PERFORMING ARTS CONNECTIONS AUSTRALIA

2017 ECONOMIC ACTIVITY REPORT

JUNE 2018

PREPARED BY

CultureCounts

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1 EXECUTIVE SUMMARY

Performing Arts Connections Australia (PAC Australia), previously Australian Performing Arts Centres Australia (APACA), is the national peak body representing and supporting Australian performing arts presenters and creators.

PAC Australia members include professionally managed performing arts centres, as well as independent producers and companies, festivals, funding bodies, touring organisations, other industry associations. Annually PAC Australia members present over 53,000 events, with over 11 million attendances, and the industry is valued at over $1.1 billion by the Australian Bureau of Statistics.

PAC Australia members present productions from a vast array of art forms from theatre, opera and classical music, to comedy, circus and contemporary dance. The 2017 Economic Activity Survey (the survey) included questions used in previous years - 2006, 2009, 2011, 2013 and 2015 – enabling longitudinal trend analysis.

1.1 Methodology

The survey was carried out online through Survey Monkey (www.surveymonkey.com). The survey was provided to PAC Australia Ordinary Members only, i.e. members who manage performing arts venues.

There were 61 responses to the survey, representing 49% of the 125 ordinary members. As responses to each section were voluntary and the number of responses relating to the analysis of each question is noted against the table and figures in this report.

In reviewing the 2017 findings, comparisons have been made with the results of the 2011, 2013 and 2015 surveys to identify emerging trends and industry changes over time.

1.2 Summary of Key Findings

- 78% of respondent centres are owned by Local Government across those venues, Local Government directly manages 76% of these centres and 13% through a company limited by guarantee.
- Of the total respondents, 33% operate a performing arts centre with one performance space, 47% have two performance spaces and 21% have three or more performance spaces.
- 59% of respondent centres have a total capacity ranging between 261 and 1,100 and 39% have a capacity ranging between 1,101 and 3,000.
- Government subsidy represents just under a third (31%) of all income and is almost equally split between State and Territory, and Local Government funding sources.
- Local government remains the largest contributor to operational funding. Across all venues that provided financial data, Local Government funding accounted for 52% of all government funding and State/Territory government funding accounted for 47%. Excluding one major capital city venue that receives significant funding from its State Government agency, the share of total government funding obtained from State/Territory government funding is similar to 2015 results (16% compared to 15% in 2015).

- 41 respondents provided financial information indicating a combined turnover of approximately $191 million. Individual turnover ranged from $303,000 to $89 million.
- Turnover greatest for venues with five or more performance spaces and total seated capacity of between 1,501 and 2,500.
- There is a positive relationship between average centre turnover and proximity to a capital city with centres located in or close to capital cities (within 0 to 10 kilometres) having the highest average turnover when compared to those located further afield.
- Since 2015, the share of total income sourced from food and beverage sales decreased from 12% to 10% and the share sourced from the respondents' entrepreneurial program (Box Office) fell marginally from 14% to 13%. Income from venue hire increased marginally from 10% to 12% of all income and 'other earned income' increased from 2% to 5%.
- The most significant expense for respondent centres continues to be labour costs, which increased from 41% of all expenditure in 2015 to 47% in 2017.
- The average utilisation rate across all performance spaces within centres was 58% in 2017, one percentage point below the average utilisation rate in 2015.
- In 2017, 36% of activities undertaken at respondents' centres were classified as non-arts related, (an increase from 33% in 2015) demonstrating the ongoing role that performing arts centres play in accommodating a variety of community activities and services not necessarily related to the arts.
- Professional performances accounted for 40% of all performances in 2017, while 60% were community performances (amateur performance groups, dance and drama groups and schools using the respondents' venue for their performances).
- The percentage of entrepreneured performances (either presented or co-presented) within seasons fell from 48% of performances in 2015 to 35% in 2017 and the share of seasons presented by Hirers of the respondent venues increased from 63% to 66%.
- Playing Australia supported 16% of entrepreneurial seasons, 14% of entrepreneurial performances and 5% of all performances in respondents' venues.
- Of the total seasons for which respondents incurred the full or part financial risk, Playing Australia supported 16%, up from 15% in 2015 but down from 21% in 2013.
- In 2017, 55% of centres had a written policy or plan and 46% had a written audience development plan or strategy. Approximately two thirds of local councils have a cultural plan and 68% of them include the activities and goals of their local centre in their plans.

1.3 Conclusions

The survey respondents represented a wide range of performing arts centres, both in relation to geographical location and size of enterprise.

The reported number of performances by respondent venues has risen significantly over the past six years from 8,495 (n=72) in 2011 to 13,116 (n=76) in 2013, 24,425 (n=64) in 2015 and 30,694 (n=42) in this reporting cycle. Given inconsistencies in the sample size and the ability for major centres to skew these results, this should not be taken to be representative of the increase in the average number of performances across venues.

In 2017, the total reported number of attendances to all activities respondent venues was 6.9 million.

Local government continues to play a significant role in the management and operational funding of performing arts centres. Excluding one major capital city venue that receives significant funding from its State Government agency, the share of total government funding obtained from State/Territory government funding is similar to 2015 results (16% compared to 15% in 2015) and Local Government accounts for 84% of government funding.

Centres continue to accommodate a variety of community activities and services not necessarily related to the arts. Between 2015 and 2017 there has been an increase in venue use related to non-arts activities (33% to 36%) and community performances (52% to 61% of all performances). This highlights the importance of performing arts centres in providing enabling infrastructure for a diversity of community development activities and performance spaces for community arts groups.

A significant finding in the 2017 survey was the reduction in entrepreneurial programming. Performances within seasons that were presented or co-presented by the respondents (where there is a financial risk to the presenter) fell from 48% of performances in 2015 to 35% in 2017. There was there was an increase in the share of external hires from from 63% to 66% in 2017. This demonstrates a trend away from entrepreneurial programing and towards no risk, external hires.

Playing Australia funds continue to be an important resource in enabling the delivery of touring shows. Playing Australia supported 16% of entrepreneurial seasons in respondent's venues, a small increase from 15% in 2015. However, there was an increase in the share of entrepreneurial performances supported by Playing Australia, from 9% in 2015 to 14% in 2017 due to an increase in the average number of performances per season from 1.9 to 2.2 over this period.

2 INTRODUCTION

Performing Arts Connections Australia (PAC Australia), previously Australian Performing Arts Centres Australia (APACA), is the national peak body representing and supporting performing arts presenters around Australia. PAC Australia supports the development of performing arts throughout Australia with a broad membership of over 200 organisations. The performing arts centres' sector presents productions from a diverse range of art forms including plays, opera and classical music, comedy, circus and contemporary dance. PAC Australia members predominantly operate in the subsidised performing arts sector.

2.1 Aim

The primary aim of the survey is to measure the scale of operations and economic activity of performing arts centres nationally, and to provide members with a benchmarking data that can assist in the financial management of venues and the planning of new performance spaces and programs. Managers of existing or proposed arts centres can use this information in the development or review of business plans.

2.2 Methodology

PAC Australia commenced surveying members about their economic activity in 2006, and has done so bi-annually since with some exceptions. Primary research was considered necessary due to a lack of consistent, standardised and available secondary data for the sector. All surveys to date have revealed ongoing challenges in the use of terminology in the sector. A glossary which defines terms used in the survey is provided at Appendix A.

Part one of the 2017 Economic Activity Survey was distributed on 2 June 2017 and part two was distributed 6 August 2017 through Survey Monkey to ordinary members only, i.e. those members who manage performing arts venues. The surveys can be found at Appendix B.

2.3 Response Rates

There were 61 responses to the survey, representing 49% of the 125 ordinary members at the time of the survey. As responses to each section were voluntary, the number of responses relating to each section's analysis is noted against the tables and figures in the report. Respondent numbers were slightly lower than in previous surveys, and detailed data from a majority of the largest capital city performing arts centres is again notably absent from the respondent sample. This has affected data and analysis in various parts of the survey and is highlighted when relevant.

2.4 Respondent Profile

Most responses came from respondent venues located in New South Wales (33%), Victoria (23%) and Queensland (21%). Minimal responses were received from centres located in the Northern Territory (3%) and South Australia (3%) and for this reason, these responses have been excluded in parts of the analysis so as not to identify respondent centres.

Figure 1: Survey Respondents by State, (n=61)

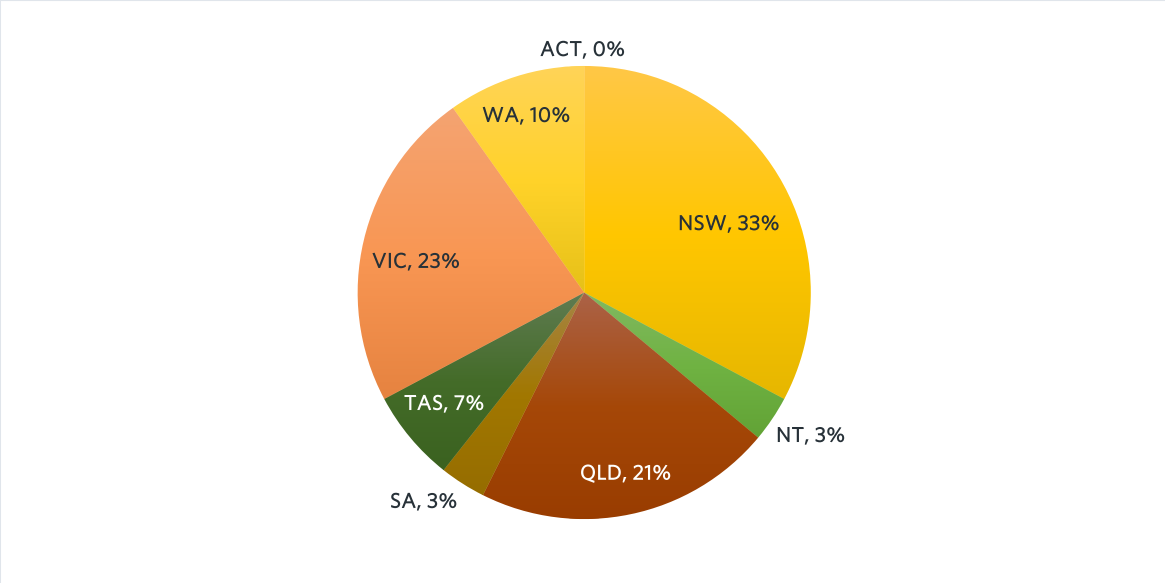
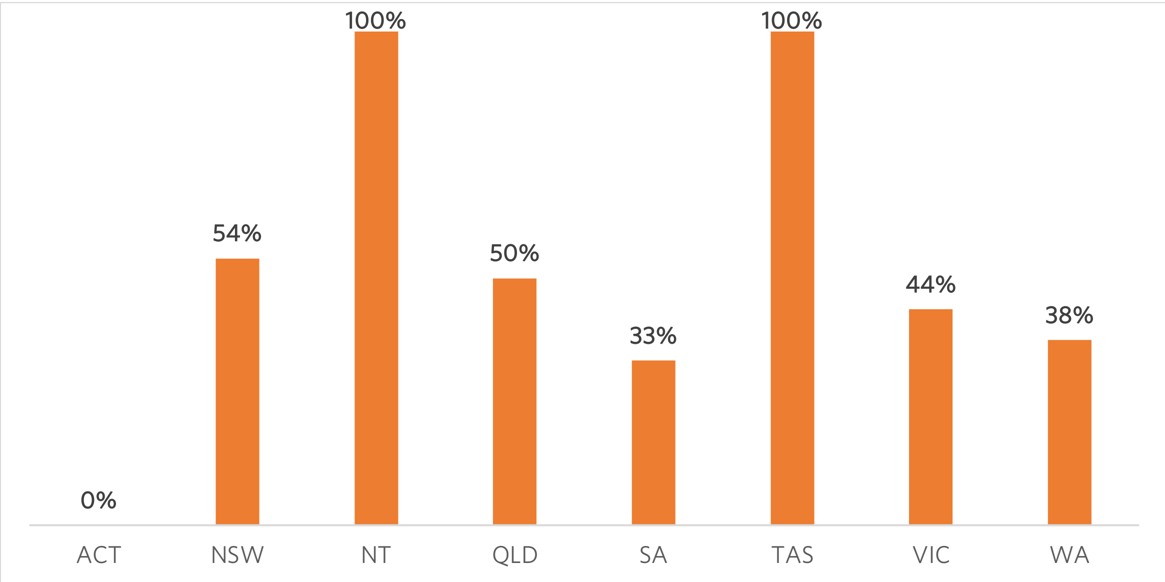


