%
<b>TAS</b>	240	67,855	554	82,787	278	50%
<b>VIC</b>	4,057	1,123,113	7,682	1,746,089	3,824	50%
<b>WA</b>	1,214	253,038	3,725	376,185	651	17%
<b>Total</b>	<b>13,116</b>	<b>4,234,918</b>	<b>28,940</b>	<b>6,153,805</b>	<b>9,916</b>	<b>34%</b>

Table 4: Venue Activity Levels

Figure 12 shows that 34% of activity in the respondent venues was Non-arts activities. This is down slightly from the 2011 Survey (37%).

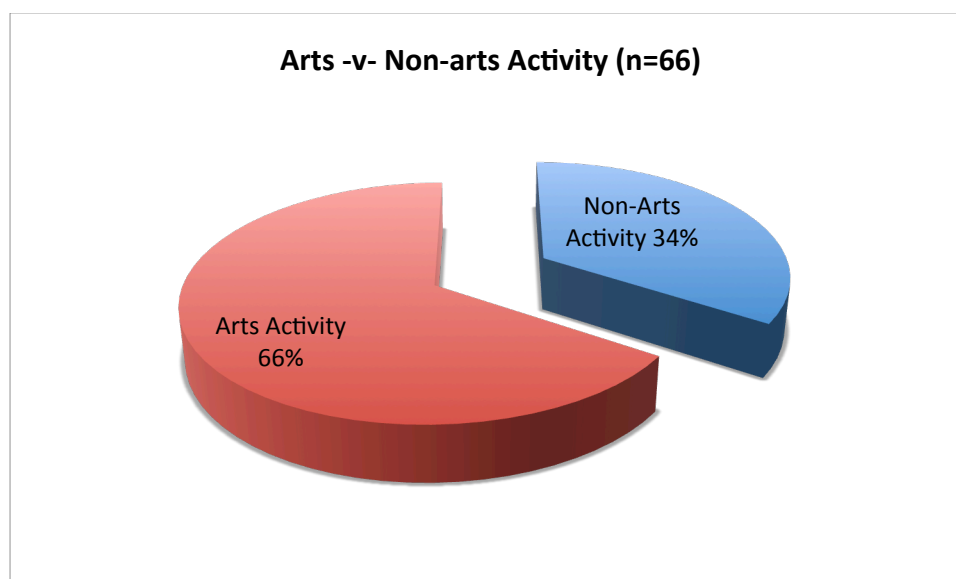
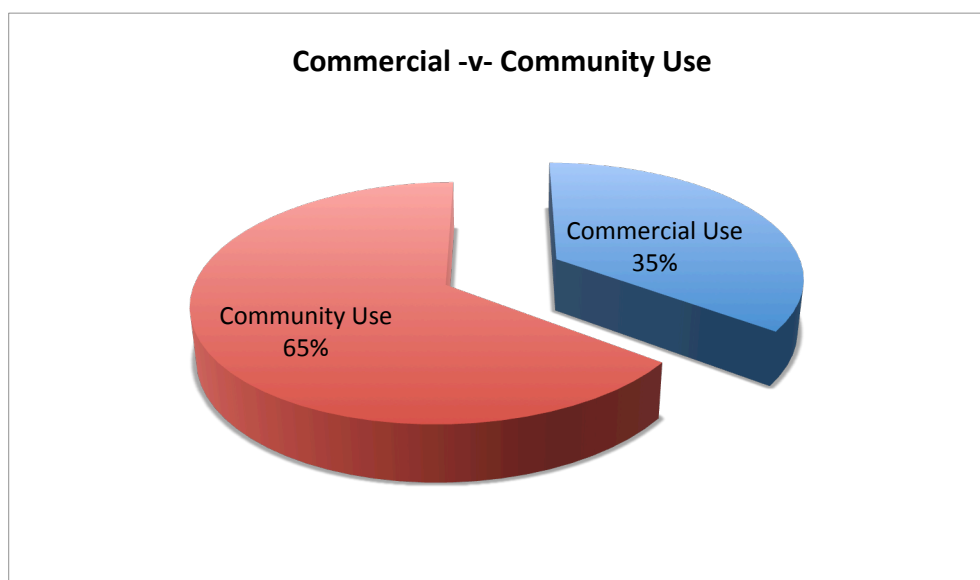


Figure 12: Activity Type

Whilst Non-arts activity has decreased, Community usage has grown quite a lot, from 55% in 2011, to 65% in 2013. Community events refers to events produced by amateur performance groups, dance and drama school concerts, etc.



**Figure 13: Community -v- Commercial Use**

Table 5 shows a breakdown by state of community and commercial performances.

	Community Performances	Commercial Performances
	<i>n=70</i>	<i>n=71</i>
ACT	130	187
NSW	1314	1029
NT	22	8
QLD	867	494
SA	370	235
TAS	96	50
VIC	1778	644
WA	568	333
<b>Total</b>	<b>5145</b>	<b>2980</b>

**Table 5: Community -v- Commercial Performances**

## Programming

Table 6 shows a breakdown of the performing arts events undertaken by respondents. Definitions of terms can be found at Appendix A. It should be noted that the number of productions supported by Playing Australia is a subset of the “Full Risk” and “Shared Risk” categories. While most categories are similar to 2011, the number of Playing Australia Seasons (397) is down from the 2011 results (411) as are Playing Australia supported performances (726 in 2013 and 845 in 2011).

