Infrastructure NSW
Australian Arts Sector Funding Review

Submitted to:
Infrastructure NSW – Jenny Davis
13 June 2012

CONTENTS

TABLES

CHARTS

1.0 EXECUTIVE SUMMARY

Repucom International has been engaged by Infrastructure NSW to provide a report on the financial health of the 'arts sector' in New South Wales compared with other Australian states and territories. The objectives of this research are to provide:

- An overview of NSW art sector funding - both government and non-government
- An overview of NSW arts sector funding per capita
- An overview of NSW arts sector patronage
- Commentary regarding the NSW arts sector

Nationally and within New South Wales art and culture encompasses many different forms of expression, education and entertainment from dance, to theatre to festivals etc. As a testament to the strength of arts and culture in New South Wales, 10 of the 28 major performing arts group are located within the state. New South Wales art forms are supported by a range of galleries, museums and infrastructure located in metropolitan and regional centres, such as the iconic Sydney Opera House and the Art Gallery of NSW which hosts some of Australia's major art prizes including the Archibald. The Australia Bureau of Statistics ('ABS') estimates that key cultural and arts sectors contribute over $4.5 billion annually (or 4%) to the New South Wales economy. Furthermore, the ABS states that approximately 4.8 million people (or 83% of the population aged 15 years and over) in New South Wales *"attended a selected cultural venue or event at least once during the 12-months prior to interview in 2009–10."*

Private sector funding is provided in two forms – via corporate sponsorship or philanthropic donations (Giving). In 2009-10, the national arts and cultural sectors received $221 million, which represents approximately 10% of total funds required annually. New South Wales received the largest share of these funds at $83 million (or 37%) with 40% ($33m) generated from sponsorship and 60% comprised of giving or donations ($49m). New South Wales also received over $465.7 million in revenue from live performances ticket sales ranking ahead of its art sector counterpart Victoria.

In 2009-10, the New South Wales Government committed $350m in funding to arts and culture – the most of any State or Territory Government. Of the funds received, art galleries were the most reliant on both private and government funding, typically receiving over 50% of all funding available.

On a 'private sector funding' per capita basis, New South Wales attracts the second highest investment, however it still lags 50% behind the Australian Capital Territory. The New South Wales Government provides the highest allocation of arts and culture 'government funding' of any State Government, 'but' records the lowest investment per capita of any Australian state or territory.

Patronage was the highest and attracted the major share of Australian audiences in both New South Wales and Victoria. During 2009-10, a total of 6.4 million people aged 15 years and over (that is, 37% of the population) visited an Art Gallery or Other Museum nationally. However, cinemas, zoos and botanic gardens recorded significantly higher patronage attendances than arts or cultural activities for the same period.

Given the global economic uncertainty of recent times, arts and culture sponsorship has remained relative stable over the past several years, and is set to remain stable over coming years. However it must also be noted that when compared with sports sponsorship (59%), the arts sector ranks poorly (7%). In a recent report completed on-behalf of the Federal Government by Harold Mitchell, it was identified that consideration should be given to ways in which Government can offer tax benefits and concessions to the private sector; consolidating Government Departments; and developing awareness campaigns to encourage greater giving to art and cultural not-for-profit organisations.

2.0 INTRODUCTION

Repucom International has been engaged by **Infrastructure NSW** to provide a report on the financial health of the 'arts sector' in New South Wales compared with other Australian states and territories.

With the Australian economy continuing to ride the highs and lows of the current global economic climate - government, business and personal spending has continued to tighten over recent years. These expenditure patterns have been reflective of many industries, businesses and households including what contributions are made to arts and cultural organisations.

The objectives of this research are to:

- Determine NSW art sector funding compared with other Australian states and territories, both government and non-government;
- Determine NSW arts sector funding per capita, compared with other Australian states and territories
- Determine NSW arts sector patronage, compare with other Australian state and territories
- Provide commentary regarding the NSW arts sector activity, funding and patronage

2.1 Methodology

Repucom has research, collated, and interpreted data pertaining to the arts sector throughout Australia and the states and territories. The final report details art sector funding sources in New South Wales compared to other Australian states and territories across a number of major revenue streams including:

- Sponsorship investment
- Philanthropic donations
- Ticket sales / admission fees
- Government funding

2.2 Research

Repucom International has referenced a number of industry reports and sources for the purposes of compiling this review. Industry reports, statistics and references are located in Section 4 of this report.

2.3 Limitations

Care should be taken when reviewing reports and when analyzing and comparing data sets. Where data has been ambiguous or missing, or limited by survey participants, conservative estimates have been used in order to provide a holistic overview, or representation of the facts.

3.0 REVIEW FINDINGS

3.1 New South Wales Overview

Art and culture in Australia has been influenced over time from our Aboriginal ancestry, colonisation, and continued diversified growth as a nation through multiculturalism reflecting our unique but varied contemporary identity. At some point in time, demographics, the media, world events, trends, people, or the natural and built environment have provided sources of stimulation and inspiration to either challenge previous artistic philosophies, contest existing cultural norms, or has allowed art and culture to develop distinctively overtime. As Mitchell (2011) states *"Australians engage with our arts and culture in diverse ways—by seeing a blockbuster Australian film, camping out at a music festival, taking a school excursion to a regional museum, visiting a remote art centre, or subscribing to a symphony orchestra season"*.

The arts and culture sector nationally encompasses many different forms of expression, education and entertainment from:

- dance
- theatre
- live music concerts
- visual arts
- indigenous art and culture
- museums and art galleries
- interdisciplinary arts
- performing arts
- literature
- festivals
- digital, new media and film

A diverse and dynamic range of multi-purpose venues, conservatoriums, galleries, museums, cultural institutions, theatres and other infrastructure located in metropolitan and regional centres, supports these art forms. One of the world's most iconic buildings stands as a testament to Australia's, and New South Wales' support for arts and culture – *The Sydney Opera House*. So iconic, is this building, it was formally listed in 2007 on the 'UNESCO World Heritage List'. In 2010 / 2011 it is estimated over 1.3 million people were entertained by 1,795 performances at the Opera House (Sydney Opera House[1], 2012, p.4), with over 7 million visitors (Sydney Opera House[2], 2012).

The Australian Bureau of Statistics[1] (2012, pp.41-42) 'Service Industries Survey' reported that some of New South Wales' key cultural and arts sectors contribute over $4.5 billion to the State's economy. The major contributors of income earned include:

- television services ($2,206.0m; 2006-07)
- film and video production ($1,000.8m; 2006-07)
- Museums and Art Galleries ($289.6m; 2007-08), and
- Performing Arts Operations ($363.9m, 2006-07)

Furthermore, the Australian Bureau of Statistics[1] (2012, p.iv) states that approximately 4.8 million people (or 83% of the population aged 15 years and over) in New South Wales *"attended a selected cultural venue or event at least once during the 12-months prior to interview in 2009–10,"*

Prior to the Census in 2006, 101,036 people in New South Wales *"had a cultural occupation as their job"*, and in 2007 over 1.1 million people (or 21% of all people aged 15 years and over) *"were involved* [paid and unpaid work] *in a culture or leisure activity"* (Australian Bureau of Statistics[1] (2012, p.v). In a report completed by Access Economics (2010, p.19) research indicates that the *'NSW Creative Industries Sector'* from 1999 to 2010 has maintained a constant share of the New South Wales economy at around 4%. Over the next decade to 2020, a similar share is expected to be retained.
Note – NSW Creative Industries include: advertising and marketing; architecture, design and visual arts; music and performing arts; film, television and radio; writing, publishing and print media; and software, web and multimedia development

Within Australia, there are 28 major performing arts companies of which 10 are located within New South Wales. These companies work across a range of art and cultural spectrums from opera, theatre and drama, music and dance and include:

- Australian Brandenburg Orchestra
- Australian Chamber Orchestra
- Bangarra Dance Theatre
- Bell Shakespeare Company
- Belvoir
- Musica Viva Australia
- Opera Australia
- Sydney Dance Company
- Sydney Symphony Orchestra
- Sydney Theatre Company

It is estimated these 10 companies alone represent circa 40% of the private sector funding received through sponsorship and giving in New South Wales. If other preeminent, New South Wales based, national arts & cultural organisations are included in this mix, i.e. the Australian Museum and National Maritime Museum, as well as the Sydney Opera House, the representation exceeds 50% of NSW private sector funding

More than 1.3 million people attend yearly performances (either local or inter-state visitors) by the major performing arts companies and they engaged directly through education programs and activities with nearly 450,000 children and students (NSW Government - Arts NSW[1], 2012). Besides these major groups, varying types of cultural and smaller performing arts organisations are spread throughout the state via regional programs and local networks.

New South Wales is also home to some of the Australia's most historical and contemporary cultural buildings. These institutions provide a continual reference for study, research, stimulation and creativity. Museums and Galleries NSW (2012, p.2) estimates over 600 museums and galleries are located in New South Wales – *"61 Regional and public galleries and 97 regional and public museums"* together with numerous volunteer, community and indigenous museums, galleries and cultural centres. The state's major Cultural Institutions such as the Australian Museum, Art Gallery of New South Wales, State Library of New South Wales and the Powerhouse Museum collectively in terms of participation in 2010-11 saw 4.8 million physical visitors (NSW Government - Arts NSW[2], 2012).

The value of the *"unique and irreplaceable archive of our history and contemporary culture"* in 2009-10 was valued at over $7 billion (NSW Government - Arts NSW[2], 2012). Furthermore on a yearly basis they hold some of the world's renowned travelling exhibitions and off-site programs, play host to some of Australia's major art prizes including the Sulman Prize or the Archbald Prize, or tour exhibitions throughout the network of public institutions.

In addition to the above, New South Wales hosts some major internationally acclaimed festivals, cultural events and outdoor performances including:

- Biennale of Sydney
- The Sydney Festival
- the Sydney Writers Festival
- The Sydney Film Festival
- as well as 1 off events each year such as the Sydney Harbour New Years Eve fireworks display which is recognised globally as one of the iconic new year's locales

Collectively, attendance at these events is into the millions annually. Furthermore, New South Wales *"has some of Australia's leading visual arts organisations"* (NSW Government - Arts NSW[3], 2012) and provide exhibitions, promotion and educational activities. Key organisations include the Museum of Contemporary Arts, Australian Centre for Photography and the d/Lux/MediaArts,

It is acknowledged by many that flourishing arts and cultural precincts create their own vitality by seeing individuals, friends and families wanting to work, play and live in these areas more commonly.

The arts sector must be recognised by Government, business and society for its collective contribution to economic development, providing cultural diversity and well-being through education and personal experiences, and allowing communities to create and promote artistic individuality.

