



2019 Economic Activity Report

Performing Arts Connections Australia

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1. EXECUTIVE SUMMARY

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

PAC Australia members include professionally managed performing arts centres, performing arts companies, festivals, independent producers and companies, funding bodies, touring organisations and other industry associations. The industry is valued at more than \$1.1 billion by the Australian Bureau of Statistics.

Annually, PAC Australia members present over 53,000 events to audiences numbering over 11 million. Members present a vast array of artforms from theatre, opera and classical music, to comedy, circus and contemporary dance.

The 2019 Economic Activity Survey (the survey) has used questions from previous survey years - 2006, 2009, 2011, 2013, 2015 and 2017 – to enable longitudinal trend analysis.

1.1 Methodology

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

There were 68 responses (plus one non-member contribution) representing 50.4% of the 135 presenter (venue) members.

In reviewing the 2019 survey findings, comparisons have been made with the results from 2011, 2013, 2015 and 2017 survey results to identify emerging trends and industry changes over time.

1.2 Conclusions

The survey respondents represented a wide range of performing arts centres, both in geographical spread and in the size of enterprise, demonstrating the breadth of PAC Australia membership.

Local government continues to play a significant role in the management and operational funding of performing arts centres. State Government and Universities own a percentage of other venues, all contributing to annual operational funding. Three respondents reported managing their venue on behalf of private ownership, the value of support increasing to over one-third of respondents' annual income.

More than two thirds of larger enterprises, defined as more than \$2 million annual turnover (n=16), are managed at arms-length from ownership by separate entities.

Total attendance at all activities presented by respondent's total over 4.2 million people with the percentage of arts activities steadily increasing over the past five surveys to 73.6% in 2019.

Venue utilisation rates have increased by 7% to 65% since the 2017 survey and occupancy of respondents' primary venue increased from 62% in 2017 to 81% in 2019.

Respondents continue to prove the importance of entrepreneurial program activity, showing it delivers significant economic and community engagement and professional arts activity into regional communities. Performing arts centres are taking financial risk in approximately one-third of their annual activities, the number of performances presented continuing on a downward trend while the annual value of respondents' investment in entrepreneurial programming increasing significantly.

Playing Australia alongside each State's touring funding programs are essential in the activation of national touring, particularly for venues located in regional and remote communities. Playing Australia funding supports the delivery of professional performances into regional venues and remains an integral aspect of respondents' entrepreneurial programs.

Entrepreneurial programming is a central focus for community engagement for audiences. Approximately 85% of respondents program community engagement activities to complement professional productions presented in their venues. Activities included pre or post show discussion, workshops and masterclasses, participatory activities, readings, residencies and other community opportunities.

Venues are a valued stimulus for employment opportunities for artists, venue professionals and supporting industries such as hospitality. Employment by venues is reported at more than \$114 million annually, while entrepreneurial programming provides artists and arts companies with touring opportunities valued at more than \$43 million annually.

The ongoing impact of PAC Australia members is essential to liveability in regional communities, with return on investment generating artistic, social and economic benefits.

1.3 Summary of Key Findings

- Venues (n=44) represent managed arts and cultural infrastructure located across Australia with a value in excess of \$1.14 billion.
- Local Government takes a leading role as the owners of 80.4% of performing arts infrastructure managed by respondent venues and of these, 66.7% are directly managed by their Council.
- Management models fall into eight categories with 24.5% operating at arms-length from Government owners. 8.7% of these are managed through a company limited by guarantee, with 4.3% under private ownership and 5.8% owned and operated as part of an educational institution.

- Respondent venues report more than 21,600 activities are presented annually in their venues, attracting attendance of more than \$4.4 million (n=49).
- 32.4% of respondents operate a performing arts centre with one performance space, while 33.8% have two performance spaces, and 33.8% have three or more performance spaces.
- Almost one third (32.3%) of respondents manage venues with total capacities up to 550 seats. 30.9% fall into a group of venues with between 550 and 1,100 seating capacity. 5.9% of venues report multiple spaces with a total capacity greater than 3,000 seats.
- Financial data was provided by 49 respondents with a combined turnover of \$285.3 million. Individual respondent turnover ranged from \$133,395 to \$24.2 million.
- Government subsidy received by all respondents represents 40.93% or \$116 million of their income. Local Government still represents the most significant government contributor, with respondents reporting almost \$105.5 million in operational support.
- Higher percentages of income from government sources is received by respondents with a turnover less than \$1 million (48.2%), and those managed within their local Council (49.87%).
- Respondents' box office income source increased to 13.37% from 12.2% reported in 2017, also marginally higher than 2015 (13.3%). Recoverables increased to 9.94% of total income after a reported 7.7% in 2017.
- Venue hire decreased by 1% to 9.94% of total income (2017, 10.9%) while ticketing services reduced by almost 2% to 5.52% (2017, 7.1%). Income from food and beverage declined substantially from 14.2% in 2017 to 8.19%.
- The predominant expense for respondents remains labour at 44.83% of their total expenditure, a decrease by 4.47% from the 49.3% reported in 2017.
- Respondents spent just over \$43.3 million purchasing and presenting their programs, with another \$11 million spent on marketing these events and their venues. 2019 figures show an increase from the 2017 report where programming costs were \$22.4 million and marketing \$8.2 million. ⁽¹⁾_{SEP}
- Average turnover has increased in the groupings of respondents with less than 1,000 seating capacity, and for those with only one or two performance spaces.
- There continues to be a positive relationship between respondents' average turnover and their proximity to a capital city, particularly for those located within 150 kilometres of their nearest city.

- The percentage of entrepreneurial performances continued a downward trend from 48% of all respondents' reported performances in 2015, to 35% in 2017 and 33.2% in 2019.
- Respondents presenting their entrepreneurial program are taking less risk overall, with risk percentage of total arts activities reported as 31.4% in 2019 against 34% in 2017.
- 32 venues reported the value of investment (net loss) towards entrepreneurial programming at approximately \$9.8 million within their annual operational budgets. 16 respondents were required to return a breakeven position for their entrepreneurial programming activities.
- The Commonwealth Government's Playing Australia Fund supported 26% of respondents' entrepreneurial seasons, an increase from 16% in 2017. Corresponding increases are shown for entrepreneurial performances at 34% (14% in 2017) and 8.8% of all performances presented (5% in 2017).
- Respondents located more than 400 kilometres from their nearest capital city received 4% of Playing Australia touring seasons while those located between 300 and 400 kilometres away received 25%. Respondents located between 150 and 299 kilometres received 24%. Venues located 40 to 150 kilometres away received 28% and those within 40 kilometres of a capital city received 19% of Playing Australia supported touring seasons.
- 42 respondents from five states reported the number of seasons presented with touring support through Playing Australia, finding each respondent presents 5.77 seasons annually. On average, Playing Australia seasons involved 2.6 performances per venue, an increase from 2.1 in 2017.
- State Funding Agencies supported 7.2% of all seasons presented and 9.3% of all performances presented within respondents' entrepreneurial programs.
- Seasons supported by State Funding Agencies reported as 2.6 performances per season in 2019, a reduction from an average 5.28 performances per season in 2017.
- Professional performances account for 52% of all performances, while 48% are community performances (school productions, amateur performance groups, dance and drama training presentations.)
- In 2019, significantly fewer respondents have a written programming policy and plan (37% against 55%) or audience development plan or strategy (29% against 46%) than those reporting in 2017. 61% of respondents' local Council have a cultural plan.
- \$52.2 million in capital funding was received for projects conducted by seven respondent venues. A combined investment of \$45 million made by state government sources was reported by two venues undertaking major venue building projects.

2. Introduction

Performing Arts Connections Australia (PAC Australia), previously the Australian Performing Arts Centres Association (APACA), is the national peak body representing and supporting performing arts presenters, touring organisations, creators and producers around Australia. PAC Australia supports the development of performing arts throughout Australia with a broad membership of over 220 organisations.

The performing arts centres sector presents productions from a diverse range of art forms including plays, opera and classical music, comedy, circus, cabaret, classical ballet and contemporary dance. PAC Australia members predominantly operate in the subsidised performing arts sector.

60% of PAC Australia members operate professionally managed performing arts centres. This sector operates within a limited resource base in service of delivering benefits to their community. Whilst members are geographically dispersed, technology facilitates regular communication that has developed the membership into a strong network.

2.1 Aim

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

Regional performing arts centres often work in isolation as a result of the relatively unique nature of the industry and their geographic location. Size of operation, staff structures and other resource limitations lowers their capability to undertake research to underpin evidence-based decision-making.

2.2 Methodology

PAC Australia commenced surveying members about their economic activity in 2006 and has completed bi-annual surveys since 2009. Primary research has benefitted members by providing consistent, standardised and readily available secondary data about the sector. A list of participating respondents for this survey is provided at Appendix A.

All surveys to date have revealed ongoing challenges in the use of terminology used by the sector. A glossary defining terms used in the survey is provided at Appendix B.

A review of survey design and questions is undertaken prior to its distribution. PAC Australia seeks to maximise participation by membership, enabling them to provide evidence-based representation of the sector. The survey tools can be found at Appendix C.

2.3 Response Rates

There were 68 responses representing 50.4% of the 135 venue members at the time of the survey. By arrangement with Stage Queensland, one additional regional venue (Cassowary Coast) provided responses included in some data sets.

As responding to each section was voluntary, the number of responses relating to the analysis of each question is noted against the tables and figures in this report. Respondent numbers were improved over the 2017 report. In the past, data from major capital city-based venues tended to skew reporting. The mix of respondents in 2019 are from a broad range of regional locations in five states. Respondents from the two Territories and South Australia were limited. In some tables and figures, their submissions are excluded so as not to identify individual respondents.

2.4 Respondent Profile

Responses were highest from New South Wales (36.2%), Victoria (21.7%), Queensland (17.4%) and Western Australia (14.5%). Few responses were received from South Australia and the Australian Capital Territory. No responses were received from the Northern Territory.

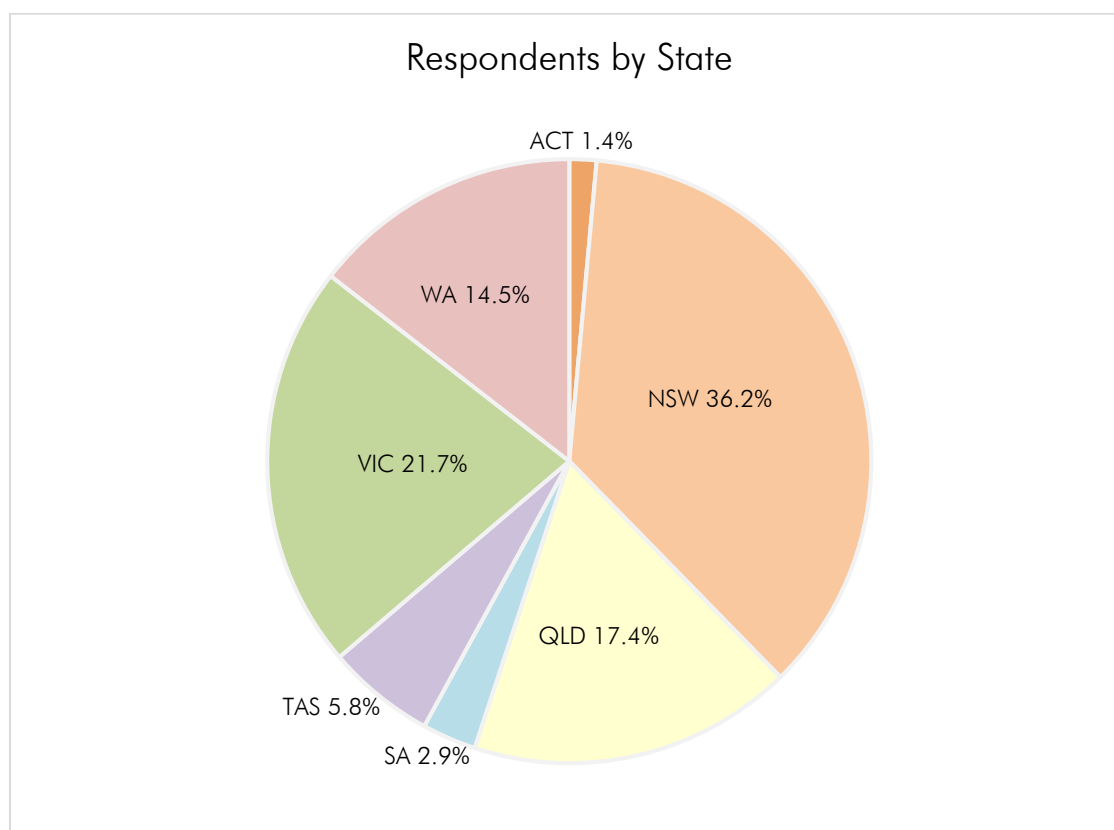


Figure 1: Survey Respondents by State, (n=69)

Figure 2 below represents the percentage of survey respondents by State as a share of total PAC Australia venue members (i.e. members eligible to respond to the survey).

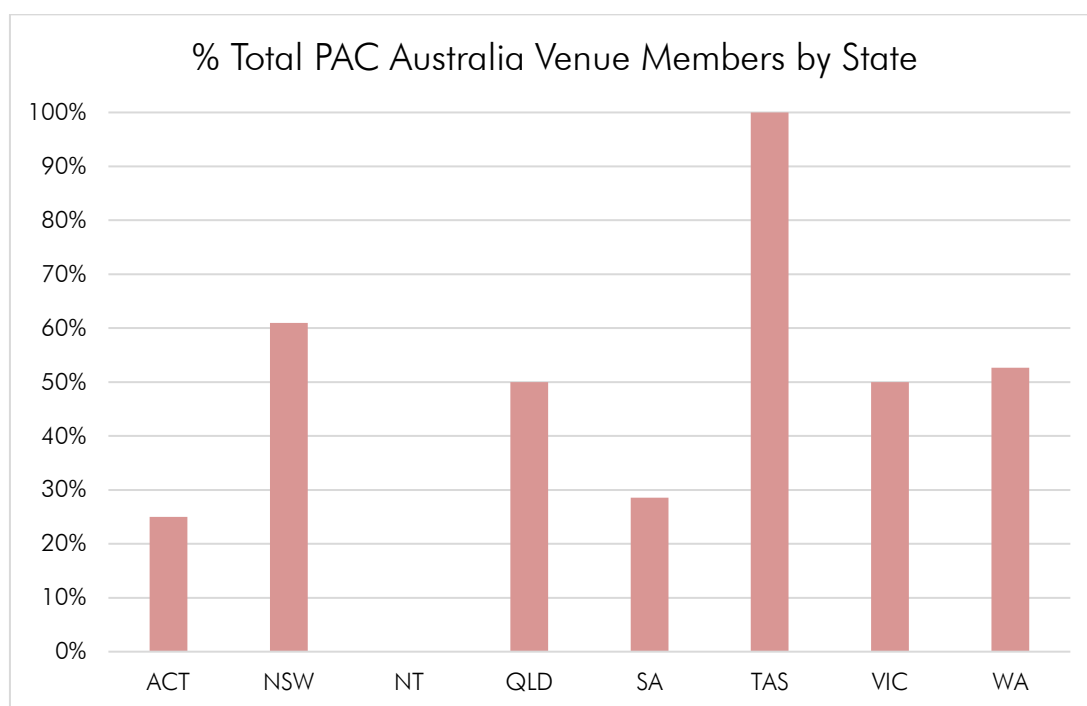


Figure 2: Survey Respondents as a Share of Total Venue Members by State (n=68)

3. General Information

3.1 Respondents

Table 1 shows key information relating to each respondent including venue, management model, their population serviced, distance from nearest capital city, number of performance spaces, total capacity, annual attendance and annual turnover (income):

State	Centre	Managed by	Population Serviced	Dist from Capital City (kms)	No. of Perf Spaces	Total Capacity	Annual Attendance	Annual Turnover
ACT	Belconnen Arts Centre	Inc. Assoc.	500,000	0	1	404	40,000	-
NSW	Albury Entertainment Centre	Local Govt	180,000	350	2	995	86,219	1,556,000
	Bangarra Dance Theatre	-	1,624,000	0	-	-	-	-
	Bathurst Memorial Entertainment Centre	Local Govt	47,000	200	2	1,642	56,169	1,818,855
	Bondi Pavilion Theatre, Waverley Council	Local Govt	74,114	8	1	230	-	-
	Cessnock Community Performing Arts Centre	Local Govt	560,000	152	1	466	17,862	249,181
	Civic Theatre Newcastle	Local Govt	500,000	160	3	2,500	-	-
	Dubbo Regional Theatre and Convention Centre	Local Govt	130,000	391	2	1,355	60,275	1,862,232
	Entertainment Venues (Tamworth)	Local Govt	120,000	405	3	6,202	55,834	1,585,858
	Glasshouse Port Macquarie	Local Govt	83,616	420	2	688	147,223	4,080,743
	Glen Street Theatre	Local Govt	252,885	18	1	400	67,707	-
	Griffith Regional Theatre	Local Govt	52,000	369	1	523	35,430	-
	Laycock Street Community Theatre	Local Govt	3,700	75	3	616	52,159	1,075,000
	Manning Entertainment Centre	Local Govt	95,000	330	1	500	25,000	479,000
	Merrigong Theatre Company	Company	517,918	84	4+	1,800	158,036	6,680,805
	Monkey Baa Theatre Company	Company	4,000,000	0	1	236	-	-
	NIDA Parade Theatres	Educ Inst	4,627,000	8	4+	1,220	70,000	24,227,897
	Orange Civic Theatre	Local Govt	100,000	364	1	1,300	-	1,284,149
	Queanbeyan Performing Arts Centre	Local Govt	56,000	7	2	926	-	-
	Riverside Theatres Parramatta	Local Govt	539,732	26	3	1,062	175,030	6,700,887
	Seymour Centre	Educ Inst	1,000,000	4	4	1,559	171,469	-

