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SECURING THE FUTURE
AN ASSESSMENT OF PROGRESS
2001 to 2006

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Australia Council for the Arts

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1. INTRODUCTION

The *Securing the Future Update* is an annual report which tracks Australia's Major Performing Arts' (MPA) companies' progress in the areas of artistic vibrancy, access and financial viability. The measures used in the report are sourced from the 1999 *Major Performing Arts Inquiry* (MPAI), which was a seminal study of the state of the Australian MPA sector that resulted in the reform of the funding model for Australia's MPA companies.

This year the *Securing the Future Update* has been expanded to include data and commentary on four other areas of MPAB companies' activity: education, regional touring, international touring and artist development. These activities have been identified as additional indicators for tracking MPA company sustainability, access and artistic vibrancy and artform development, which were all major focuses of the MPAI and the 2006 Review of the MPA Funding Model.

Major Performing Arts Inquiry

By 1997, a significant number of Australia's major performing arts organisations were exhibiting signs of major financial and artistic stress. It became clear to governments that, without suitable intervention, Australia was in danger of losing a number of those organisations. Consequently, the Major Performing Arts Inquiry (MPAI) was initiated by the Australian Government with the support of all State governments through Cultural Ministers Council (CMC).

In 1999 the Inquiry presented its findings and 95 recommendations to governments, which accepted 89 of those recommendations. These addressed major issues surrounding the companies:

- Artistic vibrancy
- Access
- Financial viability
- Transparency of funding

The government-agreed recommendations of the MPAI, including a base grant funding increase to the companies of \$10 million (12%) per annum were implemented in the period 2000-2005, improving the companies' funding arrangements and significantly changing their business practices, with a resulting strengthening of the sector's financial position. Since 2001, the companies' box office and fee income and private sector income have increased at an average five to six per cent per annum, and the companies' consolidated net assets have almost trebled over the period. The implementation of the MPAI recommendations resulted in improved access and artistic vibrancy for the sector, and a significant increase in reserve funds held by the companies to address unexpected financial challenges.

Reviews of the MPAI Funding Model

One of the MPAI recommendations included provision of a funding model for each of the major performing arts companies, which was used as a basis for determining the overall level of ongoing support for each company. The funding model is reviewed every three years, and the MPAB advises the CMC of any recommended adjustments to base funding levels.

The first review of the funding model, undertaken in 2002-03, argued for the removal of the Efficiency Dividend, and in 2005 Governments agreed to provide additional funding to compensate for the Efficiency Dividend from 2006, for four years.

The second Review of the Funding Model, undertaken using the MPAB companies' 2004 calendar year data, demonstrated that the companies had met or exceeded the MPAI requirements. However, a number of MPAB companies expressed concern that these results do not reflect the total picture for the sector. While the companies had successfully increased their income from non-government sources and strengthened their financial positions, this had required compromises in terms of artistic quality and access. Within their base funding levels, the companies were finding it increasingly difficult to deliver some of the core outputs required under the MPAI designation and

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categorisation criteria. The areas under pressure include skills development and training for artists (including young artists), research and development activity (creating and performing quality, new Australian works), domestic touring (particularly in regional areas), international touring, and education and access programs. These contentions are supported by the trends identified in the following *Update* in relation to number of new works and access performances.

In 2007 the Australian and state governments responded to the second Review's findings through increases to the base grants of the MPAB companies under review, in order to address the areas of artist development, artform development and access. This year's *Securing the Future* has been extended to begin to track these areas and a set of ongoing indicators is currently being developed.

The third Review of the Funding Model will be undertaken in 2009, using the companies' 2007 and 2008 financial information.

2. EXECUTIVE SUMMARY

The analysis shows that in 2006:

2.1 Artistic Vibrancy

- The total number of mainstage **new works** presented by MPA companies in 2006 was at its highest level since 2001. The 68 new works in 2006 represented a major recovery from a low of 43 new works in 2005.
- The total number of mainstage **Australian works** presented by MPA companies across all artforms declined from 143 in 2005 to 134 in 2006. This represented a continuation of the decline in Australian works over the past five years, from a high of 175 in 2001 (Centenary of Federation year).
- The total of 115 mainstage **new productions** presented by MPA companies in 2006 was the second lowest level over the period 2001-2006.

2.2 Breadth of Access

- Total **mainstage capital city attendances** at productions by MPA companies in 2006 were 2.1 million.
- The number of **regional** and **capital city seasons** has been maintained through 2001-2006. In 2006 MPA companies presented 138 **capital city seasons**. MPA companies presented 341 **regional seasons** in 2006, around the middle of the range for the 2001-2006 period.
- The MPA companies presented more than 4,400 **education** performances in 2006 to a total audience of 708,000 students.
- Twelve of the MPA companies presented a total of 162 performances in 14 countries **internationally** in 2006.

2.3 Financial

- Growth in the companies' **box office and fee income** from 2005 to 2006 was only marginal (less than 1%) demonstrating pressures in a number of areas. There was considerable variability in box office income by artform and state with New South Wales, Queensland and Western Australian based companies achieving the largest growth in 2006.
- There was a (0.9)% decrease in the aggregate level of **private sector income** across the sector in 2006, compared with 2005. However, there was considerable variability in results within the sector, with 15 companies achieving growth above CPI level, and 13 companies achieving only minimal growth levels or failing to reach their 2005 level of private sector income.
- Since the implementation of the Major Performing Arts Inquiry, **consolidated net assets** for the sector have increased significantly, from \$17.1m in 1999 to \$66.2m in 2006. The number of companies with positive net assets greater than \$1m has increased from six in 1999 to 19 in 2006, with a 356% growth in total net assets of this category of companies from \$18.9m to \$67.4m.

3. ARTISTIC VIBRANCY

3.1 New Works

The total number of new works¹ presented by MPA companies in 2006 (68.3) is at its highest level since the peak of 101.5 in 2001 (which was due, in part, to Centenary of Federation activities). Dance and Symphony Orchestras presented the highest number of new works, followed by Theatre (see Exhibit 1).

Exhibit 1: New Works by Artform: 2001-2006

	2001	2002	2003	2004	2005	2006
Theatre *						
Subscription Season	26.5	20.5	15.3	22.7	10.7	15.3
Other Mainstage ² Season	7	10	3	7	6	11
Theatre Total	33.5	30.5	18.3	29.7	16.7	26.3
Opera						
Subscription Season	2	1	0	2	0	1
Other Mainstage Season	3	2	1	0	0	0
Opera Total	5	3	1	2	0	1
Dance						
<i>Subscription Season</i>						
Ballet	12	13	15	8	9	12
Contemporary	4	3	9	2	5	2
Subscription Season Total	16	16	24	10	14	14
<i>Other Mainstage</i>						
Ballet	16	6	14	13	7	22
Contemporary	20	0	4	0	1	0
Other Mainstage Total	36	6	18	13	8	22
Dance Total	52	22	42	23	22	36
Chamber Music						
Subscription Season	3	7	4	2	3	3
Other Mainstage Season	8	1	0	8	2	2
Chamber Music Total	11	8	4	10	5	5
Total Subscription	47.5	44.5	43.3	36.7	27.7	33.3
Total Other Mainstage	54	19	22	28	16	35
Grand Total	101.5	63.5	65.3	64.7	43.7	68.3
Symphony Orchestras						
<i>Subscription Season</i>						
				9	15	24
<i>Other Mainstage</i>						
				10	10	12
Symphony Orchestras Total				19	25	36

* Theatre data includes Circus Oz that uses a rolling show concept, developing between 1/3 to 2/3 of its show each year.