Figure 2: Survey Respondents as a Share of Total Ordinary Members by State, (n=61)



3 FINDINGS

3.1 Respondents

Figure 3 shows key information relating to each respondent including venue name, management model, population serviced, distance from nearest capital city, number of performance spaces, total capacity, annual attendance and annual turnover.

Figure 3: Respondent Details

State/ Territory	Centre	Management Model	Population serviced	Distance from capital city (kms)	No of perf. spaces	Total Capacity	Annual Attendance	Annual Turnover
NSW	Albury Entertainment Centre	Local Government	179,000	310	1	812	84,000	1,922,862
	Bathurst Memorial Entertainment Centre	Local Government	500,000	203	2	1,542	54,033	1,670,358
	Capitol Theatre Tamworth	Local Government	62,000	405	3	6,202	56,100	3,826,276
	Cessnock Community Performing Arts Centre	Local Government	75,000	152	1	466	15,934	725,808
	Civic Precinct Theatre	Local Government	436,200	196	2	1,645	123,075	5,345,660
	Dubbo Regional Theatre and Convention Centre	Local Government	120,000	400	2	1,250	64,361	4,031,794
	Glen Street Theatre	Local Government	268,849	18	1	400	81,661	2,936,300
	Griffith Regional Theatre	Local Government	30,000	400	1	523		
	Hurstville Entertainment Centre	Local Government			2	1,130		
	Illawarra Performing Arts Centre	Company Ltd by Guarantee	496,266	84	>4	1,803	113,339	4,896,517
	Joan Sutherland Performing Arts Centre	Company Ltd by Guarantee	500,000	50	3	1,004		3,634,885
	Manning Entertainment Centre	Local Government	90,000	312	1	505	24,341	586,097
	NORPA, Northern Rivers Performing Arts	Company Ltd by Guarantee	245,000	200				
	Orange Civic Theatre	Local Government	103,000	263	1	520	56,301	2,487,040
	Seymour Centre	Statutory Authority	5,000,000	1	1	781		
	Shoalhaven Entertainment Centre	Local Government t	100,000	160	2	1,099	67,766	2,852,732
	Sutherland Entertainment Centre	Local Government	210,000	0	2	1,045	148,023	2,163,657
	The Art House Wyong	Company Ltd by Guarantee	334,857	94.2	3	695	40,028	
	The Concourse	Contract Management	870,000	12	>4	2300	197,800	4,966,304
	Wagga Wagga Civic Theatre	Local Government		245	1	491		
NT	Araluen Arts Centre	Business unit (Government)	30,000	1,500	2	692		
	Darwin Entertainment Centre	Company Ltd by Guarantee	130,000	3,500	2	1,308		
QLD	Brisbane Powerhouse	Local Government	2,000,000	5	>4	1,160	662,067	10,753,927
	Brolga Theatre	Local Government	104,000	260	2	904	57,856	
	Burdekin Theatre	Local Government	15,000	1160	2	970		
	Empire Theatre	Company Ltd by Guarantee	250,000	125	4	2,265	121,021	4,223,379
	Gladstone Entertainment Convention Centre	Local Government	70,000	515	2	1,486	85,680	1,875,119
	Ipswich Civic Centre	Local Government	190,000	37	2	880	58,003	2,568,918

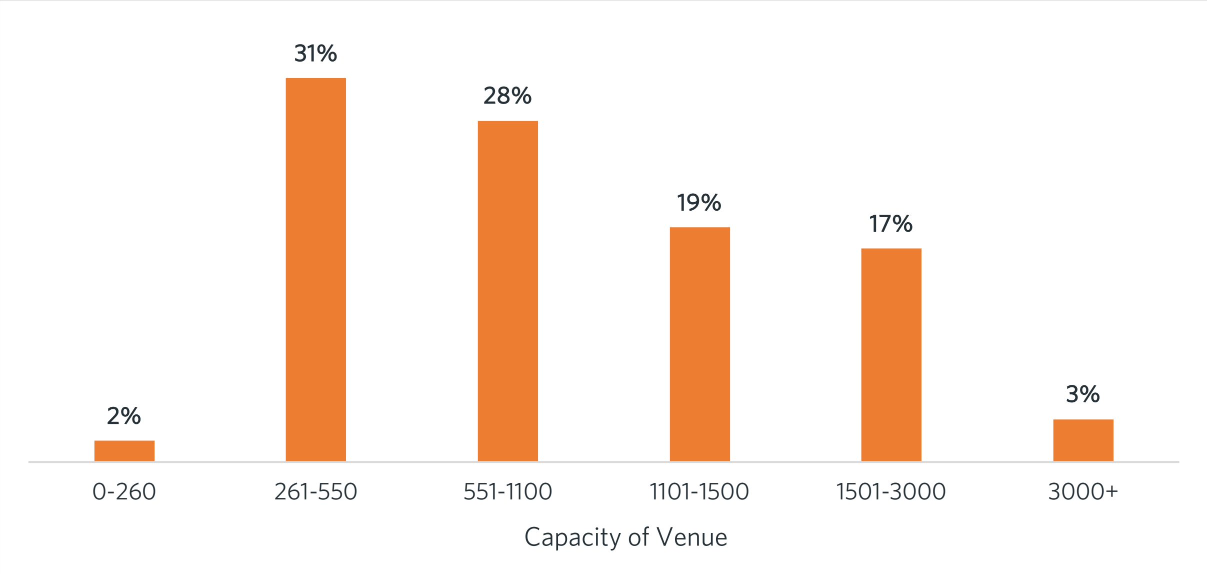
State/ Territory	Centre	Management Model	Population serviced	Distance from capital city (kms)	No of perf. spaces	Total Capacity	Annual Attendance	Annual Turnover
	Judith Wright Centre of Contemporary Arts	Business unit (Government)	2,000,000	5	2	380		
	Lake Kawana Community Centre	Local Government	295,000	97	1	750		
	Pilbeam Theatre	Local Government	110,000	640	1	967	52,615	1,894,000
	QMC - Queensland Multicultural Centre	Company Ltd by Guarantee	2,000,000	3	1	224	18,393	
	QUT Gardens Theatre	Education Institution	2,000,000	0	1	397		
	Townsville Civic Theatre	Local Government	180,000	1300	>4	1316		
	University of Southern Queensland Artsworx	Education Institution	250,000	125	2			
SA	Barossa Arts & Convention Centre	Education Institution	40,000	70	2	1,141	21,788	907,942
	The Hopgood Theatre	Statutory Authority	70,000	NA	2	612	44,824	524,081
TAS	Devonport Entertainment and Convention Centre	Local Government	65,000	285	1	482	20,445	302,405
	Princess Theatre	Other	144,270	200	2	1,133	86,501	1,382,895
TAS	The Burnie Arts and Function Centre	Local Government	18,000	325	2	1,160	44,572	708,551
	Theatre Royal	Statutory Authority	211,000	0	2	830	56,029	2,154,489
VIC	Arts Centre Melbourne	Statutory Authority	4,000,000	0	>4	17,809	2,770,820	89,102,395
	Capital Venues and Events	Local Government	150,000	150	3	1,540	171,948	
	Clocktower Centre	Local Government	118,000	7	1	545	80,276	2,568,918
	Darebin Arts and Entertainment Centre	Local Government	146,719	0	1	385	116,844	1,146,743
	Eastbank Centre - Riverlinks Venues	Local Government	80,000	185	2	1,243	72,416	1,923,700
	Frankston Arts Centre	Local Government	575,676	50	2	994	184,457	3,371,291
	Geelong Performing Arts Centre	Other	309,900	75	3	2,492	213,133	5,727,946
	Hamilton Performing Arts Centre	Local Government	17,000	300	2	800	22,940	626,146
	Melbourne Recital Centre	Company Ltd by Guarantee	4,000,000	1	2	1,140		
	Mildura Arts Centre	Local Government	53,036	400	2	544	83,401	
	The Cube Wodonga	Local Government	93,000	360	1	410	60,181	44,5327
	Wangaratta Performing Arts Centre	Local Government	100,000	76	1	520	42,666	
	Whitehorse Performing Arts Centre	Local Government	165,557	15	1	414	107,157	2,635,079
WA	Arts Margaret River Margaret River Cultural Centre	Contract Management	12,000	276	1	325	33,067	750,888
	Bunbury Regional Entertainment Centre	Other	91,000	190	2	1,051	62,107	2,106,760
	His Majesty's Theatre	Statutory Authority	2,140,000	0	2	1,381	107,836	3,490,655
	Mandurah Performing Arts Centre	Other	250,000	75	2	921	204,168	2,899,328
	Matt Dann Theatre & Cinema	Local Government	13,000	1,633	2	421		
	Queens Park Theatre	Local Government	19,000	400	4	0		

Note: Blank cells indicate information not provided or confidential

3.2 Capacity

Figure 4 demonstrates the breakdown of survey respondents by total centre seating capacity. Approximately a third of respondents (31%) had an overall capacity between 261 and 550 seats and 28% had a capacity between 551 and 1,100 seats.

Figure 4: Distribution of respondents by seating capacity, n=58



Error! Not a valid bookmark self-reference. shows that 79% of respondents operate venues with either one or two performance spaces. Only 12% of respondents operate a venue with four or more spaces.