State	Centre	Managed by	Population Served	Dist from Capital City (kms)	No. of Perf Spaces	Total Capacity	Annual Attendance	Annual Turnover
NSW cont	Shoalhaven Entertainment Centre	Local Govt	100,000	200	2	1,086	-	1,881,802
	Sutherland Entertainment Centre	Local Govt	250,000	30	3	1,300	100,000	-
	The Art House	Company Limited by Guarantee	450,000	96	3	711	55,271	2,119,477
	The Concourse	Contract Mgt	805,000	12	4+	2,500	194,703	4,429,000
	Twyford Hall Inc	Inc. Assoc.	15,000	270	1	200	-	133,395
	Wagga Wagga Civic Theatre	Local Govt	200,000	244	1	491	44,089	2,237,866
TAS	Burnie Arts & Function Centre	Local Govt	20,000	326	2	1,120	-	-
	paranaple arts centre	Local Govt	75,000	300	1	407	-	-
	Princess Theatre, Theatre North Inc	Inc. Assoc.	88,000	200	2	1,128	81,811	1,387,822
	Theatre Royal	Stat Auth	250,000	-	2	825	60,763	2,734,116
QLD	Brolga Theatre & Convention Centre	Local Govt	101,504	260	1	904	61,037	798,361
	Cassowary Coast Regional Council	Local Govt	6,000	1,600	3	1,200	-	-
	Centre of Contemporary Arts Cairns	Bus Unit of Govt	160,000	1,700	1	284	-	-
	Empire Theatre	Company	250,000	125	4	2,265	130,420	4,669,654
	Gladstone Entertainment Convention Centre	Local Govt	63,000	516	3	1,548	60,500	974,806
	HOTA (Home of the Arts)	Comp controlled Local Govt	600,000	80	4+	5,795	-	-
	Moncrieff Entertainment Centre	Local Govt	98,000	400	1	797	42,259	1,328,012
	Pilbeam Theatre	Local Govt	81,067	616	1	972	-	-
	QUT Gardens Theatre	Educ Inst	2,326,656	-	2	495	-	-
	Redland Performing Arts Centre	Local Govt	150,000	30	3	950	51,666	611,694
	The Events Centre	Company	500,000	120	2	1,200	-	-
	The World Theatre	Local Govt	12,000	1,349	4	930	26,246	388,442
VIC	Bunjil Place	Local Govt	800,000	45	2	1,046	142,834	1,051,645
	Capital Venues and Events (Bendigo)	Local Govt	180,000	150	4	1,640	139,132	8,904,594
	Colac Otway Performing Arts and Cultural Centre	Local Govt	22,000	200	2	387	9,309	-

State	Centre	Managed by	Population Served	Dist from Capital City (kms)	No. of Perf Spaces	Total Capacity	Annual Attendance	Annual Turnover
VIC cont	Frankston Arts Centre	Local Govt	617,757	42	2	1,100	140,000	3,155,571
	Geelong Arts Centre	Stat Auth	3,500,000	75	3	2,516	184,763	5,667,988
	Hamilton Performing Arts Centre	Local Govt	9,974	309	1	500	-	-
	Horsham Town Hall	Local Govt	58,000	300	3	2,000	-	-
	Karralyka Centre	Local Govt	119,900	40	1	430	47,784	-
	Lighthouse Theatre	Local Govt	35,000	270	2	741	61,820	1,077,331
	Mildura Arts Centre	Local Govt	53,878	400	2	500	85,088	-
	Portland Arts Centre	Local Govt	20,000	355	4	1,344	-	570,079
	Riverlinks Venues	Local Govt	80,000	185	2	1,243	70,406	1,000,150
	The Cube Wodonga	Local Govt	100,000	322	2	410	41,538	477,393
	Whitehorse Centre	Local Govt	173,233	15	1	414	93,108	1,588,542
SA	The Hopgood Theatre	Stat Auth	160,000	27	1	492	41,104	519,423
	Woodville Town Hall	Local Govt	1,000,000	10	2	950	39,212	113,580
WA	Arts Margaret River Margaret River Cultural Centre	Contract Mgt	12,000	275	1	325	9,268	677,933
	Broome Civic Centre	Local Govt	14,000	1,871	2	793	-	-
	Bunbury Regional Entertainment Centre	Contract Mgt	180,000	209	2	1,052	-	-
	Esperance Civic Centre	Local Govt	14,500	720	2	720	-	-
	His Majesty's Theatre	Bus Unit of Govt	2,140,000	0	4+	3,719	111,259	2,352,410
	Mandurah Performing Arts Centre	Inc. Assoc.	250,000	75	2	921	200,298	3,150,050
	Matt Dann Theatre & Cinema	Local Govt	14,000	1,619	1	302	-	-
	Moora Performing Arts Centre	Local Govt	6,000	178	1	340	-	-
	Queens Park Theatre	Local Govt	40,000	425	4	1,506	-	-
	University Theatres - UWA	Educ Inst	2,000,000	0	4+	4,168	123,127	2,497,125

Table 1: Respondent Details

Note: Blank cells indicate information was not provided or confidential

3.2 Ownership and Management Models

Figure 3 below indicates that the majority of respondents' venues (66.7%) are managed directly by local government. Other management models include Incorporated Association, Statutory Authority, contract management and Company Limited by Guarantee. Results from biennial PAC Australia surveys conducted over 10 years (2009 to 2019) shows a 9.7% decrease in venues that are managed by a separate legal entity. Since 2015, the percentage of venues managed directly by Local Government has remained consistent.

It is notable that Victorian venues are predominantly (86.7%) managed directly by the Local Government. New South Wales, Queensland and Western Australia have a wider variance in the types of management models used by their venue owners.

One venue member reported they manage three venues, two owned by local government and the third under private ownership. Another venue respondent provides management for two venues, one owned by local government and the other by their state government.

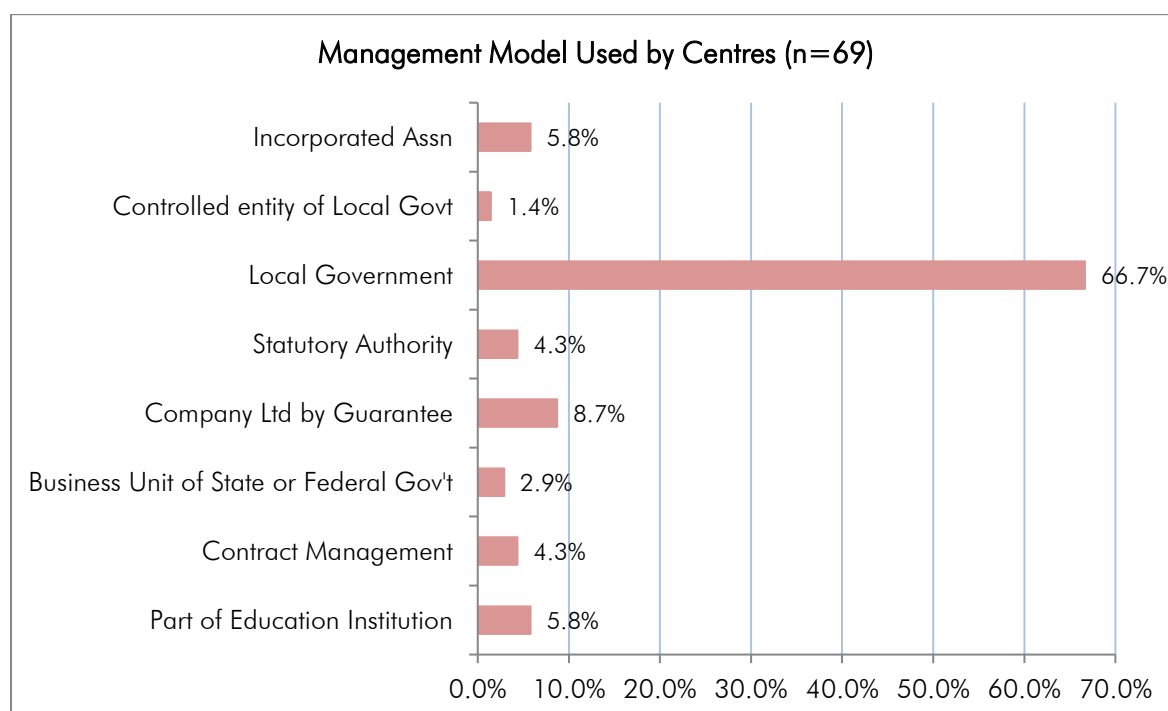


Figure 3: Management Models

Figure 4 below shows venue ownership. Local Government Authorities around Australia own 80.4% of respondent venues while State and Federal Governments own a further 10.9%.

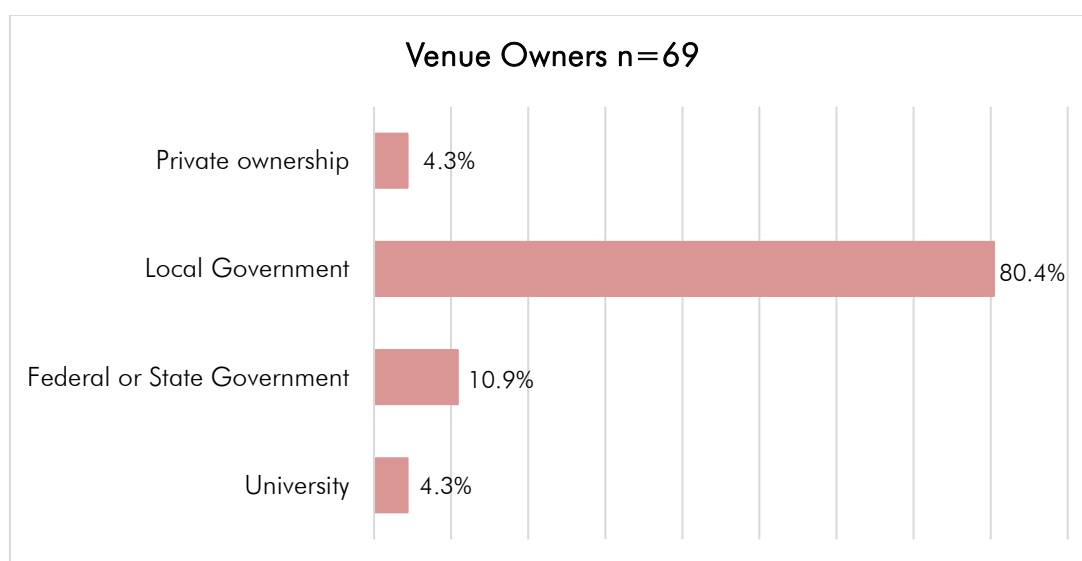


Figure 4: Venue Ownership

3.3 Infrastructure

The estimated capital value of the performing arts centres managed by 44 of the respondents to the survey is \$1.4 billion, with \$1.15 billion owned by local governments around Australia.

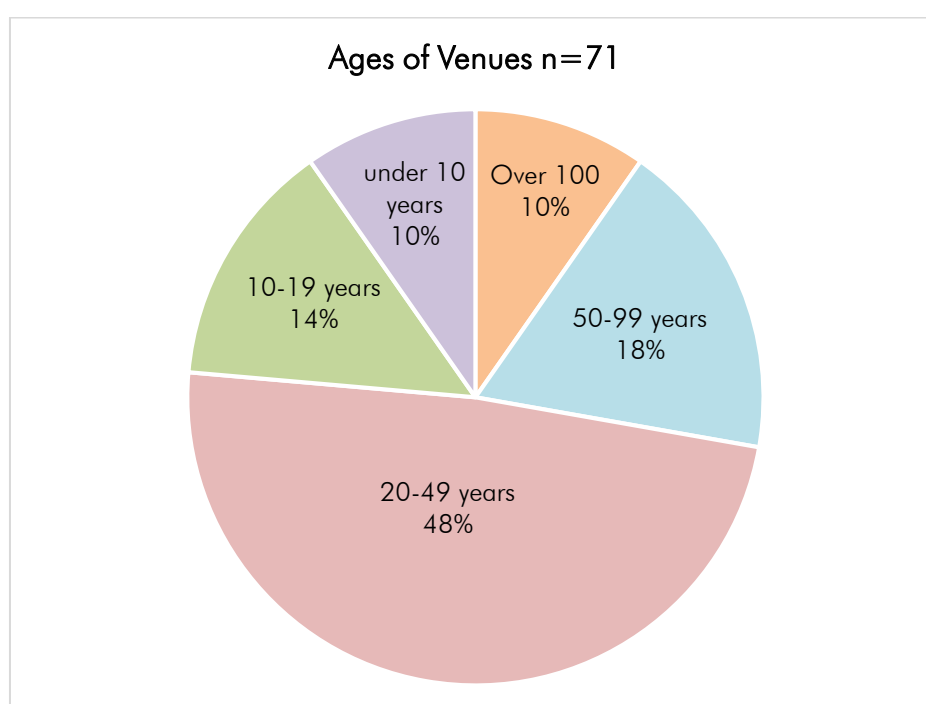


Figure 5: Ages of respondents' venues

Venues are a mix of new contemporary styles as well as renovations and restorations of some of Australia's finest historical places. The oldest of the respondent venues is 185 years and sits alongside seven historic venues aged more than 100 years.

The newest venue was opened within the past year and is among 10% of contemporary venues built within the past 10 years. Almost half of the respondent venues (48%) were built between 20 and 49 years ago.

3.4 Capital Upgrade Projects

As venues age, capital projects are scheduled to upgrade facilities and add new technologies and capabilities to aging venues. Respondents were asked how many years since their venue had a capital upgrade valued at more than \$250,000.

Most venues (62%) report their venue has had a major capital upgrade within the past 10 years. A noteworthy percentage (16%) report their venue has not seen major capital investment in upgrades for more than 20 years, with three reporting their venues have received little capital investment for more than 40 years.

Figure 6 indicates capital upgrade reporting from 53 respondents.

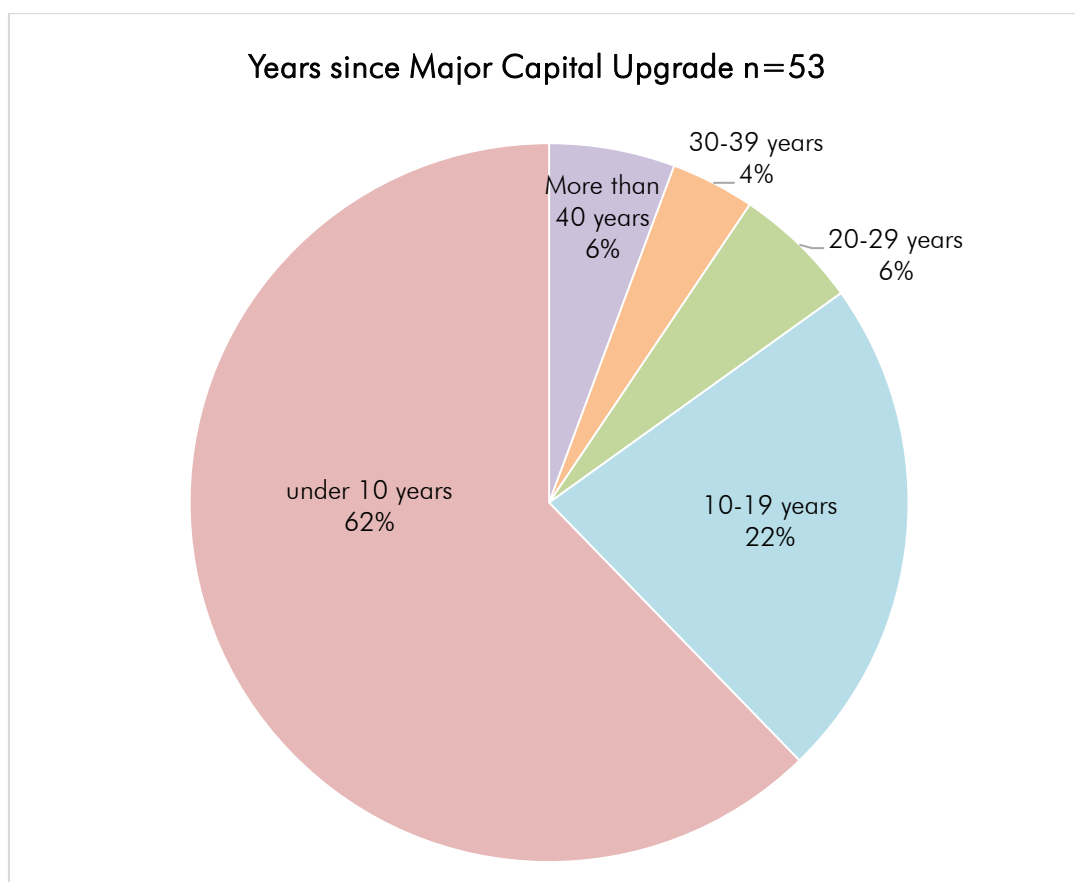


Figure 6: Number of years since a Major Capital Upgrade valued at \$250,000 or more

4. Venue Capacity and Utilisation

4.1 Venue Capacity

Respondents manage performing arts venues, from small to multi-space complexes as well as a range of associated arts activities and alternative venues.

66% of respondents operate performing arts centres with either one or two performance spaces as shown in Figure 7 below. 18% of respondents operate a venue with four or more spaces.

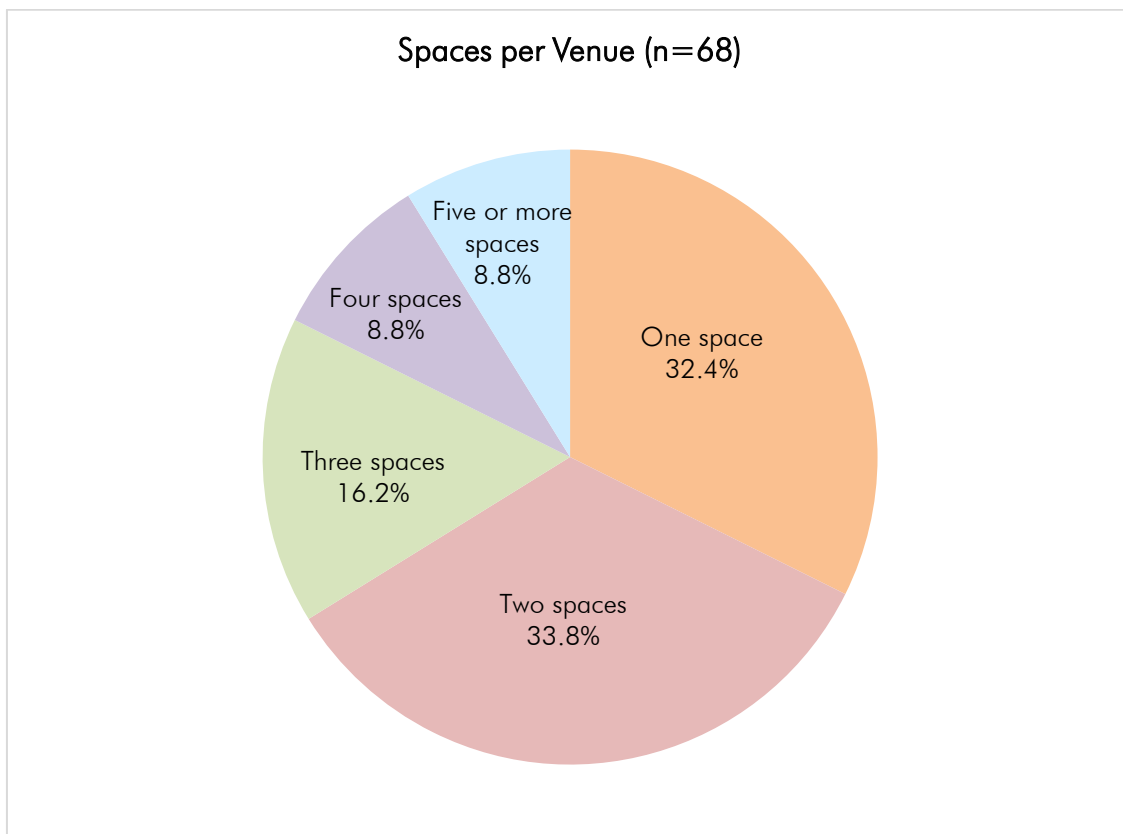


Figure 7: Performance Spaces

Figure 8 overleaf demonstrates the breakdown of survey respondents by total centre seating capacity. Almost a third of respondents (30.9%) manage performing arts venues with a combined total seat capacity between 551 and 1100, with a further 27.9% reporting total capacity between 261 and 550. The venue size parameters have been decided arbitrarily and are consistent with previous years' parameters.

