

2015 Economic Activity Report

The APACA logo consists of the letters 'APACA' in a bold, sans-serif font, enclosed within a white rectangular box. A thin, dark, curved line is positioned below the box, extending from the left side towards the right.

APACA

Australian Performing Arts Centres Association

www.apaca.com.au

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EXECUTIVE SUMMARY

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

63% of APACA's membership comprises professionally managed performing arts centres located in all corners of Australia from the remote northwest's Broome Civic Centre to the far north's Cairns Civic Theatre to southern capitals such as Hobart's Theatre Royal and The Arts Centre Melbourne and large and small regional centres around the country from The Hopgood Theatre in South Australia to the Dubbo Regional Theatre and Convention Centre in western New South Wales and Darwin Entertainment Centre in the Northern Territory.

The Economic Activity survey has now been conducted with fundamentally the same questions in 2006, 2009, 2011, 2013 and now 2015 giving the opportunity to analyse industry trends.

The aim of the bi-annual survey project is to measure the extent of operations and economic activity of performing arts centres across Australia.

Methodology

The survey was carried out online through Survey Monkey (www.surveymonkey.com) in three parts. The questionnaire was sent to APACA Ordinary Members only, which is those members who manage performing arts venues.

There were 83 responses to Part 1 and 74 responses to Part 2 representing 73.5% and 65.5% respectively of the 113 ordinary members. 70 members (62%) responded to both parts although it is noted some did not complete all questions. As responses to each section was voluntary, the number of responses relating to the section's analysis is noted against the tables and figures in this report.

In reviewing the 2015 findings, comparisons have been made with the results of surveys conducted in 2009, 2011 and 2013 to identify emerging trends and industry changes overtime.

Findings

- Almost two thirds (62.6%) of respondents manage venues with total capacities of between 261 and 1100 seats. A further 29% fall into the 1101 to 3000 seating capacity range. Less than 5% of centres had a seating capacity of below 260 and 4.8% of venues reported multiple spaces with a total of greater than 3000 capacity.
- 78.3% of all respondent centres are owned by Local Government, which also directly manages 66.3% of these centres. This equates to about two thirds of the entire sample being owned and operated by Local Government.
- Management models fall into six categories with 24.1% operating at arms-length from Government owners and 6% owned and operated as part of an educational institution.
- Between 2009 and 2015, venues managed by a separate legal entity has decreased by 9.9% with an increase by 8.3% of venues now directly managed as a business unit.
- Of the total respondents, 39.8% operate a performing arts centre with only one performance space. 73.5% operate either one or two performance spaces. Centres with four or more venues make up 12% of the sample.
- 50 respondents supplied complete financial information resulting in a combined turnover of \$211.8 million. Individual respondent turnover ranged from \$716,500 to \$79.3 million.
- Financial data from 12 venues operating at arms length from the Government owner of their building represent 60.3% of the total income and 59.2% of the total expenditure. These venues also receive 49.4% of total funding support from local, state or federal government sources and 86.7% of the total private funding support.
- Turnover was found to maximise for venues with three performance spaces. As with previous surveys, no discernible relationship was perceived between turnover and distance from the nearest capital city.
- Government subsidy represents approximately one third of all income (34.3%). Respondents' entrepreneurial program (Box Office) reduced marginally at 13.3% from 13.8% in 2013, which was an increase against 12%, reported in 2011.
- Venue Hire increased to 10.3% when compared with 2013 (9.8%) while income from Food and Beverage almost doubled from 6.1% in 2013 to 11.9% in 2015, Recoverables increased from 8.2% to 13.3% and Ticketing Services from 6.1% to 9.3%.

- The predominant expense for centres remains labour at 41.4%, a reduction from 44.4% in 2013.
- Respondents spent just over \$33.5million purchasing and presenting their programs, with another \$9.4million spent on marketing these events and their venues.
- Local Government still represents the most significant government contributor with respondents reporting \$57.4million or a consistent 78.9% (78.9% reported in 2013).
- \$29.2 million in capital funding was received for projects conducted by 40 venues. 8 venues reported that almost 30% of the combined capital funding came from alternative sources to the three levels of Government.
- The average utilisation rate for all performance spaces is up to 59% from 58% in 2013 and the average utilisation rate for primary performance space has been maintained at 59% (down from 61% in 2011).
- As cultural hubs in their respective communities, performing arts centres host a range of both arts and community events. More than 9.1million people attended over 36,000 events of some kind at the respondents' venues.
- In 2015, 33% of arts centre activities were determined as non-arts events (down from 34% in 2015 and 37% in 2011), which demonstrates the importance of performing arts venues as a resource for each community that fulfils a variety of needs that are not necessarily arts related.
- 52.2% of respondents' venue usage is attributed to community events referring to events produced by amateur groups, dance schools etc. (See Appendix 1 for definitions). This represents a significant decrease from 65% in 2013 and 55% in 2011.
- Commercial performances has significantly increased from 35% to 47.8% providing evidence that venues are being required to increase earned income as funding conditions tighten.
- Seasons presented or co-presented by the respondents [that is where there is a financial risk to the presenter] make up 48% of the total performances presented.
- Of the total seasons on which respondents incurred full or part financial risk, Playing Australia supported 15%, a reduction from 21% in 2013. This represents 4.6% of all performing arts performances in the respondents' venues.
- State based funding provides 14% of the support for venues to present their entrepreneurial programming.

- Performances presented or co-presented by the respondents make up 48% of the total performances presented. This is a further increase from 2013 levels (41%) and 2011 levels (37%) and continues to demonstrate the growing trend towards entrepreneurial programming.
- 30 venues operate with a dedicated programming budget representing an investment in entrepreneurial activities of approximately \$8.5 million annually.
- 70% of venues (n=30) reporting they were able to budget for a net loss annually on their programming budget, also reported either an annual surplus or breakeven result in their overall operating result from all venue activities.
- Of the respondents reporting on how an annual surplus is treated (n=33), 18 (54.5%) stated that they were able to retain this amount within their operations.

Conclusions

The respondents represented a wide range of performing arts centres, both in geographical spread from capital city to remote and in the size of enterprise, demonstrating the breadth of the APACA membership across Australia.

Local government remains at the centre of the sector, playing a most significant role in the management and operational funding of performing arts centres. Arms length management is preferred for larger enterprises particularly those funded through State and Territory Governments.

Performing arts centres are increasingly taking on greater risk in order to earn additional income and are looking to alternative funding sources, particularly to support their capital requirements and new infrastructure projects. Venues continue to be important community resources, with high levels of subsidised community and non-arts related activity undertaken within these facilities.

Playing Australia funds continue to deliver a proportion of seasons into venues, and remains an integral aspect of venue's entrepreneurial programs. Performing arts centres are also taking more risk in their programming reflecting the importance of self presented program activity, which delivers significant, economic and arts activity in the respondents' individual communities.

Playing Australia funds are catalysts for programming, in turn stimulating a significant percentage of employment expenditure of \$85.7 million annually in the community in addition to the work generated through artists' fees with the \$22 million invested in touring productions. 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. The respondent venues invested an additional \$20.9 million in presenting and marketing events supported by Playing Australia.

Venues are highly valued in their community as the central focus for arts and entertainment access for audiences and generate employment opportunities for artists, venue workers and for the supporting industries in hospitality directly reported in this survey. The on-going impact where APACA members operate is shown to be excellent with the return on investment generating artistic, social and economic benefits for communities.

INTRODUCTION

The Australian Performing Arts Centres' Association (APACA) represents 190 organisations throughout Australia. 63% of these members operate a professionally managed performing arts centres. Other members (37%) are from organisations that have substantially similar objectives to the Association and include producing companies, touring organisations and funding bodies. Our members operate predominantly in the subsidised sector. There are four international members.

The performing arts centres' sector presents productions from a vast array of art forms from plays, opera and classical music, to comedy, circus and contemporary dance. Typically the sector operates with 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 sector into a strong network.

AIM

The purpose of this survey and report is twofold. In the first instance, it is to provide members with comparative data that will assist in decision-making. Secondly, the report will provide information regarding the scale of operations of the sector. Performing arts centres often work in isolation as a result of the relatively unique nature of the industry and their geographic location. Similarly, lean staff structures and resource limitations restrict the ability of organisations to undertake research to inform the management and operation of their organisations and provide an evidence base for decision-making.

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

METHODOLOGY

APACA undertook research into its members' economic activity for the first time in 2006, and again in 2009, 2011 and 2013. This is the fifth such survey. Primary research has been undertaken due to a lack of consistent, standardised and available secondary data. All iterations of the project have revealed an on-going problem in the agreement on common definitions of terms used within the industry. A glossary of how terms are used in respect of this research is provided at Appendix A. Each time this research is undertaken, APACA endeavours to further clarify usage, but there is still variations within the industry on the use and definition of terms.

A review was undertaken prior to commencing the survey design in an attempt to clarify terminology, maximise participation in order to provide a strong representation of the sector and ensure the information presented met member needs. Based on

feedback, the geographic disparity of respondents and the extent of variables to be considered in the survey, an online survey tool was considered most effective in achieving high response rates. The questionnaires were distributed over a period November to 2015 to January 2016 through Survey Monkey to Ordinary members only, i.e. those members who manage performing arts venues.

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

Response Rates

There were 83 responses to Part 1 and 74 responses to Part 2 representing 73.5% and 65.5% respectively of the 113 ordinary members. 4 ordinary members are venue associations in their respective states and excluded from the data. 70 members (62%) responded to both parts although it is noted some did not complete all questions. As responses to each section was voluntary, the number of responses relating to the section's analysis is noted against the tables and figures in this report. Respondent numbers were slightly lower than in previous surveys however detailed data from a majority of the largest capital city centres is again notably absent from the respondent sample. This has affected data and analysis in various areas of the survey and will be discussed as needed.

In Figure 1, the percentage of respondents state by state against total responses is shown and compared with the percentage of total ordinary member venues per state. Both ACT venues responded to the survey registering a 100% response rate with the next highest response rate contributed by New South Wales with 86%. Most states averaged approximately 75% response rates from ordinary members operating venues providing a strong confidence level in the data result.