3.2 – "Determine NSW art sector funding compared with other Australian states and territories, both government and non-government"

Summary of findings:

- Total private sector funding of the arts and cultural sector totaled $221 million in 2009-10
- Results indicate that private sector funding represents only 10% of total Australian arts sector funding
- New South Wales receives the greatest share of private sector funding at $83 million with 60% from 'Giving' of donations and 40% from corporate 'Sponsorship'
- New South Government provided $350.5 million in funding to arts and culture in 2009-10, being the most of any State or Territory Government
- New South Wales had the greatest revenue from performing arts ticket sales with $465.7m (or 35% share of industry (2010))
- Art Galleries are the most reliant on government funding, typically receiving over 50% of their funding from government

3.2.1 Private Sector Funding

Note 1: Mackay (2011, p.52) states in his paper *'Socio-economic, cultural and generational change in Australia: implications for our attitudes to giving'*, that high-net-worth individuals generosity in Australia is poor compared with world standards. Forty percent of individuals that earn between *"$100,000 and $500,000 per annum give nothing at all to charity"*. On a holistic average for this group, charities only received 0.5% of taxable income. It is noted however in comparable countries generosity rates are between 3 and 12%. Furthermore, Australian who earn over $1,000,000 per year only give approximately 2% of taxable income to charity *"compared with a world average of 10%"*.

Note 2: Three main reports have been viewed to compile this section of the report.

1. The Australia Business Arts Foundation (AbaF) annual survey has been used to identify private sector funding to the arts and culture sectors. The AbaF survey tracks the private sector support (of donations and sponsorship) of Australia's not-for-profit arts organisations including major galleries, performing arts companies, festivals and small and medium arts organisations. The most recent survey was conducted on information collected for the 2009-10 financial year from 318 arts and cultural organisations. The two main types of private sector funding in the arts sector and can be defined as:
   - ***Sponsorship*** – both monetary and value-in-kind (or contra) investment
   - ***Giving*** – philanthropic donations from individuals or groups, as well as from corporate foundations, trusts and other non-government sources. *Gifts of property and/or artworks are not included in this data*

   As predicted by AbaF *"a decrease in corporate support for the arts occurred in 2010 with the contribution of business to arts partnerships and sponsorships lagging the general economic performance by 18-24 months – based on overseas experience of previous economic downturns"* (AbaF, 2011, p.3). However, it is considered *"Australia's decrease of 2.7% was moderate compared to similar decreases in the UK of 11%"* (Jane Haley – AbaF CEO, 2011).

   See Appendix A for Australian arts organisations included in the AbaF survey.

2. The survey completed for the Australian Major Performing Arts Group (AMPAG) - *'Tracking changes in Corporate Sponsorship and Private Donations – 2010'* reviews where the 28 major performing arts companies around Australia secure private sponsorship and donations. This survey was viewed as complimentary information, but not used in the report as the majority of the 28 performing arts companies also participated in the AbaF 2009-10 Annual Survey.

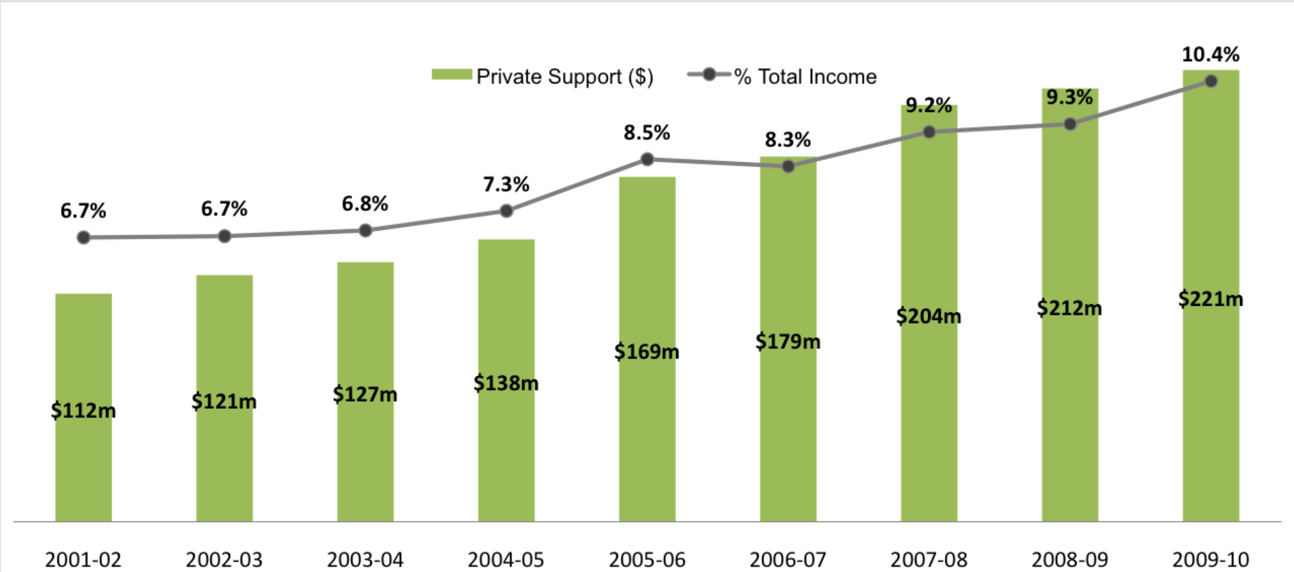
3. The Australia Council for the Arts report *'It's a given: Tracking the Importance of Private Giving and Sponsorship to Key Organisations - 2011'* monitors the arts sector performance in attracting private sector support, and *"tracks and analyses levels of private sector income of Australia Council funded key organisations"* (Australia Council for the Arts, 2012, p.2). As

noted within the report –*"It adapts the survey of major performing arts companies conducted by AMPAG, hence complementing that survey's findings as well as the private sector support survey conducted by AbaF"* (Australia Council for the Arts, 2012, p.2).

3.2.1.1 Private Sector Funding (Nationally)

Private sector funding of the Australian arts sector totaled **$221 million in 2009-10 financial year**, an increase of 4.25% on 2008-09 figures (see Chart 1). The survey results indicate that private sector funding only represents approximately **10%** of the total Australian arts sector funding. Furthermore, the results indicate over the period 2001-02 to 2009-10 that the growth of private sector funding while positive has been inconsistent.

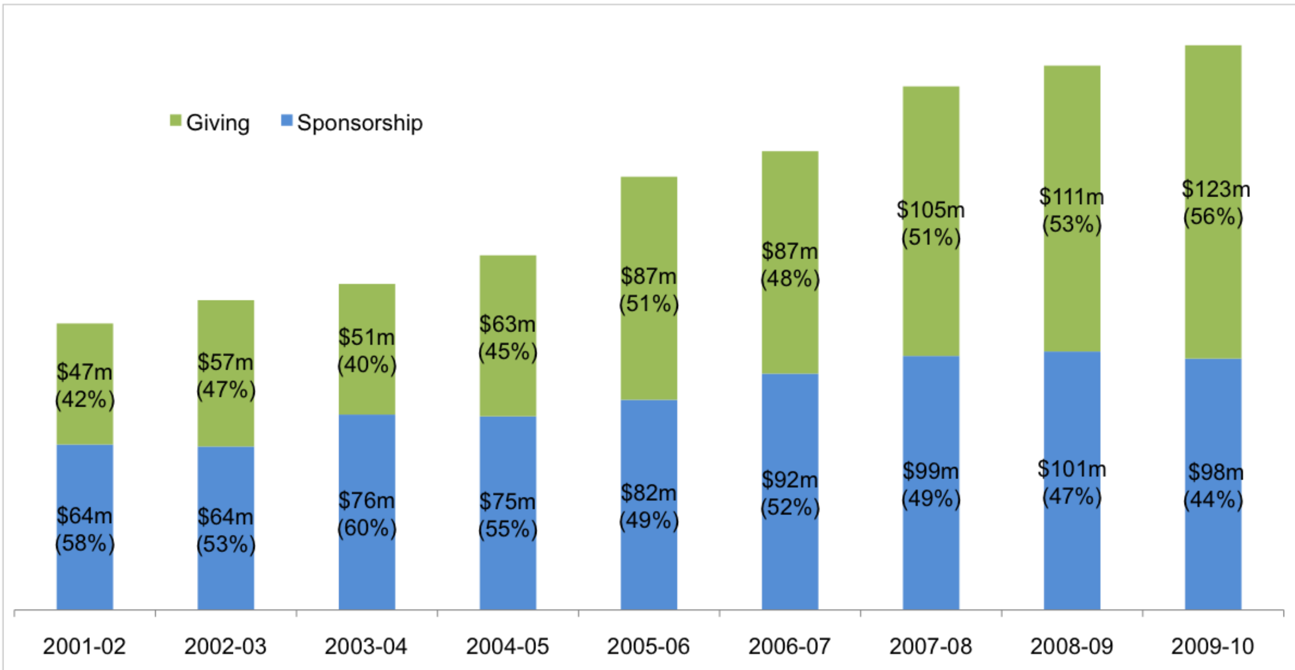
Chart 1: Total private sector support for the arts nationwide (2001-02 to 2009-10)



Source: AbaF, 2011, p.4

In 2009-10 philanthropic donations (or 'Giving') represented just over half of Australia's arts sector private funding at 56% or $123 million (see Chart 2). This was an increase of $12 million from 2008-09 and has maintained a positive steady trend since 2006-07. While sponsorship contributed the remainder 44% in 2009-10, it was found that private sector sponsorship had a slight decline from 2008-09 results but similar to 2007-08 contributions made.

Chart 2: Total private sector support for the arts nationwide – sponsorship and giving (2009-10)



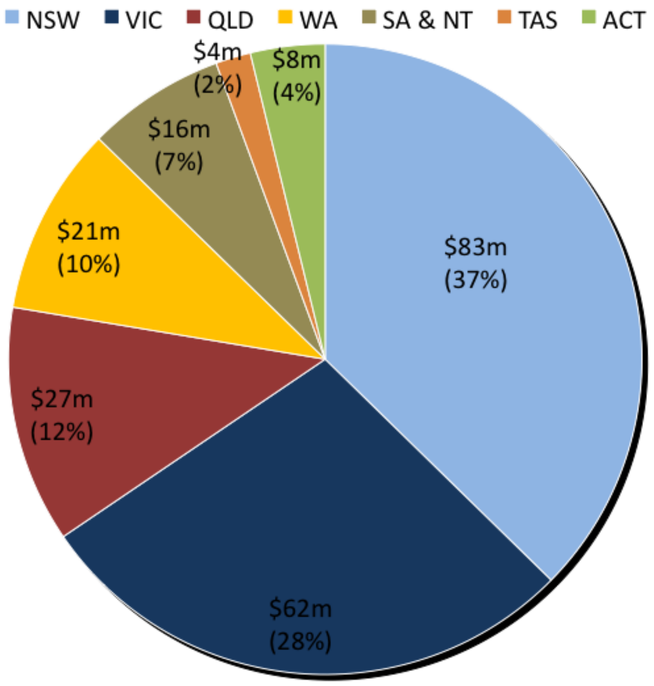
Source: AbaF, 2011, p.5

3.2.1.2 Private Sector Funding (State Comparisons)

As discussed in Section 3.2.1.1, total private sector funding totaled $211 million for the arts sector nationally.