	Productions Entrepreneuried at Full Risk n=71		Productions Entrepreneuried at Shared Risk n=47		Hires n=70		Risk as a %age of Total Arts Activated n=71		Productions Supported by Playing Australia n=58	
	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs
<b>ACT</b>	26	59	30	76	135	317	29%	30%	2	11
<b>NSW</b>	297	1,107	41	128	831	2,297	29%	35%	93	252
<b>NT</b>	44	44			19	35	70%	56%	9	9
<b>QLD</b>	283	1,045	158	599	342	955	56%	63%	32	51
<b>SA</b>	106	144	6	14	326	606	26%	21%	36	52
<b>TAS</b>	28	58	6	11	87	129	28%	35%	15	42
<b>VIC</b>	474	1,106	69	369	1,095	2,378	33%	38%	130	204
<b>WA</b>	255	353	65	46	417	706	43%	36%	80	105
<b>Total</b>	<b>1,513</b>	<b>3,916</b>	<b>375</b>	<b>1,243</b>	<b>3,252</b>	<b>7,423</b>	<b>37%</b>	<b>41%</b>	<b>397</b>	<b>726</b>

Table 6: Performing Arts Activity Levels

Figure 14 below shows the total number of venue performances broken down by financial risk. Performances presented or co-presented by the respondents make up 41% of the total performances presented. This is a further increase from 2011 levels (37%) and continues to demonstrate the growing trend towards centres’ entrepreneurial programming.

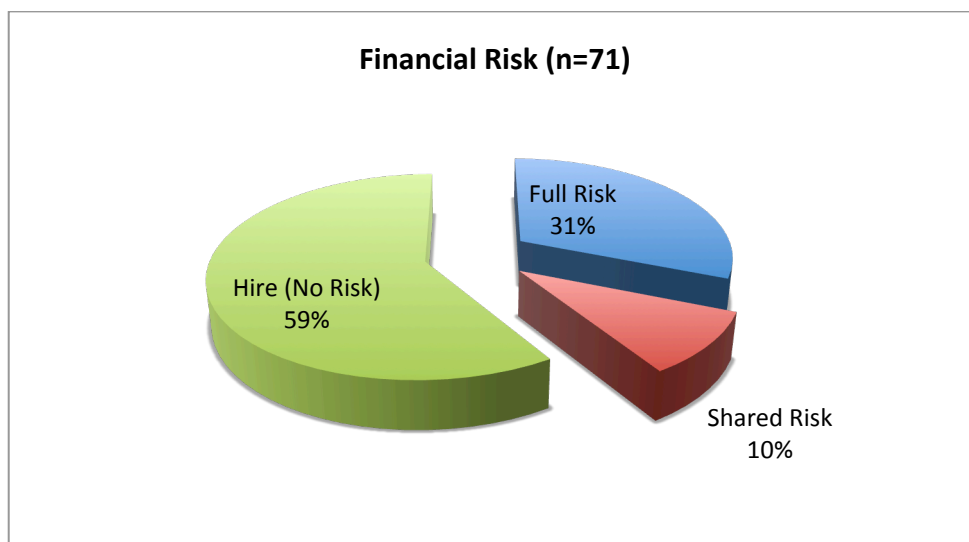
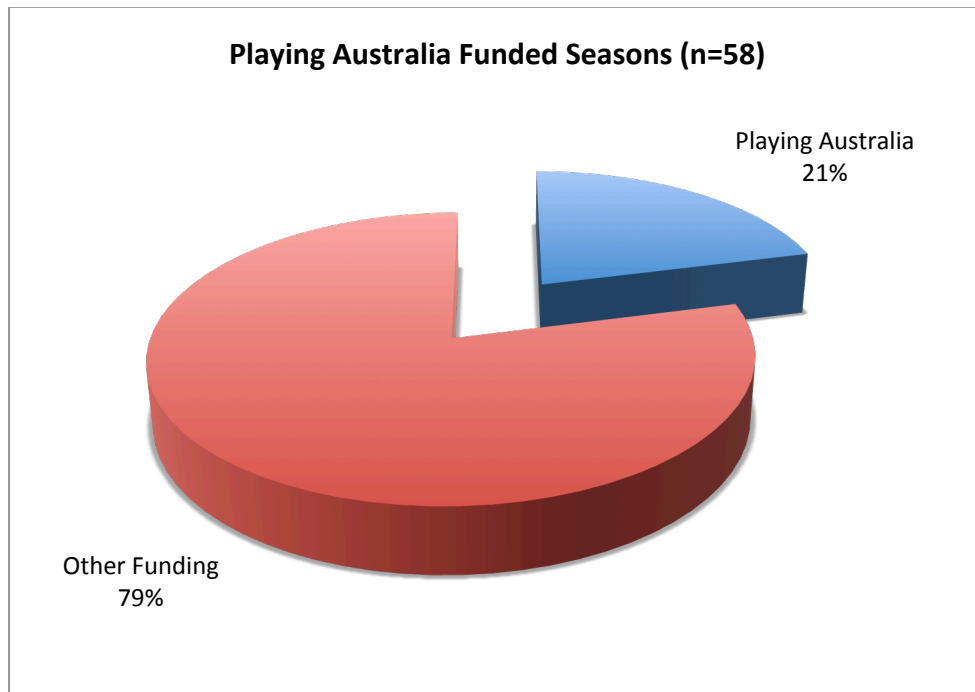
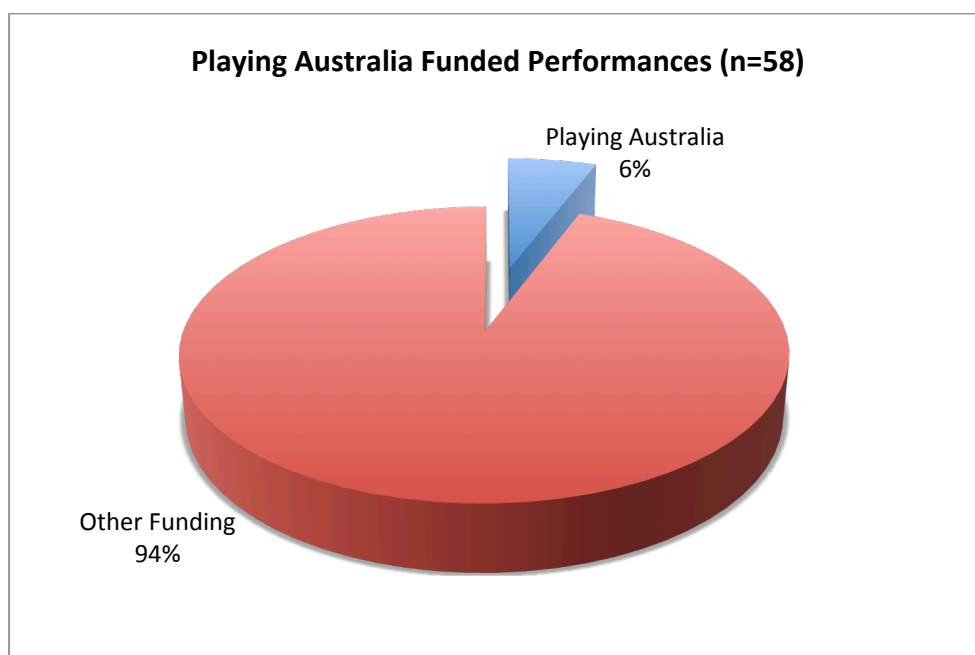