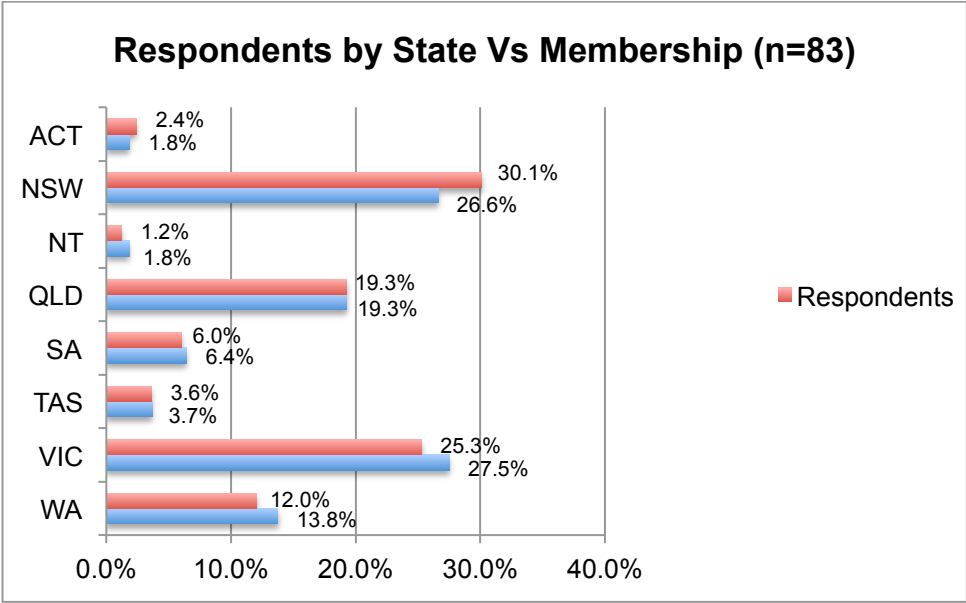


Figure 1: Respondents by State

FINDINGS

Respondents

The following venues listed in Table 1 responded to the survey:

State	Centre	Managed by	Population Served	Dist from Capital City (kms)	No. of Perf Spaces	Total Capacity	Annual Turnover	Annual Attendance
ACT	Canberra Theatre Centre	Stat Auth	900,000	-	3	1,954	9,008,931	219,716
	The Street Theatre	Contract Mgt	350,000	-	3	400	NA	NA
NSW	Albury Entertainment Centre	Local Govt	180,000	320	1	818	1,884,486	63,828
	Bathurst Memorial Entertainment Centre	Local Govt	42,000	200	2	1,642	1,790,579	47,791
	Capitol Theatre Tamworth	Local Govt	60,000	405	3	6,102	1,260,768	69,073
	Casula Powerhouse	Local Govt	190,000	40	1	326	NA	71,329
	Cessnock Community Performing Arts Centre	Local Govt	53,000	152	1	466	706,545	15,535
	City Recital Hall Angel Place	Company	4,293,000	-	1	1,238	NA	NA
	Coffs Harbour Jetty Memorial Theatre	Local Govt	75,000	300	1	249	NA	NA
	Dubbo Regional Theatre and Convention Centre	Local Govt	120,000	408	1	1,250	4,340,787	65,493
	Griffith Regional Theatre	Local Govt	55,000	575	1	523	1,189,413	24,080
	Hurstville Entertainment Centre	Local Govt	215,000	16	2	1,128	NA	137,233
	Illawarra Performing Arts Centre	Company	485,118	84	4+	801	3,705,683	130,846
	Joan Sutherland Performing Arts Centre	Company	500,000	55	3	1,288	3,418,069	224,505
	Laycock Street Com. Theatre	Local Govt	330,000	80	2	516	NA	NA
	Manning Entertainment Centre	Local Govt	95,000	310	1	505	721,071	26,843
	Monkey Baa Theatre Company	Company	4,293,000	-	1	380	NA	NA
	NIDA Parade Theatres	Educ Inst	100,000	10	4	1,260	NA	46,000
	NORPA, Northern Rivers Performing Arts	Company	240,000	200	2	750	NA	NA
	Orange Civic Theatre	Local Govt	100,000	255	1	502	2,111,945	44,990
	Queanbeyan Performing Arts Centre	Local Govt	443,409	10	1	346	NA	30,181
	Riverside Theatres Parramatta	Local Govt	200,000	26	3	1,062	5,199,616	160,673
Seymour Centre	Educ Inst	4,293,000	2	4	1,704	3,938,997	203,905	
Shoalhaven Ent. Centre	Local Govt	120,000	160	2	1,100	1,914,903	54,223	
Sutherland Ent. Centre	Local Govt	280,000	23	3	1,165	1,913,939	151,477	
The Glasshouse Arts Conference and Ent. Centre	Local Govt	75,000	388	2	694	4,016,100	122,000	
Wagga Wagga Civic Theatre	Local Govt	120,000	453	1	491	NA	NA	
NT	Darwin Entertainment Centre	Company	136,245	-	2	1,280	NA	87,867
QLD	Brisbane Powerhouse	Local Govt	2,100,000	3	3	875	10,745,799	NA
	Brolga Theatre	Local Govt	102,000	256	1	900	1,191,000	41,853
	Burdekin Theatre	Local Govt	20,000	1,200	3	1,612	738,393	96,000
	Cairns Civic Theatre	Local Govt	242,000	1,684	1	669	2,996,353	70,937
	Centre of Contemporary Arts Cairns	Bus Unit of Govt	160,285	1,684	1	250	NA	NA
	Empire Theatre	Company	250,000	125	4	2,297	4,842,495	118,711
	Gladstone Entertainment Centre	Local Govt	67,464	518	2	1,675	NA	NA
	Ipswich Civic Centre	Local Govt	195,000	39	2	921	NA	NA
Judith Wright Centre of Contemporary Arts	Bus Unit of Govt	2,100,000	3	2	380	NA	NA	

State	Centre	Managed by	Population Served	Dist from Capital City (kms)	No. of Perf Spaces	Total Capacity	Annual Turnover	Annual Attendance
QLD	Lake Kawana Community Centre	Local Govt	290,000	96	1	740	NA	86,636
	Logan Entertainment Centre	Local Govt	287,517	26	1	1,100	NA	NA
	Mackay Entertainment & Convention Centre	Local Govt	200,000	1,000	4+	3,000	NA	205,890
	Pilbeam Theatre	Local Govt	120,000	640	1	967	2,047,202	60,731
	Redland Performing Arts Centre	Local Govt	150,000	30	3	986	1,959,272	48,351
	The Events Centre	Company	300,000	95	2	1,540	2,943,465	92,129
	Townsville Civic Theatre	Local Govt	150,000	1,336	3	1,810	1,020,165	108,738
SA	Barossa Arts & Convention Centre	Educ Inst	40,000	70	2	1,155	1,089,807	23,813
	Golden Grove Arts Centre	Local Govt	98,000	25	1	329	NA	NA
	Marion Cultural Centre	Local Govt	85,000	13	1	280	NA	NA
	Murray Bridge Town Hall	Local Govt	15,000	80	1	300	NA	2,800
	The Hopgood Theatre	Stat Auth	180,000	30	2	612	513,428	37,989
TAS	Devonport Entertainment and Convention Centre	Local Govt	52,000	282	1	480	NA	NA
	The Burnie Arts and Function Centre	Local Govt	40,000	330	3	1,288	1,648,428	61,382
	Theatre Royal	Stat Auth	200,000	-	2	830	2,255,117	71,978
VIC	Arts Centre Melbourne	Stat Auth	4,880,000	-	4+	15,730	76,822,000	2,285,861
	Capitol Venues and Events	Local Govt	200,000	150	4	1,655	5,963,483	138,430
	Clocktower Centre	Local Govt	127,000	8	1	505	1,923,660	91,314
	Colac Otway Performing Arts and Cultural Centre	Local Govt	21,000	165	2	462	NA	16,099
	Darebin Arts and Entertainment Centre	Local Govt	300,000	11	4	885	NA	169,497
	Drum Theatre	Local Govt	750,000	35	1	521	NA	69,521
	Eastbank Centre - Riverlinks Venues	Local Govt	65,000	185	2	1,243	NA	NA
	Frankston Arts Centre	Local Govt	400,000	45	2	996	NA	165,949
	Geelong Performing Arts Centre	Stat Auth	290,000	75	3	2,655	NA	NA
	Hamilton Performing Arts Centre	Local Govt	16,000	295	3	800	NA	NA
	Her Majesty's Theatre	Local Govt	120,000	110	1	959	2,254,672	63,186
	Lighthouse Theatre	Local Govt	55,000	257	2	743	NA	61,620
	Melbourne Recital Centre	Company	4,880,000	1	2	1,150	NA	NA
	Melbourne Theatre Company	Educ Inst	5,000,000	1	2	734	NA	128,069
	Mildura Arts Centre	Local Govt	51,373	400	2	544	1,494,619	67,300
	Portland Arts Centre	Local Govt	20,000	359	1	144	NA	NA
	Swan Hill Town Hall Performing Arts and Convention Centre	Local Govt	10,000	340	1	860	NA	NA
	The Cube Wodonga	Local Govt	120,000	320	1	410	NA	NA
	Wangaratta Performing Arts Centre	Local Govt	100,000	250	1	520	NA	48,895
	West Gippsland Arts Centre	Local Govt	65,000	100	2	650	NA	66,949
Whitehorse Performing Arts Centre	Local Govt	163,697	15	1	414	NA	NA	
WA	Arts Margaret River Margaret River Cultural Centre	Company	15,000	270	1	350	NA	20,000
	Broome Civic Centre [Shire of Broome]	Local Govt	17,000	2,230	2	400	329,645	20,000
	Bunbury Regional Entertainment Centre	Contract Mgt	100,000	170	2	1,050	NA	NA
	Carnarvon Civic Centre	Local Govt	5,000	910	2	700	NA	NA
	Esperance Civic Centre	Local Govt	14,500	720	3	1,750	533,948	NA
	His Majesty's Theatre	Bus Unit of Govt	2,020,000	2	2	1,384	NA	NA
	Mandurah Performing Arts Centre	Inc. Assoc.	250,000	75	2	921	2,347,403	170,147
	Matt Dann Theatre & Cinema	Local Govt	20,000	1,648	2	452	NA	NA
	Queens Park Theatre	Local Govt	40,000	460	2	1,073	NA	NA
University Theatres - University of Western Australia	Educ Inst	2,020,000	-	4+	4,000	1,986,000	120,000	

Table 1: List of Respondents NOTE: NA indicates information not provided or confidential

Capacity

Figure 2 shows that almost two thirds of the respondents (63%) manage performing arts centres which have a capacity of between 261 and 1100. The venue size parameters have been decided arbitrarily and are consistent with previous years' parameters.

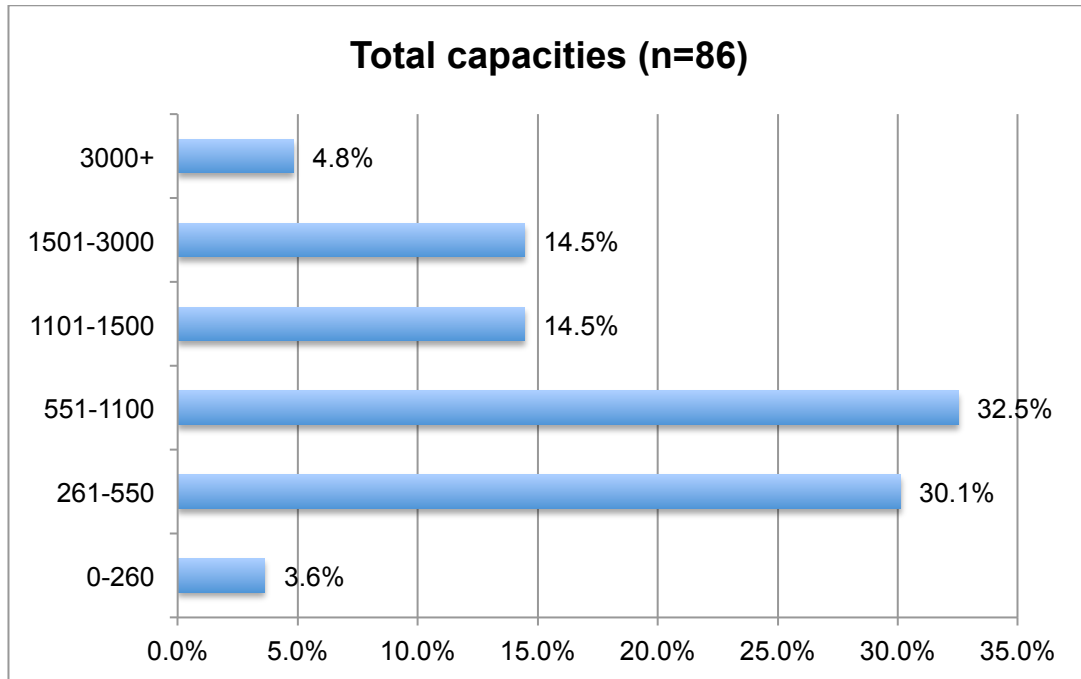


Figure 2: Distribution of Respondents by Seating Capacity

73.5% of respondents operate performing arts centres with either one or two performance spaces as show in Figure 3 below. Only 12% have four or more spaces.