For detail refer Appendix 2.

¹ New works are those being presented for the first time as World Premieres.

² Mainstage performances are those presented as the core business activity of the companies including a company's subscription season.

3.2 Australian Works

Overall the total number of Australian works³ presented by MPA companies continued to decline in 2006 (see Exhibit 2). However, there was variability across artforms. Theatre and Opera increased their number of Australian works in 2006 but there were falls in the number of Australian works in Dance and Chamber Music.

The number of Australian works in Chamber Music mainstage activity declined in 2006 to its second lowest level since 2001 (33 works). However it reached an all-time high (175 works) in Musica Viva's regional touring and *Carnivale* programs.

Exhibit 2: Total Australian Works by Artform: 2001-2006

Artform	2001	2002	2003	2004	2005	2006
Theatre	53	46	38	45	36	46
Opera	7	3	2	5	4	6
Dance	84	51	63	64	56	49
Chamber Music	31	58	40	32	47	33
Total	175	158	143	146	143	134
Symphony Orchestras				50	62	60
MVA Regional Touring and (from 2005) <i>Carnivale</i>				61	102	175

This table excludes Australian works included in Education Programs as these are not currently a reporting requirement.

For detail refer Appendix 2.

³ Australian works are works written and conceived by Australian composers, writers and choreographers.

3.3 New Productions

The total 115.3 new productions⁴ presented by MPA companies in 2006 was at its second lowest level over the period 2001-2006 (see Exhibit 3).

Exhibit 3: New and Existing Productions by Artform: 2001-2006

	2001		2002		2003		2004		2005		2006	
Theatre *												
New	46.5	85%	54.5	66%	63.3	80%	66.7	81%	61.7	81%	59.3	69%
Existing	8.5	15%	27.5	34%	15.7	20%	15.3	19%	14.3	19%	26.7	31%
Total	55		82		79		82		76		86	
Opera												
New	18	55%	21	66%	15	36%	25	54%	15	43%	17	57%
Existing	15	45%	11	34%	27	64%	21	46%	20	57%	13	43%
Total	33		32		42		46		35		30	
Dance												
New	58	50%	22	26%	47	55%	38	43%	46	67%	39	55%
Existing	59	50%	64	74%	39	45%	50	57%	23	33%	32	45%
Total	117		86		86		88		69		71	
Total												
New	122.5	60%	97.5	49%	125.3	61%	129.7	60%	122.7	68%	115.3	62%
Existing	82.5	40%	102.5	51%	81.7	39%	86.3	40%	57.3	32%	71.7	38%
Total	205		200		207		216		180		187	

* Theatre includes Circus Oz that uses a rolling show concept, developing new material for part of its show each year.

For detail refer Appendix 3.

⁴ New Productions are newly conceived stage presentations of theatre, dance or opera that have not been seen before, whether or not the work itself is new. Music is not included as concert performances are not regarded as stage productions.

3.4 Artist Development (new section)

This data provides a base for tracking artist development activities by the MPAB companies.

All MPAB companies are required to undertake artist development activities. An analysis, by level of program provided in broad categories, follows:

- Companies with a dedicated annual artist development programs involving selected participants in company activities. Many also include development opportunities for existing company artistic personnel.
 - Theatre 8
 - Opera 3
 - Dance 3
 - Music 7

- Companies with development opportunities provided for company artistic personnel and / or assist artist development within the artform.
 - Theatre 1
 - Opera 1
 - Dance 2
 - Music 4

4. BREADTH OF ACCESS

4.1 Mainstage Capital City Attendances

Attendance levels for the MPAB companies have remained relatively static in the 2001-2006 period, fluctuating between 2 million and 2.2 million. However, within this figure, there was a significant decrease in theatre attendances (see Exhibit 4).

Exhibit 4: Paid Mainstage Capital City Attendances by Artform: 2001-2006

('000)	Dance	Opera	Theatre	Chamber Music	TOTAL	Symphony Orchestras	TOTAL including Orchestras
2001 *	296	316	899	144	1,655	508	2,163
2002	271	308	855	119	1,553	443	1,996
2003 **	350	336	932	143	1,761	448	2,209
2004	314	304	897	149	1,664	457	2,121
2005	320	365	823	166	1,674	443	2,117
2006	296	360	817	154	1,627	481	2,108

* Level of attendances are due in part to additional Centenary of Federation activities.

** Increase in Chamber Music attendances largely due to ABO entering MPAB.

Refer Appendix 5A for Paid Mainstage Capital City Attendances by Artform: 1992-2006

In 2006 there were increased attendances in Canberra, Hobart and Perth (see Exhibit 5).

Exhibit 5: Paid Mainstage Capital City Attendances by City: 2001-2006
(including Orchestras)

(‘000)	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney
2001	155	171	46	35	654	130	977
2002	120	176	46	19	616	108	911
2003	129	168	56	23	664	121	1,048
2004	146	176	39	27	618	131	984
2005	140	192	32	22	649	128	954
2006	131	189	58	29	630	134	937

For detail refer Appendices 4A-E.

Refer Appendix 5B for Paid Mainstage Capital City Attendances by City: 1992-2006 (excluding Orchestras).

The overall participation rate⁵ across all capital cities has declined slightly over the period in review (see Exhibit 6).

Whilst Canberra and Hobart had the largest drops in participation rates in 2005, those rates increased considerably in 2006 reflecting the variable touring patterns of the major companies to those centres.

Exhibit 6: Participation Rates by Capital City: 2001-2006

	2001	2002	2003	2004	2005	2006
Adelaide	19.4	14.3	15.1	17.2	16.5	16.0
Brisbane	14.4	14.2	13.4	15.9	14.8	12.0
Canberra	17.6	19.6	23.1	16.5	13.5	24.0
Hobart	21.4	13.6	15.6	14.9	15.5	20.0
Melbourne	25.9	23.2	24.9	23.0	24.5	24.0
Perth	13.2	10.3	13.6	12.3	12.0	13.0
Sydney	32.9	29.1	34.8	31.8	33.0	31.0
Total (across all Capital Cities)	24.3	21.5	24.3	23.4	23.4	21.5

For detail refer Appendices 4A-E.