Private sector funding of the New South Wales arts sector equated to approximately **$83 million** (see Chart 3). New South Wales received the **largest share** of national private sector arts funding representing 37% of the national spend, followed by Victoria at 28% ($62 million) and Queensland at 12% ($27 million), Western Australia at 10% ($21m), South Australia/Northern Territory at 7% ($16m), Australian Capital Territory at 4% ($8m) and Tasmania at 2% ($4m).

Chart 3: Total private sector funding by Australian State & Territories (2009-10)

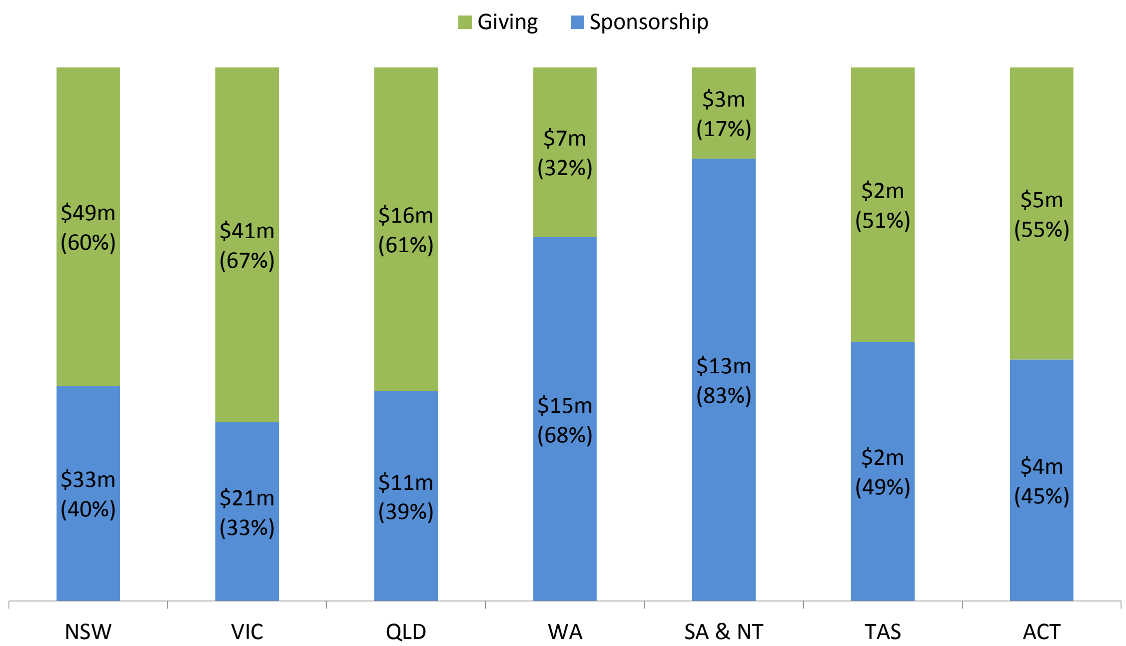


Source: AbaF, 2011, p.7

In New South Wales:

- **'Giving' - represents 60%** ($49.3 million) of the arts industry funding
- **'Sponsorship' - represents 40%** ($33.3 million) of the arts industry funding

Chart 4: Total private sector funding for the arts: Sponsorship and giving by Region (2009-10)

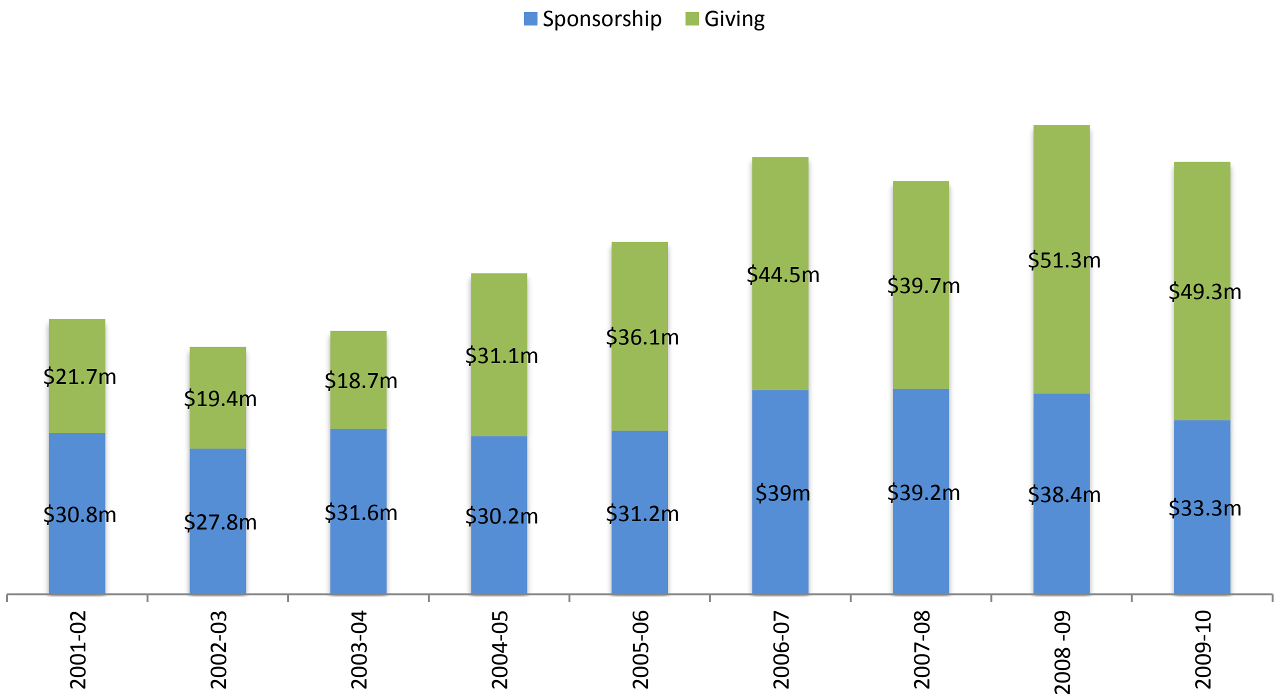


Source: AbaF, 2011, p.8

Chart 5 expands on Chart 4's 'giving and sponsorship' data for New South Wales and provided trending analysis from 2001-02 to 2009-10.

Overall, private sector support within New South Wales fell by 8% in 2009-10 from the previous year, equating to a $7.1 million decline. Sponsorship recorded the greatest decline, down $5.1 million (-13%) whilst philanthropic donations declined by $2 million (-4%). In comparison Victoria's private sector support for sponsorship fell $5.2 million (-20%) for the same period from 2008-09 results. Western Australia, South Australia / Northern Territory had sponsorship increases of 11% (+$1.4 million) and 42% (+$3.8 million) respectively between the 2008-09 to 2009-10 survey period (AbaF, 2011, p.9).

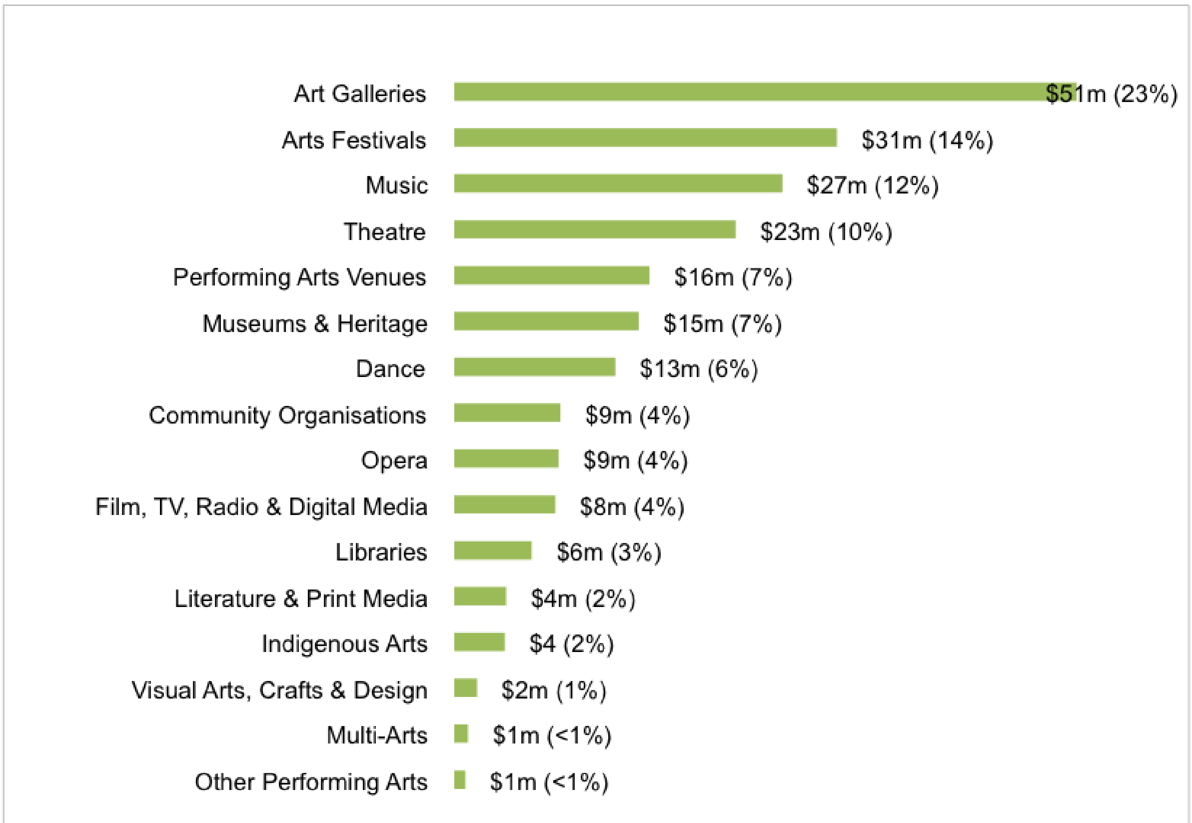
Chart 5: New South Wales private sector funding for the arts – yearly comparison: Sponsorship and giving (2001-02 to 2009-10)



Source: AbaF, 2011, compiled raw survey data

Nationally, there is a wide range of art forms that receive private sector funding (see Chart 6). Of the overall $221 million provided through 'sponsorship or giving', art galleries received the largest share of support in 2009-10 with a 23% share or $51 million. But it also must be noted that there was an $8 million decline in support from the previous year (2008-09). Art festivals (-$8.6 million), music (-$1.7 million), and opera (-$0.7 million) also recorded declining support from 2008-09. Performing arts organisations led by theatre and dance generated positive increases, together with community organisations, libraries and literature from the 2008-09 results.