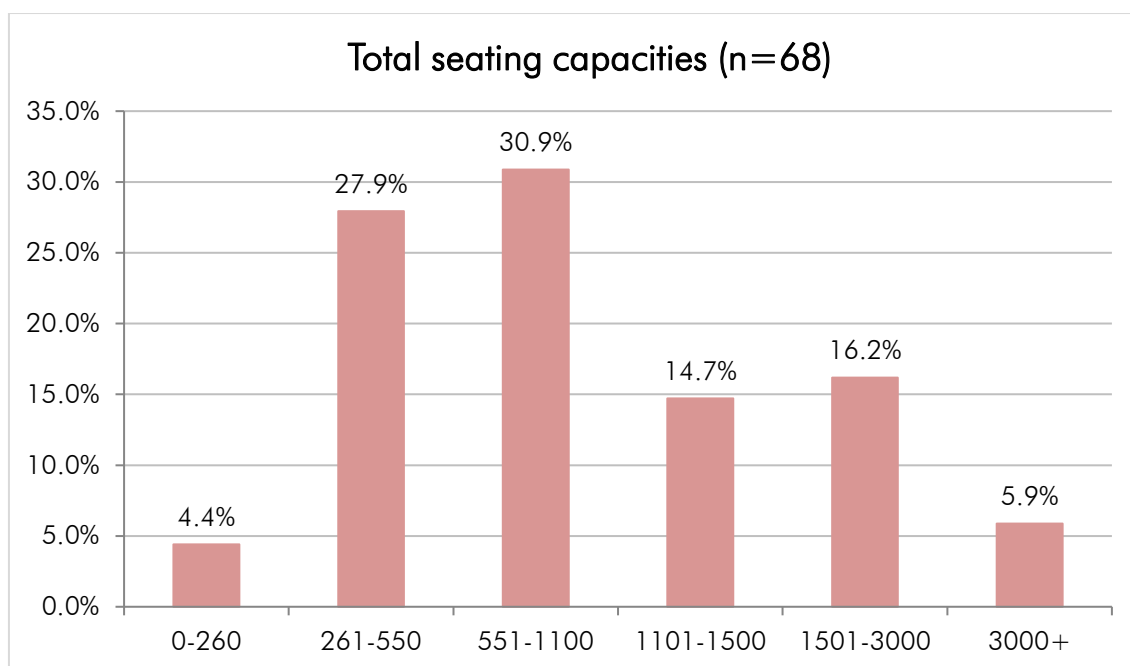


Figure 8: Distribution of Respondents by Seating Capacity

4.2 Venue Utilisation

The average total utilisation rate for all spaces operated by 61 respondents across Australia has increased by a significant 7% to 65% since last survey. Past surveys have shown a constancy of overall utilisation rates reporting in 2017, 58%; 2015, 59%; and 2013, 58%.

The average occupancy rate for respondents' primary venue has increased from 62% in 2017 to 81%, while venues with more than one space have shown overall improved utilisation rates, particularly in performance space two (11% increase) and space three (20% higher) since the 2017 report. These significant increases may be attributed in part to the mix of smaller capacity venues based in regional communities.

61 respondents provided data about their primary space. The average capacity is 622 seats in 2019 against 888 average in 2017. There is also a higher respondent sample available for each of the spaces one to three in the 2019 survey.

	Perf Space 1	Perf Space 2	Perf Space 3	Perf Space 4	Perf Space 5	All Spaces
Utilisation	81%	62%	76%	35%	35%	65%
Avg # Seats	622	323	521	337	183	397
Avg # Days Available	307	319	290	282	343	308
Average # Days Used	248	197	219	208	121	199
Number Sampled (n=)	61	37	20	9*	3*	

Table 2: Venue Utilisation by Performance Spaces

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

The number of days annually available in each venue is rarely 365 days. Depending on each venue situation, their operational conditions or higher costs preclude venue uses on days such as public holidays, Sunday or when a space is allocated to maintenance and equipment installation.

Average utilisation rates vary across each state as shown in Table 3 below.

The average utilisation rates in each state has increased since 2017. The percentage is influenced by:

- A decrease of 23 days in the average number of "Days Available" per annum, and
- An increase of the number of days used in NSW (48 days), Queensland (17 days) and Victoria (4 days) over usage reported in 2017.

State	Average Utilisation%	Avg # Days Available	Avg # days Used	Sample size
NSW	82.0%	311	255	20
QLD	73.2%	328	240	8
TAS	74.7%	277	207	3
VIC	93.5%	294	275	14
WA	74.7%	297	222	8
ACT	NA	NA	NA	1
NT	NA	NA	NA	0
SA	NA	NA	NA	2

Table 3: Average Utilisation of all Spaces by State, n=53

** Data provided by ACT, NT and SA respondents is excluded due to sample size*

5. Financial Snapshot

Respondents were asked to provide their last annual financial statement in order to give an indication of members' financial performance. A majority of respondents to the survey operate with financial year reporting, July to June, while the remaining 22% report their finances using a calendar year, January to December.

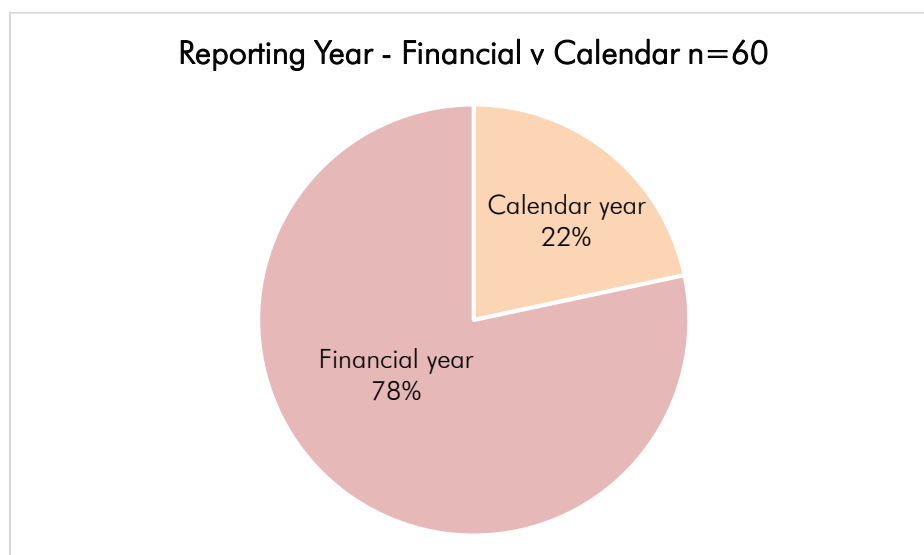


Figure 9: Financial Reporting Year

Financial data was provided by 49 respondent venues with a combined turnover of \$285 million. Of these respondents, 34 provided comprehensive financial data to permit substantiated income and expenditure line segmentation as shown in Table 4.

During analysis, different approaches to the way respondents reported their data revealed the variations in financial structures used within the industry. To combine results, corresponding data was aligned resulting in 34 respondents having substantiated data to include in Table 4 on the following page.

Variations in financial structures are generally connected to a respondent's management or funding model. Some respondents did not include a Government subsidy or Community Service Obligation (CSO) as income, reporting a deficit usually equal to the reported subsidy or CSO. This reporting approach skewed the combined data in financial tables to show larger deficit results.

Other respondents included funding support as income, reporting a zero or breakeven result with both income and expenditure balanced. A third group of respondents, usually working within an arms-length management model, included financial support from government as income and reported surplus or deficit results.

Table 4 (below) shows the overview of financial results once respondent data has been aligned for a common reporting approach.

Financial Overview (n=34)		
INCOME		% age of Total
Box Office	\$16,932,266	14.35%
Ticketing Services	\$7,093,673	6.01%
Contract Performance Fees	\$1,657,374	1.40%
Venue Hire	\$11,825,552	10.02%
Recoverables	\$12,477,286	10.57%
Food & Beverage	\$10,871,108	9.21%
Merchandise	\$138,875	0.12%
Interest	\$331,246	0.28%
Other earned income	\$6,678,922	5.66%
<i>Sub-total Earned income</i>	\$68,006,302	57.64%
Federal Funding	\$20,000	0.02%
State/Territory Funding	\$4,805,180	4.07%
Local Govt Funding	\$43,471,424	36.84%
<i>Sub-total Funding</i>	\$48,296,604	40.93%
Private Support	\$0	0.00%
Sponsorship (monetary)	\$1,311,683	1.11%
Sponsorship (in-kind)	\$56,845	0.05%
Donations/Fundraising	\$182,886	0.15%
Non-government grants	\$139,043	0.12%
<i>Sub-total Private Support</i>	\$1,690,457	1.43%
TOTAL INCOME	\$117,993,363	
EXPENDITURE		
Labour costs	\$52,191,388	44.14%
Marketing/Promotions	\$5,205,698	4.40%
Show Purchases	\$11,523,545	9.75%
Program expenses	\$9,083,221	7.68%
Food & Beverage costs	\$5,114,177	4.32%
Administration	\$13,810,974	11.68%
Repairs & Maintenance	\$3,765,933	3.18%
Other Expenses	\$17,553,378	14.84%
TOTAL EXPENDITURE	\$118,248,314	
NET RESULT	(254,951)	

Table 4: Financial Overview – Completed Financial Data from 34 Venues

Table 5, below provides the total combined data of all 49 respondents, including 15 respondents that provided incomplete financial data in the survey. This table is useful to understand the greater value and contribution to the economy by the industry.

Financial Overview (n=49)		
INCOME		% age of Total
Box Office	\$38,154,930	13.37%
Ticketing Services	\$15,747,719	5.52%
Contract Performance Fees	\$3,373,475	1.18%
Venue Hire	\$28,360,113	9.94%
Recoverables	\$27,664,640	9.69%
Food & Beverage	\$23,384,659	8.19%
Merchandise	\$325,212	0.11%
Interest	\$669,136	0.23%
Other earned income	\$26,865,758	9.41%
<i>Sub-total Earned income</i>	\$164,545,642	57.66%
Federal Funding	\$70,877	0.02%
State/Territory Funding	\$10,422,368	3.65%
Local Govt Funding	\$105,452,711	36.95%
<i>Sub-total Funding</i>	\$115,945,956	40.63%
Private Support	\$933,433	0.33%
Sponsorship (monetary)	\$2,800,609	0.98%
Sponsorship (in-kind)	\$319,786	0.11%
Donations/Fundraising	\$500,244	0.18%
Non-government grants	\$323,086	0.11%
<i>Sub-total Private Support</i>	\$4,877,158	1.71%
TOTAL INCOME	\$285,368,756	
EXPENDITURE		
Labour costs	\$114,111,806	44.83%
Marketing/Promotions	\$11,037,962	4.34%
Show Purchases	\$24,348,854	9.57%
Program expenses	\$18,948,440	7.44%
Food & Beverage costs	\$11,636,379	4.57%
Administration	\$29,573,841	11.62%
Repairs & Maintenance	\$7,840,456	3.08%
Other Expenses	\$37,064,038	14.56%
TOTAL EXPENDITURE	\$254,561,776	
NET RESULT	\$30,806,980	

Table 5: Financial Overview – All respondents

47 respondents provided their operating surplus or deficit figures with 34 of these providing complete financial data. An operating surplus was reported by 23 respondents, with 13 of these respondents able to retain these funds.

The treatment of retained surplus varies across respondents, with seven reporting they are able to transfer amounts into a general purpose reserve, two can transfer to either a building or capital reserve and four can add the surplus to the available funds for their following year's operation.

Funding from local government sources is an important factor in maintaining operations for a greater percentage of respondents.

From the group of 34 respondents providing complete data, 14 venues recorded a zero or breakeven result, where their Council provides a subsidy equal to the deficit of their annual operation.

The analysis between 2015, 2017 and 2019 reported income from venue activities annually shows significant fluctuations. In part, this is attributed to the mix of respondents in each survey.

In 2015, respondents received 27.1% of annual income from local government sources, while in 2017 it made up 16% of total income.

In Table 4 (n=34), the value of local government support in 2019 has increased to be more than one-third (36.84%) of the annual income. This result equates to a similar level of support in 2013, when respondents reported 34.8% of the total income received from local government sources.

At the same time, State and Territory funding has decreased from 15% in 2017 to 4% in 2019, a lower result than that reported in 2015 (6.8%).

Income comparisons between 2017 and 2019 show box office and ticketing services have increased by a total of 2.15% and income from recoverables has increased by 2.87%. Food and beverage and other earned income lines have both decreased by 5% respectively.

A lower number of respondents providing complete data is noted with 34 in 2019, 41 in 2017 and 50 in 2015.

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

In Table 7, one venue reporting significant investment in operations (\$4.1 million) impacts the percentage of contribution by a local government, skewing results by approximately 15%.

Financial Overview - Annual Turnover \$0-\$1M (n=13)		
INCOME		% age of Total
Box Office	\$1,128,007	16.20%
Ticketing Services	\$465,383	6.69%
Contract Performance Fees	\$3,727	0.05%
Venue Hire	\$900,423	12.93%
Recoverables	\$458,608	6.59%
Food & Beverage	\$249,585	3.59%
Merchandise	\$4,226	0.06%
Interest	\$1,286	0.02%
Other earned income	\$260,419	3.74%
<i>Sub-total Earned income</i>	\$3,471,664	49.87%
Federal Funding	\$0	0.00%
State/Territory Funding	\$711,000	10.21%
Local Govt Funding	\$2,616,554	37.59%
<i>Sub-total Funding</i>	\$3,327,554	47.80%
Philanthropic Trusts	\$ -	0.00%
Sponsorship (monetary)	\$153,120	2.20%
Sponsorship (in-kind)	\$ -	0.00%
Donations/Fundraising	\$144	0.00%
Non-government grants	\$9,000	0.13%
<i>Sub-total Private Support</i>	\$162,264	2.33%
TOTAL INCOME	\$6,961,482	
EXPENDITURE		
Labour costs	\$3,048,345	44.69%
Marketing/Promotions	\$359,947	5.28%
Show Purchases	\$759,997	11.14%
Program expenses	\$219,873	3.22%
Food & Beverage costs	\$139,794	2.05%
Administration	\$866,549	12.70%
Repairs & Maintenance	\$304,095	4.46%
Other Expenses	\$1,122,447	16.46%
TOTAL EXPENDITURE	\$6,821,047	
NET RESULT	\$140,435	

Table 6: Financial Overview – Venues with Annual Turnover from \$0 to \$1 Million

Financial Overview - Annual Turnover \$1M-\$2M (n=8)		
INCOME		% age of Total
Box Office	\$2,359,615	14.11%
Ticketing Services	\$801,255	4.79%
Contract Performance Fees	\$177,401	1.06%
Venue Hire	\$1,368,046	8.18%
Recoverables	\$1,124,152	6.72%
Food & Beverage	\$323,291	1.93%
Merchandise	\$11,681	0.07%
Interest	\$11,668	0.07%
Other earned income	\$587,609	3.51%
<i>Sub-total Earned income</i>	\$6,764,718	40.44%
Federal Funding	\$20,000	0.12%
State/Territory Funding	\$627,450	3.75%
Local Govt Funding	\$9,152,339	54.72%
<i>Sub-total Funding</i>	\$9,799,789	58.59%
Philanthropic Trusts	\$10,000	0.06%
Sponsorship (monetary)	\$102,378	0.61%
Sponsorship (in-kind)	\$ -	0.00%
Donations/Fundraising	\$4,300	0.03%
Non-government grants	\$45,000	0.27%
<i>Sub-total Private Support</i>	\$161,678	0.97%
TOTAL INCOME	\$16,726,185	
EXPENDITURE		
Labour costs	\$6,127,963	54.16%
Marketing/Promotions	\$521,847	4.61%
Show Purchases	\$838,194	7.41%
Program expenses	\$269,574	2.38%
Food & Beverage costs	\$505,835	4.47%
Administration	\$77,819	0.69%
Repairs & Maintenance	\$372,435	3.29%
Other Expenses	\$2,600,968	22.99%
TOTAL EXPENDITURE	\$11,314,635	
NET RESULT	\$5,411,550	

Table 7: Financial Overview – Venues with Annual Turnover from \$1 Million to \$2 Million

Financial Overview - Annual Turnover \$2M-\$5M (n=20)		
INCOME		% age of Total
Box Office	\$8,514,968	14.22%
Ticketing Services	\$3,980,129	6.65%
Contract Performance Fees	\$1,189,605	1.99%
Venue Hire	\$9,490,713	15.85%
Recoverables	\$8,673,286	14.49%
Food & Beverage	\$4,572,594	7.64%
Merchandise	\$105,902	0.18%
Interest	\$96,375	0.16%
Other earned income	\$1,738,410	2.90%
<i>Sub-total Earned income</i>	\$38,361,982	64.07%
Federal Funding	\$30,877	0.05%
State/Territory Funding	\$1,353,528	2.26%
Local Govt Funding	\$19,440,950	32.47%
<i>Sub-total Funding</i>	\$20,825,355	34.78%
Philanthropic Trusts	\$ -	0.00%
Sponsorship (monetary)	\$279,002	0.47%
Sponsorship (in-kind)	\$206,096	0.34%
Donations/Fundraising	\$100,207	0.17%
Non-government grants	\$99,544	0.17%
<i>Sub-total Private Support</i>	\$684,849	1.14%
TOTAL INCOME	\$59,872,186	
EXPENDITURE		
Labour costs	\$27,658,933	47.41%
Marketing/Promotions	\$1,902,572	3.26%
Show Purchases	\$3,868,264	6.63%
Program expenses	\$3,496,046	5.99%
Food & Beverage costs	\$3,110,571	5.33%
Administration	\$8,362,307	14.33%
Repairs & Maintenance	\$2,083,139	3.57%
Other Expenses	\$7,860,966	13.47%
TOTAL EXPENDITURE	\$58,342,798	
NET RESULT	\$1,529,388	

Table 8: Financial Overview – Venues with Annual Turnover from \$2 Million to \$5 Million

Financial Overview - Annual Turnover \$5M-\$10M (n=6)		
INCOME		% age of Total
Box Office	\$8,018,159	20.72%
Ticketing Services	\$2,914,131	7.53%
Contract Performance Fees	\$345,368	0.89%
Venue Hire	\$2,825,463	7.30%
Recoverables	\$3,878,773	10.03%
Food & Beverage	\$3,252,772	8.41%
Merchandise	\$64,528	0.17%
Interest	\$110,482	0.29%
Other earned income	\$2,538,994	6.56%
<i>Sub-total Earned income</i>	\$23,948,670	61.90%
Federal Funding	\$ -	0.00%
State/Territory Funding	\$2,925,210	7.56%
Local Govt Funding	\$10,898,197	28.17%
<i>Sub-total Funding</i>	\$13,823,407	35.73%
Philanthropic Trusts	\$ -	0.00%
Sponsorship (monetary)	\$708,713	1.83%
Sponsorship (in-kind)	\$56,845	0.15%
Donations/Fundraising	\$121,439	0.31%
Non-government grants	\$30,499	0.08%
<i>Sub-total Private Support</i>	\$917,496	2.37%
TOTAL INCOME	\$38,689,573	
EXPENDITURE		
Labour costs	\$15,487,977	38.73%
Marketing/Promotions	\$2,149,698	5.38%
Show Purchases	\$6,614,054	16.54%
Program expenses	\$2,607,726	6.52%
Food & Beverage costs	\$1,592,102	3.98%
Administration	\$3,787,026	9.47%
Repairs & Maintenance	\$928,954	2.32%
Other Expenses	\$6,826,279	17.07%
TOTAL EXPENDITURE	\$39,993,816	
NET RESULT	-\$1,304,243	

Table 9: Financial Overview – Venues with Annual Turnover from \$5 Million to \$12 Million

Table 10 and 11 includes all financial data provided by 46 respondents for individual line items to establish percentages, while totals for Income, Expenditure and Net Result are corrected. Table 10 shows data from 32 respondents operate within a Local Government environment. Note that eight of these respondents are providing incomplete financial data.