Figure 5: Performance spaces, n=58

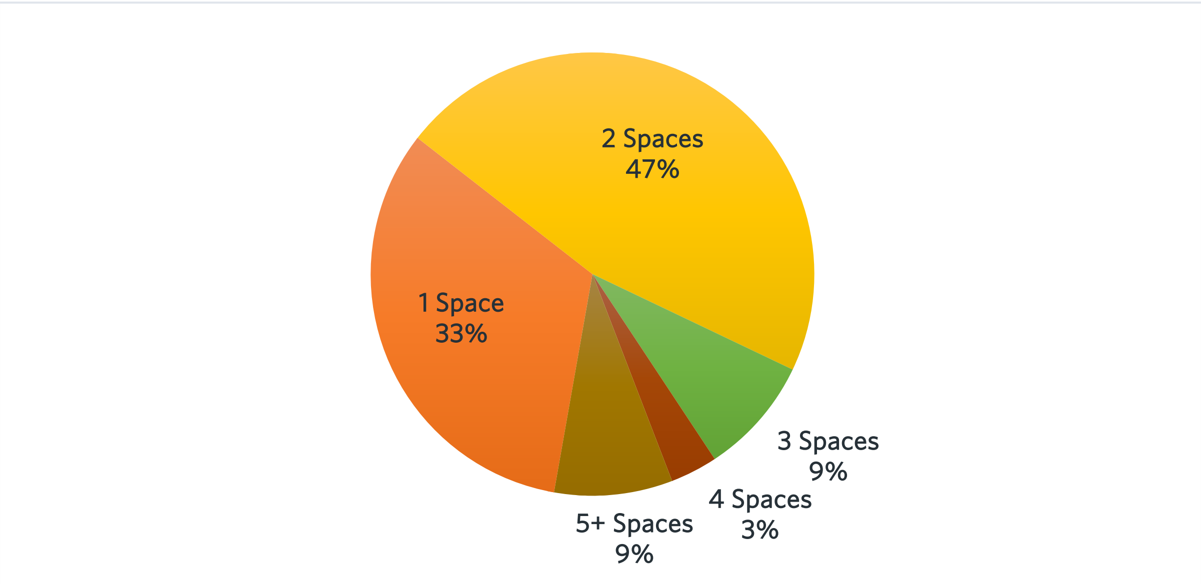
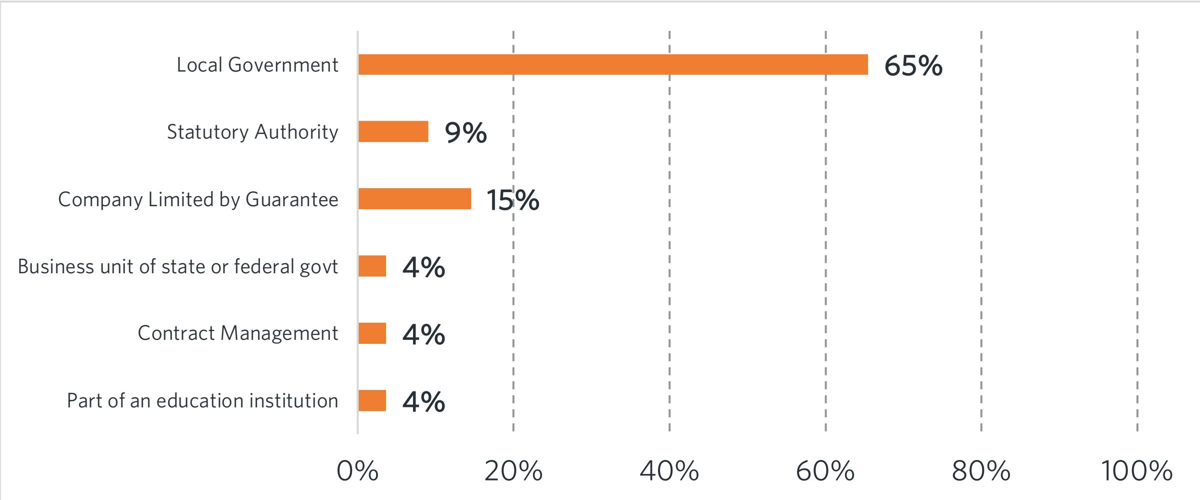


Figure 6 shows that the majority of respondents' venues (66%) are managed directly by Local Government. A number of Local Government owned centres are managed via other models, including contract management and company limited by guarantee, indicating a Local Government ownership level of 74% of respondent centres.

Figure 6: Management Models for Centres



3.3 Financial Snapshot

Respondents were asked to provide their latest annual financial statement in order to give an indication of members' financial performance. Financial data was provided by a total of 41 respondents with a combined turnover of $192 million.

As noted in previous survey reports, there are challenges in collating financial data in this way, with reporting of deficits or surpluses differing depending on management models. 25 respondents reported on how retained surpluses were treated, with responses varying. 16 reported that they were able to transfer amounts into a general purpose reserve, 2 reported that they were able to transfer to either a building, capital or programming reserve, and 7 able to add the surplus to the available funds for the following year.

The reported income generated from venue activities was lower than in 2015, however considering the lower response rate in 2017 (41 respondents compared to 50 respondents in 2015) average income generated per respondent venue increased in 2017. The percentage of funding that respondents are receiving from local governments has decreased from 27% of total income in 2015, to 16% in 2017. At the same time, State and Territory funding has increased from 7% of funding in 2015 to 15% in 2017, indicating a very significant shift in governmental funding sources for the sector over the last two years. Overall, government funding has reduced from 34% to 31% of total income.

Income from food and beverages has gone up from 12% of income in 2015 to 14% in 2017, and income from ticketing services has gone down from 9% in 2015 to 7% in 2017. Respondents reported a very large increase in 'other earned income', which accounted for 2% of income in 2015 and 11% percent of total income in 2017.

While the total reported expenditure figure is lower, taking into account the number of respondents to the 2017 survey, average total expenditure undertaken by respondent venues has increased from 2015.

The net surplus is also considerably lower. Although there were less respondents in 2017 than 2015, the amount of expenditure on labour costs is approximately $5 million more in 2017, and the percentage of expenditure on labour costs has increased from 41% to 49% of total expenditure. Food and beverage costs have reduced from accounting for 10% of expenditure in 2015, to 6% in 2017.

Figure 6: Financial Overview – All Venues

Financial Overview (n=41)		
INCOME ($)	***Total Reported ($)***	***% of Total***
Box Office	23,195,778	12.2%
Ticketing Services	13,493,716	7.1%
Contract Performance Fees	1,241,313	0.7%
Venue Hire	20,883,937	10.9%
Recoverables	14,691,483	7.7%
Food & Beverage	27,037,000	14.2%
Merchandise	416,848	0.2%
Interest	624,496	0.3%
Other earned income	20,427,116	10.7%
Sub-total Earned Income	***122,011,687***	***63.9%***
Federal Funding	689,065	0.4%
State/Territory Funding	28,169,869	14.7%
Local Govt Funding	31,364,985	16.3%
Sub-total Government Funding	***60,223,919***	***31.4%***
Philanthropic Trusts	3,613,634	1.9%
Sponsorship (monetary)	2,865,391	1.5%
Sponsorship (in-kind)	989,876	0.5%
Donations/Fundraising	559,614	0.3%
Non-government grants	616,600	0.3%
Sub-total Private Support	***8,645,115***	***4.5%***
TOTAL INCOME	***190,880,721***	
EXPENDITURE	***Total Reported ($)***	***% of Total***
Labour costs	93,857,196	49.3%
Marketing/Promotions	8,260,292	4.3%
Show Purchases	15,760,797	8.3%
Program expenses	6,638,259	3.5%
Food & Beverage costs	11,163,562	5.9%

Financial Overview (n=41)		
Administration	21,693,490	11.4%
Repairs & Maintenance	10,035,729	5.3%
Other Expenses	22,930,783	12.0%
TOTAL EXPENDITURE	***190,340,108***	
NET RESULT	***1,556,294***	

The following four tables provide a financial overview segmented into categories based on each venue's operational turnover annually.

Figure 7: Financial Overview – Venues with Annual Turnover from $0 to $1 million

Financial Overview (n=9)		
INCOME ($)	*Total Reported ($)*	*% of Total*
Box Office	1,069,505	19.0%
Ticketing Services	565,774	10.0%
Contract Performance Fees	13,099	0.2%
Venue Hire	696,706	12.3%
Recoverables	664,863	11.8%
Food & Beverage	221,024	3.9%
Merchandise	6,692	0.1%
Interest	1,577	0.0%
Other earned income	501,427	8.9%
Sub-total Earned Income	**3,740,667**	**66.3%**
Federal Funding	-	0.0%
State/Territory Funding	411,657	7.3%
Local Govt Funding	1,451,080	25.7%
Sub-total Funding	**1,862,737**	**33.0%**
Philanthropic Trusts	-	0.0%
Sponsorship (monetary)	36,865	0.7%
Sponsorship (in-kind)	-	0.0%
Donations/Fundraising	1,517	0.0%
Non-government grants	-	0.0%
Sub-total Private Support	38,382	0.7%
TOTAL INCOME	*5,641,786*	
EXPENDITURE	*Total Reported ($)*	*% of Total*
Labour costs	3,495,375	51.0%
Marketing/Promotions	190,396	2.8%
Show Purchases	760,814	11.1%
Program expenses	142,177	2.1%
Food & Beverage costs	183,001	2.7%

Financial Overview (n=9)		
Administration	812,746	11.9%
Repairs & Maintenance	373,500	5.4%
Other Expenses	895,462	13.1%
TOTAL EXPENDITURE	*6,853,471*	
NET RESULT	*(1,211,685)*	

Figure 8: Financial Overview – Venues with Annual Turnover from $1 to $2 million

Financial Overview (n=10)		
INCOME ($)		*% of Total*
Box Office	1,840,212	10.8%
Ticketing Services	980,783	5.8%
Contract Performance Fees	299,181	1.8%
Venue Hire	2,805,948	16.5%
Recoverables	1,519,084	8.9%
Food & Beverage	1,711,215	10.1%
Merchandise	34,021	0.2%
Interest	7,081	0.0%
Other earned income	756,154	4.5%
Sub-total Earned Income	**9,953,679**	**58.6%**
Federal Funding	23,195	0.1%
State/Territory Funding	570,400	3.4%
Local Govt Funding	6,319,205	37.2%
Sub-total Funding	**6,912,800**	**40.7%**
Philanthropic Trusts	-	0.0%
Sponsorship (monetary)	67,043	0.4%
Sponsorship (in-kind)	41,189	0.2%
Donations/Fundraising	1,395	0.0%
Non-government grants	-	0.0%
Sub-total Private Support	**109,627**	**0.6%**
TOTAL INCOME	*16,976,106*	
EXPENDITURE		
Labour costs	8,648,985	45.0%
Marketing/Promotions	563,540	2.9%
Show Purchases	1,192,900	6.2%
Program expenses	657,619	3.4%
Food & Beverage costs	727,950	3.8%
Administration	1,431,663	7.5%
Repairs & Maintenance	834,226	4.3%
Other Expenses	5,151,323	26.8%
TOTAL EXPENDITURE	*19,208,206*	
NET RESULT	*(2,232,100)*	