Chart 6: Total private sector funding by Arts form – Nationally (2009-10)



Source: AbaF, 2011, p.10

3.2.1.3 Impact of pre-eminent arts organisations on New South Wales Results

In 2009-10, the following preeminent Australian, New South Wales-based arts and cultural organisations, generated a total of nearly $42.8 million in private sector funding. This represents more than half of New South Wales' total private sector funding of around $83 million.

These organizations include:

- Australian Brandenburg Orchestra
- Australian Chamber Orchestra
- Australian Museum
- Australian National Maritime Museum
- Bangarra Dance Theatre Australia
- Musica Viva
- Opera Australia
- Sydney Dance Company
- Sydney Opera House
- Sydney Symphony Orchestra
- Sydney Theatre Company
- The Bell Shakespeare Company

3.2.1.4 Sponsorship Funding by Industry Categories

The 6th Annual Sponsorship Australasia Outlook Report 2011 indicates, "overall confidence in the Australasian sponsorship industry remains strong and is in line with the levels of other countries. However, confidence has dimmed from the highs of 2010, a result that would appear to be reflective of a more cautious economic mood in the greater Australian business community. Sport still dominates sponsorship budgets, but the share being allocated to community and grassroots has remained at number 2 and all indications are for growth within this category in 2012" (Sponsorship Australasia, 2012, p.2).

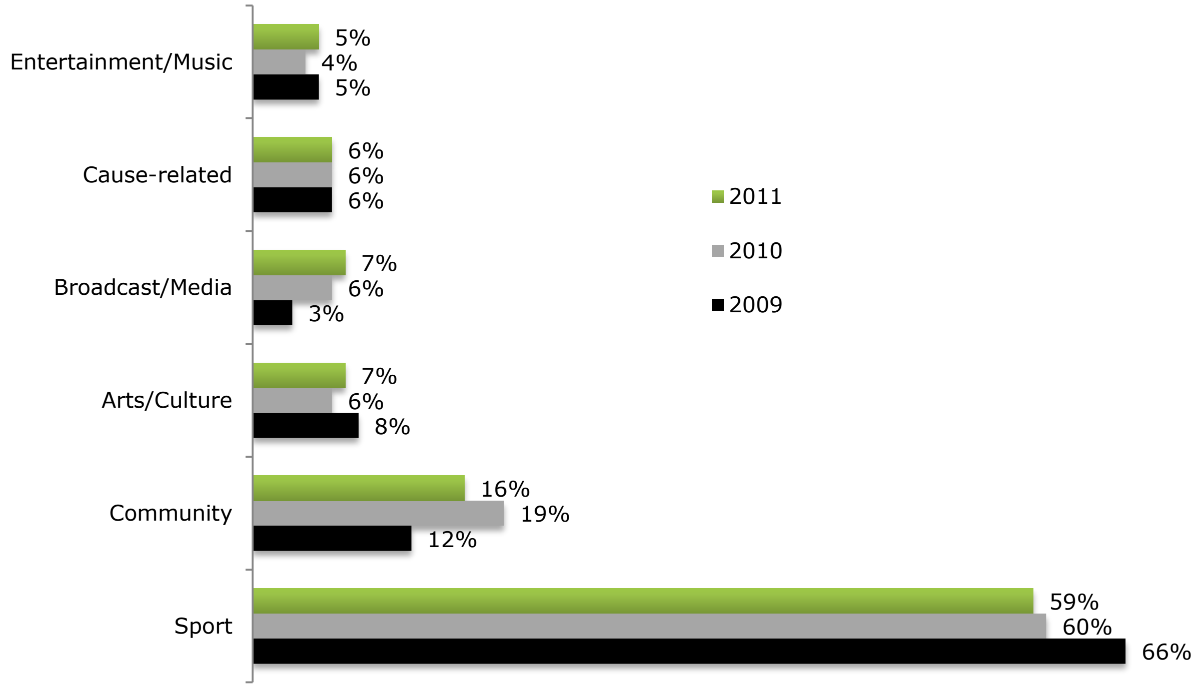
"While sponsorship continues to play a significant role in the marketing mix, its share of the marketing budget, like the more traditional marketing communications, is under threat from the new media platforms such as online, social and mobile media" (Sponsorship Australasia, 2012, p.2).

"Overall, the 2011 Outlook Report shows that while confidence" in the medium term, and optimism for ongoing funding is positive, "uncertainty and caution are evident – more is being asked of less resources, and more than ever sponsorships will be under scrutiny to perform in a rapidly changing business environment" (Sponsorship Australasia, 2012, p.2).

"Overall confidence in the Australasian sponsorship industry remains strong with 61% of respondents agreeing with the statement that 'they feel confident about the health of the sponsorship sector over the next 12 months,' however there has been a marked decrease in confidence since the 2010 study especially amongst sponsors" (Sponsorship Australasia, 2012, p.3). This decrease is consistent with trends seen globally and correlates with a wider economic uncertainty. "In parallel with the decline in confidence is a reduced budgetary optimism with less sponsors predicting budgetary increases in 2012 than in the previous year" (Sponsorship Australasia, 2012, p.3).

"While sport continued to command the majority of sponsorship budgets, the emerging category of community and grassroots sponsorship maintained its share in 2011. 42% of respondents predicted that budgets for this category would increase in 2012" (Sponsorship Australasia, 2012, p.3). This forecasted growth is likely to come at the expense of other categories including the arts sector.

Chart 7: Australian Sponsorship by Category (2009-2011)



Source: Sponsorship Australasia, 2012, p.28

3.2.2 Government Funding

According to the Australian Bureau of Statistics (ABS[2], 2012), the Australian arts and cultural sector received over $6 billion in government funding in 2009-10, from federal, state and local governments as identified below:

	%	**$**	**Funding / person**
Australian Government	37%	$2,457.0m	$110.92
State and Territory Governments	45%	$3,003.3m	$135.58
Local Government	18%	$1,197.7m	$54.07
	100%	$6,658.0m	$300.56

The majority of Federal Government (72%) funding was allocated to activities surrounding the arts within the *"category of radio and television services"* (ABS[2], 2012). Over the 2009-10 period overall funding to cultural activities increased by 3%, the sub-arts sector had an increase of 7% while the sub-heritage sector saw funding reduced by a similar amount.

"Apart from direct funding, the Australian Government also provides assistance through tax concessions………to encourage the donation of items of cultural significance to public art galleries, museums, libraries and archives" (ABS[2], 2012). This matter is discussed further in Section 3.5.2.

As can be seen from Table 1 below, the **New South Wales government dedicates the greatest share of funding to the arts sector of all Australian states and territories with $350.5 million**, closely followed by Victoria and Queensland. However on a funding per person basis, New South Wales Government spending on arts and culture lags all other states and territories. Excluding Environmental Heritage funding ($1,345.7m in – 2009-10)_from this report for all states, the next greatest funding beneficiary Museums. As stated by the ABS[2] (2012) *"museums were the most reliant on Government funding" and in 2007-08 they received 68% of their total income from Government"*. In 2009-10, New South Wales museums received approximately 50% of the state's funding.

The majority of Local Government funding is allocated to public libraries (ABS[2], 2012) except for Tasmania, Northern Territory and the ACT. In 2009-10 New South Wales Local Government funding of public libraries was 66% of total budget. Local Government cultural funding per person in 2009-10 for New South Wales equates to $54.44 which on average for all states and territories.

Table 1: State government funding by State & Territories (2009/10)

	Funding $m (2009-10)								
2009-10	**NSW**	**Vic**	**Qld**	**SA**	**WA**	**Tas**	**NT**	**ACT**	**TOTAL**
Heritage									
Art museums	50.4	54.3	44.2	9.2	13.3	4.3	7.3	4.1	187.1
Other museums and cultural heritage	122.6	82.5	71.2	25.3	41.8	8.7	12.4	7.2	371.8
Libraries	77.6	85.9	67.1	30.5	42.6	21.1	10.4	12.4	347.6
Total heritage	*250.7*	*222.7*	*182.5*	*65.1*	*97.8*	*34.0*	*30.1*	*23.7*	*906.6*
Arts									
Literature and print media	1.8	5.8	2.5	0.8	2.0	0.4	0.3	0.3	14.0
Music performance	16.5	13.8	5.2	3.8	4.6	2.6	1.8	2.1	50.6
Drama	4.9	3.2	12.2	5.2	4.8	0.4	0.1	1.2	32.0
Dance	2.4	2.6	3.9	2.0	2.6	0.6	0.4	0.6	15.1
Music theatre and opera	6.1	6.0	5.6	1.6	2.6	0.1	-	-	22.1
Other performing arts	5.6	22.0	12.4	0.8	3.5	0.3	0.3	0.1	45.1
Performing arts venues	43.5	28.2	51.0	19.1	58.8	0.5	2.0	10.9	214.1
Music composition and publishing	0.1	0.1	0.3	-	-	0.1	-	-	0.6
Visual arts and crafts	3.8	4.8	10.5	3.9	7.3	1.4	0.6	5.7	38.1
Design	1.4	4.2	1.1	0.1	0.4	0.1	-	0.2	7.4
Radio and television services	-	0.4	0.1	0.1	-	-	-	0.1	0.8
Film and video production and distribution	10.2	45.3	16.2	24.2	11.5	0.7	0.2	0.2	108.4
Multimedia	0.7	3.9	0.2	2.0	0.4	-	-	1.5	8.8
Other arts	13.0	31.7	43.4	26.1	6.8	4.0	2.7	4.3	131.9
Total arts	*99.8*	*126.4*	*148.3*	*65.6*	*93.9*	*10.6*	*8.3*	*27.0*	*579.9*
Total	**$350.5**	**$349.1**	**$330.8**	**$130.7**	**$191.7**	**$44.6**	**$38.4**	**$50.7**	**$1 486.5**
Population (ABS[3] 2009-10)	**7.230**	**5.550**	**4.510**	**1.640**	**2.290**	**0.5076**	**0.2297**	**0.3586**	**22.330**
Funding / person	**$48.5**	**$62.9**	**$73.3**	**$79.7**	**$83.7**	**$87.9**	**$167.2**	**$141.4**	

Source: ABS[2] (2012) / ABS[3] (2012)

***Table 1 has excluded**: Environmental Heritage ($1,345.7m), Archives ($62.2m), Radio and Television Services ($0.8m), Film and video production and distribution ($108.4m)* – See Appendix B

3.2.3 Other Non-Government Funding

3.2.3.1 Arts Sector Ticketing Revenue

The survey completed by Live Performance Australia (2010) *'Ticket Attendance and Revenue Survey 2010'* indicated approximately 17.24 million tickets were issued to live entertainment events in Australia. The tickets issued were comprised of approximately 15.36 million paid tickets, while the remaining 1.88 million tickets were complimentary, sponsor and zero priced tickets. This generated total **revenue of close to $1.328 billion in 2010**, as compared with $1.083 billion in 2009, representing an increase of 22.6% year on year.