Financial Overview - Local Government Management (n=32)		
INCOME		% age of Total
Box Office	\$14,403,669	18.12%
Ticketing Services	\$4,893,524	6.16%
Contract Performance Fees	\$1,143,112	1.44%
Venue Hire	\$6,833,068	8.60%
Recoverables	\$6,735,587	8.48%
Food & Beverage	\$4,340,008	5.46%
Merchandise	\$99,600	0.13%
Interest	\$55	0.00%
Other earned income	\$1,819,338	2.29%
Sub-total Earned income	\$40,267,961	50.67%
Federal Funding	\$20,000	0.03%
State/Territory Funding	\$1,759,788	2.21%
Local Govt Funding	\$36,526,303	45.96%
Sub-total Funding	\$38,306,091	48.20%
Philanthropic Trusts	\$10,000	0.01%
Sponsorship (monetary)	\$586,500	0.74%
Sponsorship (in-kind)	\$181,496	0.23%
Donations/Fundraising	\$78,774	0.10%
Non-government grants	\$45,000	0.06%
Sub-total Private Support	\$901,770	1.13%
TOTAL INCOME	\$79,475,822	
EXPENDITURE		
Labour costs	\$29,928,930	40.66%
Marketing/Promotions	\$3,158,234	4.29%
Show Purchases	\$8,563,403	11.63%
Program expenses	\$4,260,129	5.79%
Food & Beverage costs	\$3,181,617	4.32%
Administration	\$8,800,667	11.95%
Repairs & Maintenance	\$2,357,375	3.20%
Other Expenses	\$13,366,229	18.16%
TOTAL EXPENDITURE	\$73,616,584	
NET RESULT	\$5,859,238	

Table 10: Financial Overview - Venues managed within Local Government environments

Table 11 isolates the data contributed by 15 venues with management at arms-length from the owner of their building. Management models include Statutory Authority, Company Limited by Guarantee, Incorporated Association and Contract Management.

Financial Overview - Management by Separate Entity (n=15)		
INCOME		% age of Total
Box Office	\$6,563,654	7.95%
Ticketing Services	\$3,760,522	4.55%
Contract Performance Fees	\$572,989	0.69%
Venue Hire	\$9,256,176	11.20%
Recoverables	\$6,946,953	8.41%
Food & Beverage	\$8,173,543	9.89%
Merchandise	\$70,598	0.09%
Interest	\$337,835	0.41%
Other earned income	\$18,236,699	22.08%
<i>Sub-total Earned income</i>	\$53,918,969	65.27%
Federal Funding	\$30,877	0.04%
State/Territory Funding	\$3,857,400	4.67%
Local Govt Funding	\$22,517,840	27.26%
<i>Sub-total Funding</i>	\$26,406,117	31.96%
Philanthropic Trusts	\$923,433	1.12%
Sponsorship (monetary)	\$902,426	1.09%
Sponsorship (in-kind)	\$81,445	0.10%
Donations/Fundraising	\$238,584	0.29%
Non-government grants	\$139,043	0.17%
<i>Sub-total Private Support</i>	\$2,284,931	2.77%
TOTAL INCOME	\$82,610,017	
EXPENDITURE		
Labour costs	\$29,685,837	50.35%
Marketing/Promotions	\$2,551,098	4.33%
Show Purchases	\$4,108,450	6.97%
Program expenses	\$5,605,090	9.51%
Food & Beverage costs	\$3,340,585	5.67%
Administration	\$6,234,323	10.57%
Repairs & Maintenance	\$1,294,992	2.20%
Other Expenses	\$6,135,319	10.41%
TOTAL EXPENDITURE	\$58,955,694	
NET RESULT	\$23,654,323	

Table 11: Financial Overview – Venues managed by Separate Entity

5.1 Turnover

The financial data from 34 respondents (as shown in Table 4) has been used in the analysis of turnover. Turnover is defined as all income including government operational funding, subsidies and grants.

Turnover ranges from \$133,395 to \$24.2 million, a lower range overall than previous 2015 and 2017 surveys, where the highest turnover was reported as over \$79.2 and \$89.1 million respectively. The lower end of the range was \$716,500 in 2015 and \$303,000 in 2017.

Taking the average across three survey results shows a decrease in annual turnover by approximately \$1.18 million per venue. This change can be primarily attributed to fewer larger venues with high turnover within the respondent mix.

Figure 10 below provides average centre turnover by seating capacity with a comparison between the 2017 results (n=39) and 2019 survey (n=49). Note that in 2017, two large venues with capacity of more than 6,200 were omitted. The largest of these was not a respondent in 2019.

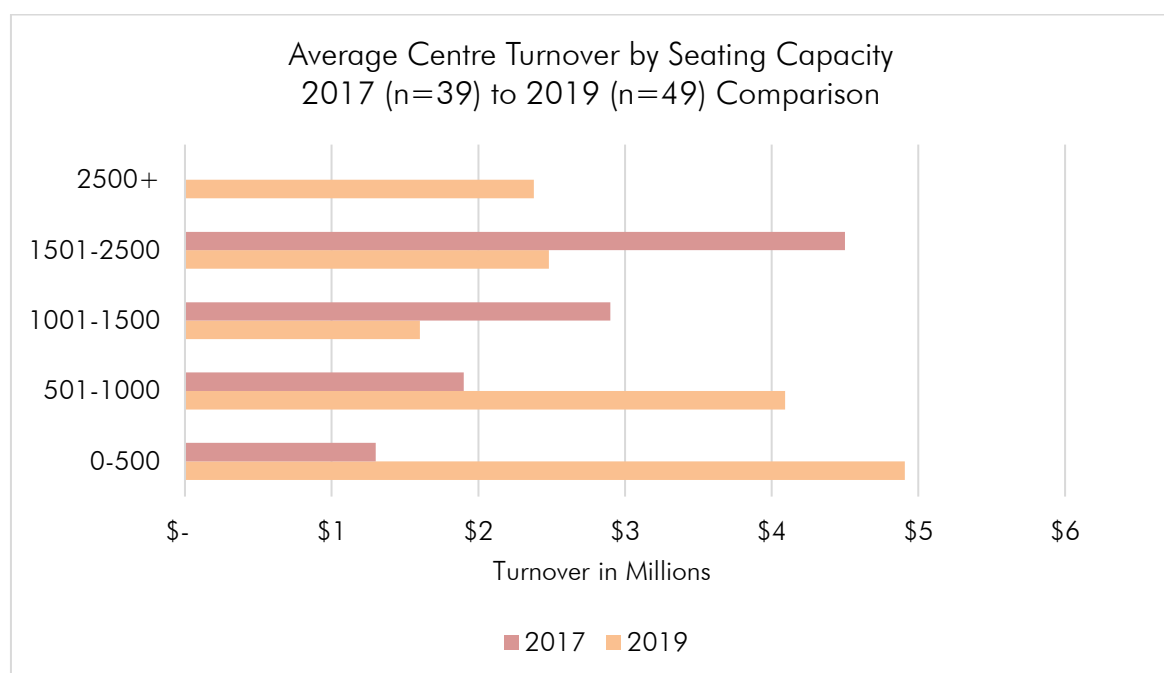


Figure 10: Average Turnover by Seating Capacity

Figure 11 below shows a comparison in turnover for respondents based on the number of performance spaces owned or managed. A reduced turnover is seen for respondents with one, three or four spaces.

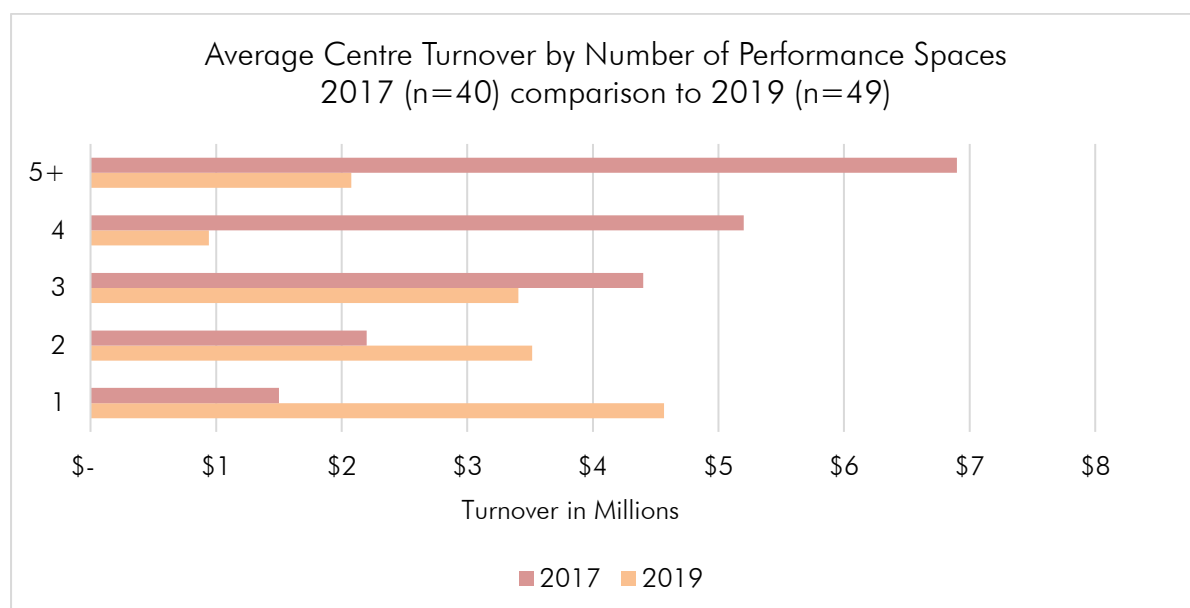


Figure 11: Average Turnover by Number of Performance Spaces

63% of respondent venues manage one or two spaces, with 58% of these operating in venues with 500 seats or more. The average turnover is consistent with previous surveys at approximately \$2.3 million. The mix of respondents and smaller samples in some categories has a significant impact on variations of turnover.

Figure 12 (below) shows the effect on turnover of a respondent's distance from the nearest capital city. There is a positive relationship between the average turnover and proximity to a capital city. Comparisons with previous surveys reveal no clear trends, although there are certain 'sweet spots' geographically suggested.

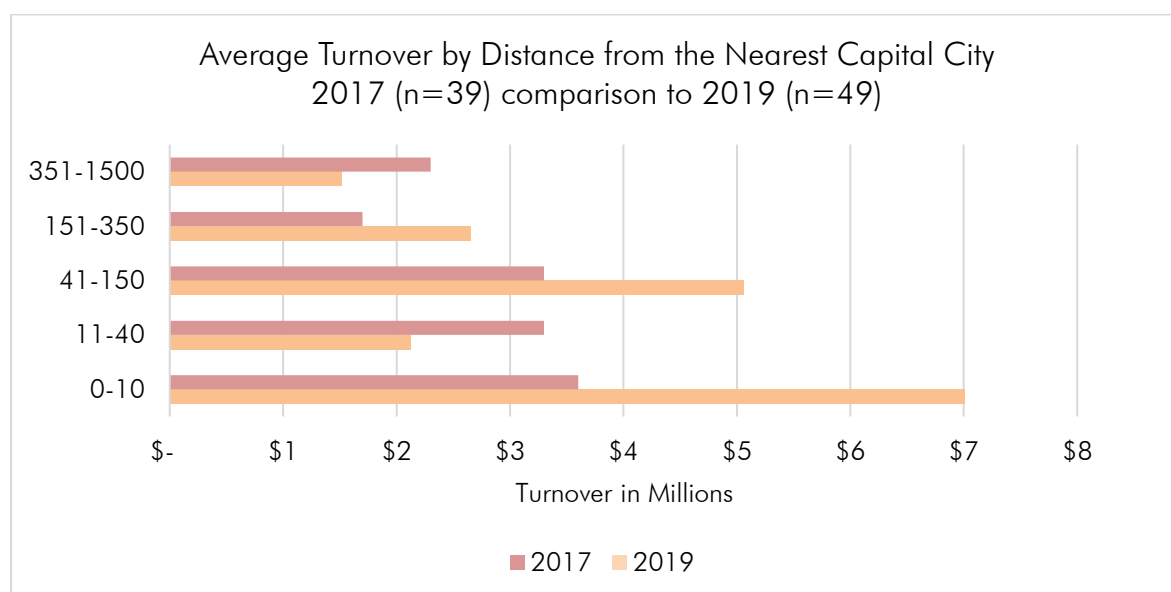


Figure 12: Average Turnover by Distance from the Nearest Capital City

The 2019 results for the respondent grouping 41 to 150 kilometres from their nearest capital city indicates a significant leap in average turnover. This grouping includes six venues reporting over \$5 million annual turnover, most with four or more spaces and all with a seating capacity higher than 1500.

The 2019 result for city-based respondents shows a significantly higher average than in 2017, although this result is closer to the 2015 survey, where this grouping showed an average turnover of \$4.6 million.

The results show a marginal increase in turnover from respondents operating venues furthest from a capital city. The majority in this grouping are less than 600 kilometres from their capital city. Many of the larger populated areas in north Queensland and north Western Australia are not among respondents.

Figure 13 below shows the average turnover by state for 2019 compared to the results of 2017. All states show an increase in average turnover from the 2017 results. With a smaller number of venues contributing data, Tasmanian results are more variable, with the 2015 result showing \$1.7 million average compared to the 2019 average of \$1.46 million.

On average, Queensland continues to increase its high average turnover, a position this grouping has maintained since 2015. Queensland's average turnover has increased by 19% since 2015 while in New South Wales, the average has increased by a significant 31%. Turnover average from South Australia, Australian Capital Territory and Northern Territory are not included as the data was gathered from two or fewer respondents.

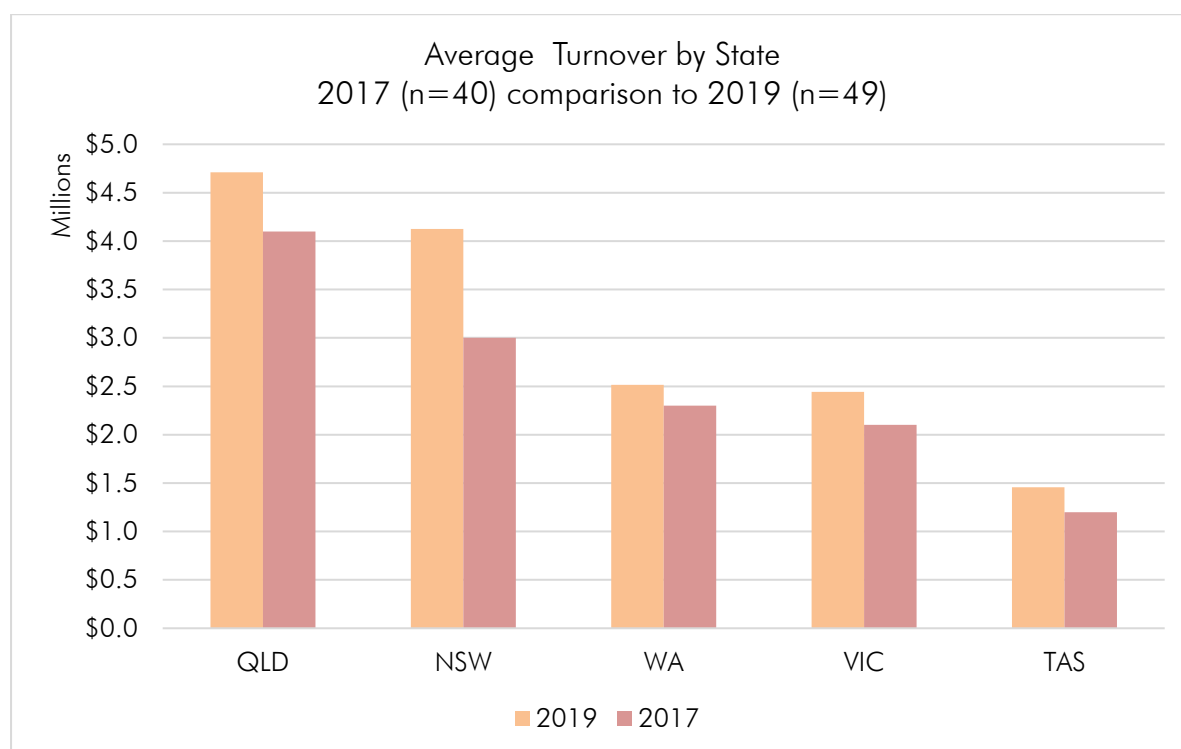


Figure 13: Average Turnover by State

5.2 Sources of Income

Local Government subsidy represents the largest source of income, at over one third (36.95%) of all revenue. This percentage has increased since 2017 (31%) and 2015 (27.1%) and is also higher than the 34.8% published in the 2013 survey.

Income from respondents' core business areas remain strong across four surveys, with Box Office income being 13.7% (2013), 13.3% (2015), 13% (2017) and for 2019, 13.37% of total income. Venue hire is a steady source of income across years at 9.8% (2013), 10.3% (2015), 12% (2017), to a lower 9.94% in 2019.

Food & Beverage income percentage is reducing, sitting at 8.19% in 2019, lower than the 10% of income reported in 2017 and 11.9% from 2015. Ticketing Services also show a downward trend, dropping to 5.52% of total income in 2019 (8% in 2017 and 9.3% in 2015).

Income from monetary categories of private support (Philanthropic Trusts, Sponsorship, Donations/Fundraising and non-government grants) remains low at around 1% (2015 and 2017) to 1.71% in 2019.