⁵ Participation rates are attendances divided by capital city population over 18 years (until 2003) and over 20 years (from 2004), assuming each person attended only once.

4.2 Capital City Access to Major Performing Arts Companies

From 2001 to 2006 touring seasons⁶ have been presented by MPA companies in all eight State and Territory capital cities. However, in 2006 the number of seasons declined against those presented in recent years back to the levels being presented between 2001 to 2003 (see Exhibit 7).

Exhibit 7: Capital City Touring by Artform, Cities and Seasons: 2001-2006

Artform	2001		2002		2003		2004		2005		2006	
	Cities	Seasons	Cities	Seasons	Cities	Seasons	Cities	Seasons	Cities	Seasons	Cities	Seasons
Theatre Total	8	21	6	22	7	23	8	25	8	14	6	20
Opera Total	2	10	3	12	1	9	3	14	4	12	4	10
Dance												
Ballet	7	11	6	13	5	13	5	11	6	12	4	5
Contemporary	5	9	7	10	4	10	4	6	3	5	6	8
Dance Total	7	20	8	23	7	23	8	17	6	17	7	13
Music												
Chamber	7	82	7	78	7	84	7	95	7	105	7	92
Symphony Orchestras	2	2	2	3	0	0	0	0	0	0	1	3
Music Total	7	84	7	81	7	84	7	95	7	105	7	95
Total	8	135	8	138	8	139	8	151	8	148	8	138

Note: Capital cities are counted only once in the Total lines, although they may be visited by multiple MPA companies across artforms.

⁶ A touring season is a performance run of a production / concert by a company in a capital city other than the company's home city.

Capital city touring access to MPA companies declined through 2001-2004, returning to 2001 levels in 2005 but dropping back in 2006 (see Exhibit 8).

Exhibit 8: Capital City Access to MPA Companies by City: 2001-2006

	2001	2002	2003	2004	2005	2006
Adelaide						
Homestage	3	3	3	3	3	3
Touring	6	6	3	6	5	8
Total	9	9	6	9	8	11
Brisbane						
Homestage	4	4	4	4	4	4
Touring	8	9	6	7	8	5
Total	12	13	10	11	12	9
Canberra						
Homestage	0	0	0	0	0	0
Touring	9	8	7	6	7	7
Total	9	8	7	6	7	7
Darwin						
Homestage	0	0	0	0	0	0
Touring	1	1	3	4	5	4
Total	1	1	3	4	5	4
Hobart						
Homestage	1	1	1	1	1	1
Touring	7	6	6	2	6	5
Total	8	7	7	3	7	6
Melbourne						
Homestage	6	6	6	6	6	6
Touring	10	6	7	6	8	4
Total	16	12	13	12	14	10
Perth						
Homestage	4	4	4	4	4	4
Touring	4	3	5	5	4	4
Total	8	7	9	9	8	8
Sydney *						
Homestage	10	10	11	11	11	11
Touring	6	4	3	2	4	2
Total	16	14	14	13	15	13
Totals						
Homestage	28	28	29	29	29	29
Touring	51	43	40	38	47	39
Total	79	71	69	67	76	68

* Number of Sydney-based companies increased by one in 2003, with ABO joining MPAB.

4.3 Regional Access

4.3.1 Regional Seasons

The total number of regional seasons presented by MPA companies from 2001 to 2006 was static except for a significant increase in 2004 (see Exhibit 9). There was a strong increase in Theatre regional seasons in 2006.

Exhibit 9: Regional Seasons by Artform: 2001-2006

	2001	2002	2003	2004	2005	2006
Theatre Total	82	69	86	55	52	79
Opera Total	37	34	34	19	36	30
Dance Total	35	44	39	45	47	44
Music						
Chamber Music	134	145	150	143	130	132
Symphony Orchestras *	43	47	32	94	63	42
Pit Orchestras	1	4	7	16	10	14
Music Total	178	196	189	253	203	188
Total	332	343	348	372	338	341

* WASO had an unusually extensive regional performance program in 2004.

4.3.2 Regional Centres

The number of regional centres visited by the MPA companies has remained constant over the period from 2001, except for a significant drop in 2002.

Theatre increased significantly in 2006 to its highest level in any year except for 2003. Music peaked in 2004, with its lowest level of regional touring taking place in 2002 and 2003 (see Exhibit 10).

It should also be noted that the data presented in Exhibit 10 represents mainstage activities only. It does not include the large amount of regional activity undertaken by MPA companies within their education performances, workshops and training programs.

Exhibit 10: Regional Touring by Towns / Cities and Artform: 2001-2006

	2001	2002	2003	2004	2005	2006
Theatre Total	47	44	51	36	36	48
Opera Total	34	27	30	19	35	25
Dance						
Ballet	28	21	23	20	24	30
Contemporary	4	13	9	19	12	12
Dance Total	32	30	28	35	33	37
Music						
Chamber Music	68	58	55	61	57	58
Symphony Orchestras	35	30	24	45	41	41
Pit Orchestras	1	4	7	6	5	10
Music Total	87	79	72	99	86	87
Total (across Regional Centres)	127	107	125	127	121	123

Note: Regional centres are counted only once in Total lines, although they may be visited by multiple MPA companies across artforms.

4.3.3 Distribution of Regional Seasons

In 2006 the proportion of regional seasons in all states and Territories except Queensland and Tasmania was equal or better than those states' share of total Australian regional population (see Exhibit 11).

Note: The percentage of regional seasons for each art-form per state is compared to each state's percentage of total Australian regional population as a measure of regional access by the MPAB companies.

Exhibit 11: Regional Access: Distribution of Seasons by Artform: 2001-2006
(percent of total number of regional seasons per artform)

	Percent of Regional Population	Dance	Music	Opera	Theatre	TOTAL
2001						
NSW	34.1	8.6	39.5	8.1	18.3	18.6
VIC	18.2	17.1	24.3	18.9	31.7	23
QLD	29.6	37.1	19.2	46	9.8	28
SA	5.7	14.3	0.6	-	15.9	7.7
WA	7.2	17.1	7.9	18.9	20.7	16.2
TAS	3.8	2.9	6.8	2.7	2.4	3.7
NT	1.4	2.9	1.7	5.4	1.2	2.8
Total	100	100	100	100	100	100
2002						
NSW	34.9	15.9	50.0	-	20.3	34.8
VIC	19	20.5	18.9	29.4	36.32	23.6
QLD	28.4	34.1	14.8	23.5	21.7	19.5
SA	5.7	11.4	1	41.2	-	6.1
WA	7	11.3	7.1	2.9	17.4	9.3
TAS	3.9	4.5	7.7	2.9	2.9	5.8
NT	1.1	2.3	0.5	-	1.4	0.9
Total	100	100	100	100	100	100
2003						
NSW	33.7	25.6	54.5	29.5	15	39.3
VIC	19.2	10.3	22	5.8	30	21.3
QLD	29	53.8	13	61.8	5.8	19.7
SA	5.8	-	0.5	0.0	18.6	4.9
WA	6.3	5.1	3	2.9	19.7	7.5
TAS	4	2.6	6	-	9.3	6
NT	2	2.6	1	-	1.2	1.5
Total	100	100	100	100	100	100