Table 2: Total ticket revenue and attendance (2004 – 2010)

	Revenue	Growth (%)	Total Tickets*	Growth (%)	Average Ticket Prices ($)**	Growth
2004	$689,599,070		13,477,231		$55.13	
2005	$834,337,206	21.0%	15,808,790	17.3%	$60.62	10.0%
2006	$1,158,064,526	38.8%	19,835,756	25.5%	$64.08	5.7%
2007	$1,228,658,664	6.1%	20,887,365	5.3%	$66.03	3.1%
2008	$1,061,273,304	-13.6%	15,823,705	-24.2%	$76.60	16.0%
2009	$1,083,329,949	2.1%	15,196,773	-4.0%	$80.57	5.2%
2010	**$1,327,805,816**	**22.6%**	**17,241,139**	**13.5%**	**$86.43**	**7.3%**

** Based on both paid & unpaid tickets*
*** Average Ticket Prices are calculated based only on paid tickets.*
Source: Live Performance Australia (2010, p.8)

Note: the Live Entertainment industry encompasses performances, productions, rehearsals or concerts that are performed in front of a live audience.

As shown in Table 3 below, **New South Wales generated the greatest revenue from live performance ticket sales of all states with over $465 million recorded for 2010.** Non-classical music was the most popular arts category followed by musical theatre and festivals.

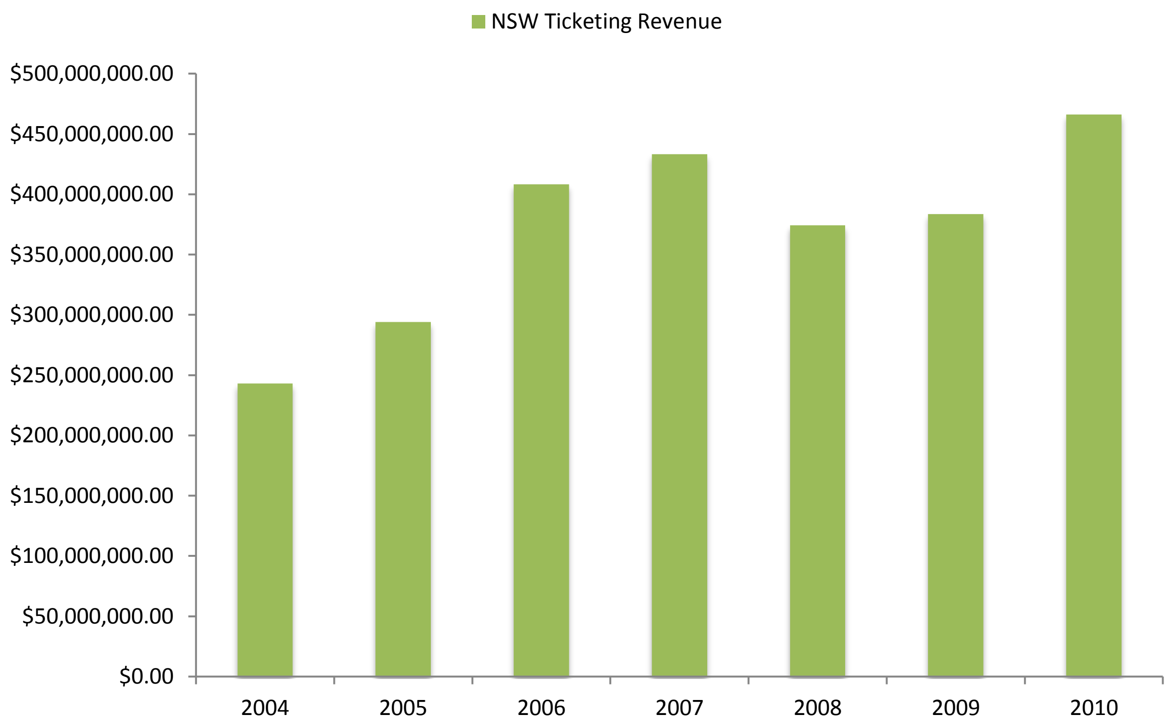
Table 3: Total ticket revenue by State / Territory (2010)

Region	Revenue	Share of Industry (2010)	Share of Industry (2009)	Tickets	Share of Industry (2010)	Share of Industry (2009)
New South Wales	**$465,761,849**	**35.1%**	**35.4%**	**5,818,163**	**33.7%**	**34.1%**
Victoria	$451,053,035	34.0%	32.1%	5,820,603	33.8%	31.2%
Queensland	$160,520,942	12.1%	13.6%	2,043,327	11.9%	13.2%
Western Australia	$145,479,374	11.0%	9.7%	1,879,408	10.9%	9.7%
South Australia	$68,538,320	5.2%	7.6%	1,035,243	6.0%	9.5%
Australian Capital Territory	$15,248,151	1.1%	1.3%	304,168	1.8%	1.7%
Tasmania	$3,783,068	0.3%	0.3%	59,753	0.3%	0.5%
Northern Territory	$3,313,888	0.2%	0.0%	96,872	0.6%	0.1%
Unallocated*	$14,107,190	1.1%	NA	183,603	1.1%	NA
Total	**$1,327,805,816**	**100.0%**	**100.0%**	**17,241,139**	**100.0%**	**100.0%**

** Unallocated events are mostly comprised of festivals that were held across several states for which ticketing data was not segregated by state. This category is new in 2010.*

Source: Live Performance Australia (2010, p.10)

Chart 8: New South Wales Ticketing Revenue - year on year comparison (2004-2010)



Source: Live Performance Australia (2010, p.10) – data from Table 2 & 3, then a pro-rata applied from Share of Industry to achieve year-by-year results for New South Wales

Table 4: Total ticket revenue by category or art form (2010)

Category	Revenue	% change in revenue (v 2009)	Share of Industry	Tickets	% change in attend. (v 2009)	Share of Industry
Ballet & Dance	$57,509,401	-1.8%	4.3%	1,023,077	-2.6%	5.9%
Children's/Family	$31,247,780	-2.1%	2.4%	974,624	-9.4%	5.7%
Classical Music	$45,882,050	-35.6%	3.5%	962,132	-14.1%	5.6%
Festivals (Multi)	$9,570,915	-10.1%	0.7%	263,464	-38.9%	1.5%
Festivals (Single)	$100,918,020	82.6%	7.6%	1,028,170	28.5%	6.0%
Musical Theatre	$242,897,364	13.0%	18.3%	2,612,507	6.3%	15.2%
Non-classical music	$659,102,048	43.1%	49.6%	7,028,235	50.1%	40.8%
Opera	$40,128,943	-8.9%	3.0%	409,541	-8.6%	2.4%
Special Events	$31,449,876	33.3%	2.4%	526,503	-5.9%	3.1%
Theatre	$60,151,139	-6.7%	4.5%	1,354,336	-15.5%	7.9%
Circus (Phys Theat)	$9,900,116	15.1%	0.7%	265,837	34.1%	1.5%
Comedy	$39,048,164	-1.3%	2.9%	792,713	3.1%	4.6%
Total	**$1,327,805,816**	**22.6%**	**100%**	**$17,241,139**	**13.5%**	**100.0%**

Source: Live Performance Australia (2010, p.11)

3.2.3.2 Museum & Gallery Admissions Revenue

Due to limited financial data pertaining to Museum & Gallery admission revenue, Repucom International has only been able to provide a national representation of this revenue stream for the purposes of comparison to the performing arts sub-sector

Table 5: Museums & Gallery Admissions Revenue nationwide (2003-04 / 2007-08)

	Art Gallery	Social history museum	Historic properties	Natural, science & other museums	Total
2003-04 *Admissions*	$8.8m	$20.2m	$18.1m	$8.9m	**$55.9m**
2007-08 *Admissions*	$19.6m	$15.4m	$25.9m	$14.7m	**$75.6m**

Source: ABS[4], (2012) – 2003-04 Data / ABS[5], (2012, p.6) – 2007-08 Data

3.3 – *"Determine NSW arts sector funding per capita, compared with other Australian states and territories"*

Summary of findings:

- New South Wales receives the greatest private sector funding of $83 million with 60% from 'Giving' and 40% from 'Sponsorship'

- New South Wales private sector funding of 'sponsorship' per person is $4.57 and 'giving' per person is $6.85, totaling $11.42 per person

- As a total per person, New South Wales attracts the second highest private sector funding per capita, however it is still lags 50% behind the Australian Capital Territory

- New South Wales Government provides the highest allocation of arts and culture funding of any State Government, but records the lowest investment per capita of any Australian state or territory

3.3.1 Private Sector Funding per Capita

New South Wales receives the greatest share of private sector funding of all Australian states and territories, and attracts the second highest investment per capita, behind the Australian Capital Territory, and closely followed by Victoria.

Table 6: Total private sector revenue by region per capita (2009-10)

Region	Population (2009-10) (ABS[3], 2012)	Sponsorship	Sponsorship Revenue / person	TOTAL REVENUE Sponsorship & Giving (AbaF, 2011)	Giving	Giving Revenue / person
Australian Capital Territory	358,600	$3,785,419 (45%)	$10.56	$8,412,043	$4,626,624 (55%)	$12.90
New South Wales	**7,230,000**	**$33,036,888 (40%)**	**$4.57**	**$82,592,220**	**$49,555,332 (60%)**	**$6.85**
Victoria	5,550,000	$20,521,469 (33%)	$3.70	$62,186,271	$41,664,802 (67%)	$7.51
Western Australia	2,290,000	$14,565,416 (68%)	$6.36	$21,419,730	$6,854,314 (32%)	$2.99
South Australia / Northern Territory	1,869,700 m	$12,975,590 (83%)	$6.94	$15,633,241	$2,657,651 (17%)	$1.42
Tasmania	507,600	$1,937,988 (49%)	$3.82	$3,955,078	$2,017,090 (51%)	$3.97
Queensland	4,510,000	$10,480,455 (39%)	$2.32	$26,872,961	$16,392,506 (61%)	$3.63
Total	**22,330,000**	$97,303,225		**$221,071,544**	$123,768,319	

Source: AbaF, 2011, raw survey data

See Section 3.2.1.2 for further analysis.

3.3.2 State Government Funding per Capita

The New South Wales Government provides the highest allocation of arts and culture funding of any State Government, but records the lowest investment per capita of any Australian state or territory.

Table 7: Total government funding by State per capita (2009-10)

Region	State Government Funding	Population	Funding / Capita
Northern Territory	$38,400,000	229,700	$167.2
Australian Capital Territory	$50,700,000	358,600	$141.4
Tasmania	$44,600,000	507,600	$87.9
South Australia	$130,700,000	1,640,000	$79.7
Western Australia	$191,700,000	2,290,000	$83.7
Queensland	$330,800,000	4,510,000	$73.3
Victoria	$349,100,000	5,550,000	$62.9
New South Wales	**$350,500,000**	**7,230,000**	**$48.5**

Source: ABS[2] (2012) / ABS[3] (2012)

See Section 3.2.2 for further analysis.