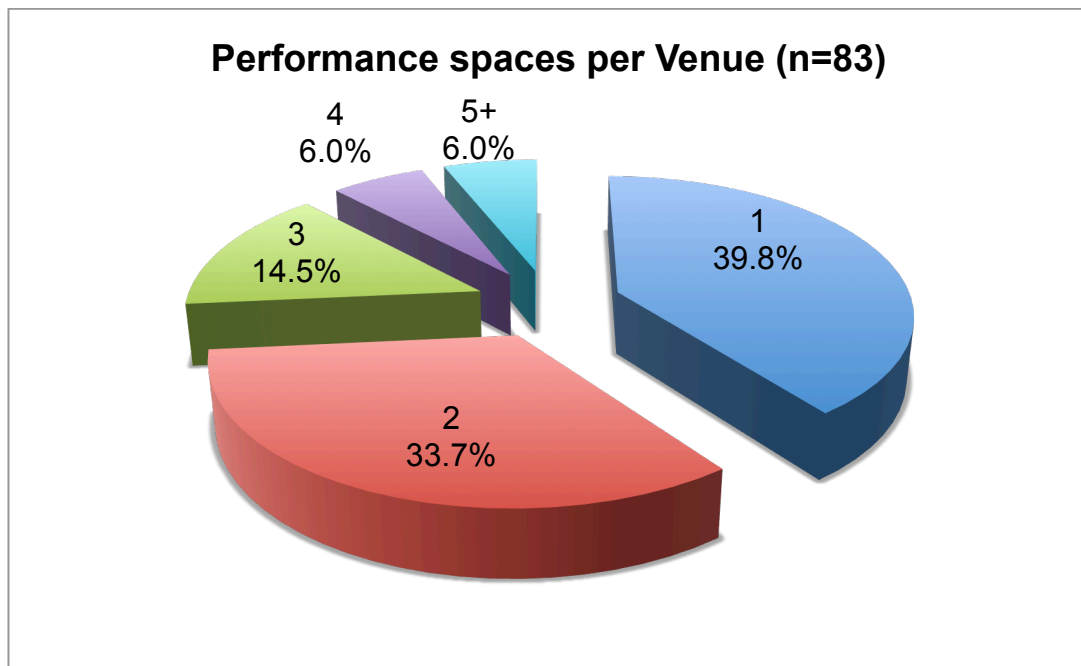


Figure 3: Performance Spaces

Figure 4 below shows that the majority of respondents' venues (66.3%) are managed directly by local government. In terms of ownership, local government's role is broader still (reaching 78.3%) as owners of the venues managed by separate legal entities. Two venue management entities recorded they maintain multiple contracts for management over venues owned by local government and respectively a state government agency and a private venue owner.

Results from APACA surveys over the past 8 years (2009, 2011, 2013 and the current 2015 results) shows a 9.9% decrease in venues that are managed by a separate legal entity (e.g.: Association, Statutory Authority or Company Limited by Guarantee) with an 8.3% increase in direct management of a business unit by the Government owner. This variation is presented with the understanding that each survey attracts a different mix of venues.

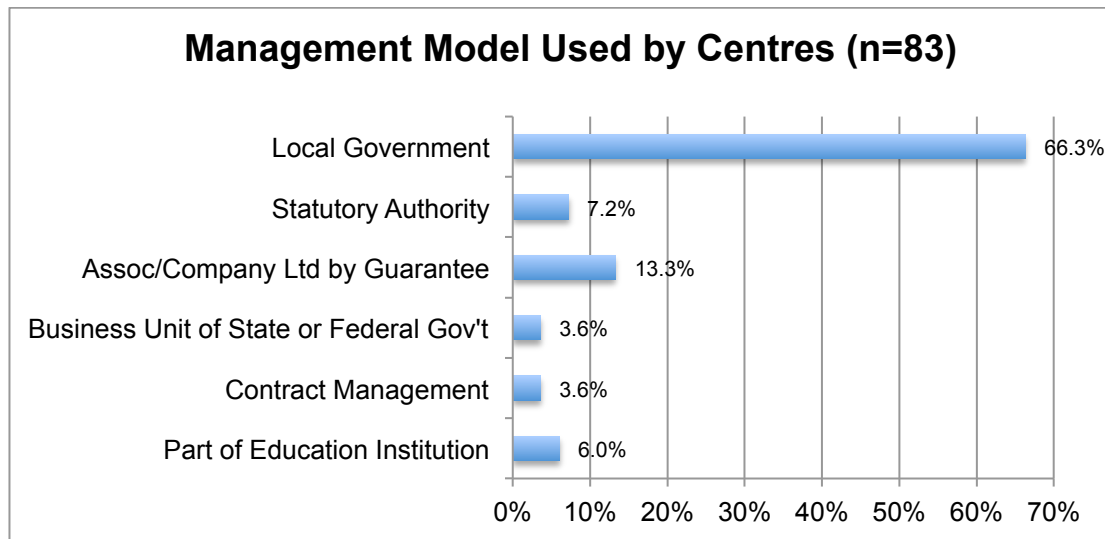


Figure 4: Management Models

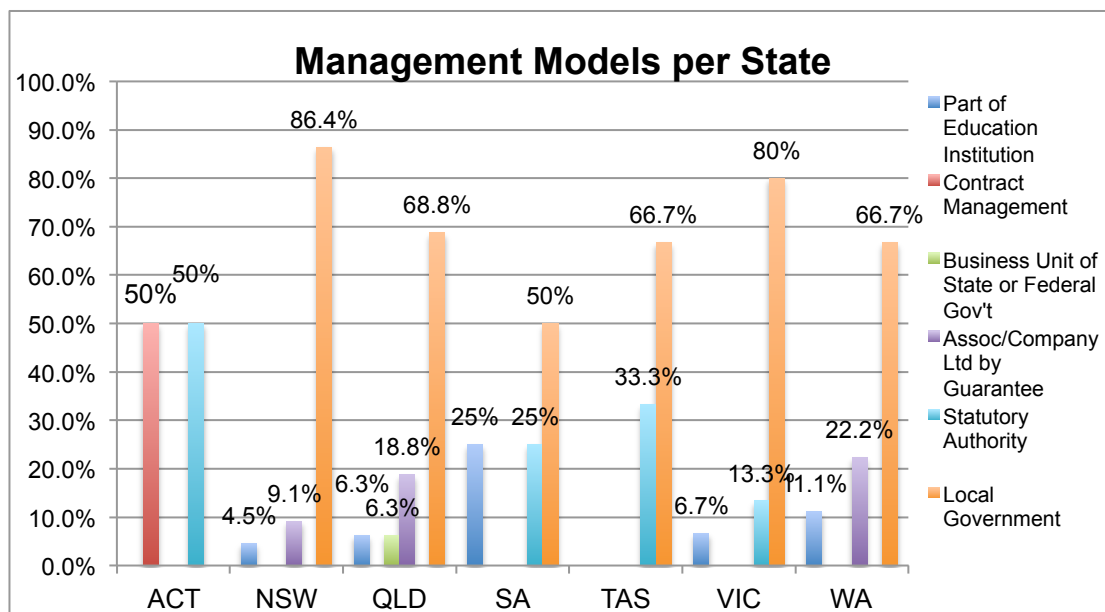


Figure 5: Management Models Used per State

Financial Snapshot

In order to understand the indicative scope of financial activity in the sector, respondents were asked to provide their last annual financial statement. Comprehensive and validated financial data was provided by a total of 50 respondent venues with a combined turnover of \$211.7 million as shown in Table 2.

There are some difficulties in collating financial data in this form, as local government venues often show their operating deficit as an adjusted local government contribution under income, while those managed by separate legal entities have a final deficit or surplus that is taken up in their own separate balance sheets.

Of the 33 respondents reporting on how a surplus is treated, 18 (54.5%) of venues stated that they were able to retain this amount. The treatment of retained surplus varies with 10 venues reporting they are able to transfer amounts into a general purpose reserve, 4 are able to transfer to either a building, capital or programming reserve and 4 venues are able to add the surplus to the available funds for the following year.

The income generated from venue activities has increased from results of the 2013 survey but remains consistent with 2011 and 2009 results. Total funding from local government sources has substantially increased from 2009 at 9.7% to 2015 at 27.1% although the highest level of support was reported in 2013 at 34.8% of total income. Overall, government funding support has reduced by 10% in the last two years.

Table 2 shows that expenditure remains consistent with the 2011 and 2009 survey results. In 2013, the expenditure figures were reported as considerably lower than in previous surveys and the net surplus is considerably higher. Even with a lower number of participant venues (80 in 2013 and 50 in 2015), the inclusion of a number of larger city venues in the 2015 survey provides a significant increase in the volume of activities and a healthy net surplus.

Financial Overview (n=50)		
INCOME		% of Total
Box Office	\$28,084,641	13.30%
Ticketing Services	\$19,644,966	9.30%
Contract Performance Fees	\$2,411,047	1.10%
Venue Hire	\$21,711,688	10.30%
Recoverables	\$28,120,491	13.30%
Food & Beverage	\$25,244,643	11.90%
Merchandise	\$580,296	0.30%
Interest	\$1,252,559	0.60%
Other earned income	\$4,040,509	1.90%
Sub-total Earned income	\$131,090,840	61.90%
Federal Funding	\$928,319	0.40%
State/Territory Funding	\$14,446,696	6.80%
Local Govt Funding	\$57,391,133	27.10%
Sub-total Funding	\$72,766,148	34.40%
Philanthropic Trusts	\$4,067,484	1.90%
Sponsorship (monetary)	\$941,563	0.40%
Sponsorship (in-kind)	\$1,160,285	0.50%
Donations/Fundraising	\$1,619,997	0.80%
Non-government grants	\$129,500	0.10%
Sub-total Private Support	\$7,918,829	3.70%
TOTAL INCOME	\$211,775,818	
EXPENDITURE		
Labour costs	\$85,693,089	41.30%
Marketing/Promotions	\$9,396,793	4.50%
Show Purchases	\$21,992,734	10.60%
Program expenses	\$11,480,642	5.50%
Food & Beverage costs	\$20,389,327	9.80%
Administration	\$17,483,510	8.40%
Repairs & Maintenance	\$19,526,634	9.40%
Other Expenses	\$21,418,700	10.30%
TOTAL EXPENDITURE	\$207,381,430	
NET RESULT	\$4,394,388	

Table 2: Financial Overview – All Venues

The following four tables provide a financial overview segmented into categories based on each venue's operational turnover annually. Table 3 provides the financial overview for venues in the category of up to \$1 million in annual turnover. The eight venues included in this group each operate in a regional area and service communities with an average population of 85,000 people or less.