Figure 14: Performances Involving Financial Risk for Venue

Many Australian venues participate in processes that access Playing Australia funds to support the delivery of touring shows. Of the total events on which respondents incurred financial risk, Playing Australia supported 21% of performing arts seasons in the respondents' venues (17% in 2011). This represented 6% of all venue performances (7% in 2011).



**Figure 15: Playing Australia Funded Seasons as a %age of Entrepreneurial (risk) Seasons**



**Figure 16: Playing Australia Funded Performances as a %age of Total Arts Events**

Of the 82 respondents to Part 2, 32 responded with data that allowed a study of dedicated programming budgets. 21 indicated they did not have a dedicated budget or chose to insert zero values.

Of those whose data could be measured slightly under a third were programming at a surplus; the remainder at a deficit.

The sample size of 32 respondents with a programming budget makes it hard to offer any really useful analysis other than the trend is not that far removed from the 2011 Survey.

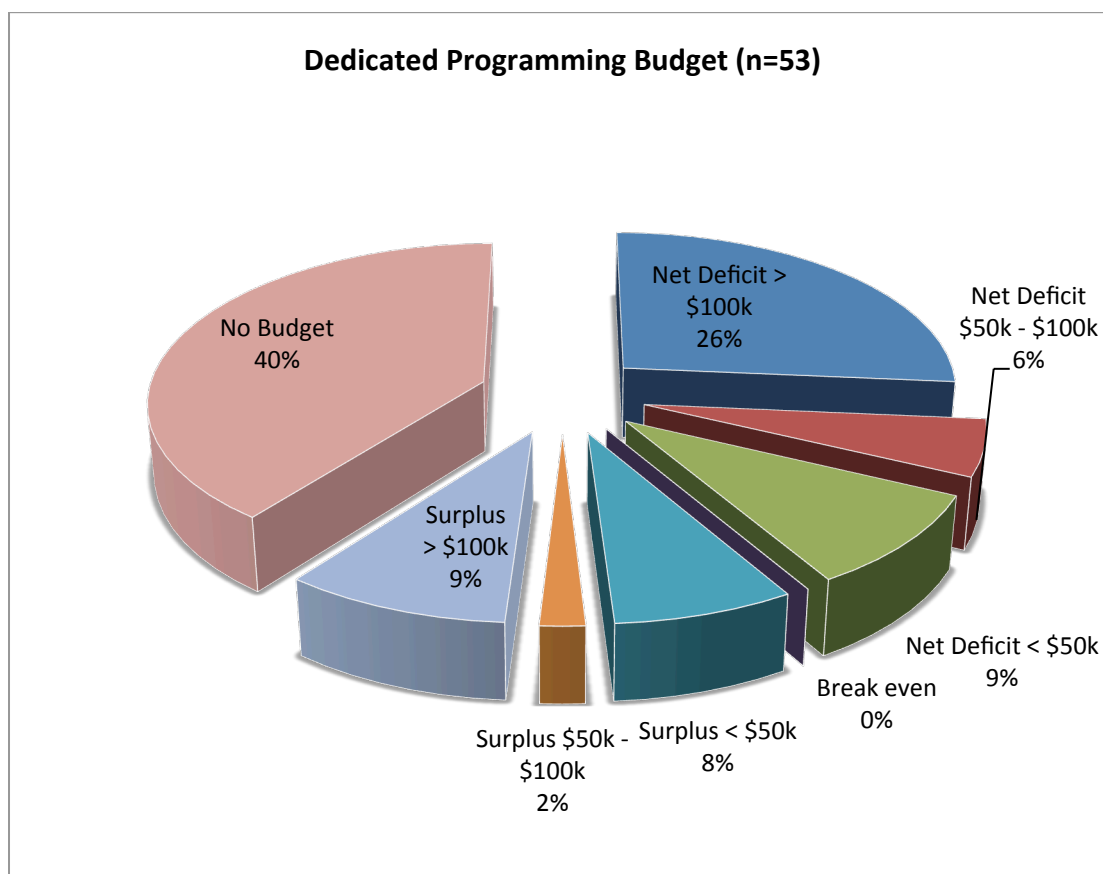


Figure 17: Dedicated Programming Budgets

## Genre

Figures 18 and 19 are new to the Survey and show a breakdown of performance activity by genre according to attendances and gross box office. It shows that the dominant activities as a function of both attendances and gross box office are Musical Theatre, Dance, Dramatic Theatre and Non-classical Music. Both attendances and gross box office figures are based on data concerning cultural activities only not the quantum of all cultural and non-cultural activities.