3.4 – *"Determine NSW arts sector patronage, compared with other Australian state and territories"*

Summary of findings:

- New South Wales approximately 4.8 million people (or 83% of the population aged 15 years and over) attended a selected cultural venues or event at least once during 2009-10

- Nationally, a total of 6.4 million people aged 15 years and over (that is, 37% of the population) visited an Art Gallery or Other Museum during 2009-10

- New South Wales and Victorian audiences attracted the major share of Australian audiences

3.4.1 Patronage overview

As discussed previously, the ABS[1] states that approximately 4.8 million people (or 83% of the population aged 15 years and over) in New South Wales "attended a *selected cultural venues or event at least once during the 12 month prior to interview in 2009-10".*

In 1991, the Australian Bureau of Statistics conducted its first Survey of Attendance at Selected Cultural Venues and Events. Following a number of surveys since this time, the most recent results have been published by the ABS relating to year 2009-10 (see cat. no. 4114.0).

Of the specific arts sector venues and events included in the survey, contemporary or popular music concerts had the highest attendance rate as shown below, with 30% of Australians aged 15 years and over, attending at least once concert in the 12 month period. However, it is noted that cinemas, zoo's and botanic gardens all had higher patronage numbers than the arts and cultural activities for the same period.

Table 8: Persons attending selected venues and events (a) – 2009-10 (nationally)

Venue or Event	Number of people attending '000	Attendance rate (b) %
Art galleries	4,524.4	25.9
Museums	4,464.3	25.5
Zoological parks and aquariums	6,424.2	36.8
Botanic gardens	6,153.8	35.2
Libraries	5,857.3	33.5
Archives	611.9	3.5
Classical music concerts	1,554.2	8.9
Popular music concerts	5,297.9	30.3
Theatre performances	2,847.0	16.3
Dance performances	1,768.4	10.1
Musicals and operas	2,849.1	16.3
Other performing arts	2,934.9	16.8
Cinemas	11,712.8	67.0

(a) In the 12 months prior to the survey
(b) Number attending as a percentage of the population aged 15 years and over

Source: ABS[6] (2012, p.6)

From the categories listed in the table above, the following art forms have been deemed relevant to this review

3.4.2 Attendance at Art Galleries and Museums by State or Territory

According to the 2009-10 ABS[6] (2012) survey, a total of 6.4 million people aged 15 years and over (that is, 37% of the population) visited an Art Gallery or Other Museum in the 12-month period prior to interview in a State or Territory. Furthermore, females recorded higher attendance rates than their male counterparts.

Table 9: Museum and Art Gallery attendance by State or Territory – 2009-10

State or Territory	Art Galleries '000	Other Museums '000	Total (a) '000
New South Wales	1,471.6	1,329.9	2,016.4
Victoria	1,157.4	1,130.6	1,633.4
Queensland	889.7	885.6	1,258.6
South Australia	333.4	368.0	478.8
Western Australia	399.0	421.0	590.2
Tasmania	106.6	143.3	161.5
Northern Territory	38.5	57.0	63.4
Australian Capital Territory	128.1	128.9	169.3
Total	4,524.4	4,464.3	6,371.6

(a) The total is less than the sum of the components as some people visited both types of museums.

Source: ABS[6] (2012, p.6)

3.4.3 Attendance at Performing Arts events by State or Territory

According to the 2009-10 ABS[6] survey, 52% of the population aged 15 years and over attended at least one type of Performing Arts performance in the 12-month period prior to interview. Additionally, 30% had attended a popular music concert, 16% had seen a Theatre performance and 16% a Musical or Opera.

According to Live Performance Australia *Ticket Attendance and Revenue Survey 2010,* New South Wales and Victorian audiences attracted the major share of Australian audiences.

Table 10: Total attendances by State or Territory – 2009-10

State or Territory	Tickets	Share of Industry 2010	Share of Industry 2009
New South Wales	5,818,163	33.7%	34.1%
Victoria	5,820,603	33.8%	31.2%
Queensland	2,043,327	11.9%	13.2%
South Australia	1,035,243	6.0%	9.5%
Western Australia	1,879,408	10.9%	9.7%
Tasmania	59,753	0.3%	0.5%
Northern Territory	96,872	0.6%	0.1%
Australian Capital Territory	304,168	1.8%	1.7%
Unallocated	183,603	1.1%	n/a
Total	17,241,139	100.0%	100.0%

** Unallocated events are mostly comprised of festivals that were held across several states for which ticketing data was not segregated by state. This is a new category in 2010.*

Source: Live Performance Australia (2010, p.10)

3.5 – "Provide commentary regarding the NSW arts sector activity, funding and patronage"

Summary of findings:

- Private sector funding including both corporate sponsorship and philanthropic donations, of the arts and cultural venues and events has remained relatively stable over several years and is predicted to remain stable for the coming years.

- Corporate sponsorship of sporting individuals, teams, venues, competitions and other related pursuits, along with community and grassroots activities, significantly exceed that of the arts sector. Whilst sport sponsorship is predicted to remain stable, investment in grassroots or community-based activities will continue to grow. However sponsorship practitioners predict corporate sponsorship of the arts will remain steady at a low base of 7% of sponsorship budgets

- The Mitchell Report has provided recommendations to Government:
    - To provide tax benefits and recognition programs for 'giving'
    - Consolidate Government businesses
    - Create an awareness campaign targeted at the next generational donor

3.5.1 Private Sponsorship Funding

Private sponsorship of the arts sector has remained consistent over the past few years with corporate sponsors indicating that 'arts & culture' properties represent approximately 7% of sponsorship portfolio investment. In today's sponsorship marketplace, corporate investment in the arts is consistent with that of 'broadcast', 'cause related' and 'entertainment/music' sponsorships, according to *Repucom International - Sponsorship Australasia's 6th Annual Sponsorship Outlook Report 2011*.

Sport sponsorship continues to far exceed all other marketing asset investments, currently representing 59% of a corporate sponsors investment portfolio. Investment in community or grassroots sponsorship has become popular over the past five years, with its share of sponsorship portfolio funding increasing from 12% in 2009 to 19% in 2010 and leveling back to 16% in 2011. (Source: Repucom International - Sponsorship Australasia's 6th Annual Sponsorship Outlook Report 2011).

From discussions made within Section 3.2.1.4, there is no reason to believe based on current indicators that arts sponsorship investment will shift significantly over the next five years. However, it is also expected that arts and culture *"look to have more difficult times ahead"* (Sponsorship Australasia, 2012, p.29).

3.5.2 Corporate & Private 'Giving' Funding

In the *Building Support: Report of the Review of Private Sector Support for the Arts in Australia (October 2011)*, Harold Mitchell (Chair) acknowledges that "*arts and cultural organisations, and artists, rely on support from the private sector, in addition to funding from government, to provide long-term stability*". The Mitchell (2011) review proposes recommendations that will be considered by the Federal Government as part of the development of the Natural Cultural Policy. The recommendations have been designed to *"broaden and strengthen the base of giving to the arts in Australia"* such as:

- Reduce red tape and timeframes for the Cultural Gifts Program
- Transfer responsibility for the Cultural Gifts Program to the Australian Taxation Office
- Tax benefit to private donors who provide a cash gift to arts organisations
- A 'matched funding for the arts' initiative
- Recognition program for significant private donors to the arts
- Amalgamation of the Australian Business Arts Foundation (ABAF) and Artsupport Australia (Artsupport) under the auspice of a new body to better coordinate with sector needs (see 3.5.3 below)
- Improve the Register of Cultural Organisations
- Develop a crowd funding initiative

- Government supported micro-loans scheme
- Awareness campaign aimed at 'cultivating' the next generation of donors

Note: all Mitchell (2011) Review recommendations are shown in Appendix E

3.5.3 Restructuring of Government Arts and Culture Departments: increasing business support

Within the Mitchell (2011, p.28) Review, it found that *"Stakeholders consistently expressed the view that there is duplication in the roles and activities of the Australia Business Arts Foundation and Artsupport Australia or, at the least, a lack of clarity within the sector on the different functions of the two programs".* While it is acknowledged services are currently available that can provide advice and assistance on private sector support, the main problem perceived is a lack of awareness of the information available. It has become apparent within the arts sector that greater access to information is required in *"identifying, obtaining and maintaining"* support. Through the consultative process of the review, it was identified amalgamation between the two would be beneficial by firstly removing duplication and, secondly creating *"a single point of reference for the sector"*.

While the Australia Business Arts Foundation (AbaF) and Art Support Australia had distinct models of business at their beginnings, over time however they have been converging especially in the *"duplication of services targeting philanthropy and giving"* (Mitchell, 2011, p.28). AbaF's mandate was to administer:

- and encourage private sector support by creating partnerships between business and arts organisations
- the Australian Cultural Fund, which allows *"Donors to make a tax-deductible gift to AbaF and express a preference that the donation goes to a particular artist or arts organisation"* (Abaf, 2012) without having to have deductible gift recipient status (i.e. Abaf has unique deductible gift recipient status allowing tax deductions that would not normally be permitted)

Alternatively, Artsupport initially *"began as began as a three-year joint pilot between the Australia Council for the Arts and AbaF"* (Australia Council for the Arts[2], 2012) with a focus on increasing philanthropy within the art sector throughout Australia. It established a *"brokering service matching potential donors and recipients of private sector support and through a research program"* (Mitchell, 2011, p.29).

In the *'Building Support: Report of the Review of Private Sector Support for the Arts in Australia (October 2011)'* – it provides the following recommendations to the Federal Government:

"Recommendation 5:

Amalgamate the Australia Business Arts Foundation (AbaF) and Artsupport Australia under the auspices of a new body with responsibility for all private sector support for the arts in Australia. This includes reworking existing AbaF and Artsupport programs within the new framework to remove duplication and better coordinate with sector needs. The new organisation would be rebranded to reflect the revised structure"

(Source: Mitchell, 2011, p.30)

The formation of a new body would see the facilitation, assistance and advocacy of *"all private sector support for the arts in Australia, including philanthropy and corporate support"* (Mitchell, 2011, p.30). It is also recommended that the new organisation be supported by government funding and the *"organisations terms of reference would need to be developed as part of its funding consideration, it is suggested that these include the following:*

- *mentoring and assisting artists and arts organisations to build their income and support from the private sector*
- *building the capacity of arts boards to attract and identify sources of private sector support*
- *building partnerships between the arts, philanthropy and business sectors, and*
- *administering the Australian Cultural Fund"*

  (Mitchell, 2011, p.30)

Currently, it is our understanding that the Australia Business Arts Foundation (AbaF) will be amalgamating with Artsupport Australia in approximately 12 months – however it is still business as usual for the present time. It is still unclear as to what terms of reference or other recommendations will be implemented for the consolidated organisation.