Exhibit 11 continued over –

Exhibit 11: Regional Access: Distribution of Seasons by Artform: 2001-2006
Continued (percent of total number of regional seasons per artform)

	Percent of Regional Population	Dance	Music	Opera	Theatre	TOTAL
2004						
NSW	<i>34.4</i>	17.8	40.9	-	27.3	33.3
VIC	<i>18.9</i>	11.1	23.2	-	38.2	22.7
QLD	<i>28.9</i>	33.4	14.5	36.8	14.5	18.3
SA	<i>5.7</i>	13.3	2.7	5.3	9.1	5.3
WA	<i>7.1</i>	22.2	10.9	47.4	9.1	14.2
TAS	<i>3.9</i>	-	5.5	-	-	3.5
NT	<i>1.1</i>	2.2	2.3	10.5	1.8	2.7
Total	100	100	100	100	100	100
2005						
NSW	<i>34.4</i>	17	46.2	5.5	17.3	32.8
VIC	<i>18.9</i>	34	22	30.6	32.7	26.5
QLD	<i>28.9</i>	21.3	17.8	55.6	36.6	25.5
SA	<i>5.7</i>	10.6	6.5	5.5	9.6	7.5
WA	<i>7.1</i>	15	1.1	-	-	2.8
TAS	<i>3.9</i>	2.1	4.8	2.8	1.9	3.7
NT	<i>1.1</i>	-	1.6	-	1.9	1.2
Total	100	100	100	100	100	100
2006						
NSW	<i>35.8</i>	16.3	49.4	36.7	39.1	41.6
VIC	<i>19.7</i>	9.3	21.3	3.3	26.6	19.4
QLD	<i>26</i>	53.5	16.5	16.70	16.5	21.1
SA	<i>6</i>	-	1.6	36.6	7.60	5.9
WA	<i>7.3</i>	18.6	5.3	6.7	8.9	7.9
TAS	<i>4.1</i>	-	4.3	-	1.3	2.9
NT	<i>1.1</i>	2.3	1.6	-	-	1.2
Total	100	100	100	100	100	100

Note: **Bold** type denotes that the percent of seasons is equal to or greater than the relevant percent of the population.

Bold Italics type denotes that the percent of seasons is no more than 2% less than the relevant percent of the population.

4.4 Education (new section)

This data documents education activities undertaken by the MPA companies in 2006.

Five MPAB companies⁷ are funded to undertake education activities with a national focus. Remaining companies categorised as ‘State Flagship’ (9 companies) are required to undertake state-based education activities. Australian Flagship (7 companies) and Specialist companies (6 companies) are not required to undertake education activity, but many do.

In 2006 company education activities are as follows:

- 5 companies have a dedicated education program of performances managed by specialist staff, involving extensive multi-state touring.
- 17 companies have a dedicated education program of performances, some managed by specialist staff, often involving single-state touring.
- 5 companies provide educational opportunities offered solely within mainstage home-city activity or mainstage touring, in conjunction with on-line education resources.
- 1 company reported no education activity.

The number of education performances and attendances in 2006 are detailed in Exhibit 12.

Exhibit 12: Education Activity by Artform: 2006

	Attendances (‘000)	Performances
Theatre Total	120.7	1,137
Opera Total	97.6	600
Dance Total	10.1	262
Music		
Chamber Music	391.7	2,170
Orchestras	88.3	255
Total Music	480.0	2,425
Total	708.3	4,424

⁷ BSC (Theatre), OQ&OA (Opera), TAB (Dance) and MVA (Music).

4.5 International (new section)

This data documents international activities undertaken by the MPA companies in 2006.

Three MPAB companies⁸ are categorised as ‘International’ and are required to meet specific criteria relating to international activity. A further nine MPA companies undertook international performances in 2006 (see Exhibit 13).

These 12 MPA companies presented 162 performances in 15 countries - Austria, Brunei, China, Dubai, Germany, Italy, Japan, Kuwait, Lebanon, Poland, Slovenia, Spain, The Philippines, United Kingdom and USA.

Exhibit 13: International Activity by Artform: 2006

	<u>No of Companies</u>	<u>Performances</u>
Theatre Total	4	87
Opera Total	0	0
Dance Total	4	28
Music		
Chamber Music	2	40
Orchestras	2	7
Total Music	4	47
Total	12	162

⁸ ACO, COZ and SDC

4.6 Other Access Activities (new section)

This data deals with access activities undertaken by the MPA companies not included elsewhere in this report.

In 2006 additional access activity, other than regional touring and education, has been undertaken as follows:

- 14 companies presented dedicated performances in diverse venues for the broader community in addition to core activity.
- 7 companies offered concession or free attendance to mainstage performances to audiences who are disadvantaged financially, developmentally or geographically, sometimes including training workshops.
- 6 companies offered access through electronic media including broadcasts, recordings, websites and occasional special performances.
- 1 company reported no additional access activity.

5. FINANCIAL RESULTS

5.1 Box Office / Fee Income

There was marginal growth in the companies' box office and fee income from 2005 to 2006, but the 2006 results demonstrate pressures in a number of areas. The growth in box office and fee income from 2005 to 2006 was less than 1%, with considerable variability within box office income by artform and state.

5.1.1 Box Office / Fee Income by Artform

In 2006 Chamber Music recorded a 12.3% increase in box office and fee income over the twelve months with all music companies achieving similar levels of growth. Orchestral Music and Theatre recorded 6.0% and 5.5% annual growth respectively. Dance and Opera both recorded overall decreases in their box office and fee income. Opera's decrease was largely due to the effect of SOSA's 2004 *Ring Cycle* being reported in the 2005 figures resulting in those being abnormally high.

Theatre experienced a slowdown in box office and fee income in 2005 but saw these return to previous growth line expectations or better in 2006.

Artform comparisons of growth from 2001 to 2006 (see Exhibit 14) are consistent with the 2005-2006 results, with Chamber Music and Orchestral Music showing the highest growth (8.2% and 9.4% respectively) and Dance showing the lowest growth over the period.