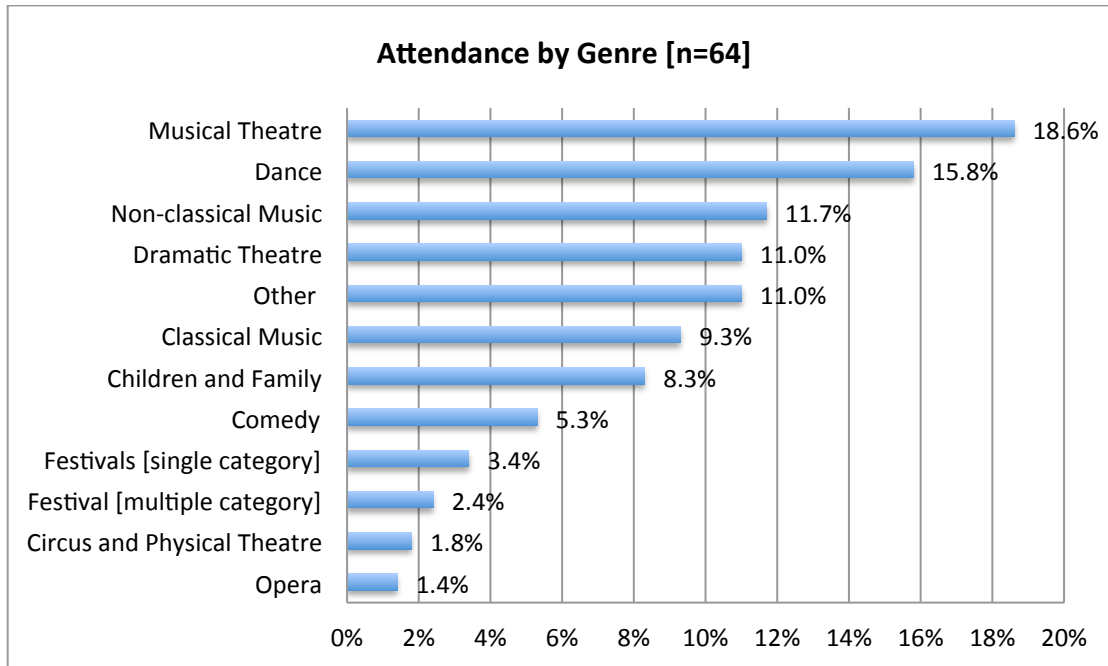


Figure 18: Attendance by Genre

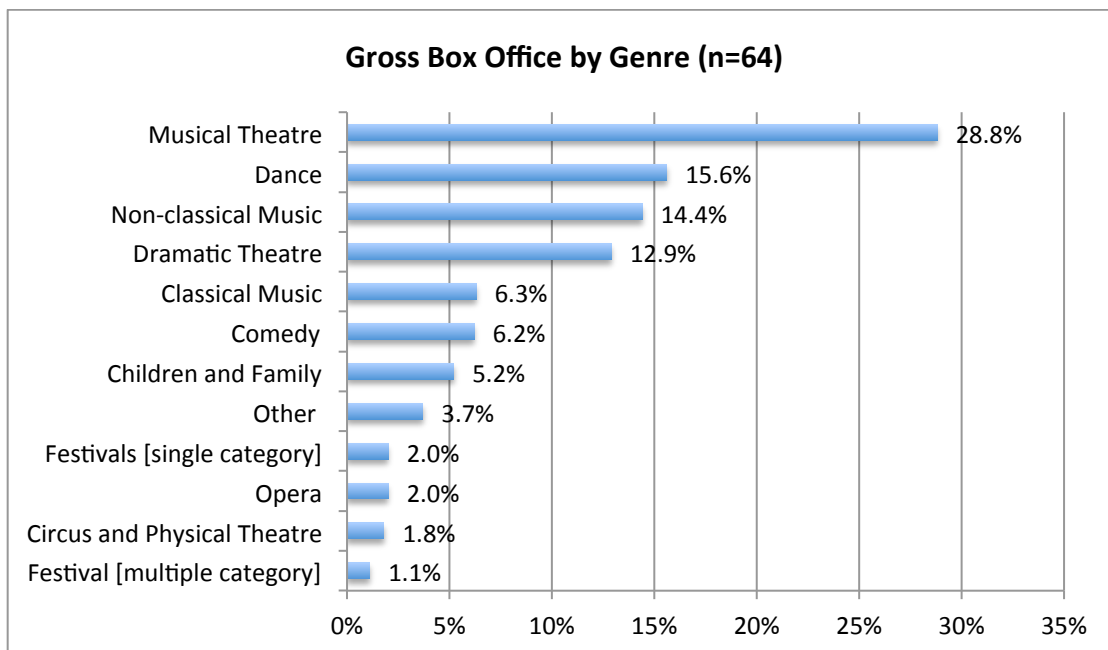


Figure 19: Gross Box Office by Genre

## APPENDIX A: GLOSSARY

**Performance:** a single performing arts presentation e.g. in the season of A Midsummer Night's Dream there were 3 performances. This does not include closed rehearsals with audience or events as detailed below. A day of three sessions of Eisteddfod is considered to be three performances.

**Season:** a series of more than one performance (over a defined period of time i.e. a week) of any one production e.g. 3 performances of A Midsummer Night's Dream would constitute one season of that play.

**Event:** a non-performance presentation such as a wedding, conference, film, rehearsal, class, workshop, ceremony, exhibition etc. Individual classes and rehearsals are counted separately, unless rehearsals are on stage or under stage lights ("production week").

**Entrepreneuried:** a show that a performing arts centre has proactively programmed, for which the organisation receives part of or total box office takings, and on which the performing arts centre takes or shares the financial risk.

**Dedicated Programming Budget:** a budgeted net expenditure that represents the net result of a centre's programming activities for the year - i.e. the contribution made by its owner or management to offset the financial loss from presenting program.

**Activities:** sum of all performances, films, lectures, seminars, conferences, workshops, rehearsals, exhibitions and other events [weddings, functions etc].

**Activities** of a non-arts nature: Product launches, conferences, functions etc of a non-arts related matter.

**Community events:** Hirers were charged a discounted rate or hire was valued at a discounted rate as part of in-kind support.

**Commercial events:** Hirers were charged a non-discounted rate or hire was valued at a non- discounted rate.



## APPENDIX B: QUESTIONNAIRES

# 2013 APACA Survey Part 1 - Economic Activity

## Introduction

This is part one of the 2013 Biennial APACA Survey.

Please note, you can return to the survey any number of times to complete various questions and you can email your centre's survey link to various members of your team for completion of questions relevant to their area of responsibility

BUT, PLEASE NOTE USE A SURVEY LINK THAT HAS NOT BEEN SPECIFICALLY SENT TO YOUR CENTRE

We are going to ask you a range of questions about your activities over the past year.

If you report on a financial year then provide details for the 2012/13 year, if you report on a calendar year then provide details for the 2012 year.

If you have more than one venue include statistics for ALL venues in your answers ie: A 'centre' can include a number of individual venues.

If you had a production that only had one performance, count it as one season AND one performance.

If you require assistance regarding clarification of definitions and/or questions please direct your enquiry via email to Rick Heath [ed@apaca.com.au] or call 08 9298 8822 [please note WA time zone].