Figure 9: Financial Overview – Venues with Annual Turnover from $2 to $5 million

Financial Overview (n=18)		
INCOME ($)		*% of Total*
Box Office	9,030,042	15.8%
Ticketing Services	4,086,075	7.1%
Contract Performance Fees	802,121	1.4%
Venue Hire	7,202,269	12.6%
Recoverables	7,146,307	12.5%
Food & Beverage	5,762,846	10.1%
Merchandise	175,723	0.3%
Interest	130,504	0.2%
Other earned income	1,527,140	2.7%
Sub-total Earned Income	**35,863,027**	**62.6%**
Federal Funding	130,969	0.2%
State/Territory Funding	2,834,226	4.9%
Local Govt Funding	17,850,154	31.1%
Sub-total Funding	**20,815,349**	**36.3%**
Philanthropic Trusts	-	0.0%
Sponsorship (monetary)	433,596	0.8%
Sponsorship (in-kind)	137,000	0.2%
Donations/Fundraising	83,930	0.1%
Non-government grants	-	0.0%
Sub-total Private Support	**654,526**	**1.1%**
TOTAL INCOME	*57,332,902*	
EXPENDITURE		
Labour costs	27,927,642	49.9%
Marketing/Promotions	2,773,739	5.0%
Show Purchases	5,010,653	8.9%
Program expenses	2,999,440	5.4%
Food & Beverage costs	2,861,070	5.1%
Administration	5,433,467	9.7%
Repairs & Maintenance	1,971,223	3.5%
Other Expenses	7,026,996	12.5%
TOTAL EXPENDITURE	*56,004,230*	
NET RESULT	*1,328,672*	

Figure 10: Financial Overview – Venues with Annual Turnover above $5 million

Financial Overview (n=4)		
INCOME ($)		*% of Total*
Box Office	11,256,019	10.1%
Ticketing Services	7,861,084	7.1%
Contract Performance Fees	126,912	0.1%
Venue Hire	10,179,014	9.2%
Recoverable	5,361,229	4.8%
Food & Beverage	19,341,915	17.4%
Merchandise	200,412	0.2%
Interest	485,334	0.4%
Other earned income	17,642,395	15.9%
Sub-total Earned Income	**72,454,314**	**65.3%**
Federal Funding	534,901	0.5%
State/Territory Funding	24,353,586	22.0%
Local Govt Funding	5,744,546	5.2%
Sub-total Funding	**31,648,714**	**27.6%**
Philanthropic Trusts	3,613,634	3.1%
Sponsorship (monetary)	2,327,887	2.1%
Sponsorship (in-kind)	811,687	0.7%
Donations/Fundraising	472,772	0.4%
Non-government grants	616,600	0.6%
Sub-total Private Support	**7,842,580**	**7.1%**
TOTAL INCOME	*110,929,927*	
EXPENDITURE		
Labour costs	53,785,194	49.6%
Marketing/Promotions	4,732,617	4.4%
Show Purchases	8,796,430	8.1%
Program expenses	2,839,023	2.6%
Food & Beverage costs	7,391,541	6.8%
Administration	14,015,614	12.9%
Repairs & Maintenance	6,856,780	6.3%
Other Expenses	9,968,365	9.2%
TOTAL EXPENDITURE	*108,385,564*	
NET RESULT	*2,544,363*	

Overall, there are 40 organisation operating within either a Local or State Government environment as a Business Unit or within a University department. A total of 28 of them have reported their financial data. The following table provides a financial overview of their data.

Figure 11: Financial Overview – Venues Managed Within Government (n=28)

Financial Overview (n=28)		
INCOME ($)		*% of Total*
Box Office	8,417,962	13.0%
Ticketing Services	4,760,217	7.3%
Contract Performance Fees	1,151,302	1.8%
Venue Hire	7,947,682	12.2%
Recoverables	5,022,740	7.7%
Food & Beverage	7,164,252	11.0%
Merchandise	138,942	0.2%
Interest	55,051	0.1%
Other earned income	2,830,091	4.4%
Sub-total Earned Income	**37,488,239**	**57.7%**
Federal Funding	23,195	0.0%
State/Territory Funding	618,400	1.0%
Local Govt Funding	25,415,376	39.1%
Sub-total Funding	**26,056,971**	**40.1%**
Philanthropic Trusts	-	0.0%
Sponsorship (monetary)	592,426	0.9%
Sponsorship (in-kind)	811,687	1.2%
Donations/Fundraising	1,526	0.0%
Non-government grants	-	0.0%
Sub-total Private Support	**1,405,639**	**2.2%**
TOTAL INCOME	*64,950,849*	
EXPENDITURE		
Labour costs	28,788,374	42.8%
Marketing/Promotions	2,447,850	3.6%
Show Purchases	4,505,942	6.7%
Program expenses	3,673,763	5.5%
Food & Beverage costs	4,248,652	6.3%
Administration	6,007,495	8.9%
Repairs & Maintenance	3,346,806	5.0%
Other Expenses	14,253,612	21.2%
TOTAL EXPENDITURE	*67,272,494*	
NET RESULT	*(2,321,645)*	

The following table isolates the data contributed by 13 venues reporting their management as being at arm's length from the Government owner of their building. Five of these venues operate as a Statutory Authority and eight operate through a Company Limited by Guarantee owned by the relevant Local Government. Only seven of these venues provided financial data.

Figure 12: Financial Overview - Venues Managed by a Separate Legal Entity (n=7)

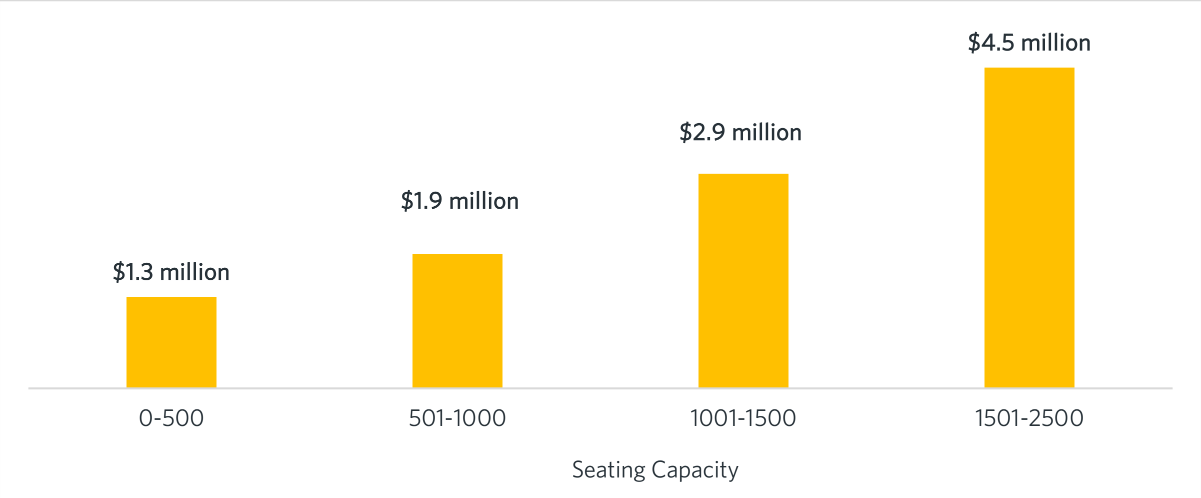
Financial Overview (n=7)		
INCOME ($)	***Total Reported ($)***	***% of Total***
Box Office	12,960,548	11.9%
Ticketing Services	7,264,910	6.7%
Contract Performance Fees	-	0.0%
Venue Hire	9,917,749	9.1%
Recoverables	6,274,670	5.8%
Food & Beverage	17,682,004	16.2%
Merchandise	217,402	0.2%
Interest	498,573	0.5%
Other earned income	18,542,292	17.0%
Sub-total Earned Income	***73,358,148***	***67.3%***
Federal Funding	588,551	0.5%
State/Territory Funding	24,857,532	22.8%
Local Govt Funding	3,651,852	3.3%
Sub-total Funding	***29,097,935***	***26.7%***
Philanthropic Trusts	3,613,634	3.3%
Sponsorship (monetary)	1,844,637	1.7%
Sponsorship (in-kind)	120,000	0.1%
Donations/Fundraising	391,398	0.4%
Non-government grants	616,600	0.6%
Sub-total Private Support	***6,586,269***	***6.0%***
TOTAL INCOME	***109,042,352***	
EXPENDITURE		
Labour costs	55,501,940	52.3%
Marketing/Promotions	5,269,709	5.0%
Show Purchases	9,333,126	8.8%
Program expenses	2,563,215	2.4%
Food & Beverage costs	5,940,219	5.6%
Administration	13,166,682	12.4%
Repairs & Maintenance	6,199,911	5.8%
Other Expenses	8,200,347	7.7%
TOTAL EXPENDITURE	***106,175,149***	
NET RESULT	***2,867,203***	

3.4 Turnover

Turnover ranged from $303,000 to $89.1 million, slightly different from the results of the 2015 survey which found turnover ranging from $716,500 to $79.3 million. Venues with a total seating capacity of 325 and upwards responded to the 2017 survey.

Figure 13 collates data from Part 1 and 2 of the survey to analyse average turnover by seating capacity, and as such, it has a low number of respondents (n=38).

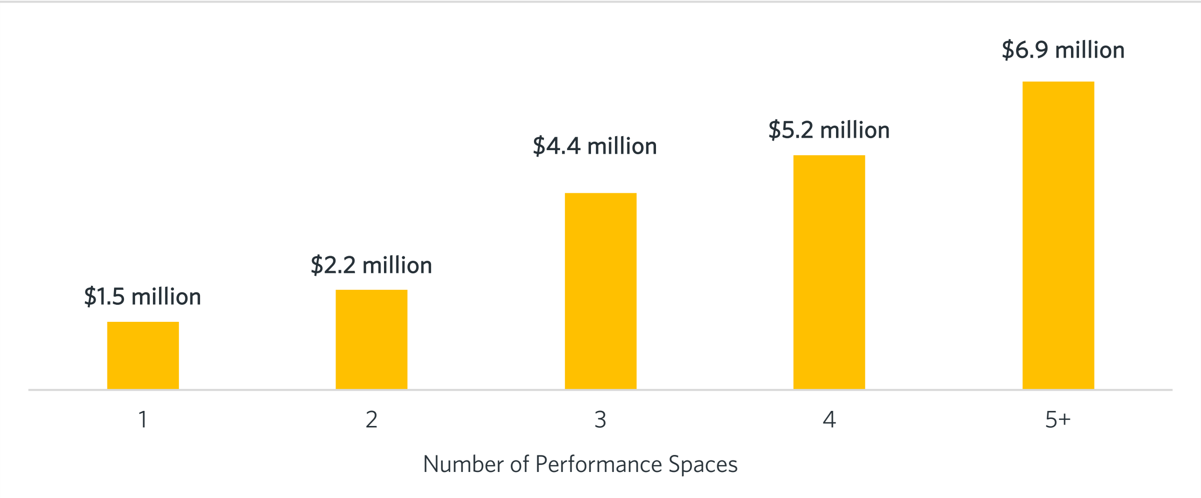
Figure 13: Average Centre Turnover by Seating Capacity, n=39



Note: To ensure consistency with previous survey results and prevent skew, one large capital city centre operating multiple large spaces (17,800 capacity) and one large regional centre (6,200 capacity) have been omitted from the above analysis.

Figure 14 shows average centre turnover by the number of performance spaces. Compared to 2015, average turnover was lower for centres with one and two performance spaces and higher for centres with three, four and five or more performance spaces.