Financial Overview \$0-\$1M (n=8)		
INCOME		% of Total
Box Office	\$689,572	12.25%
Ticketing Services	\$475,875	8.45%
Contract Performance Fees	\$0	-
Venue Hire	\$976,184	17.34%
Recoverables	\$584,872	10.39%
Food & Beverage	\$153,967	2.73%
Merchandise	\$20,930	0.37%
Interest	\$2,981	0.05%
Other earned income	\$40,991	0.73%
Sub-total Earned income	\$2,945,372	52.31%
Federal Funding	\$0	-
State/Territory Funding	\$246,230	4.37%
Local Govt Funding	\$2,431,494	43.18%
Sub-total Funding	\$2,677,724	47.56%
Philanthropic Trusts	\$0	-
Sponsorship (monetary)	\$4,000	0.07%
Sponsorship (in-kind)	\$3,000	0.05%
Donations/Fundraising	\$418	0.01%
Non-government grants	\$0	-
Sub-total Private Support	\$7,418	0.13%
TOTAL INCOME	\$5,630,514	
EXPENDITURE		
Labour costs	\$2,761,844	45.33%
Marketing/Promotions	\$217,201	3.56%
Show Purchases	\$562,788	9.24%
Program expenses	\$252,192	4.14%
Food & Beverage costs	\$62,508	1.03%
Administration	\$611,485	10.04%
Repairs & Maintenance	\$229,271	3.76%
Other Expenses	\$1,395,511	22.9%
TOTAL EXPENDITURE	\$6,092,800	
NET RESULT	-\$462,286	

Table 3: Financial Overview – Venues with Annual Turnover from \$0 to \$1 Million

The 19 venues included in this group have an annual turnover of between \$1 million and \$2 million. The majority operate in a regional area and three are small capacity venues located within a capital city. Excluding the capital city venues, the average size of the communities the remaining 16 venues service has a population base of approximately 100,000 people.

Financial Overview - Annual Turnover \$1M-\$2M (n=19)		
INCOME		% of Total
Box Office	\$2,183,518	7.32%
Ticketing Services	\$1,266,894	4.25%
Contract Performance Fees	\$869,992	2.92%
Venue Hire	\$3,254,223	10.91%
Recoverables	\$3,811,818	12.78%
Food & Beverage	\$2,860,311	9.59%
Merchandise	\$36,577	0.12%
Interest	\$0	-
Other earned income	\$741,757	2.49%
Sub-total Earned income	\$15,025,091	50.38%
Federal Funding	\$654,359	2.19%
State/Territory Funding	\$1,640,958	5.50%
Local Govt Funding	\$12,417,763	41.64%
Sub-total Funding	\$14,713,080	49.33%
Philanthropic Trusts	\$0	-
Sponsorship (monetary)	\$72,203	0.24%
Sponsorship (in-kind)	\$10,000	0.03%
Donations/Fundraising	\$2,755	0.01%
Non-government grants	\$0	-
Sub-total Private Support	\$84,958	0.28%
TOTAL INCOME	\$29,823,129	
EXPENDITURE		
Labour costs	\$13,558,164	46.16%
Marketing/Promotions	\$902,222	3.07%
Show Purchases	\$1,902,699	6.48%
Program expenses	\$1,023,179	3.48%
Food & Beverage costs	\$1,425,906	4.85%
Administration	\$2,240,407	7.63%
Repairs & Maintenance	\$1,474,637	5.02%
Other Expenses	\$6,843,263	23.3%
TOTAL EXPENDITURE	\$29,370,477	
NET RESULT	\$452,652	

Table 4: Financial Overview – Venues with Annual Turnover from \$1 Million to \$2 Million

The 17 venues included in the Table 5 group have an annual turnover of between \$2 million and \$5 million. With one exception, these venues operate in regional areas with populations above 200,000 people on average. 47% are operated by a management entity at arms-length from the venue owner. Local Government owns 76.5% in this group of venues.

Financial Overview - Annual Turnover \$2M-\$5M (n=17)		
INCOME		% of Total
Box Office	\$8,634,374	15.68%
Ticketing Services	\$4,019,105	7.3%
Contract Performance Fees	\$295,014	0.54%
Venue Hire	\$6,388,811	11.6%
Recoverables	\$6,618,157	12.02%
Food & Beverage	\$4,334,757	7.87%
Merchandise	\$198,919	0.36%
Interest	\$240,042	0.44%
Other earned income	\$1,583,523	2.88%
Sub-total Earned income	\$32,312,702	58.69%
Federal Funding	\$216,109	0.39%
State/Territory Funding	\$3,258,114	5.92%
Local Govt Funding	\$17,570,556	31.91%
Sub-total Funding	\$21,044,779	38.22%
Philanthropic Trusts	\$127,500	0.23%
Sponsorship (monetary)	\$347,588	0.63%
Sponsorship (in-kind)	\$57,000	0.1%
Donations/Fundraising	\$1,150,944	2.09%
Non-government grants	\$17,500	0.03%
Sub-total Private Support	\$1,700,532	3.09%
TOTAL INCOME	\$55,058,013	
EXPENDITURE		
Labour costs	\$24,275,181	44.9%
Marketing/Promotions	\$2,696,205	4.99%
Show Purchases	\$4,835,482	8.94%
Program expenses	\$2,653,533	4.91%
Food & Beverage costs	\$2,732,332	5.05%
Administration	\$6,082,022	11.25%
Repairs & Maintenance	\$2,283,028	4.22%
Other Expenses	\$8,504,956	15.73%
TOTAL EXPENDITURE	\$54,062,739	
NET RESULT	\$995,274	

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

Table 6 provides the financial overview of five venues with an annual turnover above \$5 million and less than \$12 million, three of these venues are operating within a city environment. For this financial overview, one major city venue that provided data in

the survey was excluded as its turnover is well above \$15 million which would skew the combined figures.

Financial Overview - Annual Turnover \$5M-\$12M (n=5)		
INCOME		% age of Total
Box Office	\$8,348,177	19.89%
Ticketing Services	\$6,564,092	15.64%
Contract Performance Fees	\$12,041	0.03%
Venue Hire	\$3,618,470	8.62%
Recoverables	\$2,739,643	6.53%
Food & Beverage	\$3,745,608	8.93%
Merchandise	\$323,869	0.77%
Interest	\$169,536	0.4%
Other earned income	\$1,674,239	3.99%
Sub-total Earned income	\$27,195,676	64.81%
Federal Funding	\$57,851	0.14%
State/Territory Funding	\$2,301,394	5.48%
Local Govt Funding	\$10,237,320	24.4%
Sub-total Funding	\$12,596,565	30.02%
Philanthropic Trusts	\$97,984	0.23%
Sponsorship (monetary)	\$517,772	1.23%
Sponsorship (in-kind)	\$1,090,285	2.6%
Donations/Fundraising	\$465,880	1.11%
Non-government grants	\$0	-
Sub-total Private Support	\$2,171,921	5.18%
TOTAL INCOME	\$41,964,162	
EXPENDITURE		
Labour costs	\$16,041,900	39.09%
Marketing/Promotions	\$2,800,165	6.82%
Show Purchases	\$4,093,765	9.98%
Program expenses	\$6,015,738	14.66%
Food & Beverage costs	\$4,024,581	9.81%
Administration	\$4,366,597	10.64%
Repairs & Maintenance	\$2,297,699	5.60%
Other Expenses	\$1,392,969	3.39%
TOTAL EXPENDITURE	\$41,033,414	
NET RESULT	\$930,748	

Table 6: Financial Overview – Venues with Annual Turnover from \$5 Million to \$12 Million

Of the total of 50 venues providing full financial data, 38 venue respondents reported operating within either a Local or State Government environment as a Business Unit or within a University department and are generally working with budgets requiring a breakeven result at the end of the financial year. Table 7 provides a financial overview of their data.

57% of these venues provided data showing the subsidy received is equal to the total income earned less expenses giving a zero end of year result. 23% of these venues showed an operating surplus while 20% showed a deficit in their yearly operational result.

Financial Overview - Venues managed within Government (n=38)		
INCOME		% age of Total
Box Office	\$10,885,299	14.01%
Ticketing Services	\$7,950,097	10.23%
Contract Performance Fees	\$1,053,893	1.36%
Venue Hire	\$9,116,967	11.73%
Recoverables	\$8,028,926	10.33%
Food & Beverage	\$6,627,102	8.53%
Merchandise	\$450,217	0.58%
Interest	\$3,977	0.01%
Other earned income	\$2,102,179	2.7%
Sub-total Earned income	\$46,218,657	59.47%
Federal Funding	\$833,220	1.07%
State/Territory Funding	\$2,215,582	2.85%
Local Govt Funding	\$33,810,532	43.5%
Sub-total Funding	\$36,859,334	47.43%
Philanthropic Trusts	\$185,484	0.24%
Sponsorship (monetary)	\$370,412	0.48%
Sponsorship (in-kind)	\$50,900	0.07%
Donations/Fundraising	\$442,118	0.57%
Non-government grants	\$-	0.00%
Sub-total Private Support	\$1,048,914	1.35%
TOTAL INCOME	\$84,126,906	
EXPENDITURE		
Labour costs	\$35,444,424	45.64%
Marketing/Promotions	\$3,456,681	4.45%
Show Purchases	\$7,646,638	9.85%
Program expenses	\$6,329,970	8.15%
Food & Beverage costs	\$5,139,142	6.62%
Administration	\$7,140,889	9.19%
Repairs & Maintenance	\$4,105,939	5.29%
Other Expenses	\$15,413,638	19.85%
TOTAL EXPENDITURE	\$84,677,322	
NET RESULT	\$-550,416	

Table 7: Financial Overview - Venues managed within Government or University environments

Table 8 isolates the data contributed by 12 venues reporting their management as being at arms length from the Government owner of their building. Five of these venues report their management model as a Statutory Authority and five operate through a Company Limited by Guarantee owned by their Local Government

authority. Five of these venues are located in a capital city and seven are within 150 kilometres of their nearest capital city.

Their data when compared with the results in Table 2 shows they represent 60.3% of the total income and 59.2% of the total expenditure. These venues also receive 49.4% of total funding support from Local, State or Federal government sources to Table 2 and 86.7% of the total private funding support.

Financial Overview - Venues managed by a Separate Entity (n=12)		
INCOME		% age of Total
Box Office	\$17,199,342	12.83%
Ticketing Services	\$11,694,869	8.72%
Contract Performance Fees	\$1,357,154	1.01%
Venue Hire	\$12,594,721	9.40%
Recoverables	\$20,091,565	14.99%
Food & Beverage	\$18,617,541	13.89%
Merchandise	\$130,079	0.1%
Interest	\$1,248,582	0.93%
Other earned income	\$1,938,330	1.45%
Sub-total Earned income	\$84,872,183	63.31%
Federal Funding	\$95,099	0.07%
State/Territory Funding	\$12,231,114	9.12%
Local Govt Funding	\$23,580,601	17.59%
Sub-total Funding	\$35,906,814	26.78%
Philanthropic Trusts	\$3,882,000	2.90%
Sponsorship (monetary)	\$571,151	0.43%
Sponsorship (in-kind)	\$1,109,385	0.83%
Donations/Fundraising	\$1,177,879	0.88%
Non-government grants	\$129,500	0.1%
Sub-total Private Support	\$6,869,915	5.12%
TOTAL INCOME	\$127,648,912	
EXPENDITURE		
Labour costs	\$50,248,665	21.83%
Marketing/Promotions	\$5,940,112	2.58%
Show Purchases	\$14,346,096	6.23%
Program expenses	\$5,150,672	2.24%
Food & Beverage costs	\$15,250,185	6.63%
Administration	\$10,342,621	4.49%
Repairs & Maintenance	\$15,420,695	6.7%
Other Expenses	\$6,005,062	2.61%
TOTAL EXPENDITURE	\$122,704,108	
NET RESULT	\$4,944,804	

Table 8: Financial Overview – Venues managed by Separate Entity

Turnover

Turnover ranged from \$716,500 to \$79.3 million, a wider range than the 2013 survey but consistent with data reported in the 2011 survey (Figure 6).