### 1. Your Name:

### \*2. Organisation name: (ie the APACA member)

Other (please specify)

### 3. State:

☐ QLD

☐ NSW

☐ ACT

☐ VIC

☐ TAS

☐ SA

☐ WA

☐ NT

## 2013 APACA Survey Part 1 - Economic Activity

**4. What is the management model of your organisation? (select one)**

**5. Who is the owner of your venue ?**

Other (please specify)

**6. What is the current estimated capital value of the venue you manage (including building and contents) ?**

**7. What is the total estimated number of people in your catchment area. i.e. that your organisation makes services available to (including outlying areas)?**

**8. What is the distance, in kms, to the state or territory capital city nearest you, which may be in another state or territory ?**

# 2013 APACA Survey Part 1 - Economic Activity

## Venue Capacity and Utilization

**\*9. How many performance spaces are owned or managed by your organisation?**

**10. What is the TOTAL seated capacity of ALL the performance venues you manage?**

**11. At the end of the year in which you're accounting, how many days in that year was this performance space available for hire but not used?**

**(If you report on a financial year then 2012/13 year OR if you report on a calendar year then 2012 year)**

### Performance Space 1

Capacity (the maximum seated capacity of the performance space per performance)

Total Days per annum venue available for hire (e.g. excluding maintenance days etc)

Whole days NOT used per annum (i.e. when the venue was not used and could have been available for hire or self presenting, preparation or performance)

# 2013 APACA Survey Part 1 - Economic Activity

## Venue Capacity and Utilization for more than one venue

### 12. Performance Space 2

Capacity (the seated capacity of the performance space per performance)

Total Days per annum venue available for hire (eg excluding maintenance days etc)

Whole days NOT used per annum

### 13. Performance Space 3

Capacity (the seated capacity of the performance space per performance)

Total Days per annum venue available for hire (eg excluding maintenance days etc)

Whole days NOT used per annum

### 14. Performance Space 4

Capacity (the seated capacity of the performance space per performance)

Total Days per annum venue available for hire (eg excluding maintenance days etc)

Whole days NOT used per annum

### 15. Performance Space 5

Capacity (the seated capacity of the performance space per performance)

Total Days per annum venue available for hire (eg excluding maintenance days etc)

Whole days NOT used per annum

# 2013 APACA Survey Part 1 - Economic Activity

## Productions and Performances

This section relates to your Performing Arts activities - NOTE: productions reported on in this section do not include other non-cultural events.

### Definitions

Performance: a single Performing Arts presentation of 1-3 hours duration e.g. in the season of A Midsummer Night's Dream there were 3 performances. This does not include closed rehearsals with audience or events as detailed below. A day of three sessions of Eisteddfod is considered to be three performances.

Season: a series of more than one performance (over a defined period of time ie a week) of any one production e.g. 3 performances of A Midsummer Night's Dream would constitute 1 season of that play.

Event: a non-performance presentation such as a wedding, conference, film, rehearsal, class, workshop, ceremony, exhibition etc. Count individual classes and rehearsals separately, unless rehearsals are on stage or under stage lights ("production week").

Entrepreneuried: a show that your venue has proactively programmed, that your organisation receives part of or total box office takings and on which you take, or share financial risk.

(If you report on a financial year then please use the 2012/13 year OR if you report on a calendar year then please report on 2012)

### 16. Of the productions you entrepreneured last year on how many did you take the full financial risk?

Number of productions/seasons:

Number of performances:

### 17. Of the productions you entrepreneured last year on how many did you co-produce/co-present (ie: you shared the financial risk)?

Number of productions/seasons:

Number of performances:

### 18. Of the total number of productions presented at your Centre last year that you had a financial risk in [professional and non-professional], how many were financially supported by Playing Australia?

Number of productions/seasons:

Number of performances:

2013 APACA Survey Part 1 - Economic Activity

**19. How many productions were outside hires last year (ie: you had no financial risk)?**

Number of productions/seasons:

Number of performances

# 2013 APACA Survey Part 1 - Economic Activity

## Productions and Performances

This section relates to your Performing Arts activities - NOTE: productions reported on in this section do not include other non-cultural events.

### Definitions

Performance: a single Performing Arts presentation of 1-3 hours duration e.g. in the season of A Midsummer Night's Dream there were 3 performances. This does not include closed rehearsals with audience or events as detailed below. A day of three sessions of Eisteddfod is considered to be three performances.

Season: a series of more than one performance (over a defined period of time ie a week) of any one production e.g. 3 performances of A Midsummer Night's Dream would constitute 1 season of that play.

Event: a non-performance presentation such as a wedding, conference, film, rehearsal, class, workshop, ceremony, exhibition etc. Count individual classes and rehearsals separately, unless rehearsals are on stage or under stage lights ("production week").

Entrepreneuried: a show that your venue has proactively programmed, that your organisation receives part of or total box office takings and on which you take, or share financial risk.

**20. Of the total number of productions undertaken at your Centre last year, how many were considered 'community' (ie: you charged a discounted rate or valued hire at a discounted rate as part of your in-kind support)?**

Number of productions/seasons:

Number of performances:

**21. Of the total number of productions undertaken at your Centre last year, how many were considered 'commercial' (ie: you charged a non-discounted rate or valued hire at a non-discounted rate)?**

Number of productions/seasons:

Number of performances:

**22. What is the total attendance at performances (i.e. do not include non-performance events such as weddings) at your Centre for the last year?**



# 2013 APACA Survey Part 1 - Economic Activity

## Attendance and Box Office by Genre

Over the next 12 questions we will ask you to provide attendance and box office data for your centre by the following genres

Note: Please report total attendance and box office for the venue regardless of presenter ie include hires, co-presents and venue presented productions

Ballet and Dance  
Children's/Family  
Circus and Physical Theatre  
Classical Music  
Comedy  
Festivals (Multi-Category)  
Festivals (Single-Category)  
Musical Theatre  
Non-Classical Music  
Opera  
Theatre  
Special Events/Other

a description for each genre will be provided at each question

Please report revenue as Gross Box Office i.e. including inside charges and GST (where applicable).