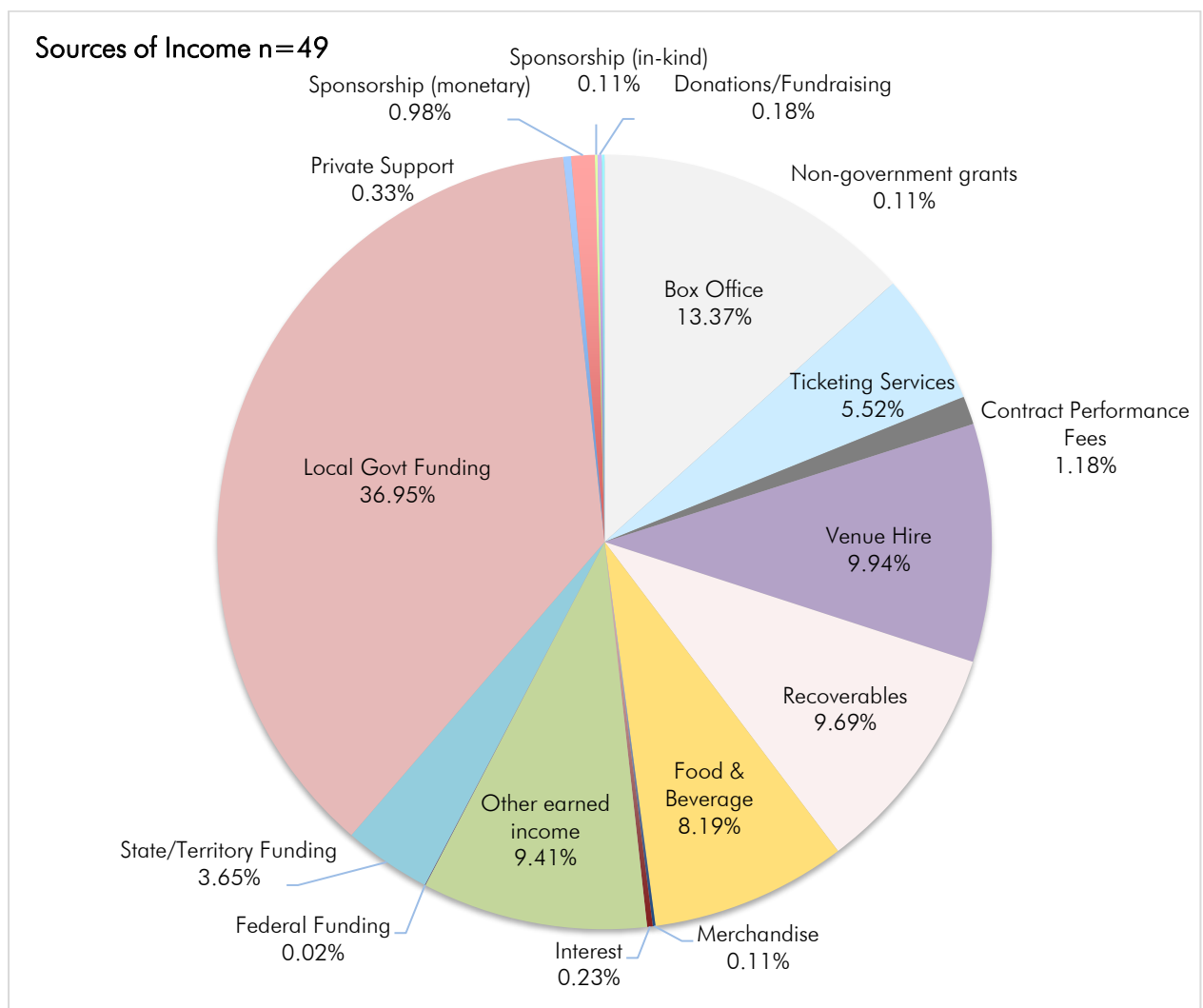


Figure 14: Sources of Income, n=49

5.3 Expenditure Breakdown

Labour costs remain the largest expense for respondents at 44.83%, representing \$114 million in employment for the sector. This equates to an average of \$2.32 million per venue, an increase from the 2017 average of \$2.28 million.

Expenditure on entrepreneurial programming (show purchases 9.57%, and program expenditure 7.44%) is higher than in 2017 (11.8% combined) and almost 1% higher than the 2015 combined result (16.1%). Entrepreneurial expenditure has continued to strengthen when compared with 2009 (13% combined) and 2011 (15.8% combined) results.

Respondents spent just over \$43 million purchasing and presenting their program, with a further \$11 million spent on marketing and promotional activities. Spending on repairs and maintenance has slightly reduced from 4% in 2017 to 3.8% in 2019.

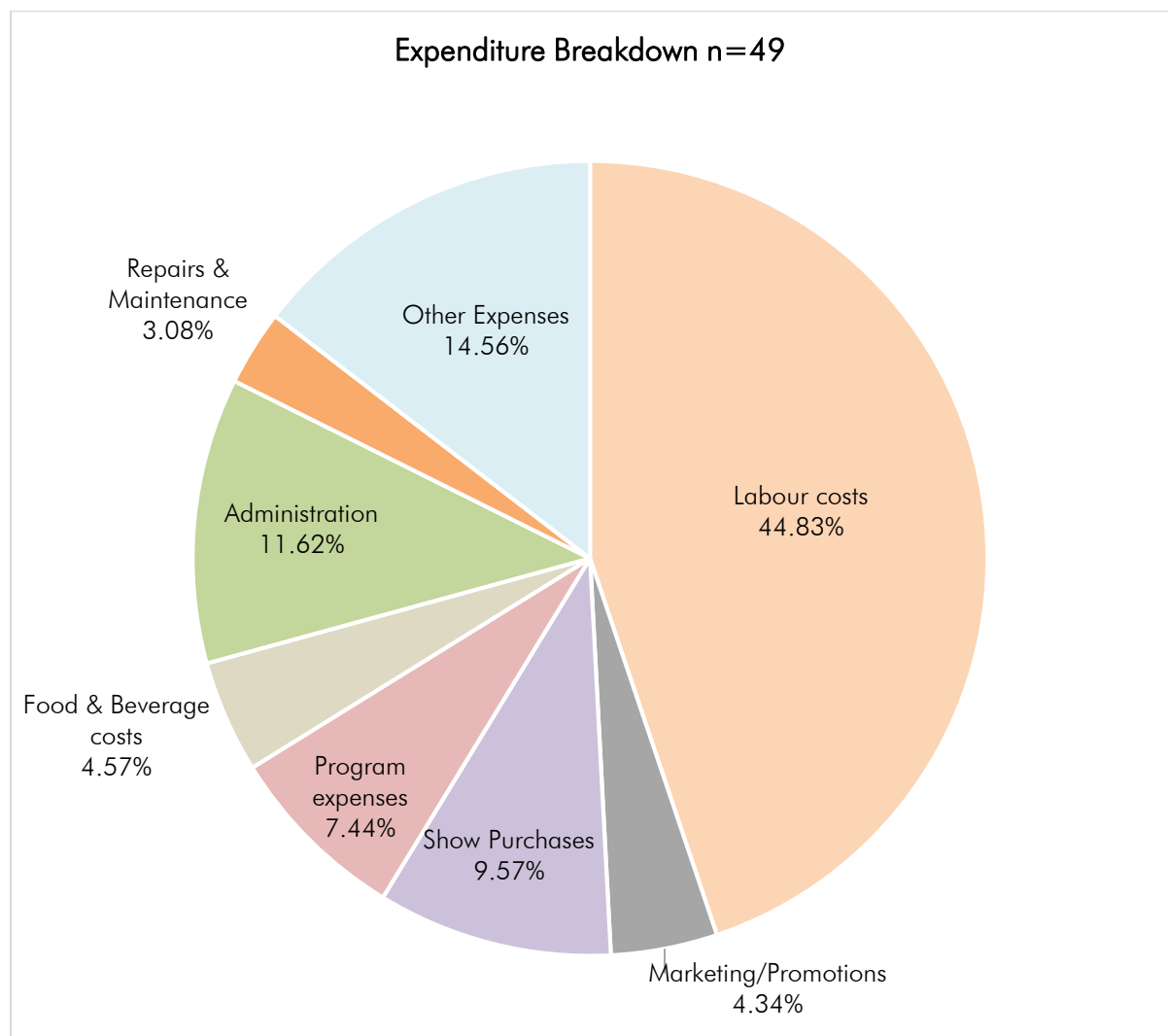


Figure 15: Expenditure Breakdown

5.4 Government Funding

Figure 16 represents the breakdown of total operational funding from Government sources. Federal Government funding has reduced significantly in 2019 (0.06%) from 2015 (1.3%), although is higher than 2017 (0.4%).

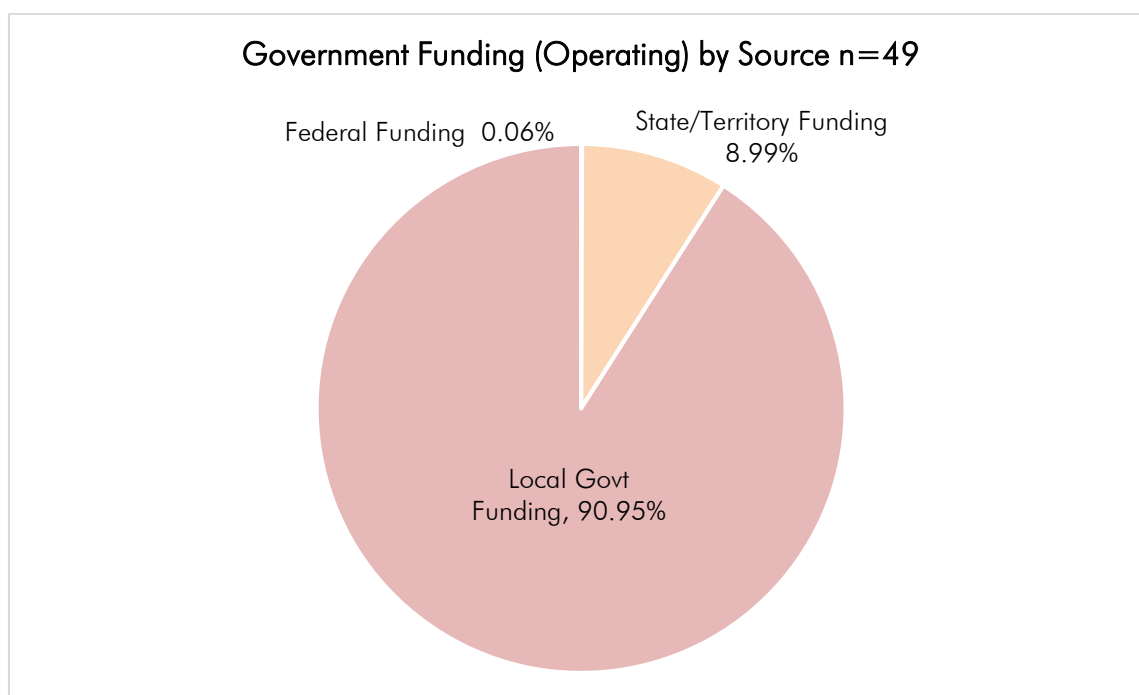


Figure 16: Income from Government Sources

State/Territory funding is also notably reduced in 2019, at 8.99% over the 2017 report (16%), and earlier years' results in 2015 (19.85%) and 2013 (19.8%). Some of this change can be attributed to the mix of respondents, with previous surveys including State Government funded Arts Centres located in capital cities.

Local Government remains the largest contributor of funding support for respondents at \$57.4 million (90.95%).

35 respondents provided the total value of the contribution made by their primary source of operational subsidy or community service obligation (CSO), and included an estimate of the value of in-kind services provided. 33 are managed and owned by their Local Government. The total value reported is just over \$62.3 million.

5.5 Capital Expenditure Funding

The breakdown of capital expenditure funding sources is shown at Figure 17.

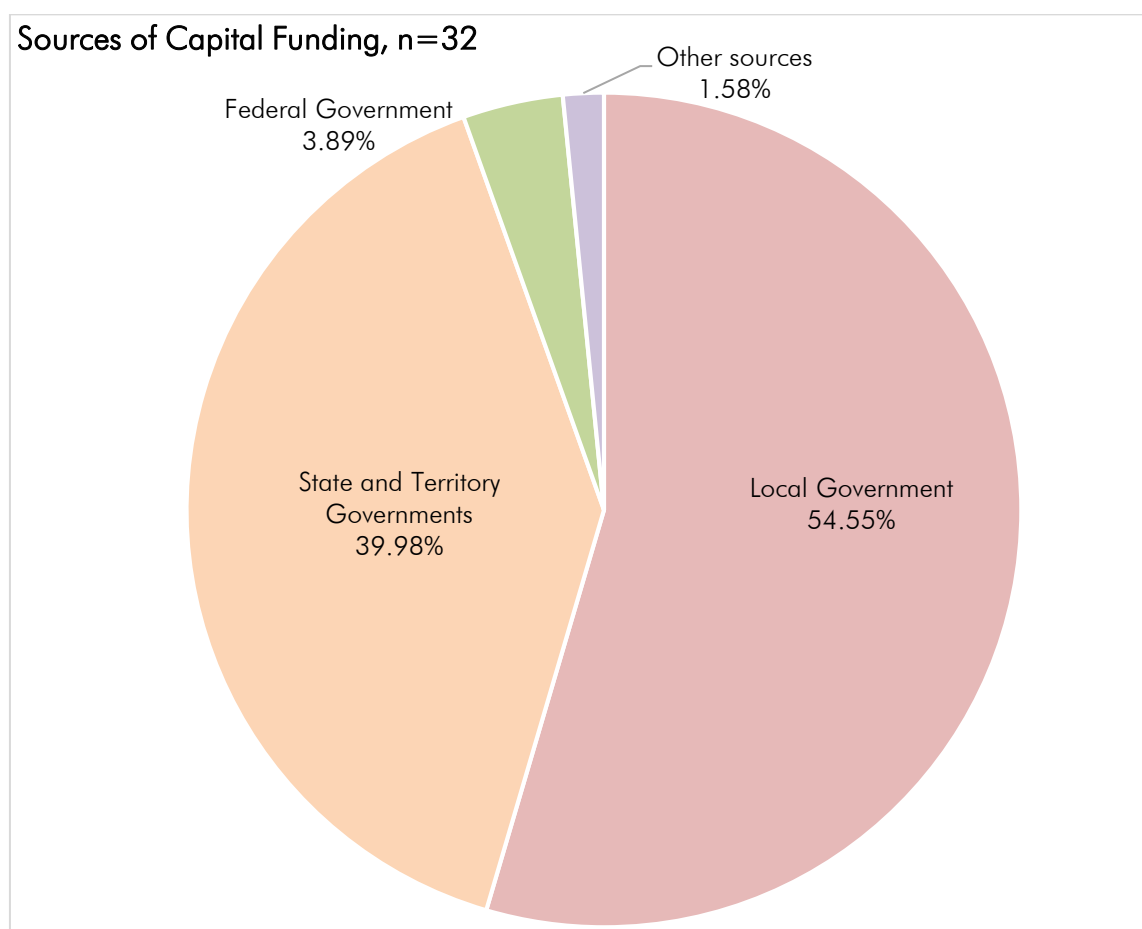


Figure 17: Sources of Capital Expenditure Funding

The results above exclude two significant capital investments made by respective State and Territory Governments for building projects totalling \$45 million, shared by two respondents. Without adjusting, the result is skewed to show 82.8% of capital expenditure funding having been received from States or Territories.

As in past years (2015 and 2017), one-off capital funding for major building projects have been excluded to reflect the on-going annual contributions towards capital projects by three levels of government and other sources.

The local government funding for capital projects (54.55%) reported in Figure 17 is lower than in 2017 (62%) while the investment by States, notably Western Australia and New South Wales, shows higher investment in capital projects at 39.98% in 2019 against 26% reported in 2017.

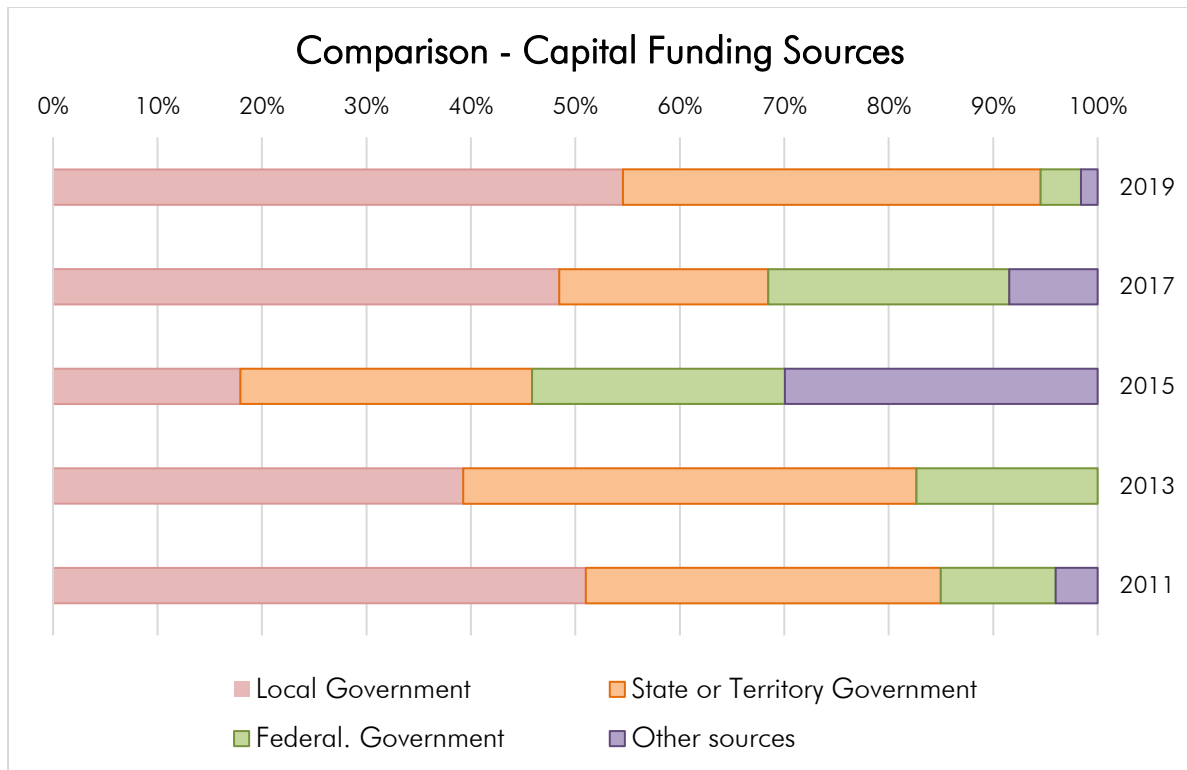


Figure 18: Comparison of Sources of Capital Expenditure Funding 2011 to 2019

In Figure 18, results have excluded a major Federal Government investment in a regional venue in 2015, State investment in a capital city production company in 2017 and two substantial State/Territory investments in 2019. Another respondent commented on a joint investment by a university in partnership with a State Government, although the value of this investment relating to the venue was yet to be apportioned.

6. Productions and Performances

6.1 Primary activity

As cultural hubs in their respective communities, performing arts centres host a range of professional and community performing arts and non-arts events.

Total annual attendance reported by 49 respondent venues reached 4.4 million people.