Exhibit 14: Aggregate Box Office and Fees by Artform: 2001-2006

\$'000	2001	2002	2003	2004	2005	2006	% Average Growth
Theatre	35,095	35,418	37,428	40,541	41,397	43,685	4.48
Opera *	31,597	33,096	36,508	33,627	44,600	40,708	5.20
Dance **	18,134	17,061	19,939	20,004	21,299	20,220	2.20
Chamber Music ***	8,151	8,582	10,146	10,914	10,779	12,104	8.23
Orchestras	22,657	23,043	26,637	28,591	33,468	35,472	9.38
Total	115,634	117,200	130,658	133,677	151,543	152,189	5.65

* 2004 SOSA reduced activity prior to 2004 *Ring Cycle* (reported in 2005).

** 2006 BDT and TAB presented a joint season.

*** ABO included from 2003.

5.1.2 Box Office / Fee Income by State

Comparisons by State (see Exhibit 15) show that Western Australia and South Australia had the strongest level of growth between 2001 and 2006.

However, in 2006 New South Wales, Queensland and Western Australian based companies achieved the largest levels of box office and fee income growth over 2005 levels. Victorian and South Australian companies (the South Australian decrease was due to the effect of SOSA's *Ring Cycle*) both experienced drops in box office and fee income.

Exhibit 15: Aggregate Box Office and Fees by State: 2001-2006

\$'000	2001	2002	2003	2004	2005	2006	% Average Growth 2001-06
New South Wales *	39,647	39,308	45,440	47,944	47,120	51,868	5.52
New South Wales/Victoria	43,773	42,582	47,249	44,867	50,506	51,976	3.49
Victoria	17,869	19,567	20,556	22,423	26,377	23,960	6.04
Queensland	5,692	5,701	6,090	6,886	8,163	8,808	9.12
South Australia **	3,441	4,659	4,894	4,231	10,276	5,941	11.54
West Australia	4,011	4,474	5,412	6,096	7,617	8,138	15.20
Tasmania	1,201	909	1,017	1,230	1,484	1,498	4.52
Total	115,634	118,226	130,658	133,677	151,543	152,189	5.65

* ABO included from 2003.

** 2004 SOSA reduced activity prior to 2004 Ring Cycle (reported in 2005).

5.2 Private Sector Income

There was a (0.9)% decrease in the aggregate levels of private sector income across the sector in 2006, compared with 2005. However, there was considerable variability of results within the sector, with 15 companies achieving growth above CPI level, and 13 companies achieving only minimal growth levels or failing to reach their 2005 level of private sector income.

5.2.1 Private Sector Income by Artform

Orchestras and Chamber Music have experienced the greatest growth over the five years although Chamber Music remained static between 2005 and 2006 (see Exhibit 16).

From 2005 to 2006 Orchestral Music achieved the strongest overall growth (17.3%) of the artforms. Dance experienced a drop of (24.6)% from a five year high result in 2005 with only one of the five dance companies reporting an increase in income from this source.

Exhibit 16: Aggregate Private Sector Income by Artform: 2001-2006

\$'000	2001	2002	2003	2004	2005	2006	% Average Growth 2001-06
Theatre	6,257	7,001	6,863	7,055	8,153	8,227	5.63
Opera *	7,034	7,978	7,085	6,058	5,758	6,109	-2.78
Dance	5,246	5,859	6,346	6,507	9,596	7,234	6.64
Chamber Music **	3,681	3,940	3,954	4,864	6,037	6,040	10.41
Orchestras	6,150	6,032	7,967	8,379	9,140	10,723	11.76
Total	28,368	30,810	32,215	32,863	38,684	38,333	6.21

Part of the recorded growth in private sector income reflects changes in companies' accounting practices in this period in recognising in-kind sponsorships.

* 2004 SOSA reduced activity prior to 2004 Ring Cycle (reported in 2005).

** ABO included from 2003.

5.2.2 Private Sector Income by State

Comparisons by State (see Exhibit 17) show that the strongest percentage growth from 2001-2006 occurred in Western Australia and Tasmania, both off low bases. New South Wales, with the highest base, achieved more moderate percentage growth. New South Wales and New South Wales / Victorian companies recorded decreases in 2006 compared to 2005.

Exhibit 17: Aggregate Private Sector Income by State: 2001-2006

\$'000	2001	2002	2003	2004	2005	2006	% Average Growth 2001-06
New South Wales *	11,510	10,750	11,713	13,122	16,073	15,385	5.98
New South Wales/Victoria	8,986	9,921	9,567	9,002	10,839	10,063	2.29
Victoria	3,179	3,870	4,317	3,693	4,147	4,700	8.13
Queensland	1,296	1,427	1,494	1,404	1,668	1,927	8.26
South Australia **	1,085	2,572	1,812	1,932	2,058	1,521	6.99
West Australia	2,096	2,084	3,125	3,437	3,576	4,282	15.36
Tasmania	216	186	187	273	323	455	16.07
Total	28,368	30,810	32,215	32,863	38,684	38,333	6.21

* ABO included from 2003.

** 2004 SOSA reduced activity prior to 2004 Ring Cycle (reported in 2005).

5.3 Annual Results

In the years preceding the implementation of the MPAI's recommendations, the sector (excluding the Orchestras which were part of the ABC or other organisations during some or all of this period) regularly returned aggregate deficit annual operating results. Over the period 1992-1998, the sector incurred a cumulative deficit of \$(12.9)m. Between 2001 and 2006 there has been an overall improvement in the sector's annual results, although this has not been seen evenly across all artforms and States. There was a negative trend in Dance between 2005 and 2006.

It should also be noted that since 2003 the aggregate net result has included grants paid under the Reserves Incentive Scheme (RIS) by the Australian and state governments. In 2004 the aggregate net result, after adjusting for RIS grants paid, was the highest ever achieved at \$9.7m (see Exhibits 16 and 17).

In 2006 special funding was provided to Orchestras as a result of the Orchestras Review and Further Examination of Pit Services recommendations. The aggregate net result was a surplus of \$8.4m excluding RIS and special Orchestras Review grants.

5.3.1 Annual Results by Artform

The aggregate annual result for the Theatre sector declined from 2001 to 2005, with a deficit result in 2005. 2006 saw the sector return to a modest surplus (see Exhibit 18).

Exhibit 18: Aggregate Net Results by Artform: 2001-2006

\$'000	No of Companies	2001	2002	2003	2004	2005	2006
Theatre	9	2,066	1,996	1,144	1,951	-640	135
Opera *	4	1,404	-1,196	1,723	3,543	-1,345	1,748
Dance	5	1,311	483	-343	627	4,026	1,568
Chamber Music **	3	256	-87	372	1,101	1,930	1,838
Orchestras ***	8	183	1,241	-173	5,849	1,397	10,287
	29	5,220	2,437	2,723	13,071	5,368	15,576
Included in above:							
RIS			94	4,276	3,345	108	1,458
Extinguish Debt							5,744
Total		5,220	2,343	-1,553	9,726	5,260	8,374

* SOSA is required to cash account for grants. This affects SOSA's results over the period leading up to and including the 2004 Ring Cycle.