Figure 14: Average Centre Turnover by Number of Performance Spaces, n=40

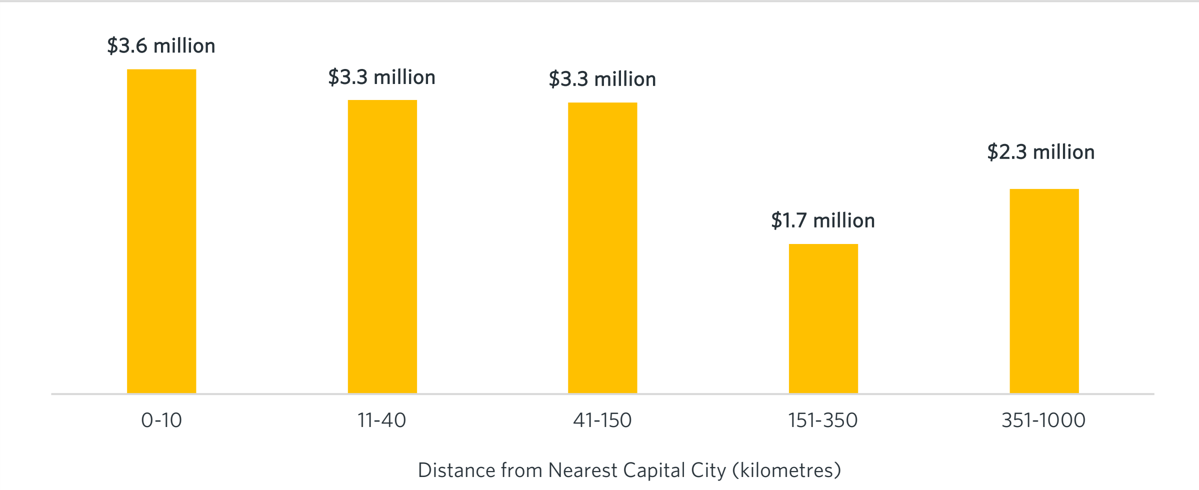


Note: One major city venue was excluded as the 5+ spaces category significantly skewed the average results.

Figure 15 shows average centre turnover by distance from the nearest capital city. Results generally show a positive relationship between average turnover and proximity to a capital city.

Comparing results to 2015, average turnover was higher for venues located 0 to 150 kilometres from the nearest capital city and lower for venues located 151 or more kilometres from a capital city.

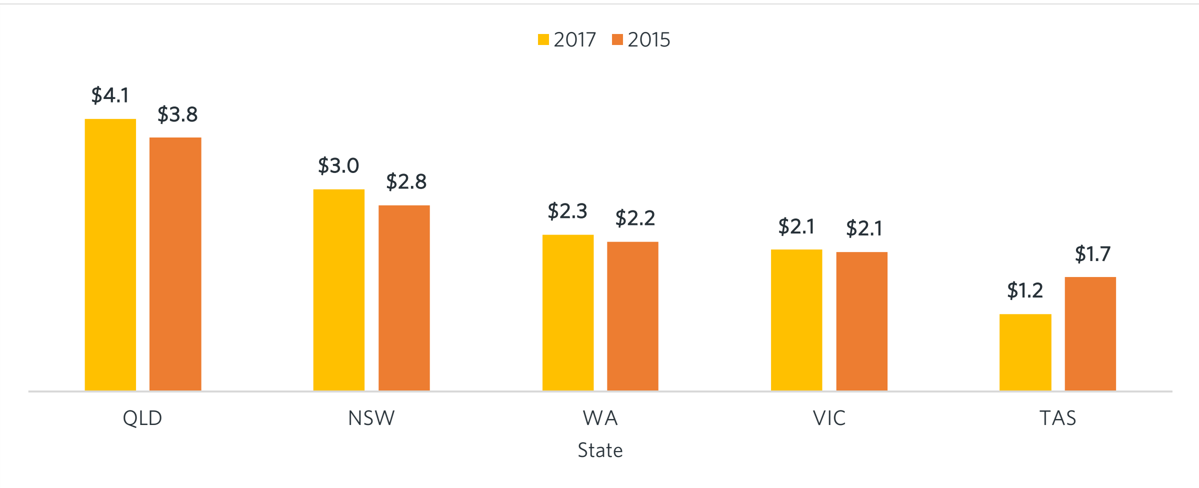
Figure 15: Average Centre Turnover by Distance from Capital City, n=39



Note: One large capital city production company was omitted as it skewed the results.

Figure 16 shows average centre turnover by state for 2017 compared to 2015. The results indicate that respondents from QLD reported the highest turnovers on average, a similar result to 2015. The overall ranking of states by average turnover remains unchanged from 2015. Average turnover is slightly higher for all states in 2017 than in 2015, apart from Tasmania which had lower turnover compared to 2015 . As before, one large capital city respondent was omitted as their inclusion would unjustly skew the results.

Figure 16: Average Centre Turnover by State, n = 40

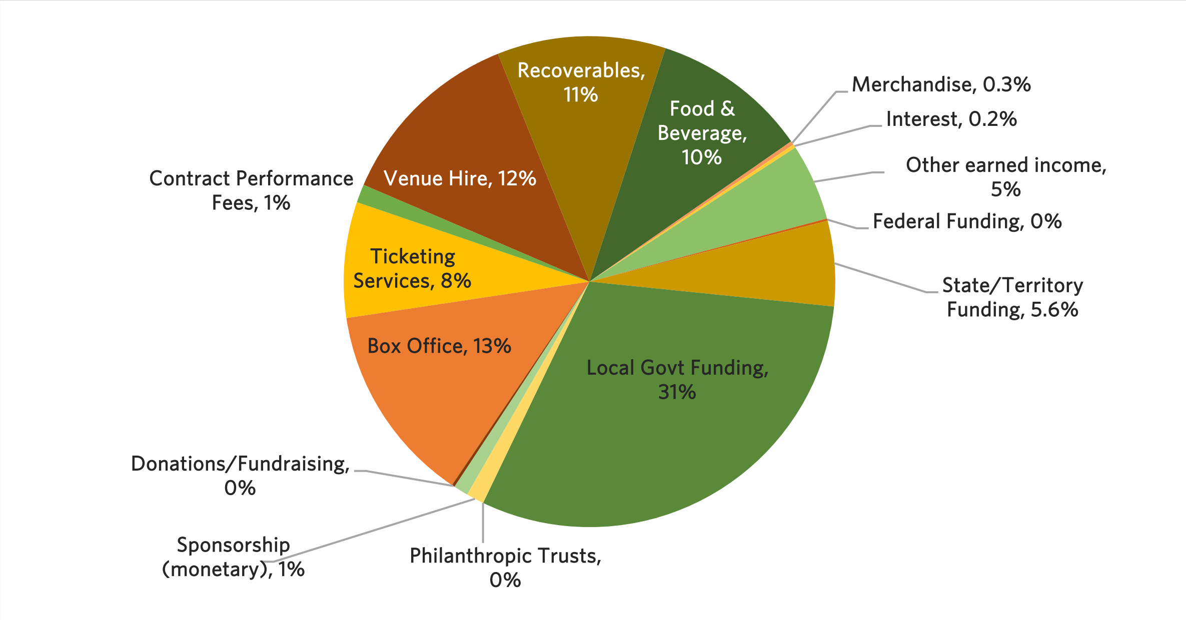


Note: One major city venue was excluded as the total value of turnover for the venue significantly skewed the average results. Results for South Australia and the Northern Territory have not been included given the small sample of respondent venues in these states.

3.5 Sources of Income

Local Government funding represented the largest share of income for respondents, at 31%, closely followed by State and Territory Funding at 6%. The proportion of income attributable to food and beverage sales has decreased from 12% in 2015 to 10% in 2017.This analysis excludes one major city venue.

Figure 17: Sources of Income, n=40



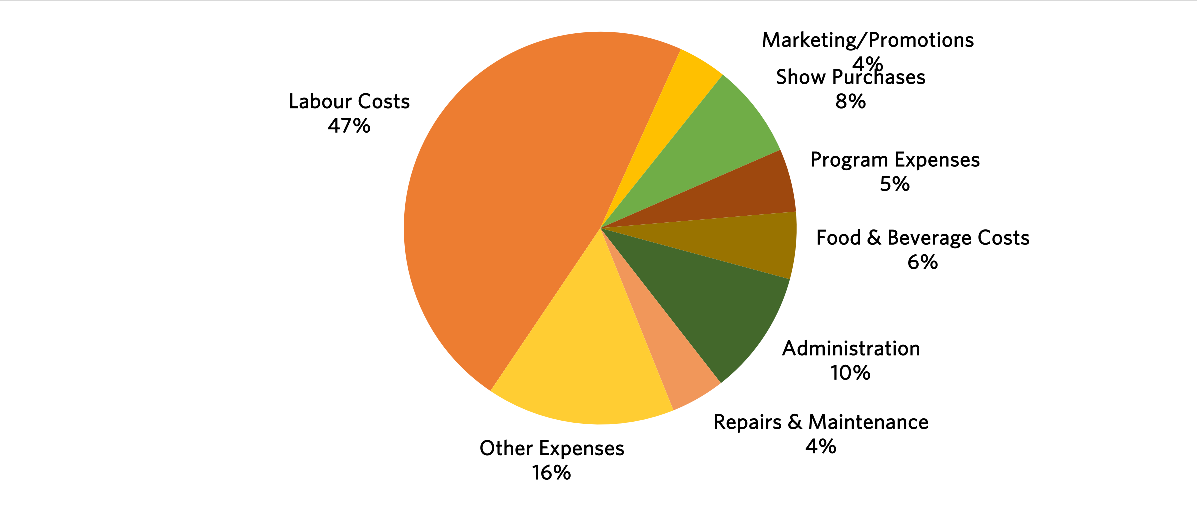
Note: One major city venue was excluded as the total value of turnover for the venue significantly skewed the average results.

From a peak of 35% in 2013, Local Government funding for respondents has fallen steadily, to 27% in 2015 and increasing marginally to 31% in 2017. At the same time State and Territory funding remained relatively constant, falling marginally from 7% in 2015 to 6% in 2017.

3.6 Expenditure Breakdown

Labour costs remain the largest expense for respondents (47%), increasing from 41% in 2015. Costs of show purchasing and program expenses are marginally below previous years (8% and 5% compared to 11% and 6% in 2015 respectively). The costs of venue food and beverages fell from 10% in the 2015 survey to 6% in 2017 and marketing/promotions fell marginally from 4.5% to 4%.

Figure 18: Expenditure Breakdown, n=40



Note: One large capital city production company was omitted as it skewed the results.