Respondents reported on the total number of activities at their centre annually, inclusive of all performances, films, lectures, seminars, conferences, workshops, rehearsals, exhibitions and other events such as weddings and functions.

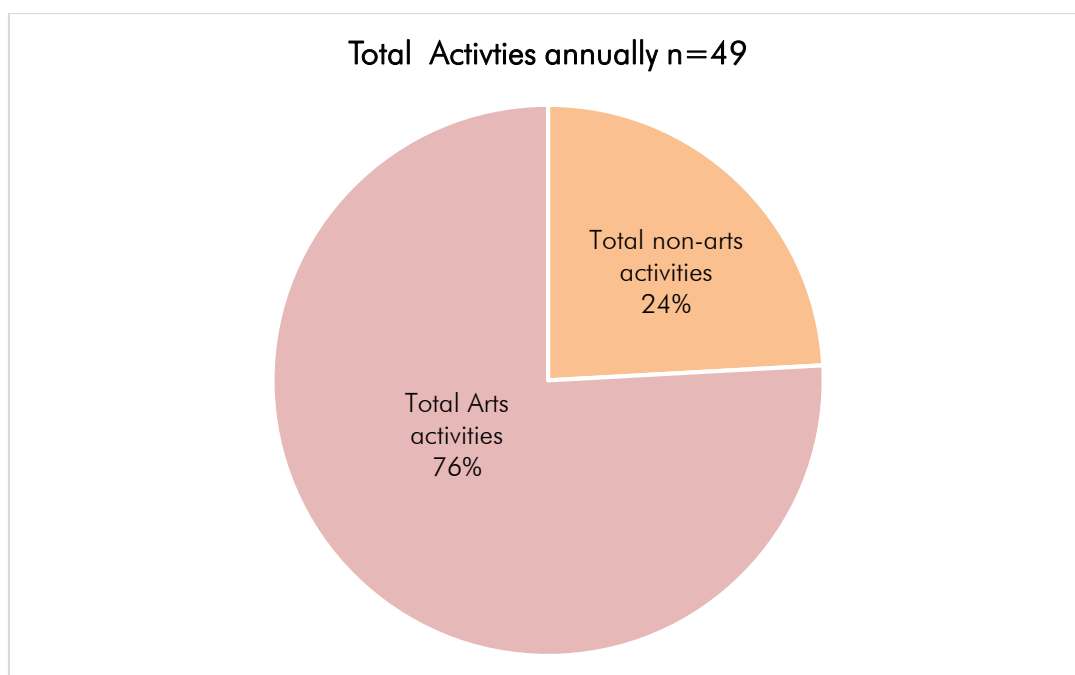


Figure 19: Total number of activities

96% of respondents' venues report their primary activity is as a receiving or presenter venue for professional work. Two (3%) produce or co-produce professional productions, while 44% produce or co-produce non-professional productions. 20% of respondents report they commission new professional work.

32 respondents reported a combined financial investment in programming of \$9.8 million, with venues maintaining a dedicated budget for entrepreneurial activities. This result compares favourably with the \$8.5 million reported in 2015 (the 2017 figure was not available).

6.2 Additional Programming responsibilities

Of the 68 respondents, 40% report presenting work and other performance related activities at locations other than the venue they directly manage. 38% present performances in other venues in their Council area or nearby townships. 19% report staging events at outdoor spaces, such as their local botanic gardens and showgrounds, while 12% present performances in their local art gallery or museum.

31% program a community arts festival or local major event, with 29% of these venues reporting their organisation is directly responsible for programming a local festival (not only hosting festival events).

6.3 Risk

Programming data collected asked respondents for the breakdown of performing arts events undertaken under 'Full Risk', 'Shared Risk' and 'No Risk' hire categories. Definitions of terms can be found at Appendix B.

Table 12 shows an analysis of the performing arts events undertaken by respondents.

In state by state comparisons, Queensland (13.6%), Tasmania (9.1%) and Western Australia (25.5%) are taking less risk than in 2017. New South Wales has increased the risks taken as a percentage of their arts activities by 8% against 2017 reporting. Victoria has presented 2% less seasons, increasing the number of performances per season by almost 5%.

State	Productions entrepreneured at Full Risk		Productions entrepreneured at Shared Risk		Hires, at No Risk		Risk as a % of Total Arts Activities	
	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs
NSW (n=22)	400	973	155	347	1379	2792	28.7%	32.1%
QLD (n=7)	175	294	12	51	288	577	39.4%	37.4%
SA (n=2)	9	11	1	40	17	37	37.0%	58.0%
TAS (n=4)	38	72	8	21	125	417	26.9%	18.2%
VIC (n=13)	360	577	45	89	755	1017	34.9%	39.6%
WA (n=4)	57	161	17	72	228	611	24.5%	27.6%
Total	1039	2088	238	620	2792	5451	31.4%	33.2%

Table 12: Entrepreneurial activity by Risk

Figure 20 shows the total number of venue performances segmented by financial risk. The percentage of entrepreneured performances within seasons continues a downward trend from 48% of performances in 2015 to 35% in 2017 and 33.2% in 2019. 2015 has proven to be a peak in entrepreneurial activity levels, with previous surveys reporting less activity (2011 – 37% and 2013 – 41%).

In 2019, shared risk taken by respondents within their entrepreneurial activity has reduced by 2% overall while hires have increased by almost 2.5%.

Two thirds (66.66%) of respondents (n=48) report they are able to budget for a net loss annually within their programming budget, while only 22 respondents (37%) have a written Programming Policy or Plan (n=59).

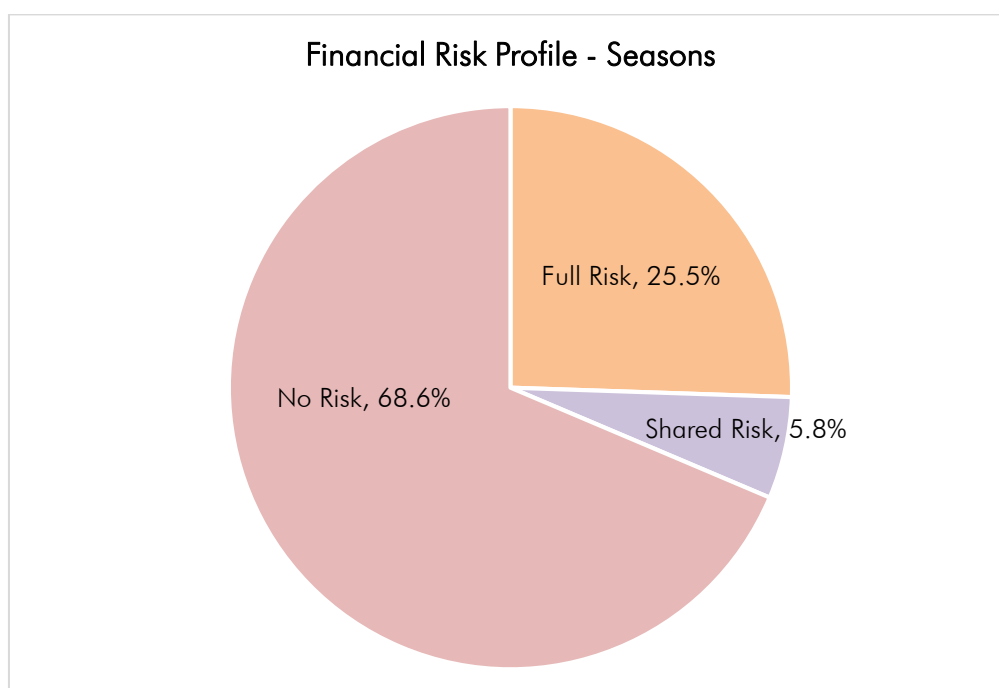


Figure 20: Seasons - Financial Risk

6.4 Range of Presentations

Table 13 figures demonstrating the respondents' overall level of venue activity should be used as an indication, with previous results also taken into account. Major venues contributing to past surveys have tended to skew results increasing the activity figures. The 2019 survey has fewer major venue responses, with the effect the volume of activity has appreciably decreased.

Past surveys noted the activity levels annually as steadily rising from 8,495 (n=72) in 2011, 13,116 (n=76) in 2013, 24,425 (n=64) in 2015 and 30,694 (n=42) in 2017. 2019 results record 14,323 performances presented by 48 respondents, with corresponding lower attendance and total activities.

State	Total Performances (n=48)	Performance Attendance (n=53)	Total of all Activities (n=47)	Overall Attendance (n=53)	Total Non-Arts Activities (n=44)	% Non-Arts Activities
NSW	5,583	1,287,538	7,364	1,539,329	1,781	24%
QLD	2,522	441,023	3,249	1,038,614	727	22%
TAS	572	177,263	583	157,967	31	5%
VIC	4,216	676,329	6,527	1,027,852	2,311	35%
WA	1,430	290,887	1,705	443,952	275	16%
TOTAL	14,323	2,873,040	19,428	4,207,714	5,125	26%

Table 13: Venue Activity Levels

Data from SA, ACT and NT was excluded due to a low sample size.

Figure 21 provides the 2019 percentage of arts versus non-arts activity:

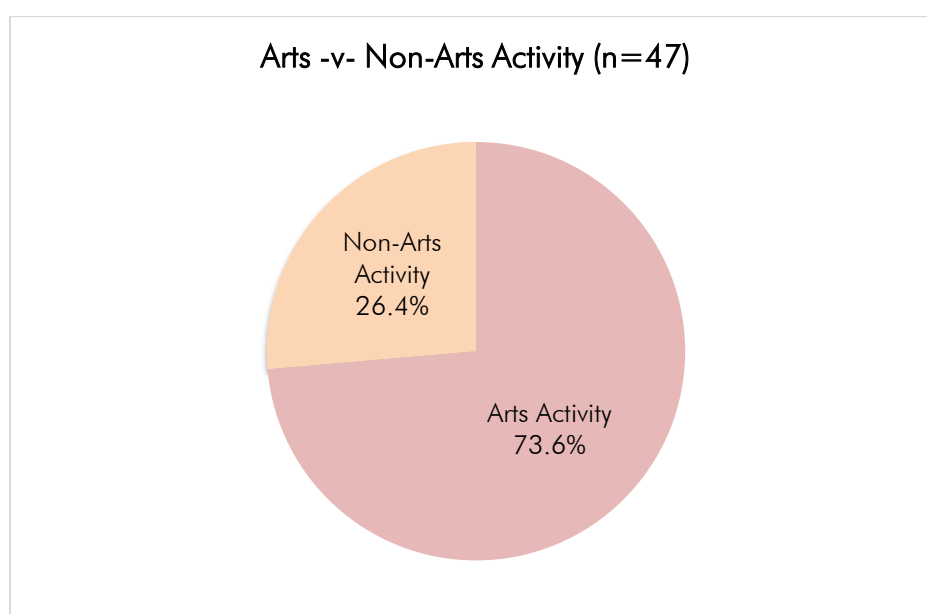


Figure 21: Activity Type

The percentage of arts activities in respondents' venues has steadily increased, with one survey exception, over five surveys from 63% in 2011, 66% in 2013, 67.3% in 2015, 64% in 2017, to 73.6% in the current results.

Figure 22 shows usage by the community at respondents' venues has decreased since 2017 (61%), although is in line with 2015 results (52.2%). Community events are defined as activities produced by amateur performance groups, dance and drama school concerts, and other community performances.

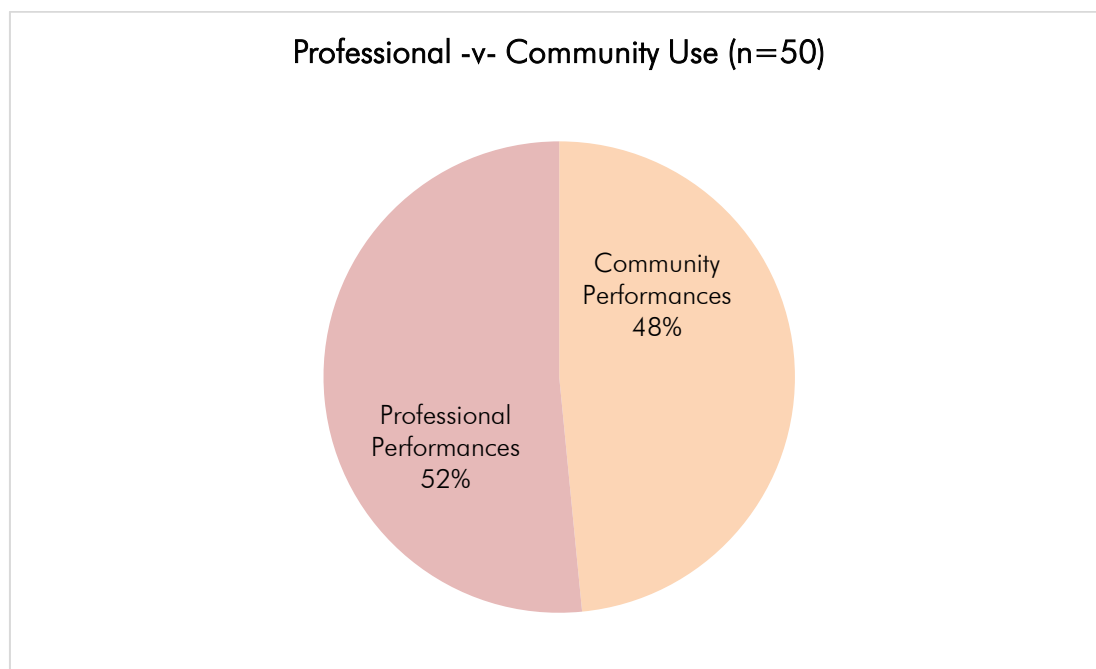


Figure 22: Community -v- Professional Use

Table 14 shows a breakdown by state of community and commercial performances and the percentages of activity type. A number of states have low response rates to these specific questions and Northern Territory and Australian Capital Territory are not included.

State	Community Performances	Community as % of total activities per state	Professional Performances	Professional as % of total activities per state	Total Activity per state
NSW (n=22)	868	48.1%	938	51.9%	1806
QLD (n=7)	212	53.0%	188	47.0%	400
SA (n=2)	59	63.4%	34	36.6%	93
TAS (n=4)	63	44.1%	80	55.9%	143
VIC (n=13)	511	46.5%	589	53.5%	1100
WA (n=4)	91	36.5%	158	63.5%	249
Total	1804		1987		3791

Table 14: Professional -v- Community Performances per State

Respondents were also asked to report on the percentage of professional performances presented versus non-professional or community performances in their venues.

Figure 23 shows the mix of venues, with almost half presenting a mix between 41% and 70% professional versus non-professional performances.

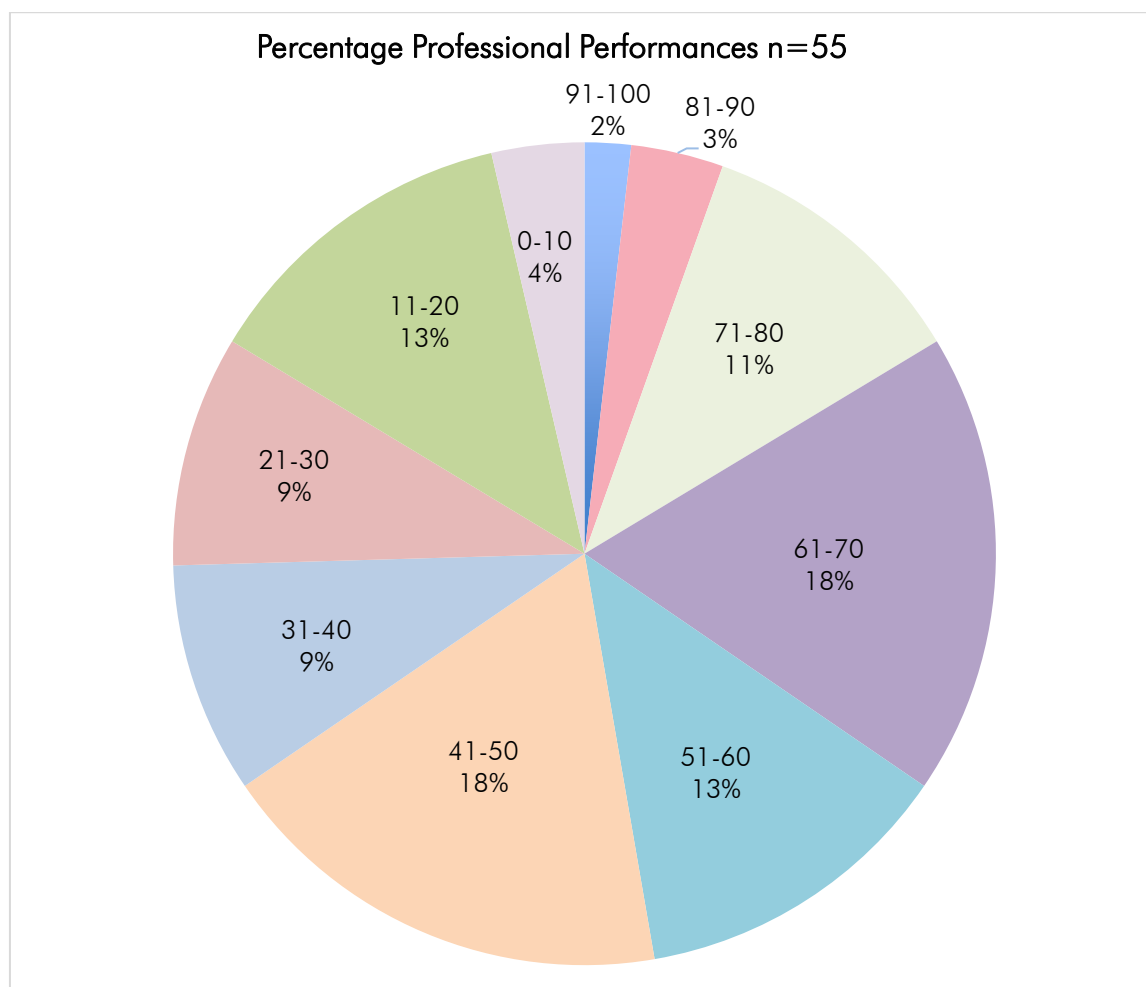


Figure 23: Percentage of professional performances versus non-professional

6.5 Presentations by Artform

Respondents were asked to provide a breakdown of performances presented annually by both artform and the audience attendance at each. Performances were further apportioned into those considered professional and non-professional in nature.