Venues with less than 260 seats did not respond to the 2015 survey while large venues with multiple spaces provided a new category of 3000 or more seats. The extremities of the range are higher than in previous surveys, mostly due to the inclusion of high capital city arts centres.

The following figures required collated data from both Parts 1 and 2 of the survey and, as such, have a low number of respondents (n=48). To ensure consistency with previous survey results and prevent skew, one large, capital city centre operating multiple large spaces has been omitted from this particular data.

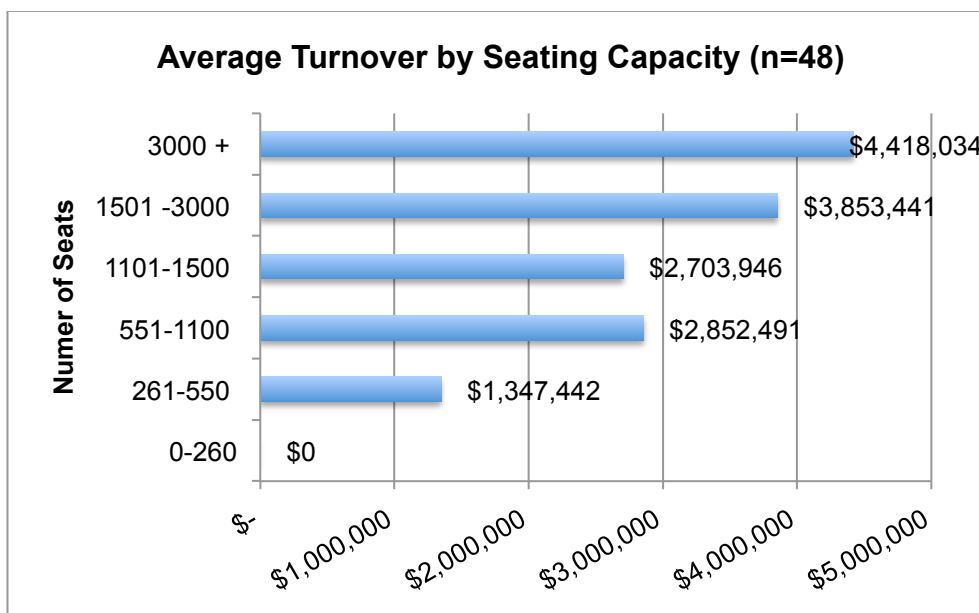


Figure 6: Average Turnover by Seating Capacity

Figure 6 above shows a higher turnover for all categories excepting venues with three performance spaces when compared with the 2013 survey. An additional five or more spaces category has been included for this survey. Again, one major city venue was excluded as the 5+ spaces category was significantly skewed by an average of \$3.7 million to over \$22 million turnover.

In the group of 10 venues with three spaces, 50% are venues with less than 500 seats providing an average turnover result approximately \$800,000 less than in 2013 (although the average \$2.8 million is consistent with 2011 and 2009 results).

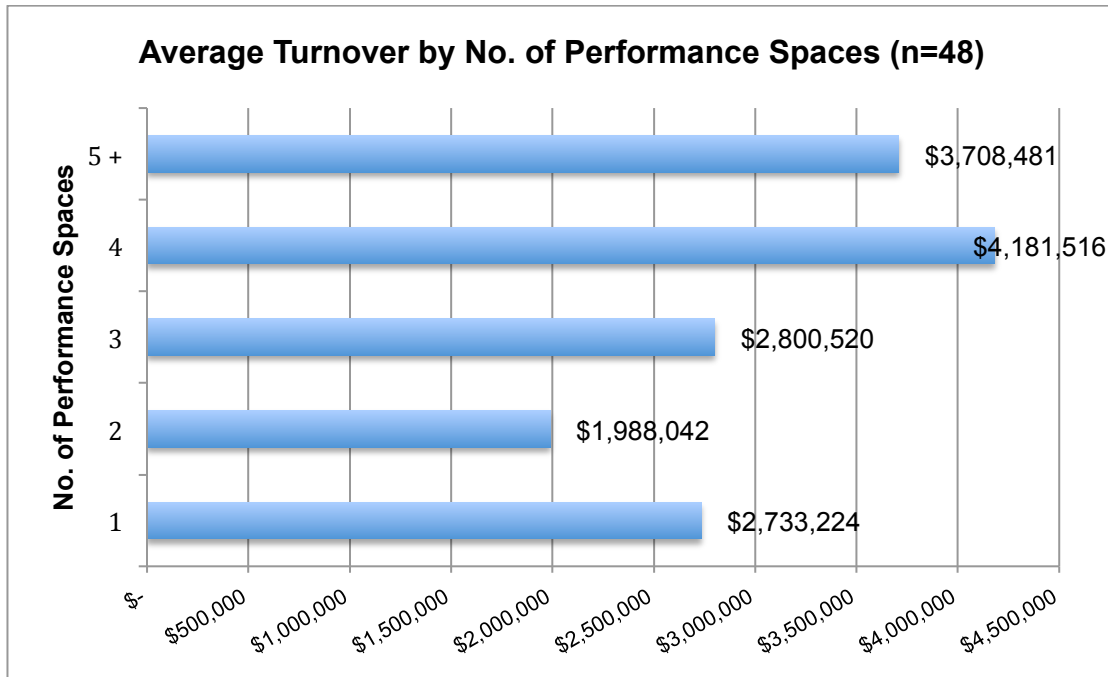


Figure 7: Average Turnover by No. of Performance Spaces

Figure 8 shows the effect on turnover of a centre’s distance from the nearest capital city. While it displays no obvious trend as such, it does suggest that there are certain “sweet spots” geographically. One major capital city venue is not included in the grouping of city and metropolitan venues within 10 kilometres of the city centre as inclusion of this data skews the average turnover from \$4.6 million to over \$23 million. Respondents operating venues furthest from a capital city are located in larger populated areas in north Queensland and the north of Western Australia.

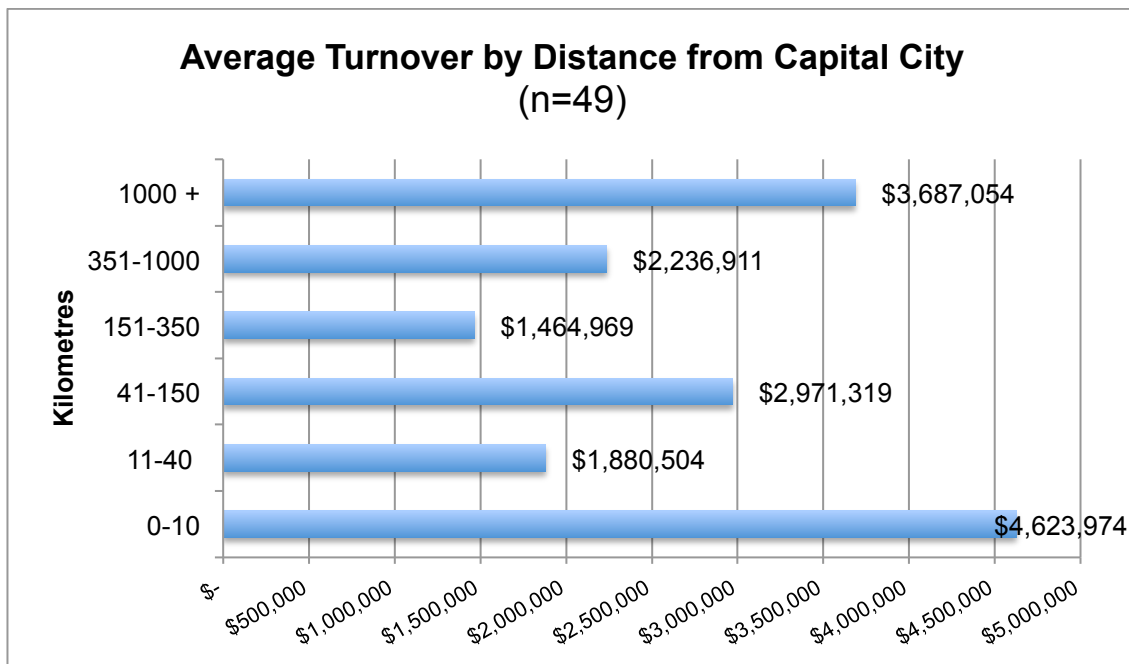


Figure 8: Average Turnover by Distance from the Nearest Capital City

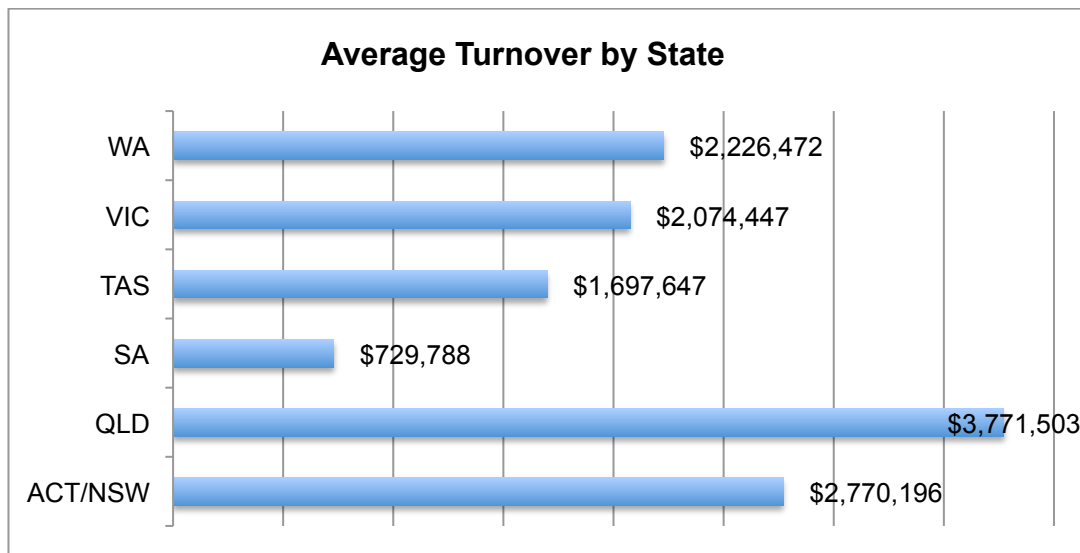


Figure 9: Average Turnover by State (note: a major city venue excluded from data above)

Local Government subsidy represents the largest source of income at just under one third (27.1%) of all revenue. This percentage has reduced since 2013 where Local Government provided 34.8% of all revenue.

Income from venues' entrepreneurial program has changed marginally from 2013 figures (Box Office from 13.7% to 13.3% and Venue Hire from 9.8% to 10.3%). In the 2013 survey, Food and Beverage income decreased to 6.1% (from 12.1% in 2011) and Ticketing Services dropped to 6.1% (8.4% in 2011). The 2015 survey shows both categories have returned to 2011 levels at 11.9% income from Food and Beverage and 9.3% for the provision of Ticketing Services.

Income from monetary categories of private support (Philanthropic Trusts, Sponsorship and Donations/Fundraising) has increased by almost 1%. This increase represents \$3.5 million that can be attributed in its entirety to the inclusion of the one major capital city venue. By excluding this venue, private support for venues has decreased by approximately \$500,000 since 2013.