** ABO included from 2003.

*** 2006 Orchestras includes special one-off Orchestras Review funding (\$5.1m) and the first year of additional on-going Orchestras Review funding.

5.3.2 Annual Results by State

All States experienced positive cumulative net results in 2006. This had only previously occurred in 2004 (see Exhibit 19).

Exhibit 19: Aggregate Net Results by State: 2001-2006

\$'000	No of Companies	2001	2002	2003	2004	2005	2006 ***
New South Wales *	10	2,132	367	1,263	1,245	1,553	2,671
New South Wales/Victoria	2	512	-2,825	-756	1,985	6,107	3,423
Victoria	5	895	1,699	830	3,856	1,220	740
Queensland	4	-469	419	346	150	378	2,518
South Australia **	3	-85	857	178	2,787	-4,036	4,206
West Australia	4	1,805	1,646	869	1,495	399	1,110
Tasmania	1	430	274	-7	1,553	-253	908
	29	5,220	2,437	2,723	13,071	5,368	15,576
Included in above:							
RIS			94	4,276	3,345	108	1,458
Extinguish Debt							5,744
Total		5,220	2,343	-1,553	9,726	5,260	8,374

* ABO included from 2003.

** SOSA is required to cash account for grants. This affects SOSA's results over the period leading up to and including the 2004 Ring Cycle.

*** 2006 includes special one-off Orchestras Review funding (\$5.1m) and the first year of additional on-going Orchestras Review funding.

5.4 Levels of Net Assets

Over the six years from 1999 to 2006, consolidated net assets for the sector have increased significantly, from \$17.1m to \$66.2m (see Exhibit 20).

The number of companies with positive net assets greater than \$1m has increased from six in 1999 to 19 in 2006, with a 356% growth in total net assets of this category of companies from \$18.9m to \$67.4m.

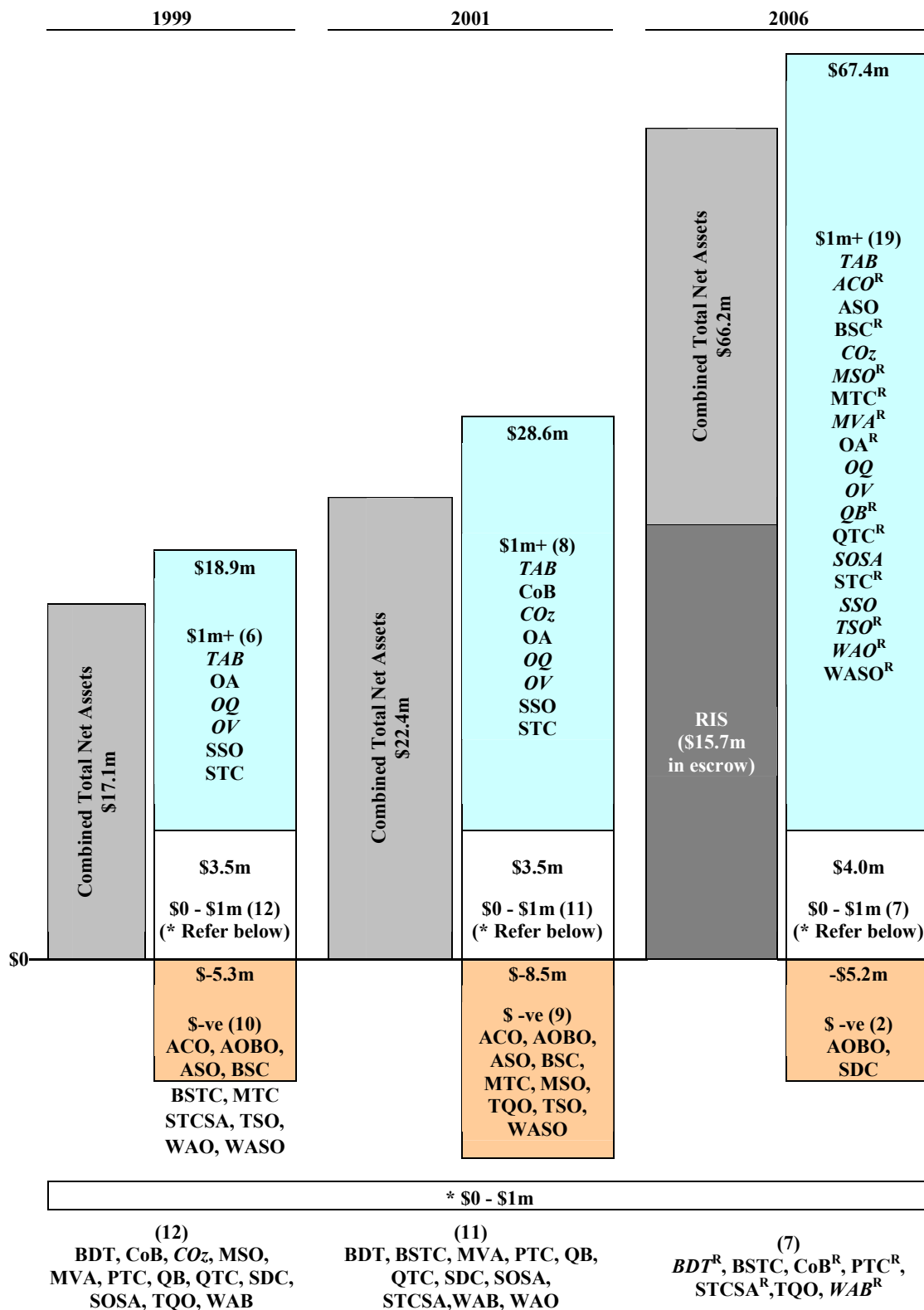
Conversely, the number of companies with negative net assets has reduced from 10 in 1999 to two in 2006. However, the aggregate negative net assets of this category of companies remained consistent at just over \$5m.

In 1999 three companies had accumulated reserves in excess of the recommended 20% of annual expenditure. By 2006, 14 companies had achieved this target, with an additional six companies having reserves in excess of 15% of their annual expenditure.

It should be noted that in 2006 the companies' consolidated net assets of \$67.4m included \$15.7m held in escrow for 15 years under the RIS. Of these funds held in escrow, \$13.9m represents core RIS funds, equally contributed by the companies, the Australian Government and the relevant state government, with the balance being interest earnings and additional company contributions.

In 2006 three of the orchestras, previously recording negative reserves, received special funding as a result of the Review of Orchestras to address their net asset positions.

Exhibit 20: Consolidated Net Assets: 1999-2006



Note: Not to scale above chart areas indicative only.

^R indicates company is in receipt of all or part of their RIS entitlement.

Companies in ***bold italics*** have reserves in excess of 20% annual expenditure.