4.0 REFERENCES

AbaF (2010), *AbaF Survey of Private Sector Support – Measuring private sector support for the arts in 2008-09*, retrieved 12 June 2012, from http://www.abaf.org.au/Media/docs/AbaF-Survey-of-Private-Sector-Support-2010-Summary-b87493a2-cc2e-4c9f-b232-da5a066d0134-0.pdf

AbaF (2011), *AbaF Survey of Private Sector Support – Measuring private sector support for the arts in 2009-10*, retrieved 17 May 2012, from http://www.abaf.org.au/Media/docs/AbaF-2011-survey-of-private-sector-support-for-the-arts-c95e592a-c95f-4e68-8dbc-fde84de5e39a-0.pdf

Access Economics (2010), *The NSW Economy in 2020 – NSW Business Forum Discussion Paper – prepared for the NSW Innovation Council*, retrieved 24 May 2012, from http://www.ict-industry-reports.com/wp-content/uploads/2010/10/2010-NSW-Economy-in-2020-Access-Economics-Apr-2010.pdf

Australian Bureau of Statistics[1] (2012), *Culture Report 2012 New South Wales*, retrieved 25 May 2012, from http://www.arts.nsw.gov.au/wp-content/uploads/2011/05/NSW-CULTURE-REPORT-2012.pdf

Australian Bureau of Statistics[2] (2012), *4172.0 – Arts and Culture in Australia: A Statistical Overview, 2011 – Government Funding*, retrieved 4 June 2012, from http://www.abs.gov.au/ausstats/abs@.nsf/Products/2C061A3C38D10A59CA257968000CB6BA?opendocument

Australian Bureau of Statistics[3] (2012), *3218.0 – Regional Population Growth, Australia 2009-10*, retrieved 6 June 2012, from http://www.abs.gov.au/ausstats/abs@.nsf/Previousproducts/3218.0Main%20Features32009-10?opendocument&tabname=Summary&prodno=3218.0&issue=2009-10&num=&view=#PARALINK16

Australian Bureau of Statistics[4] (2012), *8560.0 – Museums, Australia, 2003-04*, retrieved 12 June 2012, from http://www.abs.gov.au/ausstats/abs@.nsf/ProductsbyReleaseDate/E773CD190936EBA8CA2575850013DD18?OpenDocument

Australian Bureau of Statistics[5] (2012), *8560.0 – Museums, 2007-08*, retrieved 12 June 2012, from http://www.ausstats.abs.gov.au/ausstats/subscriber.nsf/0/7BA052B8A3E7AC78CA2575850013F961/$File/85600_2007-08.pdf

Australian Bureau of Statistics[6] (2012), *4114.0 – Attendance at Selected Cultural Venues and Events, Australia, 2009-10*, retrieved 12 June 2012, from http://www.ausstats.abs.gov.au/ausstats/subscriber.nsf/0/527DC2F6CB079837CA2577FF0011EC88/$File/41140_2009-10.pdf

Australia Council for the Arts (2012), *It's a given: Tracking the Importance of Private Giving and Sponsorship to Key Organisations – Key Findings*, retrieved 7 June 2012, from http://www.australiacouncil.gov.au/__data/assets/pdf_file/0018/116037/Australia_Council_-_Its_a_Given_Key_findings_2010.pdf

Australia Council for the Arts[2] (2012), *Artsupport Australia is an initiative of the Australia Council for the Arts*, retrieved 12 June 2012, from http://www.australiacouncil.gov.au/philanthropy/artsupport_australia

Australian Major Performing Arts Group (2012), *Member Companies*, retrieved 9 June 2012, from http://www.ampag.com.au/Member_Companies

Jane Haley (2011), *2011 AbaF survey of private sector support for the arts*, retrieved 17 May 2012, from http://www.abaf.org.au/news--research/research/2011-abaf-survey-of-private-sector-support-for-the-arts.html

Live Performance Australia (2010), Ticket Attendance and Revenue Survey 2010, retrieved 29 May 2012, from http://www.liveperformance.com.au/site/_content/document/00000184-source.pdf

Mackay, H (2012), Appendix C: Community & Generosity, Socio–economic, cultural and generational change in Australia: implications for our attitudes to giving, October 2011, retrieved 25 May 2012, from http://www.arts.gov.au/sites/default/files/pdfs/Report_of_the_Review_of_Private_Sector_Support_for_the_Arts.pdf

Mitchell, H (2012), Building Support: Report of the Review of Private Sector Support for the Arts in Australia, October 2011, retrieved 25 May 2012, from http://www.arts.gov.au/sites/default/files/pdfs/Report_of_the_Review_of_Private_Sector_Support_for_the_Arts.pdf

Museums and Galleries NSW (2012), *Museums & Galleries NSW Strategic Plan 2009 - 2011*, retrieved 17 May 2012, from http://mgnsw.org.au/uploaded/About%20Us/Overivew/Final%20MG%20NSW_Strategic%20Plan%202009-2011.pdf

NSW Government - Arts NSW[1] (2012), *Major Performing Arts Venues*, retrieved 17 May 2012, from http://www.arts.nsw.gov.au/index.php/category/arts-in-nsw/major-performing-arts-organisations/

NSW Government - Arts NSW[2] (2012), *State Cultural Institutions*, retrieved 17 May 2012, from http://www.arts.nsw.gov.au/index.php/category/arts-in-nsw/state-cultural-institutions/

NSW Government - Arts NSW[3] (2012), *Visual Arts and craft organisations*, retrieved 17 May 2012, from http://www.arts.nsw.gov.au/index.php/category/arts-in-nsw/visual-arts-craft-organisations/

Sponsorship Australasia (2012), Repucom Sponsorship Australasia Sponsorship Report Outlook Report 2011, Repucom International, Sydney

Sydney Opera House[1] (2012), *Annual Report 2010 . 11*, retrieved 23 May 2012, from http://www.sydneyoperahouse.com/uploadedFiles/About_Us_(new_nav)/Sydney_Opera_House/Annual_Report/Annual%20Report%202011.pdf

Sydney Opera House[2] (2012), *Government Information and Public Access – Our Services*, retrieved 23 May 2012, from http://www.sydneyoperahouse.com/about/corporate_information_gipa.aspx

Appendix A

Australian arts organisations included in the Australian Business and Arts Foundation (AbaF) annual survey include:

Australian Capital Territory

Organisation
National Library of Australia
National Gallery of Australia
Belconnen Community Service
Canberra Cultural Facilities Corporation
Tuggeranong Arts Centre
Canberra Symphony Orchestra
Jigsaw Theatre Company
Canberra Youth Music
QL2 Centre for Youth Dance (Australian Choreographic Centre)
Arts Writer Centre

NSW

Organisation
Accessible Arts
Art Gallery of New South Wales
Arts Law Centre of Australia
Arts North West
Arts OutWest
Aurora Community Channel
Australian Brandenburg Orchestra
Australian Chamber Orchestra
Australian Copyright Council
Australian Film Television and Radio School
Australian Museum
Australian Music Centre
Australian National Maritime Museum
Australian Society of Authors
Australian Theatre for Young People
Australian Theatre of the Deaf
Australian Youth Orchestra
Bangarra Dance Theatre Australia
Beyond Empathy
Biennale of Sydney
Bundanon Trust
CarriageWorks
Clarence Valley Conservatorium
Coffs Harbour Regional Art Gallery
Company B
Critical Path
CuriousWorks
Currency House
Ensemble Productions (Ensemble Theatre)
Force Majeure
Gondwana Choirs (Gondwana Voices)
Goulburn Regional Conservatorium
Grafton Regional Gallery
Griffin Theatre Company
Hazelhurst Regional Gallery & Arts Centre
Information & Cultural Exchange
Joan Sutherland Performing Arts Centre
Liverpool Migrant Resource Centre
Monkey Baa Theatre for Young People
Mosman Art Gallery

Murray Arts
Murray Conservatorium
Museum of Contemporary Art
Museums and Galleries Foundation of NSW
Music Council of Australia
Music NSW
Music Outback Foundation
Musica Viva
National Association for the Visual Arts
National Institute of Dramatic Art
New England Regional Art Museum
Northern Rivers Performing Arts
NSW Writers' Centre
Object: Australian Centre for Craft and Design
Opera Australia
Orange Regional Conservatorium
Performance Space
Performing Lines
Pinchgut Opera
PlayWriting Australia
Powerhouse Museum
Ranamok Glass Prize
Regional Arts NSW
Shopfront Theatre for Young People
South East Arts Region
State Library of New South Wales
Sydney Dance Company
Sydney Festival
Sydney Film Festival
Sydney Opera House
Sydney Symphony
Sydney Theatre Company
Sydney Writers' Festival
Sydney Youth Orchestra
Tamworth Regional Conservatorium of Music
The Bell Shakespeare Company
The Song Company
Tweed River Art Gallery
Wagga Wagga Regional Art Gallery
Watermark Literary Society

Northern Territory

Organisation
Alice Desert Festival (Alice Springs Festival)
Artback NT Arts Touring
Barkly Regional Arts
Darwin Entertainment Centre
Desart
Incite Youth Arts
Museums and Art Galleries of the Northern Territory
Ngaanyatjarra Pitjantjatjara Yankunytjatjara Women's Council
Northern Territory Library
Tracks

Queensland

Organisation
Aboriginal Centre for the Performing Arts
artisan (Craft Queensland)
Backbone Youth Arts
Brisbane Powerhouse
Cairns Regional Gallery

Circa: Rock 'n' Roll Circus Ensemble
Contact
Crossroad Arts
Dance North
Empire Theatres
Expressions Dance Company
Flying Arts
Griffith Artworks
Impress Printmakers Studio Brisbane
Ipswich Art Gallery (Ipswich Arts Foundation)
La Boite Theatre
Major Brisbane Festivals
Opera Queensland
Q Music (Queensland Music Network)
QPIX
Queensland Art Gallery
Queensland Arts Council
Queensland Ballet
Queensland Centre for Photography
Queensland Museum
Queensland Theatre Company
Queensland Writers' Centre
State Library of Queensland
The Queensland Orchestra
UMI Arts
Young People and the Arts Australia (ASSITEJ Australia)
Zen Zen Zo

South Australia

Organisation
Adelaide Central School of Art
Adelaide Festival Centre (Foundation)
Adelaide Festival of Arts (Adelaide Bank Festival of Arts)
Adelaide Film Festival
Adelaide Fringe
Adelaide Philharmonia Chorus
Adelaide Symphony Orchestra
Ananguku Arts & Cultural Aboriginal Corporation
Art Gallery of South Australia
Artlab Australia
Arts Access SA (Arts in Action)
Ausmusic (South Australian Contemporary Music Company)
Australian Dance Theatre
Australian Festival for Young People
Australian Network for Art and Technology (ANAT)
Brink Productions
Co-Opera
Collections Council of Australia
Community Arts Network SA
Country Arts SA
Craftsouth: Centre for Contemporary Craft and Design
D'Faces of Youth Art
Feast (Adelaide Lesbian & Gay Cultural Festival)
Flinders University Art Museum
Helpmann Academy
History Trust of South Australia
JamFactory Contemporary Craft and Design
Leigh Warren & Dancers
Move Through Life