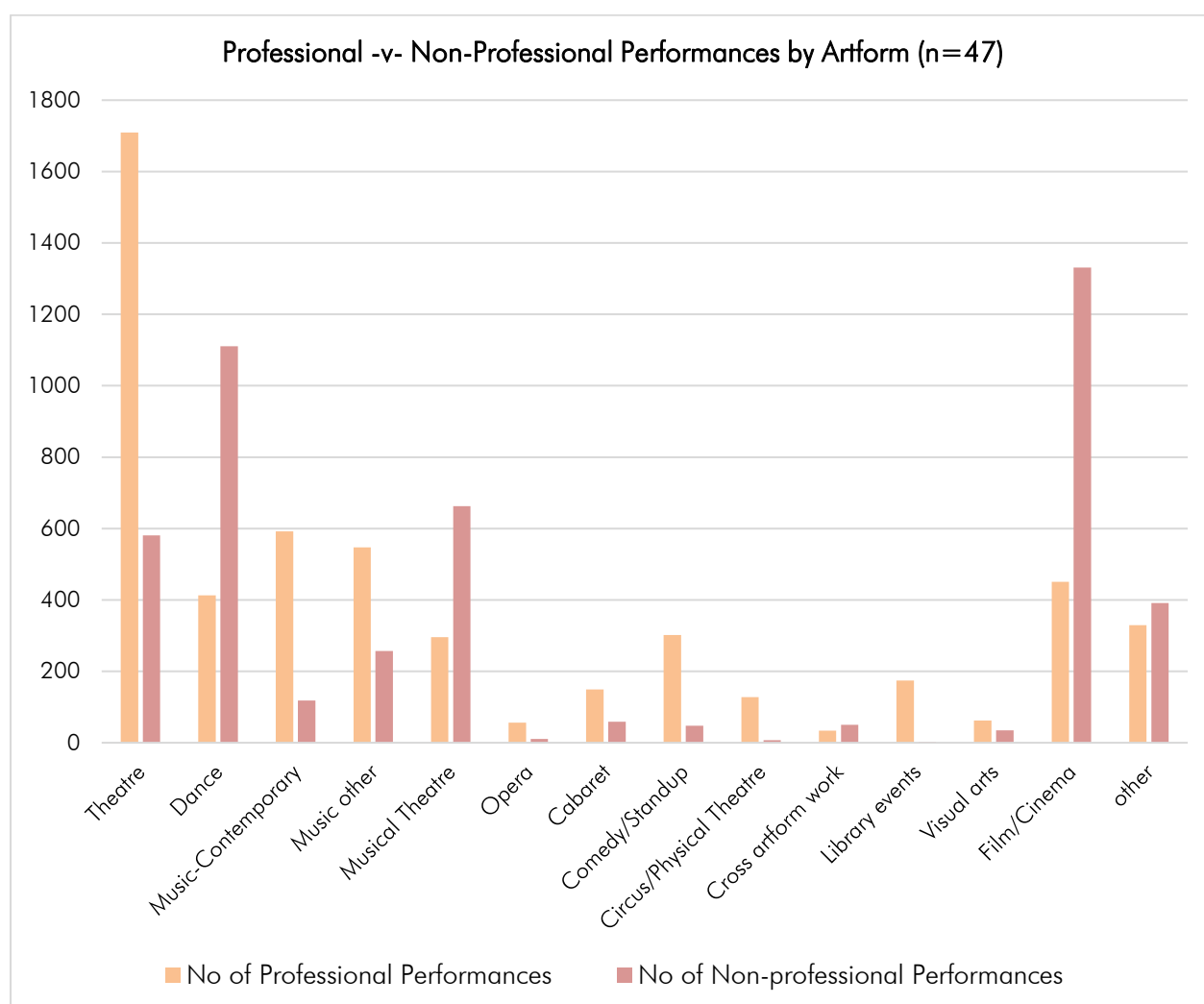


Figure 24: Number of professional performances versus non-professional by Artform

Almost 75% of Theatre presented annually is considered professional performance, while 73% of dance presented is non-professional, most likely dance school productions. Musical Theatre productions by non-professionals make up 69% of this artform presented in respondents' venues annually.

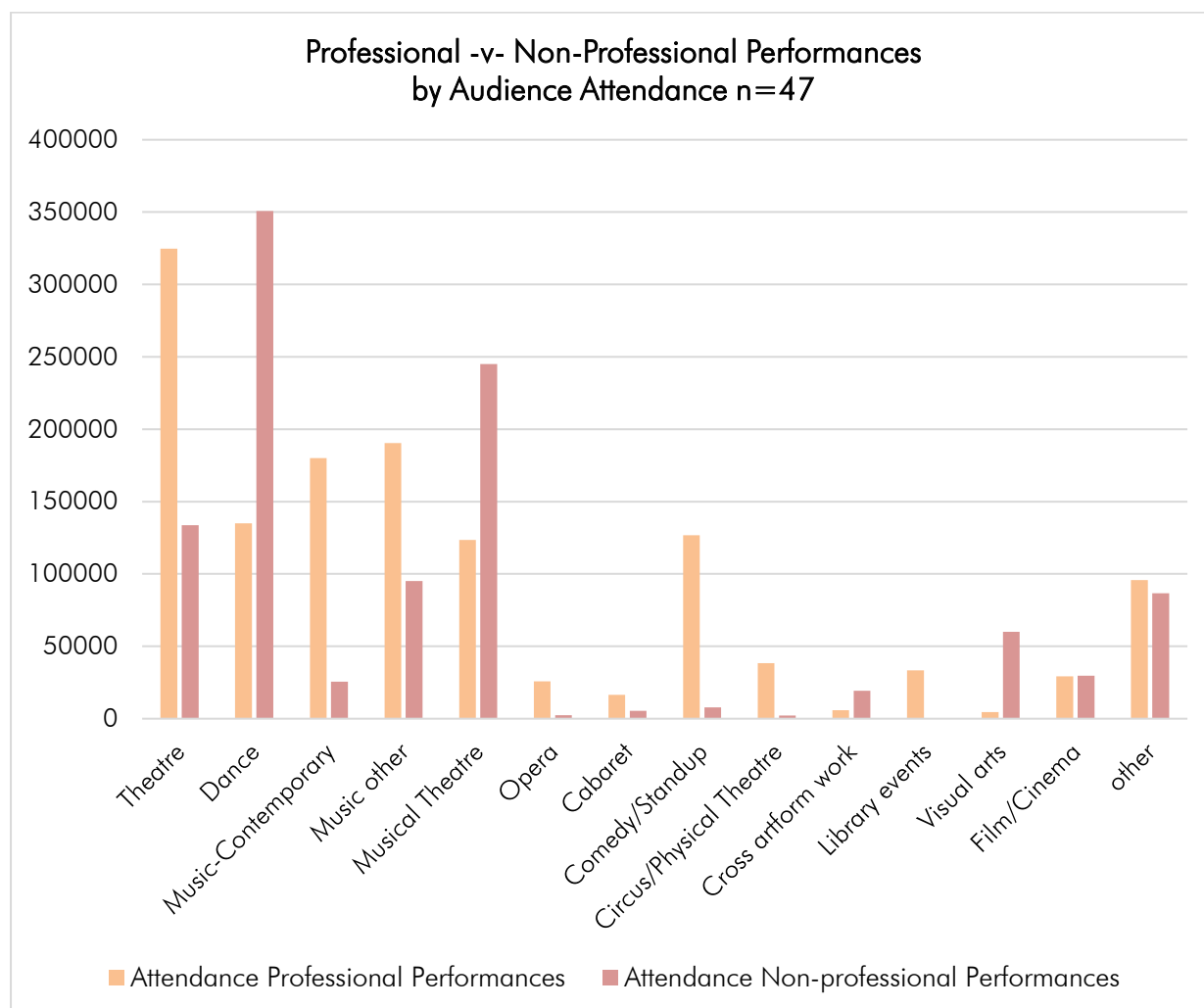


Figure 25: Professional performances versus non-professional by Audience Attendance

Dance attracts the highest combined audience numbers across the 47 respondents' venues at almost 0.5 million people annually. 72% of this audience attends non-professional dance. Theatre attracts an audience of almost 460,000 people, with some 71% of this audience attending professional theatre.

Smaller size audiences are attending opera, comedy and circus/physical theatre productions, although more than 90% of these performances are by professional artists and companies. Lowest attendance of less than 25,000 annually is at cross artform and cabaret productions. More non-professional cross artform performances (59%) are presented while more professional cabaret (71%) productions attract audiences.

6.6 Artists Engaged

Respondents were asked to provide information about the number of artists engaged annually in their program with 27 venues contributing data.

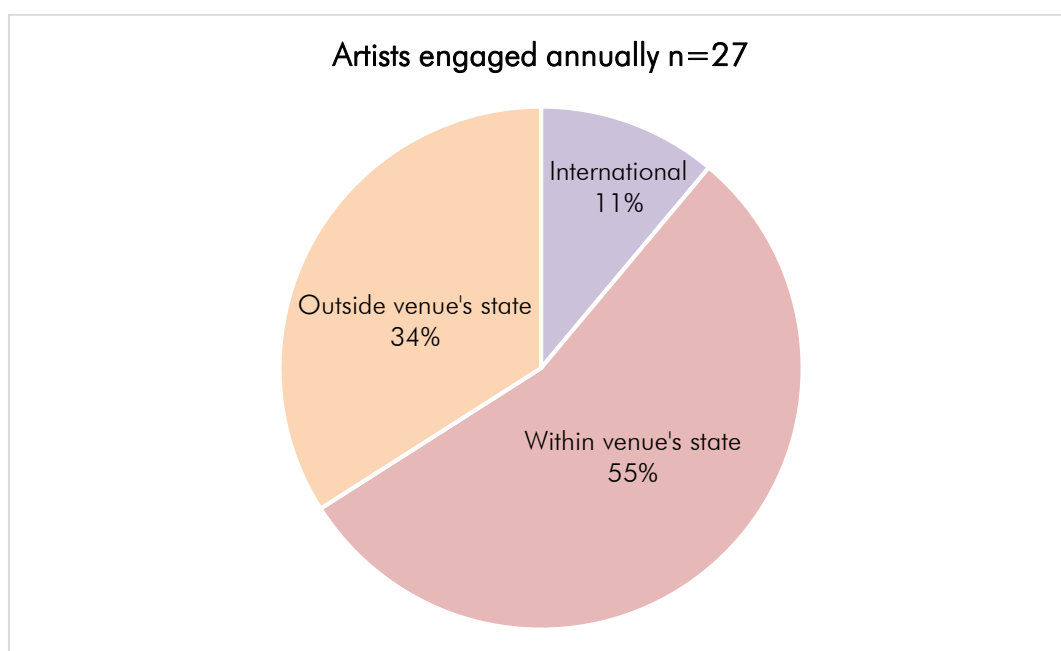


Figure 26: Professional performances versus non-professional by Audience Attendance

28 respondents reported presenting at least one First Nations' production within their annual program. The survey defines First Nations' work to include Indigenous creative involvement, cultural expression or Indigenous social, political or historical content, as well as works where there is Indigenous creative control.

The respondents reported 53 seasons of First Nations' productions with 269 performances. Of these, 37% were presented by the venue organisation and the remaining two-thirds hosted as hires in the venue. A total of 351 First Nations artists were engaged by the 27 respondent venues.

6.7 Community Engagement

Engaging the community through a range of supporting activities has grown in importance for venues when presenting professional productions and the 2019 survey asked respondents, for the first time, to indicate the community engagement activities which form part of their annual program.

The range of activities offered by respondents is shown in Figure 27. Most popular are pre and post show discussions (17%) and workshops or masterclasses (16%).

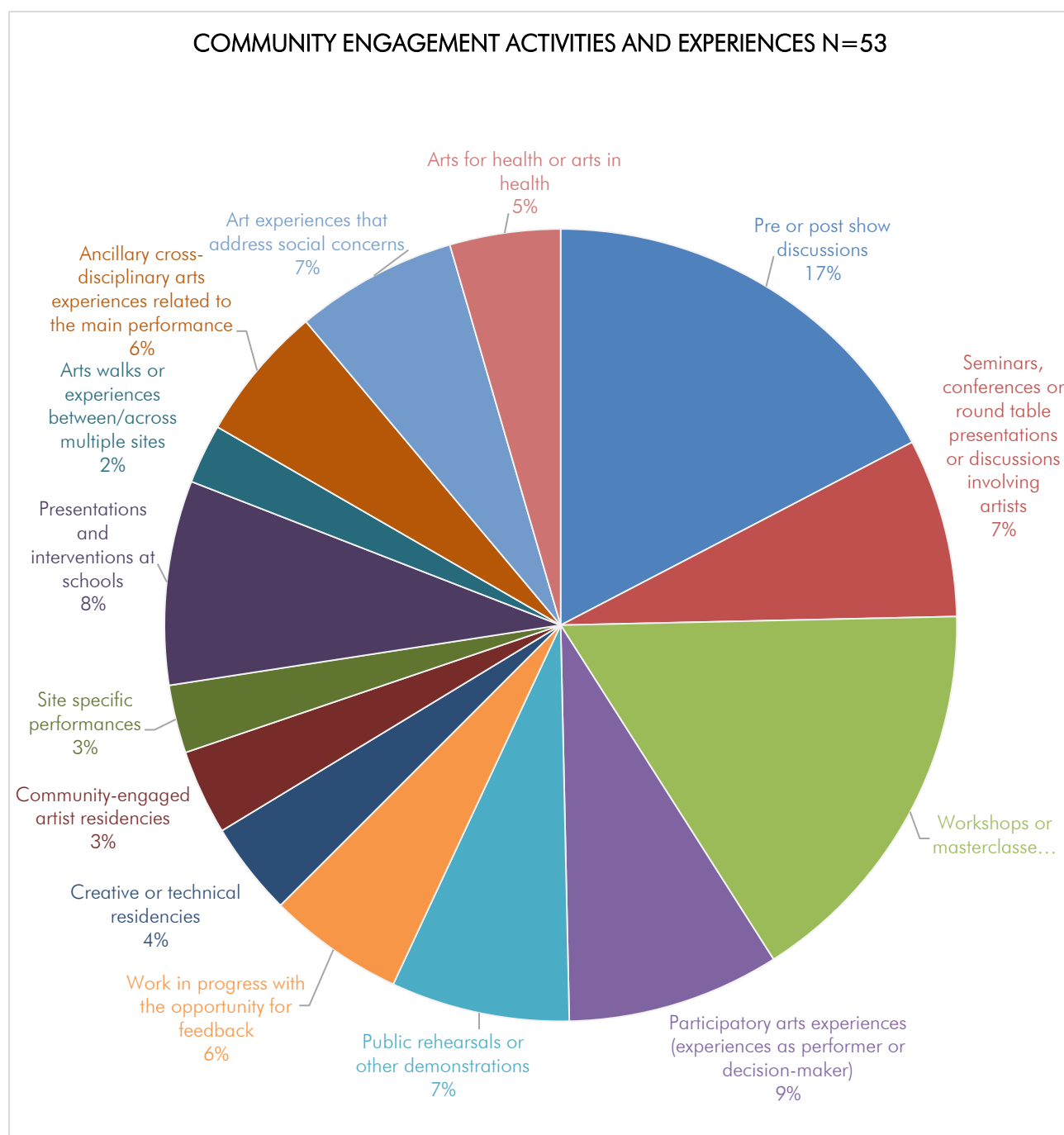


Figure 27: Community Engagement activities and experiences

7. Playing Australia and State Funding support

7.1 Playing Australia

Playing Australia funds are an important resource for many regional centres to facilitate the delivery of touring shows.

Based on survey responses, the number of performances supported by Playing Australia has increased to 719 within 272 seasons (n=39) compared to the 2017 report that revealed 457 performances were supported. The average number of performances per season has increased from 2.1 in 2017 to 2.6 in 2019 on average.

State	Productions Supported by Playing Australia		Productions Supported by State Funding Agencies		Average # performances per production/season	
	Seasons	Perfs	Seasons	Perfs	Playing Australia	State Agencies
NSW (n=19)	125	432	130	464	3.5	3.6
QLD (n=4)	30	57	24	37	1.9	1.5
SA (n=2)	0	0	0	0	0	0.0
TAS (n=4)	18	38	27	67	2.1	2.5
VIC (n=11)	82	162	98	165	2.0	1.7
WA (n=3)	17	30	14	22	1.8	1.6
Total	272	719	293	755	2.6	2.6

*Table 15: Playing Australia and State Funded Seasons and Performances per State
Data from ACT and NT was not available while SA data reported zero activities in these categories.*

Playing Australia supported 26% of respondents' entrepreneurial seasons, representing 34% of their entrepreneured performances and 8.8% of all performances presented by respondents. This is a favourable increase over 2017 reporting of 16% of entrepreneurial seasons, 14% of entrepreneurial performances and 5% of all performances in respondents' venues. The overall result is also higher than past years, when Playing Australia support of entrepreneurial programming represented 15% in 2015, 21% in 2013 and 17% in 2011.

Respondents located more than 400 kilometres from their nearest capital city received 4% of Playing Australia touring seasons while those located between 300 and 400 kilometres away received 25%. Respondents located between 150 and 299 kilometres received 24%. Venues located 40 to 150 kilometres away received 28% and those within 40 kilometres of a capital city received 19% of Playing Australia supported touring seasons.

On average per respondent, Victorian venues received 7.45 seasons supported by Playing Australia, followed by New South Wales at 6.3 seasons, Queensland 6, Western Australia 4.6 and Tasmania 4.5 seasons annually. No touring data was reported by ACT, NT or SA venues.

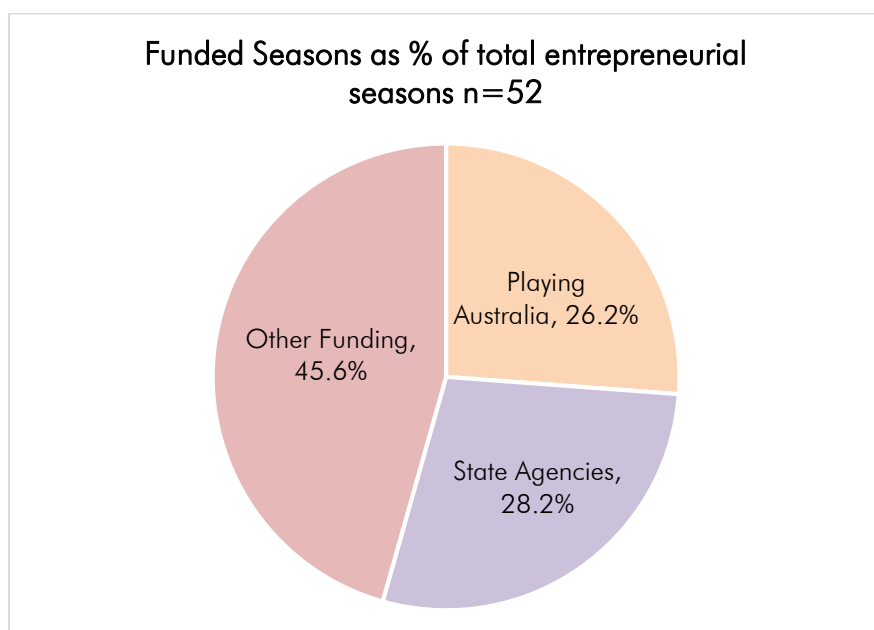


Figure 28: Seasons Funded as a Percentage of Total Entrepreneurial Seasons

7.2 State Funding support

A total of 293 seasons and 755 performances were supported by state funding agencies, representing 7.2% of all seasons presented and 9.3% of all performances presented at venues.