APPENDICES

Appendix 1: Current Major Performing Arts Companies

	State	Category
Adelaide Symphony Orchestra (ASO)	SA	Orchestra
The Australian Ballet (TAB)	VIC	Dance
Australian Brandenburg Orchestra (ABO) *	NSW	Chamber
Australian Chamber Orchestra (ACO)	NSW	Chamber
Australian Opera and Ballet Orchestra (AOBO)	NSW	Orchestra
Bangarra Dance Theatre (BDT)	NSW	Dance
Bell Shakespeare Company (BSC)	NSW	Theatre
Black Swan Theatre Company (BSTC)	WA	Theatre
Circus Australia (COz)	VIC	Theatre
Company B Ltd (CoB)	NSW	Theatre
Melbourne Symphony Orchestra (MSO)	VIC	Orchestra
Melbourne Theatre Company (MTC)	VIC	Theatre
Musica Viva Australia (MVA)	NSW	Chamber
Orchestra Victoria (OV)	VIC	Orchestra
Opera Australia (OA)	NSW	Opera
Opera Queensland (OQ)	QLD	Opera
Playbox Theatre Company trading as Malthouse Theatre (PTC)	VIC	Theatre
Queensland Ballet (QB)	QLD	Dance
Queensland Orchestra (QO)	QLD	Dance
Queensland Theatre Company (QTC)	QLD	Theatre
State Opera of South Australia (SOSA)	SA	Opera
State Theatre Company of South Australia (STCSA)	SA	Theatre
Sydney Dance Company (SDC)	NSW	Dance
Sydney Symphony Orchestra (SSO)	NSW	Orchestra
Sydney Theatre Company (STC)	NSW	Theatre
Tasmanian Symphony Orchestra (TSO)	TAS	Opera
West Australian Ballet (WAB)	WA	Dance
West Australian Opera (WAO)	WA	Opera
West Australian Symphony Orchestra (WASO)	WA	Orchestra

* ABO joined MPAB in 2003 and, unless noted otherwise, is only include from that time.

Note: Australian Dance Theatre left the MPAB in 2002. ADT has been omitted from all figures in this report.

Appendix 2: Profile of Works by Artform and Origin of Work: 2001-2006

	2001					2002					2003				
	Australian Works			O/S Works	Total Works	Australian Works			O/S Works	Total Works	Australian Works			O/S Works	Total Works
	New	Exist	Total			New	Exist	Total			New	Exist	Total		
Theatre *															
Subscription Season	26.5	18.5	45	28	73	20.5	9.5	30	29	59	15.3	16.7	32	37	69
Other Mainstage Season	7	1	8	3	11	10	6	16	5	21	3	3	6	3	9
Theatre Total	33.5	19.5	53	31	84	30.5	15.5	46	34	80	18.3	19.7	38	40	78
Opera															
Subscription Season	2	0	2	26	28	1	0	1	23	24	0	0	0	23	23
Other Mainstage Season	3	2	5	7	12	2	0	2	6	8	1	1	2	16	18
Opera Total	5	2	7	33	40	3	0	3	29	32	1	1	2	39	41
Dance															
<i>Subscription Season</i>															
Ballet	12	11	23	30	53	13	9	22	24	46	15	7	22	18	40
Contemporary	4	2	6	0	6	3	1	4	0	4	9	3	12	1	13
<i>Subscription Season Total</i>	16	13	29	30	59	16	10	26	24	50	24	10	34	19	53
<i>Other Mainstage</i>															
Ballet	16	17	33	9	42	6	12	18	9	27	14	8	22	6	28
Contemporary	20	2	22	0	22	0	7	7	0	7	4	3	7	0	7
<i>Other Mainstage Total</i>	36	19	55	9	64	6	19	25	9	34	18	11	29	6	35
Dance Total	52	32	84	39	123	22	29	51	33	84	42	21	63	25	88
Chamber Music **															
Subscription Season	3	3	6	220	226	7	32	39	156	195	4	12	16	147	163
Other Mainstage Season	8	17	25	79	104	1	18	19	58	77	-	24	24	92	116
	11	20	31	299	330	8	50	58	214	272	4	36	40	239	279
Regional / Carnivale	-	-	-	-	-	-	-	-	-	-	-	-0	-	-	-
Chamber Music Total	11	20	31	299	330	8	50	58	214	272	4	36	40	239	279
Total	101.5	73.5	175	402	577	63.5	94.5	158	310	468	65.3	77.7	143	343	486
Percentage Total ***	17%	13%	30%	70%		14%	20%	34%	66%		14%	16%	30%	71%	

Appendix 2 continued over -

Appendix 2: Profile of Works by Artform and Origin of Work: 2001-2006
Continued

	2004					2005					2006				
	Australian Works			O/s Works	Total Works	Australian Works			O/s Works	Total Works	Australian Works			O/s Works	Total Works
	New	Exist	Total			New	Exist	Total			New	Exist	Total		
Theatre *															
Subscription Season	28.7	5.3	34	28	61	10.7	17.3	28	34	62	15.3	15.7	31	36	67
Other Mainstage Season	7	4.	11	9	21	6.0	2.0	8	6	14	11	4	15	4	19
Theatre Total	35.7	9.3	45	37	82	16.7	19.3	36	40	76	26.3	19.7	46	40	86
Opera															
Subscription Season	2	1	3	25	28	0	0	0	20	20	0	1	1	20	21
Other Mainstage Season	0	2	2	17	19	1	3	4	10	14	4	0	4	5	9
Opera Total	2	3	5	42	47	1	3	4	30	34	4	1	5	25	30
Dance															
<i>Subscription Season</i>															
Ballet	8	4	12	23	35	7	8	15	12	27	11	4	15	13	28
Contemporary	2	3	5	0	5	5	0	5	1	6	2	3	5	1	6
<i>Subscription Season Total</i>	<i>10</i>	<i>7</i>	<i>17</i>	<i>23</i>	<i>40</i>	<i>12</i>	<i>8</i>	<i>20</i>	<i>13</i>	<i>33</i>	<i>13</i>	<i>7</i>	<i>20</i>	<i>14</i>	<i>34</i>
<i>Other Mainstage</i>															
Ballet	13	18	31	3	34	7	24	31	2	33	22	7	29	5	34
Contemporary	0	16	16	0	16	1	2	3	0	3	0	0	0	0	0
<i>Other Mainstage Total</i>	<i>13</i>	<i>34</i>	<i>47</i>	<i>3</i>	<i>50</i>	<i>8</i>	<i>26</i>	<i>34</i>	<i>3</i>	<i>36</i>	<i>22</i>	<i>7</i>	<i>29</i>	<i>5</i>	<i>34</i>
Dance Total	23	41	64	26	90	20	34	54	15	69	35	14	49	19	68
Chamber Music **															
Subscription Season	2	4	6	108	114	3	9	12	125	137	2	2	4	108	112
Other Mainstage Season	6	20	26	194	220	2	33	35	120	155	2	27	29	150	179
	8	24	32	302	334	5	42	47	245	292	4	29	33	258	291
Regional / Carnivale	0	61	61	327	388	0	102	102	870	972	0	175	175	767	942
Chamber Music Total	8	85	93	629	722	5	144	149	1,115	1,264	4	204	208	1,025	1,233
Total	68.7	138.3	207	734	941	42.7	200.3	243	1,200	1,443	69.3	238.7	308	1,109	1,417
Percentage Total ***	7%	15%	22%	78%		3%	14%	17%	83%		5%	17%	22%	78%	

* Theatre includes Circus Oz, which uses a rolling show concept, developing new material for half of its 2001 and 2002 shows, one third of its 2003 show and two thirds of its 2004 show.