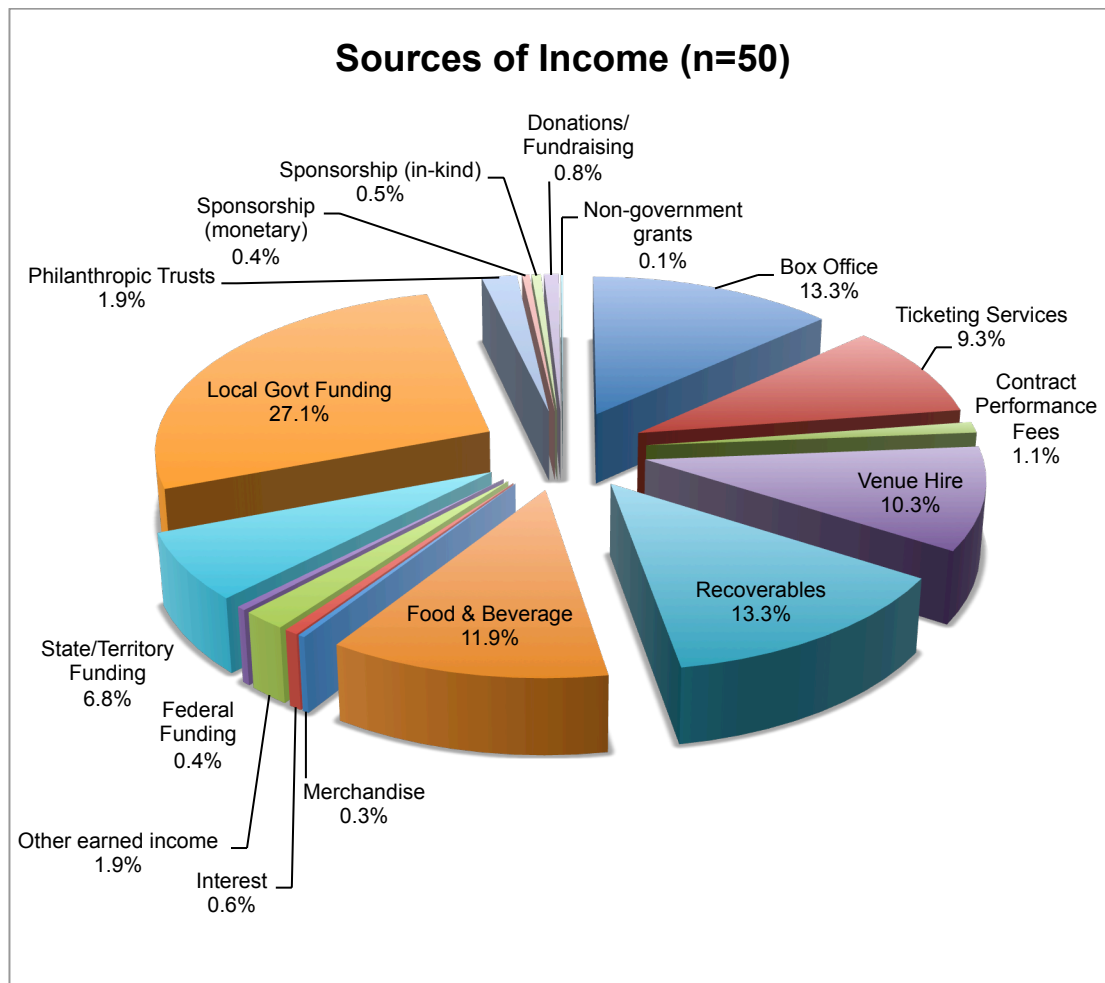


Figure 10: Sources of Income

Expenses

Labour costs remain the largest expense for respondents (41.4%) representing \$85.7M in employment for the sector. Employment also benefits from a reported doubling of food and beverage costs from \$5.5M in 2013 to \$20.4M in 2015.

Expenditure on entrepreneurial programming (show purchases 10.6% and program expenditure 5.5%) is slightly lower than in 2013 (17.1% combined) although still higher than in 2009 (13% combined) and 2011 (15.8% combined).

Respondents spent just under \$22M purchasing and presenting their programs, with another \$9.3M spent on marketing these events and their venues. Both these figures are higher than the 2013 survey's figures of \$12.9M and \$7M respectively, although compare well with the 2011 results showing \$24M for purchase and presentation of programs and \$8.2M for marketing.

Repairs and Maintenance also shows a significant increase since 2013 moving from 4.4% to 9.4% although as shown in Tables 3 and 4, much of the increase can be attributed to the inclusion of one major capital city venue.

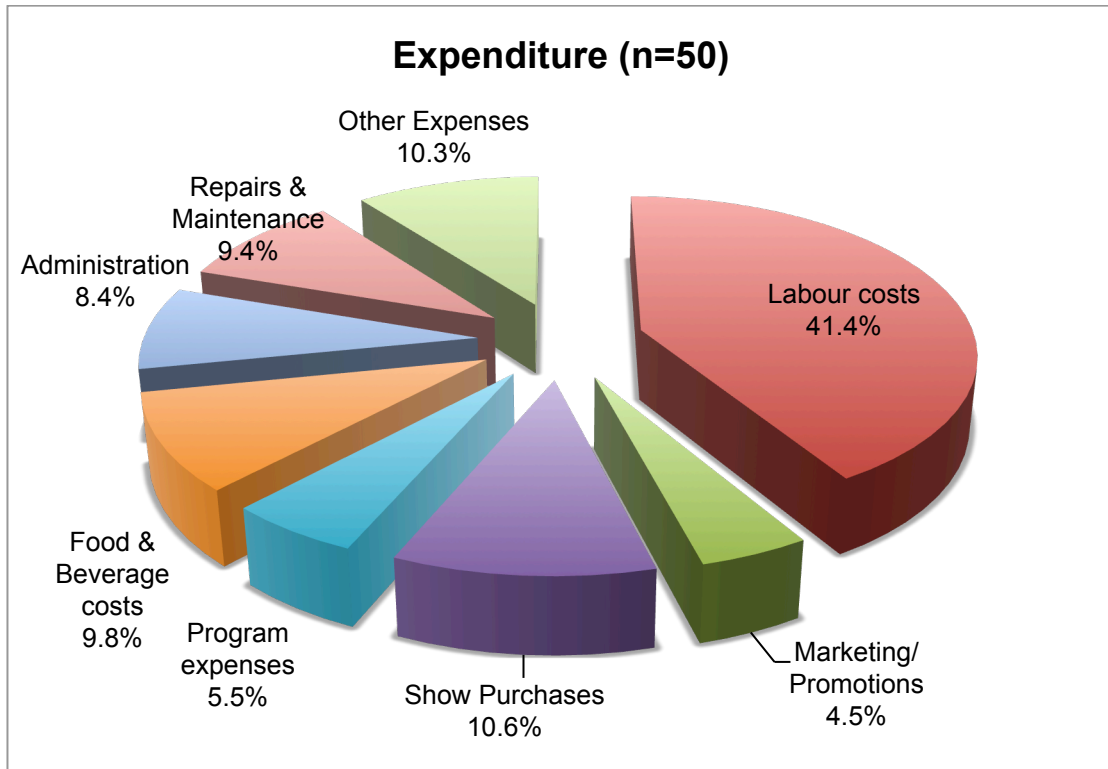


Figure 11: Expenditure Breakdown

Funding

Figure 12 represents the breakdown of total operational government funding received by respondents. It shows Federal Government Funding has remained static at 1.3% and State/Territory Funding has shown 0.1% increase from 19.8% in 2013. However, by excluding the one major capital city venue that receives significant funding from its State Government agency, the percentage of State/Territory Funding received by the remaining 49 venues across Australia shows a reduction by 5.26% from 2013 results. Local Government remains the largest contributor at \$57.4 million.

48 respondents provided the total value of the contribution made by their primary source of operational subsidy including the total value of their Community Service Obligation (CSO). Approximately one quarter of these venues also recognised the value of services such as business support in accounting or IT services provided by their parent organisation. The total value reported is just over \$75 million.

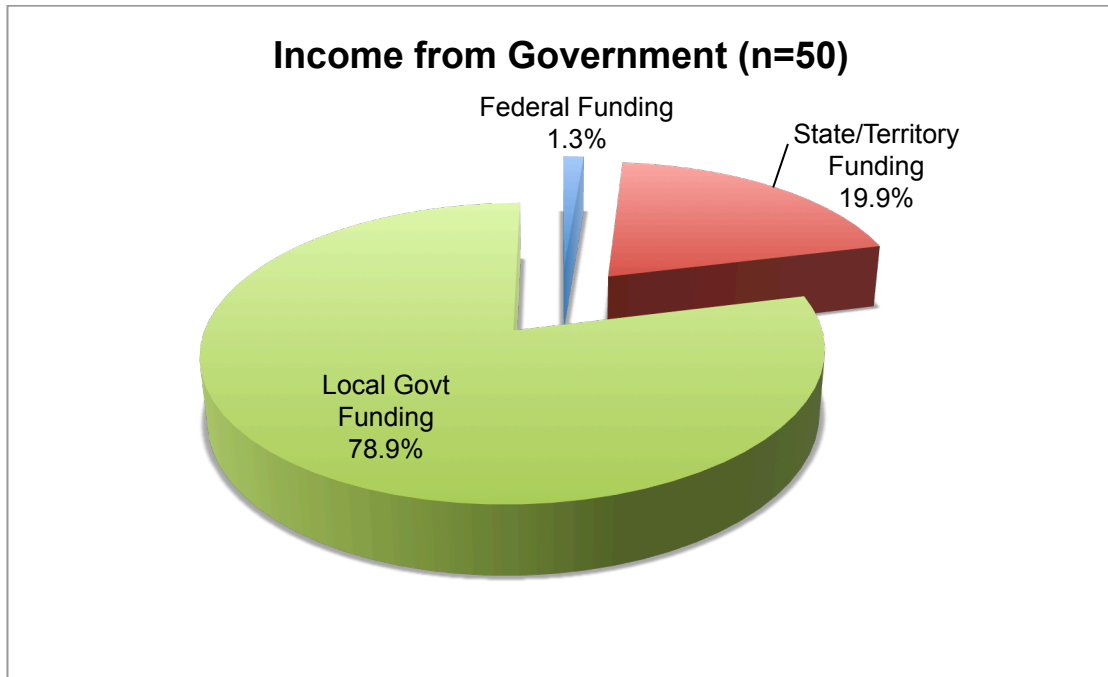


Figure 12: Total Income from Government

The breakdown of funding sources for capital expenditure is shown at Figure 13. At 24.2% Federal funding is higher than in previous surveys (17.2% in 2013 and 11% in 2011) although it should be noted this result includes a one-off grant towards a major regional centre's building project that attracted a total \$29.2M contribution across all three levels of government. Local Government funding towards Capital projects shows a considerably lower comparative percentage than previous reports mainly due to the inclusion of reported funding from other sources.