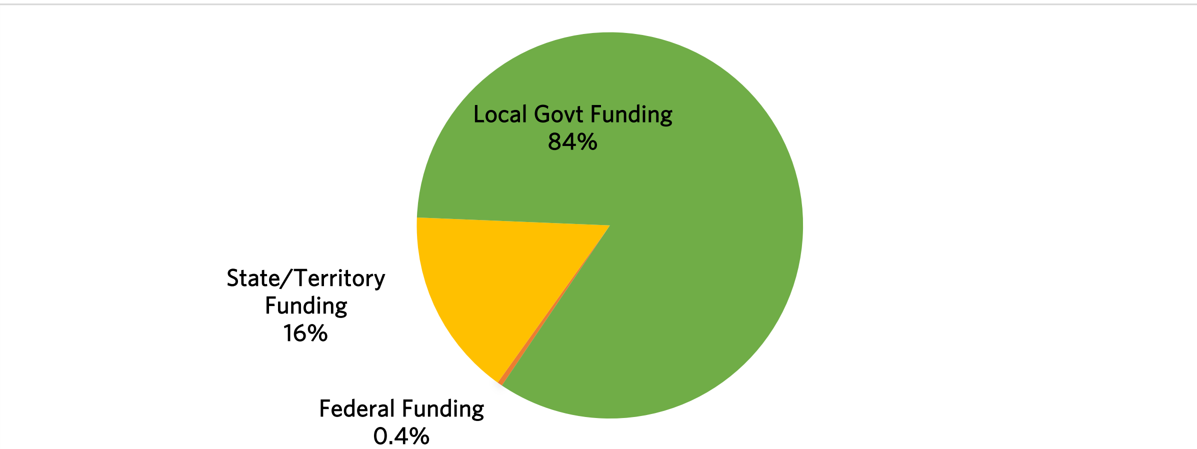
3.7 Government Funding

Figure 19 provides a breakdown of total operational government funding received by respondents. Local government continues to play a significant role in the management and operational funding of performing arts centres.

Excluding one major capital city venue that receives significant funding from its State Government agency, the share of total government funding obtained from State/Territory government funding is similar to 2015 results (16% compared to 15% in 2015) with Local Government accounting for 84% of government funding.

37 respondents provided the total value of the contribution made by their primary source of operational subsidy including the total value of their Community Service Obligation (CSO). The total value reported is $49.4 million.

Figure 19: Government Funding by Source, n=40



Note: One large capital city production company was omitted as it skewed the results.

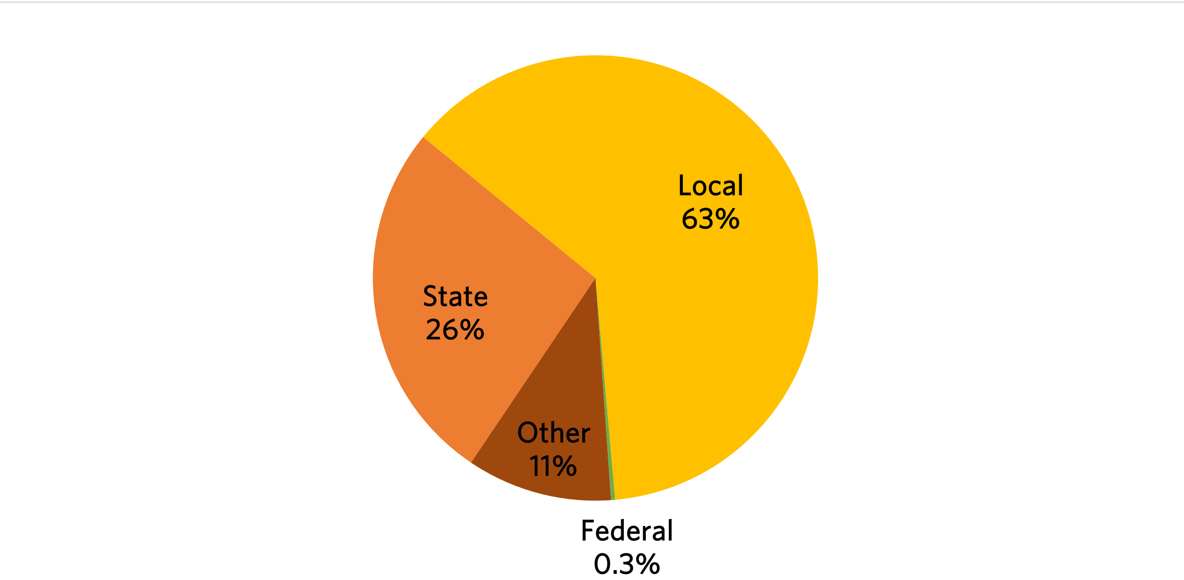
3.8 Capital Expenditure Funding

The breakdown of capital expenditure funding sources is shown in Figure 20. Across all responses, the breakdown of funding sources has realigned with the reporting years pre-2015 after a one-off grant in the 2015 reporting period towards a major regional centre's building project resulted in an unusually high Federal funding share in 2015 (24%). Consequently, the share of local government funding towards capital projects has increased from 18% in 2015 to 31% in 2017 and the share of State government funding has increased from 28% in 2015 to 52% in 2017.

When the effects of one major capital city venue that received a significant amount of State and Federal government funding for capital expenditure are removed, the results are quite different. State/Territory funding accounted for only 26% of capital expenditure funding and local government funding share increases considerably to 63%.

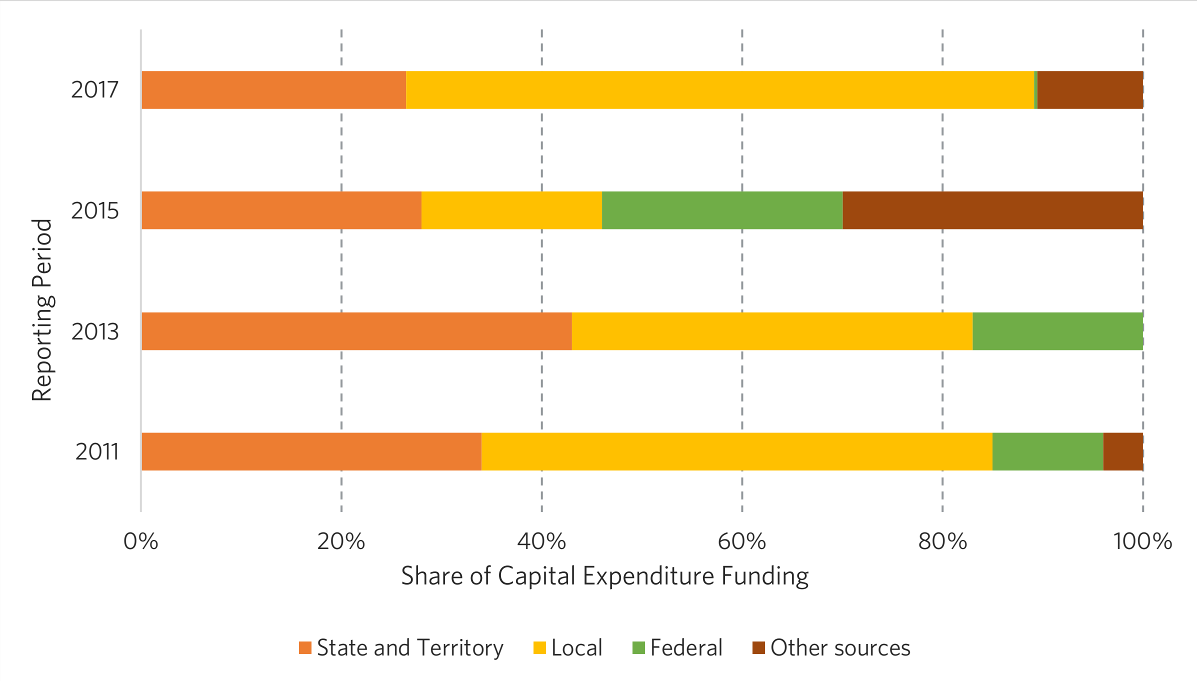
Figure 21 shows the comparison of Capital Funding sources between only Local, State/Territory and Federal sources over four surveys.

Figure 20: 2017 Sources of Capital Expenditure Funding, n=38



Note: One large capital city production company was omitted as it skewed the results.

Figure 21: Sources of Capital Expenditure Funding Comparison to Previous Years, n=38



Note: One large capital city production company was omitted from 2017 analysis as it skewed the results.

3.9 Venue Utilisation

The average total utilisation rate for all performance spaces operated by respondents has fallen by 1 percentage point from 59% in 2015 to 58% in 2017. Utilisation rates remain, therefore, consistent with previous years.

Figure 22: Venue Utilisation by Performance Space, n=53

Metric	Perf Space 1	Perf Space 2	Perf Space 3	Perf Space 4	Perf Space 5	All Spaces
Utilisation	62%	51%	56%	62%	57%	58%
Average # seats	888	372	958	431	226	575
Average # days available	320	310	317	348	351	329
Average # days unused	121	153	140	131	150	139
Number Sampled (n=)	53	34	9*	5*	3*	

*** Data for these performance spaces was calculated from a relatively small sample size**

Average utilisation rates across performance spaces vary across states as shown in Figure 23. Average utilisation for each state is relatively consistent with 2015 results, despite the rate for NSW which has fallen from 58% in 2015.

Figure 23: Venue Utilisation of Main Performance Space by State, n=53

State	Average Utilisation %	Average # days available	Average # days unused	Number Sampled (n=)
ACT	n/a	n/a	n/a	0
NSW	52%	330	158	15
NT*	n/a	n/a	n/a	2
QLD	58%	335	142	12
SA*	n/a	n/a	n/a	2
TAS	56%	344	150	4
VIC	69%	306	94	13
WA	67%	307	101	5

*** Data provided from the NT and SA is excluded so as not to identify the respondents.**

3.10 Activity Levels

The reported number of performances by respondent venues, shown in Figure 24, has risen significantly over the past six years from 8,495 (n=72) in 2011 to 13,116 (n=76) in 2013, 24,425 (n=64) in 2015 and 30,694 (n=42) in this reporting cycle. Given inconsistencies in the sample size and the ability for major centres to skew these results, this should not be taken to be representative of the increase in activity across all venues however, these results give an indication of the total volume of activity being undertaken.

Figure 24: Venue Activity Levels

State	Total Performances	Performance Attendance (n=44)	Total of All Activities (n=42)	Overall Attendance (n=44)	Total Non-Arts Activities (n=43)	% Non-Arts Activities
ACT	n/a	n/a	n/a	n/a	n/a	n/a
NSW	3,553	763,322	5,228	1,126,762	1,675	32%
NT*	n/a	n/a	n/a	n/a	n/a	n/a
QLD	1,961	520,268	5,196	1,142,720	3,235	62%
SA*	n/a	n/a	n/a	n/a	n/a	n/a
TAS	665	183,809	927	207,547	262	28%
VIC	22,947	2,030,637	34,548	3,926,239	11,601	34%
WA	1,094	248,086	1,526	407,178	432	28%
Total	**30,694**	**3,804,513**	**48,114**	**6,877,058**	**17,420**	**36%**

***Data provided from the NT and SA is excluded so as not to identify the respondents.**

Figure 25 indicates that approximately two thirds of activities undertaken at respondents' venues are arts related, and one third non-arts related. This result is slightly above the 2015 result of 33%.

Figure 25: Activity by Type

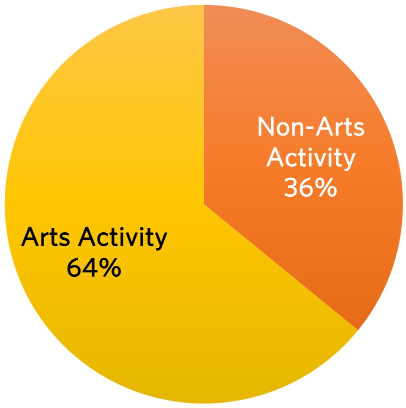


Figure 26 shows that 61% of performances at respondents' venues are community performances, and 39% are professional performances. Community performances are defined as activities paid by an amateur performance groups, dance and drama groups and schools using the respondent's venue for their performances. The results indicate an increase in the share of community performances to return to 2013 levels, after a fall in 2015 to 52% from 65% in 2013.