** Regional touring programs included from 2004 to ensure consistency with other artforms.

*** If Chamber Music regional programs are excluded, percentage of Australian:overseas works in 2004 is 26%:77% and 2005 is 30%:70%.

Note: Generally works for Opera and Theatre are full evening works, Dance features both full length and shorter works while works presented by Chamber Music are all shorter/part evening works.

Appendix 3: Profile of New and Existing Production: 2001-2006

	2001			2002			2003		
	New	Existing	Total	New	Existing	Total	New	Existing	Total
Theatre *									
Subscription Season	38.5	7.5	46	41.5	19.5	61	57	13	70
Other Mainstage Season	8	1	9	13	8	21	7	2	9
Theatre Total	46.5	8.5	55	54.5	27.5	82	64	15	79
Opera									
Subscription Season	14	14	28	13	11	24	5	19	24
Other Mainstage Season	4	1	5	8	0	8	10	8	18
Opera Total	18	15	33	21	11	32	15	27	42
Dance									
<i>Subscription Season</i>									
Ballet	13	37	50	13	35	48	18	21	39
Contemporary	4	2	6	3	1	4	11	1	12
<i>Subscription Season Total</i>	<i>17</i>	<i>39</i>	<i>56</i>	<i>16</i>	<i>36</i>	<i>52</i>	<i>29</i>	<i>22</i>	<i>51</i>
<i>Other Mainstage</i>									
Ballet	19	20	39	6	21	27	14	14	28
Contemporary	22	0	22	0	7	7	4	3	7
<i>Other Mainstage Total</i>	<i>41</i>	<i>20</i>	<i>61</i>	<i>6</i>	<i>28</i>	<i>34</i>	<i>18</i>	<i>17</i>	<i>35</i>
Dance Total	58	59	117	22	64	86	47	39	86
TOTAL	122.5	82.5	205	97.5	102.5	200	126	81	207
Percentage Total	60%	40%		49%	51%		61%	39%	

Appendix 3 continued over -

Appendix 3: Profile of New and Existing Production: 2001-2006

Continued

	2004			2005			2006		
	New	Existing	Total	New	Existing	Total	New	Existing	Total
Theatre *									
Subscription Season	51.6	10.4	62	49.7	12.3	62	46.3	20.7	67
Other Mainstage Season	15	5	20	12	2	14	13	6	19
Theatre Total	66.6	15.4	82	61.7	14.3	76	59.3	26.7	86
Opera									
Subscription Season	13	15	28	9	13	22	8	13	21
Other Mainstage Season	12	6	18	3	7	10	9	0	9
Opera Total	25	21	46	12	20	32	17	13	30
Dance									
<i>Subscription Season</i>									
Ballet	14	19	33	11	18	29	13	16	29
Contemporary	2	3	5	6	0	6	2	3	5
<i>Subscription Season Total</i>	<i>16</i>	<i>22</i>	<i>38</i>	<i>17</i>	<i>18</i>	<i>35</i>	<i>15</i>	<i>19</i>	<i>34</i>
<i>Other Mainstage</i>									
Ballet	22	12	34	28	3	31	24	13	37
Contemporary	0	16	16	1	2	3	0	0	0
<i>Other Mainstage Total</i>	<i>22</i>	<i>28</i>	<i>50</i>	<i>29</i>	<i>5</i>	<i>34</i>	<i>24</i>	<i>13</i>	<i>37</i>
Dance Total	38	50	88	46	23	69	39	32	71
Total	129.6	86.4	216	119.7	57.3	177	115.3	71.7	187
Percentage Total	60%	40%		68%	32%		62%	38%	

* Theatre includes Circus Oz, which uses a rolling show concept, developing new material for between 1/3 and 2/3 of it's show annually.

Note: Chamber Music / Orchestras is not included as the companies present concerts not productions.

Appendix 5: Paid Mainstage Capital City Attendances: 1992-2006

Appendix 5A: Paid Mainstage Capital City Attendances by Artform: 1992-2006

('000)	Dance	Opera	Theatre	Chamber Music	TOTAL	Symphony Orchestras	TOTAL including Orchestras
1992	287	345	722	112	1,466	n/a	n/a
1993	318	335	837	76	1,566	n/a	n/a
1994	290	354	723	67	1,434	n/a	n/a
1995	312	372	661	117	1,462	n/a	n/a
1996	286	339	631	124	1,380	n/a	n/a
1997	309	354	728	132	1,523	n/a	n/a
1998	290	317	705	119	1,431	n/a	n/a
1999	238	361	787	137	1,523	527	2,050
2000 *	333	313	798	144	1,588	547	2,135
2001 **	303	316	899	144	1,662	513	2,175
2002 ***	271	308	855	119	1,553	444	1,997
2003 ****	350	336	996	143	1,825	448	2,273
2004	314	304	940	149	1,707	457	2,164
2005	318	365	853	166	1,702	525	2,227
2006	304	361	818	154	1,637	481	2,118

* Relative changes are due in part to Olympic season programming.

** Relative changes are due in part to Centenary of Federation activities.

*** Relative changes in part due to drop in inbound tourism

Decrease in Dance attendances largely due to ADT leaving MPAB

**** Increase in Chamber Music attendances largely due to ABO entering MPAB.

Appendix 5B: Paid Mainstage Capital City Attendances by City: 1992-2006
(excluding Orchestras)

(‘000)	Adelaide	Brisbane	Canberra	Hobart	Melbourne	Perth	Sydney
1992	107	150	25	3	463	55	663
1993	142	162	33	4	508	86	630
1994	93	144	29	7	471	53	637
1995	100	155	36	3	445	53	670
1996	87	129	33	4	404	67	657
1997	85	131	36	5	491	53	724
1998	62	135	33	2	442	76	681
1999	100	130	35	2	430	77	749
2000	111	107	39	5	445	82	800
2001	111	139	48	11	516	64	774
2002	86	141	46	5	498	55	726
2003	82	140	56	5	558	84	903
2004	103	173	39	3	502	71	816
2005	93	171	20	2	575	71	768
2006	90	159	58	6	498	75	739