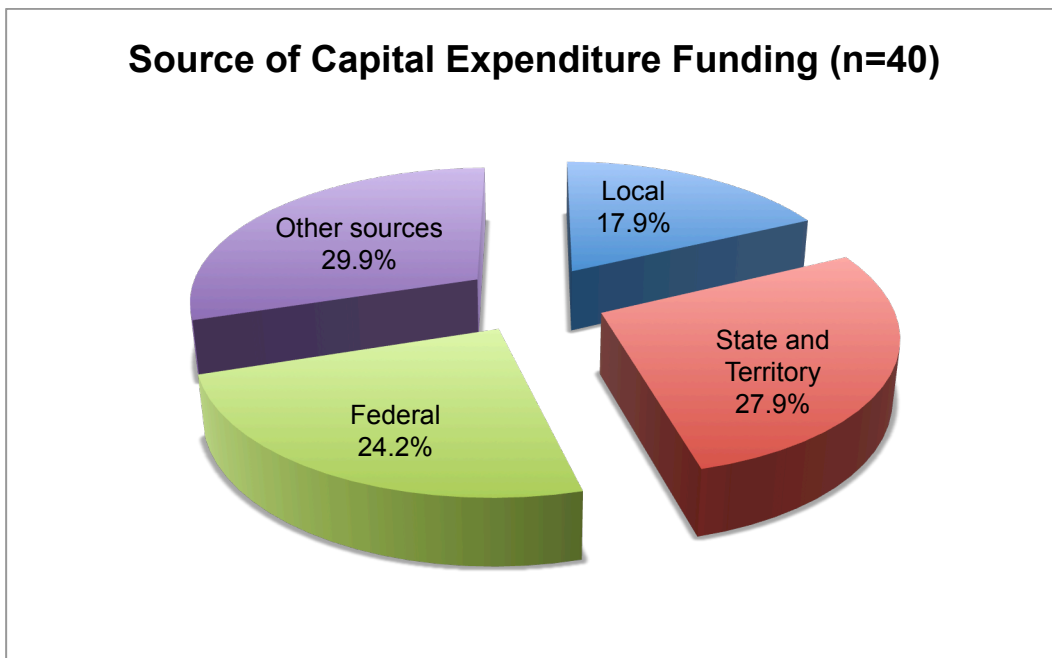


Figure 13: Sources of Capital Expenditure Funding

In 2015, eight venues reported attracting capital from other sources at 29.9% of the total, which changes the weighting of contributions by the three levels of government. This is a significant change over previous survey results that in 2011 reported other sources contributing 4% towards capital projects (nil was reported in 2013).

Figure 13 shows the comparison of Capital Funding sources between only Local, State/Territory and Federal sources over three surveys.

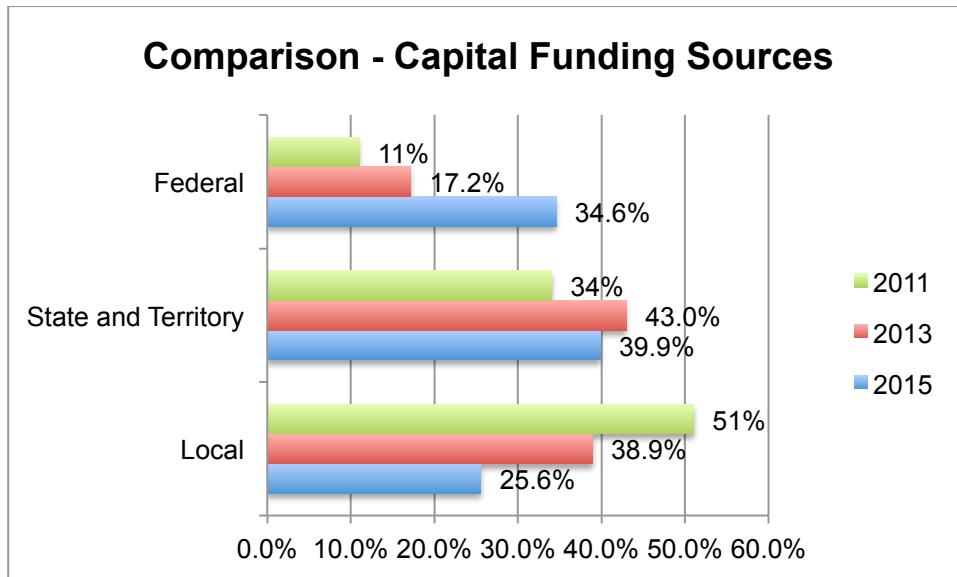


Figure 14: Comparison of Sources of Capital Expenditure Funding 2011 to 2015

Venue Utilisation

The average total utilisation rate for all spaces operated by 73 venues across Australia has increased by 0.1% (59% in 2015) over 2013 results (58% up from 54.7% in 2009). The average occupancy rate for the respondents' primary venue is also at 59%, equal to the 2013 survey rate although lower than in the 2011 survey (61%).

	Perf Space 1	Perf Space 2	Perf Space 3	Perf Space 4	Perf Space 5	All Spaces
Utilisation	59%	52%	59%	56%	64%	59%
Avg # Seats	654	334	407	300	207	
Avg # Days Available	313	315	299	254	188	314
Average # Days Unused	127	152	124	111	68	128
Number Sampled (n=)	82	50	21	10	4*	

Table 9: Venue Utilisation by Performance Spaces

* Data for performance spaces 5 calculates from a small a sample size

The utilisation rate varies from state to state as shown in Table 10. The number of days annually available in each venue is rarely 365 days as in some venues, operational conditions and costs preclude uses on days such as public holidays or when a space is allocated to maintenance and equipment installation.

State	Average Utilisation%	Avg # Days Available	Avg # days Used	Sample size
ACT*	NA	NA	NA	1
NSW	58.3%	312	182	22
NT*	NA	NA	NA	1
QLD	59.4%	330	196	12
SA	54.9%	334	183	5
TAS	32.6%	287	94	3
VIC	67.1%	317	213	19
WA	64.1%	289	185	10

Table 10: Average Utilisation of all Spaces by State

* Data provided from the ACT and NT is excluded so as not to identify the one venue respondent.

Activity Levels

As cultural hubs in their respective communities, performing arts centres host a range of both performing arts and community events. Table 11 demonstrates the respondents' overall level of venue activity.

While this survey samples an average of 60% of all APACA venue members, these results give an indication of the total volume of activity being undertaken. Significant numbers of people are attending performing arts centres in Australia, the sample venue members are attracting over \$9.15 million attendances annually.

The number of performances presented by member venues has risen significantly over the past six years from 8,495 (n=72) in 2011 to 13,116 (n=76) in 2013 and in these results, has almost doubled to 24,425 (n=64). Approximately, 12% of the increase can be attributed to the inclusion of data belonging to one major capital city venue.

The total attendances at performances is also shown to have increased over time, with 64 respondents in 2009 attracting over 4.5 million people rising to almost 5 million in 2015. In 2009, three major capital city venues (The Arts Centre Melbourne, Sydney Opera House and the Queensland Performing Arts Centre) contributed to the data. The comparative 2015 results indicates increases in attendances at regional venues over the six-year period.

State	Total Perfs n=64	Total Attendance at Perfs n=66	Total all Activities n=68	Attendance at all Activities n=64	Total Non- Arts Activities n=64	%age Non- Arts Activities
ACT	144	207,578	155	219,716	11	7%
NSW	10,618	1,376,470	12,100	1,949,757	1,482	12%
NT	255	84,000	260	87,867	5	2%
QLD	2,283	598,777	5,008	1,114,890	2,725	54%
SA	404	28,759	834	94,996	430	52%
TAS	726	126,777	1,142	160,511	416	36%
VIC	8,363	2,223,077	14,452	3,903,976	6,089	42%
WA	1,632	348,809	2,333	1,616,950	701	30%
Total	24,425	4,994,247	36,284	9,148,663	11,859	33%

Table 11: Venue Activity Levels

Figure 15 shows that 32.7% of annual activity in the respondent venues was non-arts activities. The number of arts activities conducted in respondent venues annually has increased in 6 years from 63% in 2011, 66% in 2013 to 67.3% in 2015.

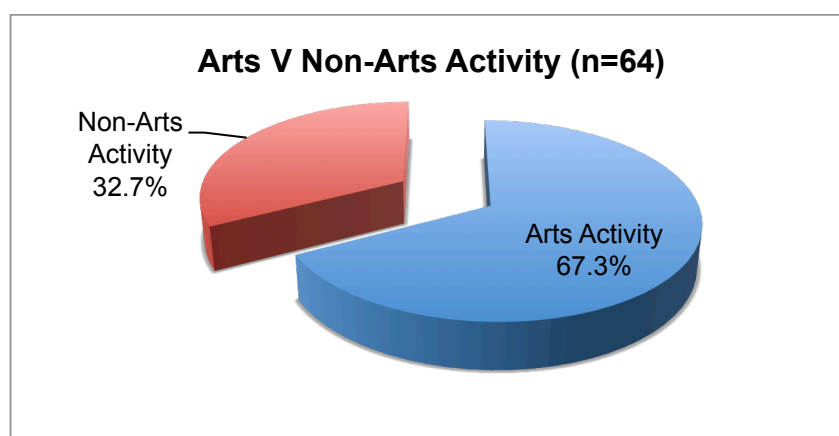


Figure 15: Activity Type

Community usage has decreased to 52.2% having risen to 65% in 2013, although the 2015 percentage is more consistent with a 55% result recorded in 2011. Community events are defined as activities produced by amateur performance groups, dance and drama school concerts, etc using the respondent venue for their presentations.

Most states excepting the Australian Capital Territory (ACT), Queensland (QLD) and South Australia (SA) show an increase in the number of community activities and overall, the level of community use has increased from 5,145 in 2013 to 5,362 in the 2015 survey results.

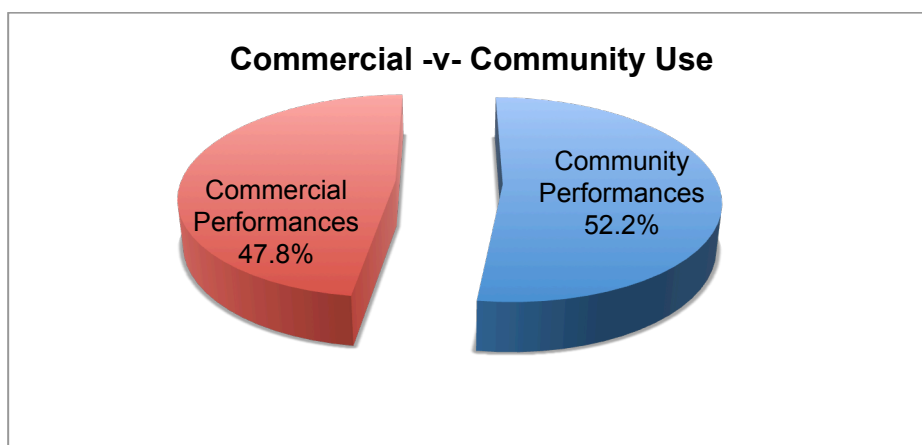


Figure 16: Community -v- Commercial Use

Table 12 shows a breakdown by state of community and commercial performances. Commercial use has seen a dramatic increase from 35% in 2013 to 47.8% in 2015. Queensland and South Australia show decreases in commercial activities while New South Wales (NSW), Tasmania (TAS) and Victoria (VIC) recorded significant increases taking total commercial activities from 2,980 in 2013 to 4,904 in 2015.

	Community Performances	Community Activities	Community as % age of total activities per state	Commercial Performances	Commercial Activities	Commercial as % age of total activities per state
	n=68			n=68		
ACT	113	14	11%	223	113	89%
NSW	2054	589	38%	1657	961	62%
NT	36	34	42%	47	47	58%
QLD	782	303	56.3%	345	235	43.7%
SA	146	84	79.2%	24	22	20.8%
TAS	93	23	21.3%	182	85	78.7%
VIC	1426	609	58.3%	2073	435	41.7%
WA	712	413	59.4%	353	282	40.6%
Total	5362	2069		4904	2180	

Table 12: Community -v- Commercial Performances and weighting of Activities per State

Programming

Of the 83 respondents to part 2 of the survey, 30 responded with data that allowed a study of dedicated programming budgets representing an investment in entrepreneurial activities of approximately \$8.5 million annually.