National Railway Museum
No Strings Attached Theatre of Disability
Out of the Square
Port Pirie Regional Art Gallery
Restless Dance Company
Riddoch Art Gallery
SALA
Slingsby
South Australian Council for Country Music
South Australian Museum
South Australian Youth Arts Board & Carclew Youth Arts Centre
State Library of South Australia
State Opera of South Australia
State Theatre Company of South Australia
Tandanya (National Aboriginal Cultural Institute)
Urban Myth Theatre of Youth
Windmill Performing Arts Company

Tasmania

Organisation
Australian Script Centre
Big hart
Kickstart Arts
MONA Festival of Music and Art (MONA FOMA)
Mudlark Theatre
Queen Victoria Museum and Art Gallery
Slipstream Circus
State Library of Tasmania
Tasdance
Tasmanian Museum and Art Gallery
Tasmanian Regional Arts
Tasmanian Symphony Orchestra
Tasmanian Theatre Company (is Theatre)
Ten Days on the Island
Terrapin Puppet Theatre
The Design Centre (Tasmanian Wood Design Collection)
Theatre Royal
Wide Angle Tasmania

Victoria

Organisation
Abbotsford Convent Foundation
Arena Theatre Company
Arts Access Society
Arts Management Advisory Group
Arts Project Australia
Asialink
Ausdance Victoria
Ausglass
Australian Centre for the Moving Image
Australian Film Institute
Australian National Memorial Theatre
Back to Back Theatre
Bendigo Art Gallery
Black Hole Theatre
Castlemaine Art Gallery & Historical Museum
Centre for Contemporary Photography
Chamber Music Australia

Chunky Move
City Museum at Old Treasury
Courthouse Youth Arts Centre
Craft Victoria
Cultural Infusion
Footscray Community Arts Centre
Frankston Arts Centre
Gasworks Arts Park
Geelong Gallery
Geelong Performing Arts Centre
Gertrude Contemporary Art Spaces
Gippsland Art Gallery
Hamilton Art Gallery
Heide Museum of Modern Art
Hothouse Theatre
Ilbijerri Aboriginal and Torres Strait Islander Theatre Co-op
Joy Melbourne
Kage Physical Theatre Association
La Mama Theatre
La Trobe University Art Museum
Linden Centre for Contemporary Arts
Lucy Guerin
Malthouse Theatre
McClelland Gallery & Sculpture Park
Melbourne Fringe
Melbourne International Arts Festival
Melbourne International Comedy Festival
Melbourne International Film Festival
Melbourne Recital Centre
Melbourne Symphony Orchestra
Melbourne Writers' Festival
Melbourne Youth Music Council
Monash Gallery of Art
Montsalvat Foundation
More Than Opera
MTC (Melbourne Theatre Company)
Multicultural Arts Victoria
Museum Victoria
Museums Australia (Victoria)
National Gallery of Victoria
National Institute of Circus Arts
Open Channel
Orchestra Victoria
Organs of the Ballarat Goldfields
Polyglot Puppet Theatre
Port Fairy Spring Music Festival
Regional Arts Victoria
RMIT Gallery
Royal Historical Society of Victoria
Shepparton Art Gallery
Somebody's Daughter Theatre
Southern Cross Philharmonia Orchestra
St Francis' Choir
State Library of Victoria
Strange Fruit Productions
TarraWarra Museum of Art
The Australian Ballet
The Australian Ballet School
The Boite
The Torch Project
Victorian Arts Centre
Victorian Opera
Victorian Tapestry Workshop
Victorian Writers' Centre

Victorian Writers' Centre
Western Edge Youth Arts
Westside Circus

Western Australia

Organisation
Art Gallery of Western Australia
Art on the Move
Artsource
Ausdance WA
AWESOME Arts Australia
Black Swan Theatre Company
Buzz Dance Theatre
Central TAFE Art Gallery
Community Arts Network Western Australia
Country Arts (WA)
Film & Television Institute WA
Fremantle Arts Centre
Fremantle Press
Kimberley Aboriginal Law and Culture Centre
Magabala Books Aboriginal Corporation
Mundaring Arts Centre
Perth Institute of Contemporary Arts
Perth International Arts Festival
Perth Theatre Trust
Propelarts
Propelarts
Southern Edge Arts
Southern Edge Arts
State Library of Western Australia
STEPS Youth Dance Company
The Blue Room (Performing Arts Centre Society)
WA Youth Jazz Orchestra
West Australian Ballet
West Australian Music Industry Association
West Australian Music Industry Association
West Australian Opera
West Australian Symphony Orchestra
Western Australian Academy of Performing Arts
Western Australian Museum
WritingWA (WA State Literature Centre)
Yirra Yaakin Aboriginal Corporation (Noongar Theatre)
Youth Ballet WA

Appendix B – Australian Bureau of Statistics Arts Categories

The Australian Bureau of Statistics recognises numerous arts categories within its various reports. For the purposes of this review, Repucom International has included the following categories as typical of the current Australian arts sector:

- Art Museums
- Dance
- Design
- Drama
- Libraries
- Literature & print media
- Multimedia
- Music composition & publishing
- Music performance
- Music theatre & opera
- Other arts
- Other museums & cultural heritage
- Other performing arts
- Performing arts venues
- Visual arts & crafts

The categories ***excluded*** from this review but identified within the 'arts and cultural' sector of the Australian Bureau of Statistics reports are:

- Environmental heritage
- Archives
- Radio & television services
- Film & video production & distribution

Appendix C – Ticket Attendance & Revenue Survey 2010

Live Performance Australia's Ticket Attendance and Revenue Survey 2010 was conducted across ticketing companies, self-ticketing venues and the Australia Council for the Arts (collectively referred to in the study as "the survey participants"). The ticketing companies surveyed as part of the study were:

- Araluen Centre for Arts & Entertainment NT
- The Arts Centre (Melbourne)
- Arts Projects Australia (Womadelaide) SA
- BASS SA
- BOCS Ticketing WA
- Canberra Ticketing
- Darwin Entertainment Centre (new in 2010)
- Moshtix (new in 2010)
- Queensland Performing Arts Centre (QPAC)
- Sydney Opera House
- Ticketek
- Ticketmaster

These companies were identified by Live Performance Australia and provided both gross revenue and attendance data for the 2010 calendar year. Gross revenue comprised revenue sourced from paid tickets only (i.e. excludes sponsorships); while the attendance data provided and applied in the analysis included both paid and non-paid tickets. Average ticket price data was calculated based on paid tickets only. The Australia Council companies included in the survey were:

- The Australian Ballet
- Australian Brandenburg Orchestra
- Adelaide Symphony Orchestra
- Australian Chamber of Commerce
- Bangarra Dance Theatre
- Bell Shakespeare
- Belvoir
- Black Swan Theatre Company
- Circus Oz
- Malthouse Theatre
- Melbourne Symphony Orchestra
- Melbourne Theatre Company
- Musica Viva
- Opera Australia
- Opera Queensland
- Orchestra Victoria
- Queensland Ballet
- Queensland Symphony Orchestra
- Queensland Theatre Company
- State Opera of South Australia
- State Theatre Company of South Australia
- Sydney Dance Company
- Sydney Symphony Orchestra
- Sydney Theatre Company
- Tasmania Symphony Orchestra
- West Australian Opera
- West Australian Ballet
- West Australian Symphony Orchestra

For these companies, the gross revenue includes both single ticket sales as well as subscription revenues.

Appendix D – The AMPAG companies included in the survey:

- The Australian Ballet
- Australian Brandenburg Orchestra
- Adelaide Symphony Orchestra
- Australian Chamber of Commerce
- Bangarra Dance Theatre
- Bell Shakespeare
- Belvoir
- Black Swan Theatre Company
- Circus Oz
- Malthouse Theatre
- Melbourne Symphony Orchestra
- Melbourne Theatre Company
- Musica Viva
- Opera Australia
- Opera Queensland
- Orchestra Victoria
- Queensland Ballet
- Queensland Symphony Orchestra
- Queensland Theatre Company
- State Opera of South Australia
- State Theatre Company of South Australia
- Sydney Dance Company
- Sydney Symphony Orchestra
- Sydney Theatre Company
- Tasmania Symphony Orchestra
- West Australian Opera
- West Australian Ballet
- West Australian Symphony Orchestra

For these companies, the gross revenue includes both single ticket sales as well as subscription revenues.

Appendix E – Recommendations from the Mitchell Report (2011) *'Building Support: Report of the Review of Private Sector Support for the Arts in Australia.'*

Recommendation 1a: Reduce red tape and timeframes for the Cultural Gifts Program through improvement of all aspects of the process, including the processing of applications, reducing the role of the committee and requiring applicants to obtain one valuation only

Recommendation 1b: Transfer responsibility for the Cultural Gifts Program to the Australian Taxation Office, with the Australian Valuation Office appointed as the primary valuer for the program and the Office for the Arts maintaining an advisory role.

Recommendation 2: The Australian Government introduce the capacity for private donors to provide a cash gift through their will to an arts organisation, and to receive an immediate taxation benefit to the present value of the gift.

Recommendation 3: The Australian Government commits funding to support a 'matched funding for the arts' initiative.

Recommendation 4: The Australian Government implements a formal program of recognition for significant donors to the arts.

Recommendation 5: Amalgamate the Australia Business Arts Foundation (AbaF) and Artsupport Australia (Artsupport) under the auspices of a new body with responsibility for all private sector support for the arts in Australia. This includes reworking existing AbaF and Artsupport programs within the new framework to remove duplication and better coordinate with sector needs. The new organisation would be rebranded to reflect the revised structure.

Recommendation 6a: The new private sector support body should promote, extend and formalise its advisory services to provide a program of fundraising, sponsorship and philanthropy governance support to small to medium arts organisations, particularly in regional and remote areas.

Recommendation 6b: The new private sector support body should expand its training activities to build the capacity of arts organisations to use their boards to attract and retain private sector support

Recommendation 6c: The new private sector support body should work with key arts training organisations to develop resources on seeking and retaining private sector support targeted at students and emerging artists.

Recommendation 7a: Amend the guidelines for the Register of Cultural Organisations to improve the definition of 'cultural' to encompass Aboriginal and Torres Strait Islander cultural practices, such as Aboriginal and Torres Strait Islander languages.

Recommendation7b: Transfer responsibility for administration of the Register of Cultural Organisations to the Australian Taxation Office, with administration to be streamlined in line with other deductible gift recipient categories. The Office for the Arts will retain an advisory role.

Recommendation 8: The Australian Government develops a crowd funding initiative with a matched funding from government component

Recommendation 9: The Australian Government provides funding to support a micro–loans scheme for the arts sector.

Recommendation 10a: The Australian Government conducts an awareness–raising program, targeting financial planners, taxation accountants and estate lawyers, providing information on taxation and testamentary giving incentives available to encourage private sector support for the arts

Recommendation 10b: The Australian Government establishes a public campaign promoting the benefits of giving to the arts using a series of arts 'champions' drawn from the philanthropic, business and arts sectors.