Download the Genre Definitions [here](#)

# 2013 APACA Survey Part 1 - Economic Activity

## 23. Ballet and Dance

### Traditional forms

#### Ethnic dance

#### Folk dance

#### Ballet

#### Ballroom

#### Latin dance

#### Liturgical dance

#### Modern dance

#### Ballet

#### Tap

#### Breakdancing

Attendance

Gross Box Office

## 24. Children's/Family

### Live entertainment for children

### Interactive performances for children

### Workshops for children

Attendance

Gross Box Office

## 25. Circus and Physical Theatre

### Physical Theatre

### Circus

Attendance

Gross Box Office

## 2013 APACA Survey Part 1 - Economic Activity

### 26. Classical Music

**Any of the following in classical/contemporary art (i.e. current, but not 'pop') style:**

**Orchestral music**

**Chamber music**

**Choirs and choral music**

**Recitals**

**Singing/playing**

**All styles of the following:**

**Sacred music**

**Traditional music/ethnic music/world music**

Attendance

Gross Box Office

### 27. Comedy

**Stand up**

**Comedy performances (but not Comedy plays)**

Attendance

Gross Box Office

### 28. Festivals (Multi-Category)

**Festivals/events which contains a number of different types of events which fall into two or more categories**

Attendance

Gross Box Office

### 29. Festivals (Single-Category)

**Festivals/events which contain a number of events but which fall into one category only**

Attendance

Gross Box Office

## 2013 APACA Survey Part 1 - Economic Activity

### 30. Musical Theatre

**Staged productions which include music/drama/movement in popular form, primarily (but not limited to):**

**Musicals**

**Cabarets in cabaret mode/style**

Attendance

Gross Box Office

### 31. Non-Classical Music

**All forms of the following, performed by any type of ensemble or soloist (including any ensemble/chorus/solo musicians advertising a program which is exclusively one of the following categories, e.g. 'pop' or 'jazz,' as in The Australian Jazz Orchestra):**

**Pop**

**Jazz**

**Blues**

**Country**

**Rock**

**Folk**

**Soul**

**R&B**

**Techno**

**Hip hop**

**Rap**

**Heavy Metal**

**Dance parties**

Attendance

Gross Box Office

## 2013 APACA Survey Part 1 - Economic Activity

### 32. Opera

**Theatrical presentations in which a dramatic performance is set to music in classical or contemporary art style:**

**Opera**

**Operetta (includes Gilbert and Sullivan)**

Attendance

Gross Box Office

### 33. Theatre

**Script based theatre**

**Drama**

**Mime**

**Plays**

Attendance

Gross Box Office

### 34. Special Events/Other

**Unique presentations which do not fall into any other category**

Attendance

Gross Box Office

## 2013 APACA Survey Part 1 - Economic Activity

### Other events

**35. What is the total number of activities at your Centre for the last year?**

**Include the sum of all performances, films, lectures, seminars, conferences, workshops, rehearsals, exhibitions and other events [weddings, functions etc].**

**36. Of all the activities/events counted above how many were of a non-arts nature?**

**E.g. product launches, conferences etc of a non-arts related matter**

**37. What is the total number of attendees to all your performances and events held at your centre?**

## 2013 APACA Survey Part 1 - Economic Activity

### THANK YOU

**38. Do you have any comments regarding questions that you found difficult to answer ?**

**39. Any comments and/or feedback**

# 2013 APACA Survey Part 2 - Economic Activity

## Introduction

This is part of the 2013 APACA Survey

For this survey we have significantly reduced the number of free form responses to improve collection and collation of data and this means that we have not provided a printed form - please collect the survey online.

You can return to the survey any number of times to complete various questions and you can email your centre's email link to various members of your team for completion of questions relevant to their area of responsibility.

BUT, PLEASE DON'T USE A SURVEY LINK THAT HAS NOT BEEN SPECIFICALLY SENT TO YOUR CENTRE.

We are going to ask you a range of questions about your activities over the past year.

If you report on a financial year then provide details for the 2012/13 year, if you report on a calendar year then provide details for the 2012 year.

If you have more than one venue include statistics for ALL venues in your answers ie: A 'centre' can include a number of individual venues.

Please do not include dollar signs ['\$'], commas or spaces in numeric responses.

If you require assistance regarding clarification of definitions and/or questions please direct your enquiry via email to Rick Heath [ed@apaca.com.au] or call 08 9298 8822 [please note WA time zone].