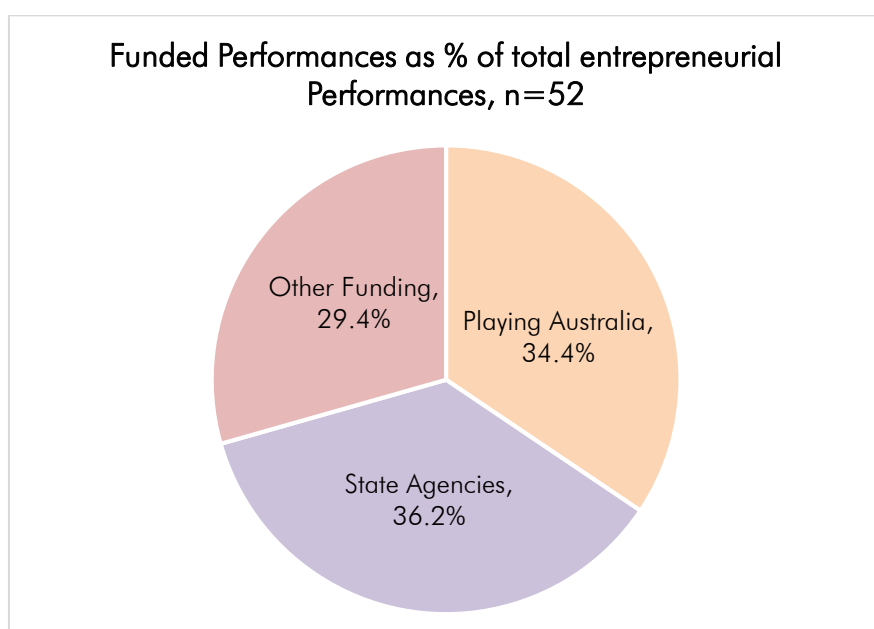


Figure 29: Funded Performances as a percentage of Entrepreneurial Performances

Comparing these results to 2017 finds an increase in the number of seasons presented (10.9%) and a significant reduction to 2.6 in the number of performances within seasons from the high of 5.28 per season reported in 2017. The mix of venues, particularly respondents in smaller regional communities programming one-night stands, may account for this change.

8. Policies and Plans

The following three questions were introduced in 2017 and refer to the Programming, Audience Development and Cultural Plans relating to each of the respondents. Figures 21 to 23 show the responses.

8.1 Programming Policies or Plans

The majority of respondents (63%) do not have a written Programming Policy or Plan. This is a significant change from 2017 when 45% of respondents did not have a Programming Policy or Plan.

Eight venues have committed to sharing their Programming Policy or Plan with other PAC Australia members (this information is available in the members-only section of the PAC Australia website).

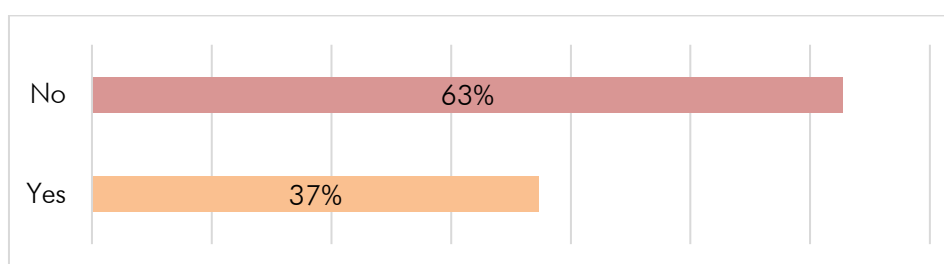


Figure 30: Percentage of Respondents with a Written Programming Policy or Plan, n=59

8.2 Audience Development Plans

Written Audience Development Plans or Strategy are less common among respondents with 29% confirming they have one. In 2017, 46% of respondents reported having an Audience Development Plan or Strategy.

Two venues have committed to sharing their Audience Development Plans or Strategy with other PAC Australia members, while seven will share with PAC Australia for internal reference and analysis (this information is available in the members-only section of the PAC Australia website).

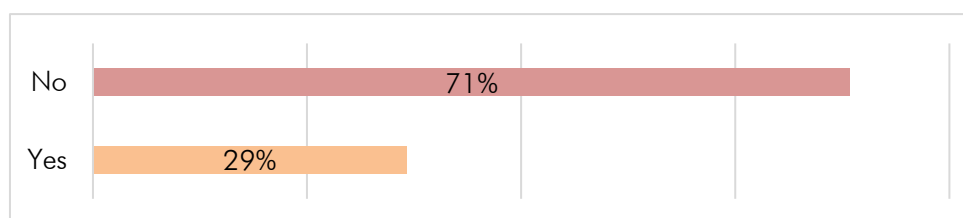


Figure 31: Percentage of Respondents with a Written Audience Development Plan, n=58

8.3 Local Government Cultural Plan

Respondents were asked if their local Council had a Cultural Plan, with 61% responding positively. 12 venues have committed to sharing their Council's Cultural Plan with other PAC Australia members (this information is available in the members-only section of the PAC Australia website).

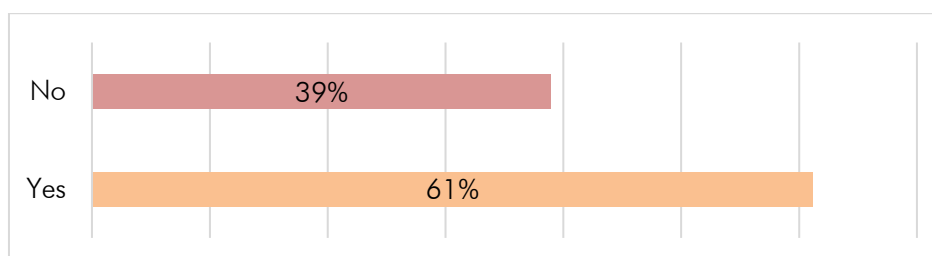
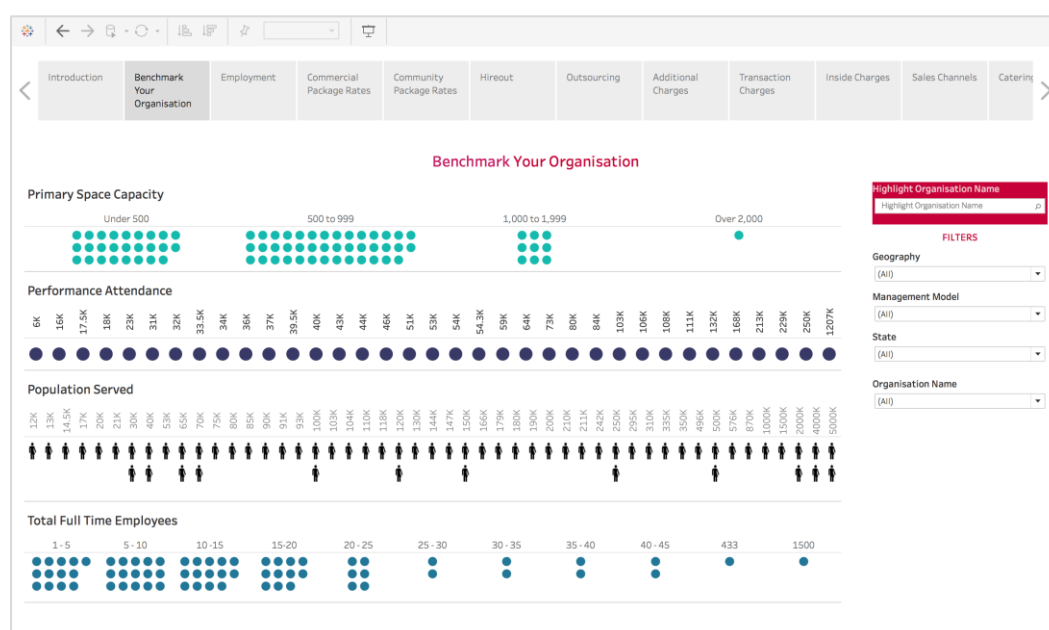


Figure 32: Percentage of Respondents Local Council with a Cultural Plan, n=54

9. The Dashboard

PAC Australia is now able to present the data in this report (and the Venue Hire Charges & Salaries Report) in an online, searchable format. Members who participated in the data collection (see Appendix A, overleaf) can access the dashboard for free. Non-participating members receive access to the dashboard at a significant discount.

More information is available on our website www.paca.org.au/benchmarking-reports/



APPENDIX A: LIST OF RESPONDENT VENUES

- Albury Entertainment Centre
- Arts Margaret River, Margaret River Cultural Centre
- Bathurst Memorial Entertainment Centre
- Belconnen Arts Centre Inc
- Bondi Pavilion Theatre
- Brolga Theatre & Convention Centre
- Broome Civic Centre
- Bunbury Regional Entertainment Centre
- Bunjil Place
- Burnie Arts & Function Centre
- Capital Venues and Events (Bendigo)
- Cassowary Coast Regional Council
- Centre of Contemporary Arts Cairns
- Cessnock Community Performing Arts Centre
- Civic Theatre Newcastle
- Colac Otway Performing Arts & Cultural Centre
- Dubbo Regional Theatre & Convention Centre
- Empire Theatre
- Entertainment Venues (Tamworth)
- Esperance Civic Centre
- Frankston Arts Centre
- Geelong Arts Centre
- Gladstone Entertainment Convention Centre
- Glasshouse Port Macquarie
- Glen Street Theatre
- Griffith Regional Theatre
- Hamilton Performing Arts Centre
- His Majesty's Theatre
- Horsham Town Hall
- HOTA (Home of the Arts)
- Karralyka Centre
- Laycock Street Community Theatre
- Lighthouse Theatre
- Mandurah Performing Arts Centre
- Manning Entertainment Centre
- Matt Dann Theatre & Cinema
- Merrigong Theatre Company
- Mildura Arts Centre
- Moncrieff Entertainment Centre
- Monkey Baa Theatre Company
- Moora Performing Arts Centre
- NIDA Parade Theatres
- Orange Civic Theatre
- paranapple arts centre
- Pilbeam Theatre
- Portland Arts Centre
- Princess Theatre, Theatre North Inc
- Queanbeyan Performing Arts Centre
- Queens Park Theatre
- QUT Gardens Theatre
- Red Stitch Theatre Company
- Redland Performing Arts Centre
- Riverlinks Venues
- Riverside Theatres Parramatta
- Seymour Centre
- Shoalhaven Entertainment Centre
- Sutherland Entertainment Centre
- The Art House
- The Concourse
- The Cube Wodonga
- The Events Centre
- The Hopgood Theatre
- The World Theatre
- Theatre Royal
- Twyford Hall Inc
- University Theatres - UWA
- Wagga Wagga Civic Theatre
- Whitehorse Centre
- Woodville Town Hall

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.

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.

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.

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.

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.

APPENDIX C: SURVEY QUESTIONS

1. Introduction

This is the second and final part of the 2019 PAC Australia Survey

The survey covers the Economic Activity of your centre.

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

For attendance / program data our preference is that you report on a calendar year basis (but this is not imperative) HOWEVER if you do choose to report on a calendar year basis we will share this data with LPA (Live Performance Australia) for their Annual Attendance and Revenue Survey - PAC Australia working for the benefit of members - and you won't have to complete their survey as well, so you'll get the pain over and done with in one go, in one place.

For financial data you are welcome to complete this on a financial OR calendar year basis - what ever is easiest for you to deliver - if you can provide this data on calendar year basis that would be our preference - but we do ask that you provide us with the most recent year data.

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.

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.

A PDF of this survey is available [here](#) to assist you with preparing the required information.

Please do not include dollar signs ['\$'], commas or spaces in numeric responses and please enter a zero for zero values, do not leave the field blank or enter 'N/A'.

If you require assistance regarding clarification of definitions and/or questions please direct your enquiry via email to Katherine Connor [katherine@paca.org.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 PAC Australia member)

Other (please specify)

* 4. State/Territory or country:

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

* 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. Do you present work or other performance related activities at any locations other than the venues which you directly manage?

☐ Yes

☐ No

If you answer 'Yes' please give examples below

17. Is your venue/organisation responsible for programming a local festival (i.e. not just hosting festival events)?

☐ Yes

☐ No

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

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

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

20. 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

21. 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

22. 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

23. 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").

Entrepreneuried: 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.

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

Number of productions/seasons:

Number of performances:

25. Of the productions you entrepreneuried 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:

26. 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:

27. 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

28. 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:

29. 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").

Entrepreneur: 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.

30. 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:

31. 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. Production and Performances

32. Of the statements below, which best describes your centre's primary activity? (Please select ONE):

- ☐ A receiving/presenter venue for professional work
- ☐ Producing or co-producing professional productions
- ☐ Producing or co-producing non-professional productions
- ☐ Commissioning new professional work

33. Please select all other activities your Centre undertakes (You can select more than one):

- ☐ A receiving/presenter venue for professional work
- ☐ Producing or co-producing professional productions
- ☐ Producing or co-producing non-professional productions
- ☐ Commissioning new professional work

34. What is the percentage of activities/presentations of performances (not conferences, functions etc) would you consider to be professional versus non-professional?

Professional

○

Non-Professional

How many Professional performances (not seasons) has your Centre undertaken in the previous year by artform ?

35. No. of Performances

Theatre

Dance

Music - Contemporary

Music - Other

Musical Theatre

Opera

Cabaret

Comedy / Stand Up

Circus / Physical Theatre

Cross artform work

Literary events

Visual Arts

Film / Cinema

Other

36. Attendance

Theatre

Dance

Music - Contemporary

Music - Other

Musical Theatre

Opera

Cabaret

Comedy / Stand Up

Circus / Physical Theatre

Cross artform work

Literary events

Visual Arts

Film / Cinema

Other

37/38. How many Non-professional performances (not seasons) has your Centre undertaken in the previous year by artform

37. No. of Performances

Theatre

Dance

Music - Contemporary

Music - Other

Musical Theatre

Opera

Cabaret

Comedy / Stand Up

Circus / Physical Theatre

Cross artform work

Literary events

Visual Arts

Film / Cinema

Other

38. Attendance

Theatre

Dance

Music - Contemporary

Music - Other

Musical Theatre

Opera

Cabaret

Comedy / Stand Up

Circus / Physical Theatre

Cross artform work

Literary events

Visual Arts

Film / Cinema

Other

8. Productions and Performances

39. Of the total number of professional productions / performances undertaken at your Centre last year, how many performing artists were engaged (do not include creative, production, touring and management personnel etc.)

Australian Artists

International Artists

From within your state

From outside your state

40. Of the total number of professional productions / performances undertaken at your Centre last year, please provide information below about First Nations' work: (Using a definition identified by the Australia Council for the Arts, First Nations' work, in this context, includes performing art works with Indigenous creative involvement; cultural expression; or Indigenous social, political or historical content. We acknowledge that this definition captures a broader range of activity than works in which there is Indigenous creative control.)

Number of seasons

Total Number of
performancesNumber of performances
(hires)Number of performances
(presented by your
organisation)Number of First Nation
artists engaged

41. Community Engagement

Please indicate whether you have undertaken any of the following community engagement activities related to the presentation of professional productions undertaken at your Centre in the past year: (select all that are applicable)

- ☐ Pre or post show discussions
- ☐ Seminars, conferences or round table presentations or discussions involving artists
- ☐ Workshops or masterclasses
- ☐ Participatory arts experiences (experiences requiring participation of audience or community members as performer or decision-maker)
- ☐ Public rehearsals or other demonstrations
- ☐ Public reading or presentation of a work in progress with the opportunity for feedback
- ☐ Creative or technical residencies
- ☐ Community-engaged residencies (where professional artists dedicate MOST of their time to participatory activities involving community members)
- ☐ Site specific performances
- ☐ Presentations and other interventions at schools
- ☐ Arts walks or experiences that involve movement between/across multiple sites
- ☐ Ancillary cross-disciplinary arts experiences related to the main performance (e.g. a visual arts exhibition that expands on the theme of the main show)
- ☐ Presentation of art experiences that address social concerns
- ☐ Arts for health or arts in health

Other (please specify)

--

9. Other events

42. 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].

43. 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

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

10. Programming / Cultural Plan

45. Does your Centre have a written Programming Policy or Plan?

☐ Yes

☐ No

46. Please mark the check-box below if you would be willing to share your written Programming Policy with PAC Australia for -

☐ internal reference and analysis by **PAC Australia**

☐ **PAC Australia** to share with other **PAC Australia** members

Please use one of the method below if you are willing to share your policy document

47. Upload your document here

Choose File

No file chosen

48. Or provide a link (or URL) to your document here

49. Does your Centre have a written Audience Development Plan or Strategy?

☐ Yes

☐ No

50. Please mark the check-box below if you would be willing to share your written Audience Development Plan or Strategy with PAC Australia for -

☐ internal reference and analysis by **PAC Australia**

☐ **PAC Australia** to share with other **PAC Australia** members

Please use one of the method below if you are willing to share your plan or strategy document

51. Upload your document here

Choose File

No file chosen

52. Or provide a link (or URL) to your document here

53. Does your Local Council have a Cultural Plan

☐ Yes

☐ No

54. Please mark the check-box below if you would be willing to share your Local Council's Cultural Plan with PAC Australia for -

☐ internal reference and analysis by **PAC Australia**

☐ **PAC Australia** to share with other **PAC Australia** members

Please use one of the method below if you are willing to share your local Council's Cultural Plan document

55. Upload your local Council's planning document here

Choose File

No file chosen

56. Or provide a link (or URL) to your local Council's planning document here

57. Please provide your organisation's Mission Statement or Purpose

58. Would you be willing to make your Mission statement or Purpose publicly available?

☐ Yes

☐ No

11. Financial Year

59. Does your organisation report on a calendar year (January to December) or financial year (July to June) basis?

☐ Calendar year (January to December)

☐ Financial year (July to June)

12. 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.

Please again refer to our note at the start of the survey regarding reporting period.

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

60. 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

61. 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

62. Private support

Philanthropic trusts

Sponsorship (monetary)

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

Donations / fundraising

Non-government grants

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

13. Operating Expenditure

Include all recurrent expenditure; do not include capital expenditure

64. 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

65. TOTAL EXPENDITURE - AMOUNT B

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

67. 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

68. How is this surplus treated?

☐ Add to available funds for the following financial year

☐ Transferred to a programming reserve

☐ Transferred to a capital reserve

☐ Transferred to a building reserve

☐ Transferred to a general purpose reserve

☐ Available for capital expenditure in the current or next financial year

69. Does your organisation (or venue owner) have a process or mechanism in place to build a fund for future capital maintenance or upgrades ?

☐ Yes

☐ No

14. Other

70. 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 PAC Australia.

71. 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)

72. 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.

15. Your contribution to Playing Australia funded presentations

73. 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.

16. Capital Project Expenditure

74. How much was spent on capital projects on your centre in the last 12 months (by funding source) excluding operational maintenance.

State Government

Local Government

Federal Government

Other

75. 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)

17. THANK YOU

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

77. Any other comments and/or feedback

78. 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'm not coming back to finish it ... ever!

79. Please estimate the number of hours it has taken to complete the survey (including collating the required data)?