Figure 26: Professional vs. Community Performances

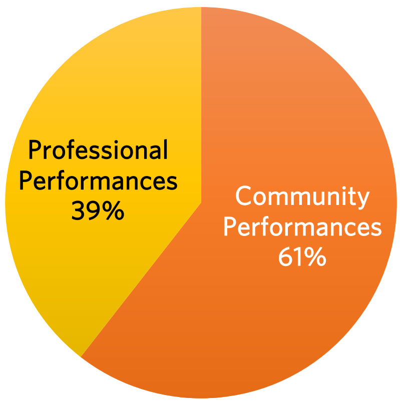


Figure 27 shows a breakdown by of professional and community performances by state. The data shows wide variations of the split between professional and community performances. For example, 66% of performances in Western Australia (WA) were professional, compared to only 9% in South Australia (SA). The percentage of professional performances has increased in New South Wales (NSW) and WA compared with the 2015 results, and decreased in every other state.

Figure 27: Professional vs. Community Performances per State, n=45

State	Community Performances	Professional Performances	Percentage Professional
ACT	-	-	-
NSW	1,681	834	33%
NT	-	-	-
QLD	837	542	39%
SA	-	-	-
TAS	403	244	38%
VIC	839	795	49%
WA	101	197	66%
Total	4,033	2,629	40%

3.11 Programming

Figure 28 and Figure 29 show a breakdown of the performing arts events undertaken by respondents under "Full Risk", "Shared Risk" and "No Risk" categories. The data indicates a trend away from entrepreneurial programming with the reported share of entrepreneurial seasons presented by respondent venues decreasing from 37% of all seasons in 2015, to 34% in 2017.

The percentage of entrepreneured performances within seasons fell from 48% of performances in 2015 to 35% in 2017 and the share of seasons presented by Hirers of the respondent venues increased from 63% to 66%.

Figure 28: Performance Risk Level by State

State	Productions entrepreneured at Full Risk, n=49		Productions entrepreneured at Shared Risk, n=48		Hires, at No Risk n=45		Risk as a % of Total Arts Activities (2017)	
	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs
ACT	-	-	-	-	-	-	-	-
NSW	278	608	66	156	1,318	2,478	21%	24%
NT	-	-	-	-	-	-	-	-
QLD	213	351	125	594	297	904	53%	51%
SA	-	-	-	-	-	-	-	-
TAS	46	89	12	37	104	227	36%	36%
VIC	339	802	73	210	695	1,888	37%	35%
WA	94	181	55	119	149	383	50%	44%
Total	**991**	**2,056**	**337**	**1,134**	**2,582**	**5,902**	**34%**	**35%**

Figure 29: Share of Performances Involving Financial Risk for the Venue

Playing Australia funds are an important resource for many regional centres to facilitate the delivery of touring shows. The 2017 survey revealed that 457 performances were supported by Playing Australia funds, with NSW being the main beneficiary with 95 supported seasons. The results indicate that Playing Australia supported 16% of entrepreneurial seasons, 14% of entrepreneurial performances and 5% of all performances in respondents' venues.

A total of 261 seasons and 1,380 performances were supported by state agency funding, representing 7% of all seasons presented at respondent's venues and 15% of all performances presented at venues.

Figure 30: Playing Australia and State Funded Seasons and Performances per State

	Productions Supported by Playing Australia		Productions Supported by State Funding Agencies		Average # performances per production/season
	Seasons	Perfs	Seasons	Perfs	
ACT	-	-	0	0	-
NSW	95	261	64	693	2.7
NT	-	-	0	0	-
QLD	20	34	32	63	1.7
SA	4	6	3	4	1.5
TAS	19	50	2	2	2.6
VIC	37	50	155	597	1.4
WA	33	56	5	21	1.7
Total	208	457	261	1,380	2.2

Figure 31: Playing Australia Funded Seasons as a Percentage of Total Entrepreneurial Seasons, n=46

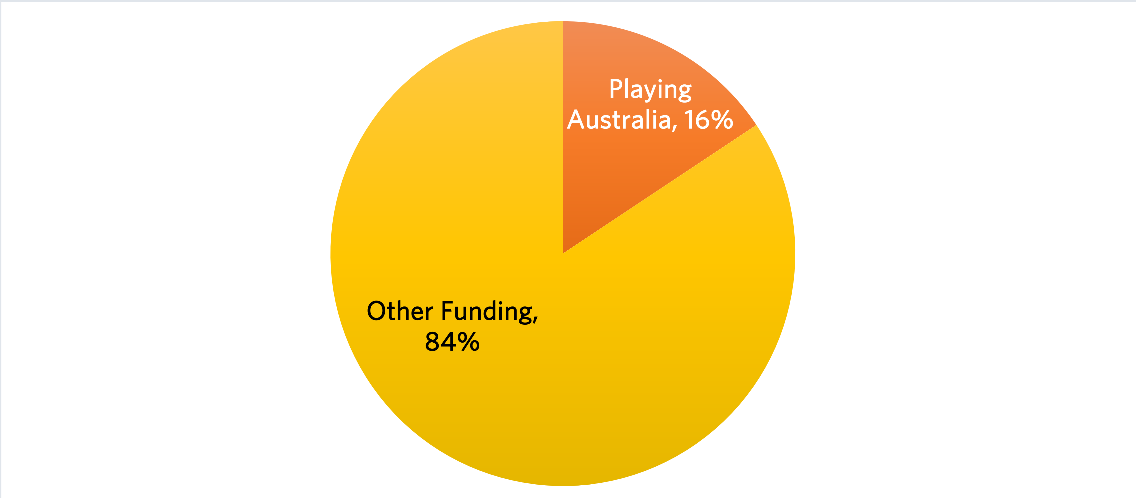
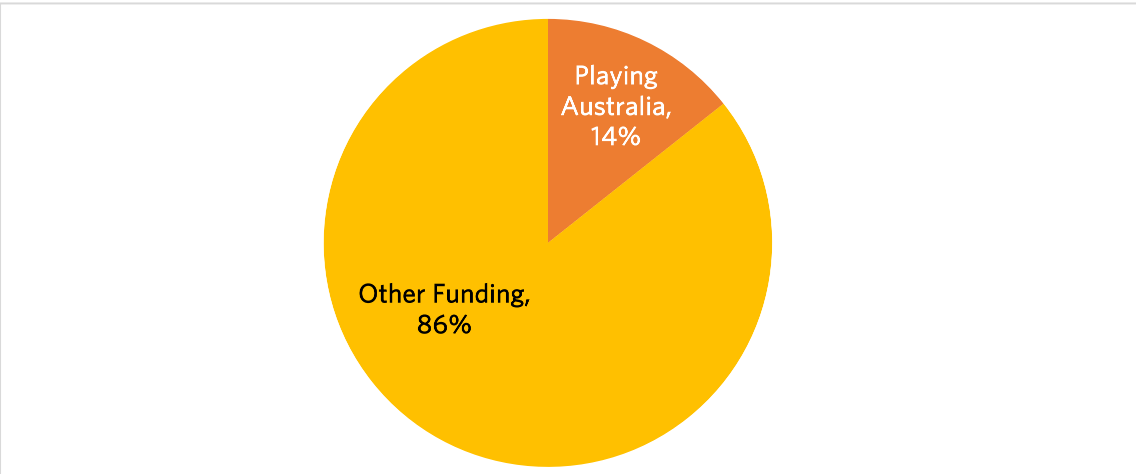


Figure 32: Playing Australia Funded Performances as a Percentage of Total Entrepreneurial Performances, n=44



3.12 Policies and Plans

2017 survey has introduced four new questions regarding the programming and cultural plan. Figures 34 to 37 show the breakdown of responses. Overall majority of centres (55%) have a written policy or plan. Written audience development plan or strategy are less common among art centres, around 46% of respondent have confirmed that they have one.

Figure 33: Percentage of centres with a written policy or plan, n = 73

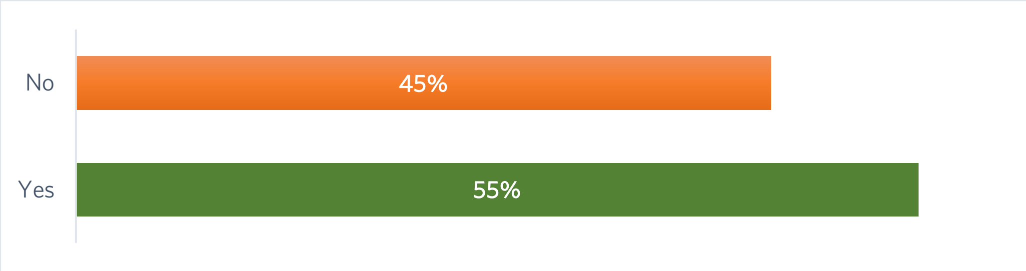
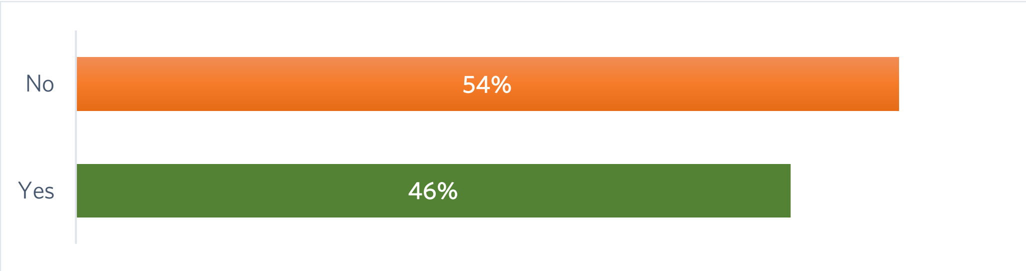


Figure 34: Percentage of centres with a written audience development plan or strategy, n = 71



Approximately two thirds of local council have a cultural plan and 68% of them include the activities and goals of their local centre in their plans.