### 1. Your Name:

### \*2. Organisation name: (ie the APACA member)

Other (please specify)

### 3. State:

☐ WA ☐ QLD ☐ SA ☐ ACT ☐ VIC ☐ TAS ☐ NSW ☐ NT



# 2013 APACA Survey Part 2 - Economic Activity

## Operating Income

These figures should reflect your organisation's audited financial statements - Do not include cents; round figures to the nearest dollar.

Please do not include dollar signs ['\$'], commas or spaces in numeric responses.

Operating Income and Expenditure 2012/13 (financial year) or 2012 (calendar year).

If 'nil' value please enter '0' so that we know you have completed the question.

### 4. Government Funding

Total local government funding [not in-kind] - include operating subsidy & grants from neighbouring local authorities here.

State/Territory funding - include Guarantee against Loss, Project Funding and Core Operations Funding

Federal government funding - include Guarantee against Loss, Project Funding and Core Operations Funding

### 5. Earned Income (excludes sponsorship)

**Include all recurrent income; do not include grants for capital expenditure**

Box office/admissions (for events presented by your centre)

Provision of ticketing services from all services / Ticketing Fees & Charges - include inside charges [amount incurred by promoter] and outside charges [amount incurred by customer], exchanges, booking fees and transaction charges.

Contract performance / exhibition fees

Venue hire

Recoverables - include wages, equipment, electricity, marketing [advertising placed on behalf of a hirer] etc...

Food and Beverage

Merchandise - include commissions on merchandise sales including programs.

Interest

Other earned income - include all other items of your organisation's income not already identified

### 6. Private Support

Philanthropic trusts

Sponsorship (monetary)

Sponsorship (in-kind) - only include in-kind support if listed in audited statement

Donations / fundraising

### 7. TOTAL INCOME (total of Questions 4-6) - AMOUNT A

# 2013 APACA Survey Part 2 - Economic Activity

## Operating Expenditure

Include all recurrent expenditure; do not include capital expenditure

### 8. Operating Expenditure

Labour costs (salaries/fees)

Marketing/Promotions - include advertising of product; launch and opening night expenses; sponsorship material; market research and publicity material

Show purchases - Sell-off / performance fee - include amount paid for purchasing shows, performances and/or exhibitions.

Production/ Presenter program expenditure - include self-produced productions and royalties BUT excluding Show Purchase costs above

Food and Beverage Costs

Administration costs - include phone, electricity etc

Repairs and maintenance

Other expenditure - include all other items of your organisation's expenditure not already identified in the table

### 9. TOTAL EXPENDITURE - AMOUNT B

### 10. OPERATING SURPLUS / DEFICIT = AMOUNT A (on previous page) less AMOUNT B

**11. If the Operating Result for your centre, AMOUNT C is a surplus (i.e. you earn more than spend) are you able to retain this surplus ?**

### 12. How is this surplus treated ?

## 2013 APACA Survey Part 2 - Economic Activity

### Other

**13. Please estimate the total dollar value of the contribution from your primary source of operational subsidy; include non-cash plus cash e.g. including your total Community Service Obligation [C.S.O.]. This may be just the contribution from government in the income section of your survey response but may also include the value of other inkind services provided to your operation such the cost to your owner of providing business support such as payroll, accounting services, IT services etc**

**14. . Do you have a dedicated Programming budget - a budgeted net expenditure that represents the net result of your programming activities for the year ie the contribution made by your owner to offset the financial loss from presenting program ? If so please indicate the total fund available**

**Note: This is not the total expenditure but the final result Income (Box Office) less Expenditure (Venue Costs, Performance Fees, Marketing Costs etc)**

## 2013 APACA Survey Part 2 - Economic Activity

### Your contribution to Playing Australia funded presentations

**15. For those productions in your program delivered with Playing Australia funds, please state your total expenditure incurred in association with these productions**

**These may include:**

- **Performance Fee**
- **Delivery/Tour Coordinator Fee**
- **Bump-in/Bump-out**
- **Venue Rental**
- **Venue Tech Labour**
- **Venue FOH Labour**
- **Equipment Hire**
- **Consumables/Materials**
- **Marketing**
- **Administration Expenses**
- **Booking Fees**
- **Royalties**

**Please supply a total figure only NOT a breakdown of costs. Note, this figure would have been supplied by you in your Playing Australia acquittal information.**

## 2013 APACA Survey Part 2 - Economic Activity

### Capital Project Expenditure

**16. How much was spent on capital projects on your centre in the last 12 months excluding operational maintenance.**

State

Local

Federal

Other

**17. Although it should also be included in the previous question please provide the amount on any grant funding received under RLCIP (Regional & Local Community Infrastructure Program)**

# 2013 APACA Survey Part 2 - Economic Activity

## THANK YOU

Thank You for completing Part 2 of the APACA Economic Impact Survey

Acknowledgement

Thank you to Arts Victoria for allowing APACA to use their Industry Checklist as a model for the financial data collected for this survey

**18. Do you have any comments regarding questions that you found difficult to answer ?**

**19. Any other comments**

**20. Can you please confirm that you have completed this part of the survey?**