70% of the venues reporting they were able to budget for a net loss annually on their programming budget, also reported either an annual surplus or breakeven result in their overall operating result from all venue activities.

Table 13 shows a breakdown of the performing arts events undertaken by respondents. Definitions of terms can be found at Appendix A. It should be noted that the number of productions supported by Playing Australia is a subset of the “Full Risk” and “Shared Risk” categories.

In comparison to the 2013 data, the number of entrepreneurial seasons presented by respondents has remained similar with an overall increase of 3%. This result is mainly due to a marked increase for both New South Wales and Tasmania in the number of seasons presented. All other states are reporting a reduction of entrepreneurial activities, five of them by up to 40%.

While the number of seasons remains similar, the number of entrepreneurial performances within seasons is reducing with approximately 1,500 less presented in 2015 than reported in 2013. There is also a marginal increase in the number of seasons presented by Hirers of the respondent venues (from 3,252 to 3,378).

The number of Playing Australia supported seasons (339) is again down from 2013 (397), 2011 (411) and from the 2009 results (482) as are Playing Australia supported performances being 639 in 2015 (726 in 2013, 845 in 2011 and 931 in 2009).

	Productions entrepreneurial at Full Risk		Productions entrepreneurial at Shared Risk		Hires		Risk as a percentage Total Arts Activities		Productions Supported by Playing Australia		Productions Supported by State Funding Agencies	
	n=59		n=50		n=67				n=52		n=51	
	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs	Seasons	Perfs
ACT	16	87	12	37	127	336	18%	27%	2	11	2	11
NSW	430	1,036	102	323	1,254	2,152	30%	39%	95	223	77	206
NT	24	52	1	10	47	47	35%	57%	-	-	2	4
QLD	233	443	22	41	526	1,165	33%	29%	61	109	53	113
SA	79	105	8	15	93	147	48%	45%	10	15	-	-
TAS	30	72	21	49	96	258	35%	32%	16	46	24	58
VIC	434	3,089	354	1,029	881	2,494	47%	62%	100	168	122	166
WA	165	220	21	67	354	561	34%	34%	55	67	51	76
Total	1,411	5,104	541	1,571	3,378	7,160	37%	48%	339	639	331	634

Table 13: Performing Arts Activity Levels

Figure 17 shows the total number of venue performances broken down by financial risk. Performances presented or co-presented by the respondents make up 48% of the total performances presented. This is a further increase from 2013 levels (41%) and 2011 levels (37%) and continues to demonstrate the growing trend towards entrepreneurial programming.



Figure 17: Performances Involving Financial Risk for Venue

Many Australian venues participate in processes that access Playing Australia funds to support the delivery of touring shows. Of the total events on which respondents incurred financial risk, Playing Australia supported 15% of performing arts seasons in the respondents' venues (a reduction from 21% in 2013 and 17% in 2011). This represented 4.6% of all venue performances (6% in 2013 and 7% in 2011) and 9.6% of venue entrepreneurial programming.

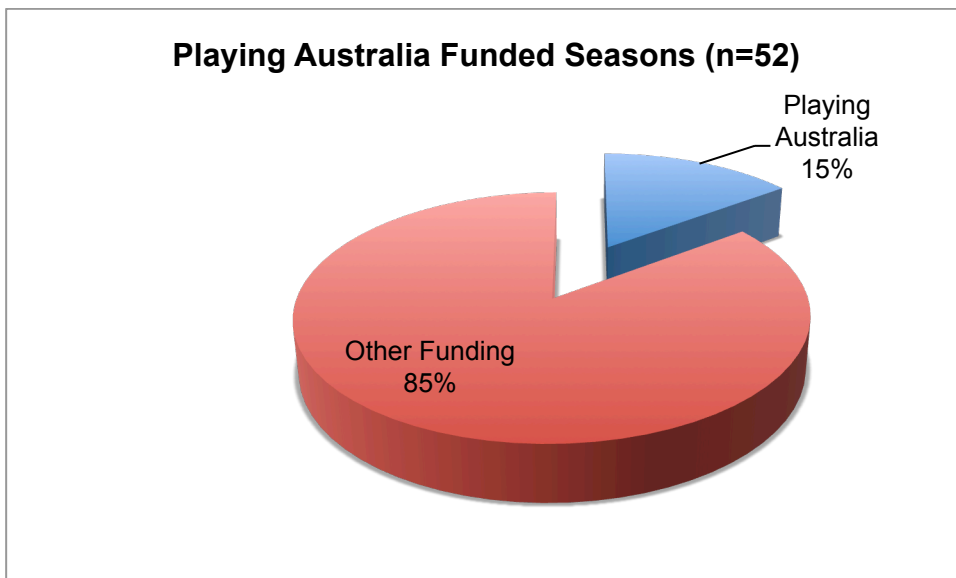


Figure 18: Playing Australia Funded Seasons as a percentage of Entrepreneurial (risk)

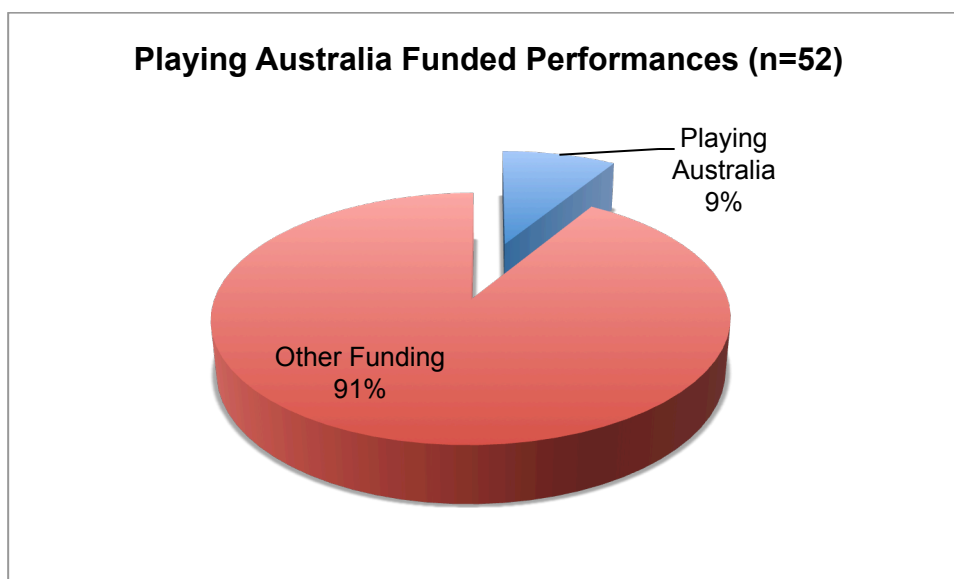


Figure 19: Playing Australia Funded Performances as a percentage of Entrepreneurial (risk)

The value of the investment regional venues across Australia make in bringing high quality touring productions supported by Playing Australia to their community was also captured in the 2015 survey.

The respondent venues program to take the entrepreneurial risk and allocate an annual budget towards performance fees, technical and front-of-house labour, marketing etc to successfully host a Playing Australia funded production.

36 venues, mainly regionally and remotely based, reported the value of the additional presentation funds made, as part of their programming commitment to Playing Australia funded productions was \$5.7million.

	Playing Australia supported productions/seasons n=68	Playing Australia supported performances	Avg # Performances per Production/Season
ACT	2	11	5.5
NSW	95	223	2.3
NT	0	0	-
QLD	61	109	1.8
SA	10	15	1.5
TAS	16	46	2.9
VIC	100	168	1.7
WA	55	67	1.2
Total	339	639	1.88

Table 14: Playing Australia Funded Seasons and Performances per State

State funding supporting productions touring to respondents' venues was captured for the first time in the 2015 survey. These results (14% state funding support of the total seasons presented by venues) reveal a similar percentage of tours were supported by the combined state agencies to that of the total seasons funded through Playing Australia.

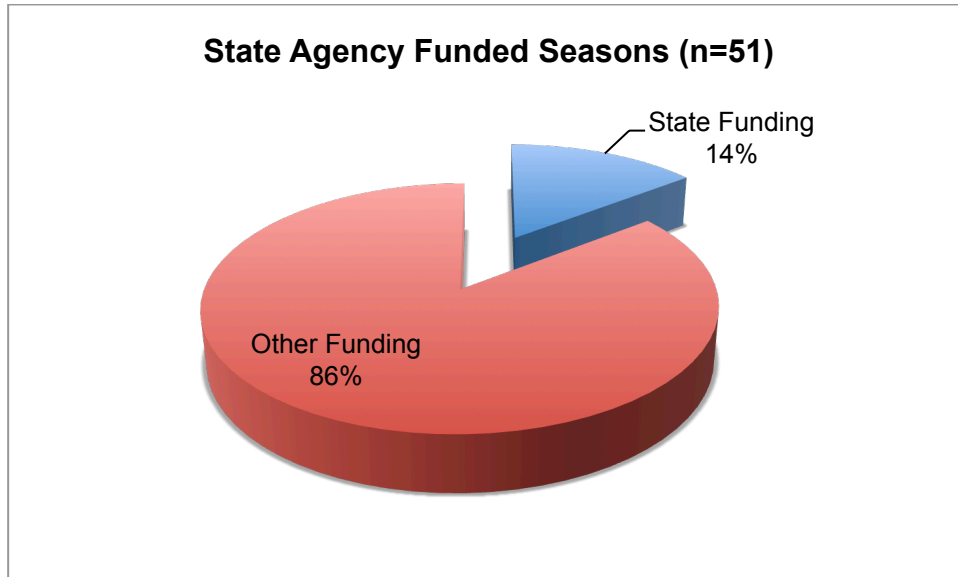


Figure 20: State Funding Agency Seasons as a Percentage of Total Arts Events

APPENDIX A: GLOSSARY

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

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

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

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

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

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

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

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

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

APPENDIX B: QUESTIONNAIRES



Introduction

This is part one of the three parts of the 2015 Biennial APACA Survey.

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

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

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

If you report on a financial year then provide details for the 2014/15 year, if you report on a calendar year then provide details for the 2014 year.

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

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

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

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

1. Your Name:

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

Other (please specify)

3. State:

QLD NSW ACT VIC TAS SA WA NT



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

Local Gov't, Statutory Authority, Part of an Education body, Bus. Unit of State/Federal Gov't dept., Co Limited by Guarantee, Contract Management

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

Local Gov't, State Gov't, Federal Gov't, Private

Other (please specify)

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

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

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

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

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



Venue Capacity and Utilization

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

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

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

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

Performance Space 1

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

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

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



Venue Capacity and Utilization for more than one venue

14. 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

15. 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

16. 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

17. 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



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").

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.

(If you report on a financial year then please use the 2014/15 year OR if you report on a calendar year then please report on 2014)

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

Number of productions/seasons:

Number of performances:

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

Number of productions/seasons:

Number of performances:

20. 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:

21. 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?

Number of productions/seasons

Number of performances

22. 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:

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

Number of productions/seasons:

Number of performances



Productions and Performances

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

Definitions

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

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

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

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

24. 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:

25. 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?

Other events

26. 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].

27. 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

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



THANK YOU

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

30. Any comments and/or feedback