Figure 35: Percentage of local councils with a cultural plan, n = 67

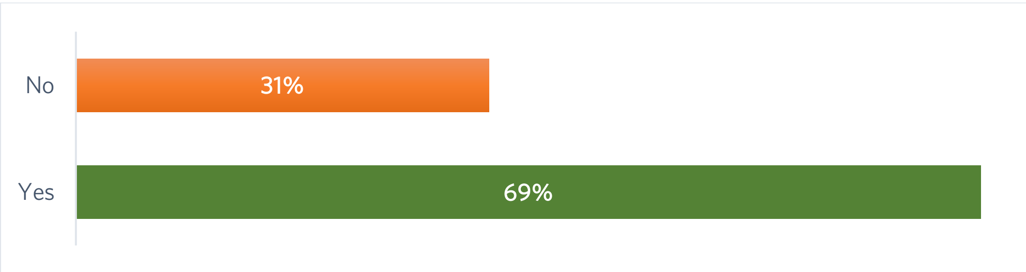
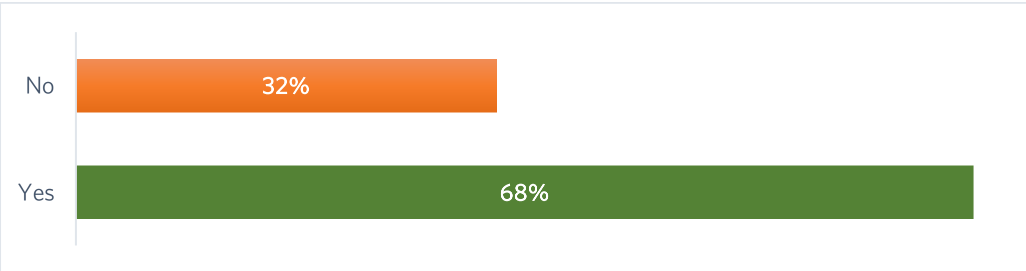


Figure 36: Percentage of local council plans that refer to the activities or goals of the centre, n = 47



4 APPENDIX A: LIST OF RESPONDENT VENUES

- Albury Entertainment Centre
- Araluen Arts Centre
- Arts Centre Melbourne
- Arts Margaret River Margaret River Cultural Centre
- Barossa Arts & Convention Centre
- Bathurst Memorial Entertainment Centre
- Brisbane Powerhouse
- Brolga Theatre
- Bunbury Regional Entertainment Centre
- Burdekin Theatre
- Capital Venues and Events
- Capitol Theatre Tamworth
- Cessnock Community Performing Arts Centre
- Civic Precinct Theatre
- Clocktower Centre
- Darebin Arts and Entertainment Centre
- Darwin Entertainment Centre
- Devonport Entertainment and Convention Centre
- Dubbo Regional Theatre and Convention Centre
- Eastbank Centre - Riverlinks Venues
- Empire Theatre
- Frankston Arts Centre
- Geelong Performing Arts Centre
- Gladstone Entertainment Convention Centre
- Glen Street Theatre
- Griffith Regional Theatre
- Hamilton Performing Arts Centre
- His Majesty's Theatre
- Hurstville Entertainment Centre
- Illawarra Performing Arts Centre
- Ipswich Civic Centre
- Joan Sutherland Performing Arts Centre
- Judith Wright Centre of Contemporary Arts
- Lake Kawana Community Centre
- Mandurah Performing Arts Centre
- Manning Entertainment Centre
- Matt Dann Theatre & Cinema
- Melbourne Recital Centre
- Mildura Arts Centre
- NORPA, Northern Rivers Performing Arts
- Orange Civic Theatre
- Pilbeam Theatre
- Princess Theatre
- QMC - Queensland Multicultural Centre
- Queens Park Theatre
- QUT Gardens Theatre
- Seymour Centre
- Shoalhaven Entertainment Centre
- Sutherland Entertainment Centre
- The Art House Wyong
- The Burnie Arts and Function Centre
- The Concourse
- The Cube Wodonga
- The Hopgood Theatre
- Theatre Royal
- Townsville Civic Theatre
- University of Southern Queensland
- Wagga Wagga Civic Theatre
- Wangaratta Performing Arts Centre
- Whitehorse Performing Arts Centre

5 APPENDIX B: GLOSSARY

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

6 APPENDIX C: SURVEY QUESTIONNAIRES

1. Introduction

This is survey one of two APACA biennial benchmarking surveys and concerns the Economic Activity of your centre. Survey two concerns salaries and venue charges and will be sent separately.

The surveys have been undertaken since 2003 and are regularly used by members to build a business case for organisation changes or redevelopments where the comparison to national standards is valuable. The reports are also widely used as the basis for art centre development and feasibility studies.

The reports are circulated free of charge to members completing both surveys and are available for purchase by appropriate third parties in support of the arts industry.

All individual member organisation data is confidentially provided to APACA. We will only reveal raw survey information for the purpose of data cleaning and processing or on and as needs basis after obtaining express permission from the data provider (APACA member).

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

A PDF of this survey is available **here** to assist you with preparing the required information.

We are going to ask you a range of questions about your activities over the past year. Please report on the 2016/2017 financial 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 presented a production that only had one performance, count it as one season AND one performance.

Please enter figures without dollar signs, commas, spaces or decimal points.

If you require assistance regarding clarification of definitions and/or questions please direct your enquiry via email to Katherine Connor [katherine@apaca.com.au] or call 1300 66 52 63.

1. Your Name:

2. Please enter an email address we can contact you on in case we need to clarify a response.

* 3. Organisation name: (i.e. the APACA member)

Other (please specify)

* 4. State/Territory:

QLD NSW ACT VIC TAS SA WA NT

* 5. Please indicate your geographic location (self-defined):

Metropolitan Regional Remote

6. I give permission for the annual turnover of my centre to be revealed.

This is important information that allows art centres to compare their activity levels.

In previous years the majority of respondents have given this permission.

Yes - I give permission for the annual turnover of my centre to be revealed.

No - I do not give permission for the annual turnover of my centre to be revealed.

7. I give permission for the annual attendance of my centre to be revealed.

This too is important information that allows art centres to compare their activity levels. In previous years the majority of respondents have given this permission.

Yes - I give permission for the annual attendances of my centre to be revealed.

No - I do not give permission for the annual attendances of my centre to be revealed.

2. General information

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

Other (please specify)

9. Who is the owner of your venue? (select one)

Other (please specify)

10. What is the current estimated capital value of the centre you manage (including buildings and contents)?
Please enter a figure without a dollar sign, commas, spaces or decimal points.

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

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

13. What is the age of your centre/venue in years?

14. How many years is it since your centre had a capital upgrade [greater than $250K]?

3. Venue Capacity and Utilisation

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

16. What is the TOTAL combined seated capacity of ALL the performance venues you manage?

17. How many days in the last financial year was this performance space available for hire but not used?

(Please report on the 2016/2017 financial 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)

4. Venue Capacity and Utilization for more than one venue

18. 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

19. 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

20. 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

21. 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

5. 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 e.g. in the season of A Midsummer Night's Dream there were three 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. three 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. Count individual classes and rehearsals separately, unless rehearsals are on stage or under stage lights ("production week").

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

Please report on the 2016/2017 financial year.

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

Number of productions/seasons:

Number of performances:

23. Of the productions you entrepreneured last year, on how many did you co-produce/co-present (i.e. you shared the financial risk)?

Number of productions/seasons:

Number of performances:

24. 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:

25. 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 State Government Support? [i.e received touring support from State Gov't]

Number of productions/seasons

Number of performances

26. 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:

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

Number of productions/seasons:

Number of performances

6. 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").

Entrepreneured: 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.

28. 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:

29. 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?

7. Other events

30. 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].

31. 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

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

8. Operating Income

This section asks about your Income and expenditure for your centre.

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 should be for the 2016/2017 financial year.

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

33. 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

34. 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	

35. Private support

Philanthropic trusts	
Sponsorship (monetary)	
Sponsorship (in-kind) - only include in-kind support if listed in audited statement	
Donations / fundraising	
Non-government grants	

36. TOTAL INCOME (total of Questions 32-34) - AMOUNT A

9. Operating Expenditure

Include all recurrent expenditure; do not include capital expenditure

37. 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	

38. TOTAL EXPENDITURE - AMOUNT B

39. OPERATING SURPLUS / DEFICIT = AMOUNT A less AMOUNT B

40. If the Operating Result for your centre [identified at Q38 above] is a surplus (i.e. you earn more than spend) are you able to retain this surplus?

- Yes
- No

41. How is this surplus treated?

- Add to available funds for the following financial year
- Transfered to a programming reserve
- Transfered to a capital reserve
- Transfered to a building reserve
- Transfered to a general purpose reserve
- Available for capital expenditure in the current or next financial year

10. Other

42. 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 in-kind services provided to your operation such the cost to your owner of providing business support such as payroll, accounting services, IT services etc

NOTE: The aim of this question is to be able to report is a total net cash subsidy/contribution from Local Government and the total net subsidy [cash and other services e.g. car, IT services, etc] from Local Government - This is one of the most-often asked questions of APACA.

43. When setting operational budgets, do you have the ability to budget a net loss for programming?

By net loss we mean Total Income from Box office is less than Total Expenditure for Venue Costs, Performance Fees, Marketing costs, etc

- Yes - we budget a net loss for programming within our operational budget
- No - programming must deliver a breakeven position within our operational budget
- No - programming must deliver a net surplus within our operational budget

Other (please specify)

44. Please enter the net loss amount you are able to budget for programming [or have expended on programming (purchasing shows) in the most recent year].

NOTE: the aim of this question is to try and establish how much each centre spends on programming [buying shows] each year.

11. Your contribution to Playing Australia funded presentations

45. 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.

12. Capital Project Expenditure

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

State

Local

Federal

Other

47. 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)

13. THANK YOU

48. Do you have any comments regarding questions that you found difficult to answer? (Please refer to the question number)

49. Any other comments and/or feedback

50. Can you please confirm that you have **COMPLETED** this survey?

- Yup - all done
- Nup - still workin' on it - I'll be back to add more responses
- No - I not coming back to finish it ... ever!

Please click next for further information.

14. Event Level and Genre Data

LPA Ticket Attendance and Revenue Survey 2016.

APACA and LPA are working together to develop a coordinated approach to annually collect your ticket attendance and revenue event level data that avoids duplication and eases the administrative burden on you.

For LPA to include your data in their annual Ticket Attendance and Revenue Survey report, they require attendance and box office information to be classified according to defined genre categories. They also require that information be provided on a calendar year basis (as opposed to a financial year).

In addition, APACA is undertaking a project that will combine this information with Culture Counts to enable art centres to measure event impact (cultural, civic, economic, social and civic) against event investment. This requires that you provide event level data (as opposed to aggregated/annual data). APACA will report this information in an online format with a data query function allowing you to search and compare many variables across your centre's annual activity.

To enable the gathering of this data in the easiest way possible for you, we ask that you:

1. Complete the Excel spreadsheet available via the below link;OR

2. Export and amend an Excel spreadsheet from your venue's ticketing system that meets the data requirements requested. Refer to the instructions and sample template via the below link for further information on the data requested.

3. Submit your data to APACA (admin@apaca.com.au) by 31 July.

Event Level Data Template and Guidelines SPREADSHEET

Figures provided will be reported in LPA's Ticket Attendance and Revenue Survey 2016 (Supplementary Report). The results of this report are used extensively by the industry, media and government when referring to the value of the live performance industry in Australia.

All individual member company data is confidentially provided via APACA to Ernst &Young (commissioned to prepare LPA Survey report). Ernst & Young will only reveal raw survey data to LPA on an as needs basis after obtaining express permission from the data provider (APACA Member). APACA will only reveal raw survey data on a confidential basis to a third party contractor for the purpose of cleaning and processing.

Should you have any questions with regard to completing the excel spreadsheet or how this

data will be used, please contact LPA Senior Policy Advisor, Holly Crain at hcrain@liveperformance.com.au or (03) 8614 2000 at any time.

If you require assistance regarding clarification of definitions and/or questions about this survey please direct your enquiry via email to Katherine Connor [katherine@apaca.com.au] or call 1300 66 52 63.