

2nd ADVICE National Report

January – June 2010



Queensland
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Where is the ADVICE project at?



Progress

In less than 3 years, the ADVICE project has:

- made significant progress towards a national audience database
- contributed to an analytical evidence based culture
- informed audience engagement

But ADVICE is an evolving project – it needs time to:

- develop a critical mass – local and national
- refine the accuracy and usefulness of data reports
- become a source of data for policy development and infrastructure planning

Current status

- Funding for three year ADVICE pilot concludes in June 2011
- Technical and organisational challenges during its roll out has slowed implementation
- Work continuing on improving the accuracy and robustness of the ADVICE dataset and reporting
- Cost of the entire project is underwritten by Australia Council and 3 state partner arts agencies:
 - Arts Victoria
 - Arts Queensland
 - WA Department of Culture and the Arts
- A more sustainable, long-term approach is needed



Risks to the project

1. Legal

The introduction of the Queensland *Information Privacy Act 2009* since ADVICE commenced has:

- Implications for the transfer of data to overseas servers including ‘historic’ data
- Impacts on all state and local government owned venues

Potential resolution: AQ working with Crown Law and the Australia Council – amended venue agreements, privacy statements, changes to Australia Council/Purple Seven agreement

2. Sustainable Business Model

If a sustainable business model cannot be identified loss of:

- Licensing arrangements and data collected through ADVICE
- Financial investment by the federal and participating state governments
- National installed technology base

Potential resolution: meeting with Australia Council and states to consider new business models

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What the ADVICE data is telling us... so far.



Interpreting the data

- Second national report data from 84 performing arts organisations across all states/territories
- Report covers the **6 month** period from January to June 2010
- Queensland has the most uniform metro/regional coverage
- Proposed licensed reporting system for state/territory agencies under development by Purple 7
- Caution should be exercised in interpreting and comparing this data:
 - The Sydney Opera House and Melbourne Arts Centre have not yet joined
 - Significant work underway to improve the accuracy of event coding
 - Some inconsistencies in the data remain - being explored with the Australia Council



Data for Queensland in this report has been contributed by the following organisations:

Metropolitan

Brisbane Powerhouse
La Boite, Roundhouse Theatre
Logan Entertainment Centre
Queensland Performing Arts Centre (QTIX)
QUT Gardens Theatre

Significant organisations not yet included in the ADVICE Queensland dataset:

Judith Wright Centre of Contemporary Art, Ipswich Civic Centre, Redland Performing Arts Centre

Regional

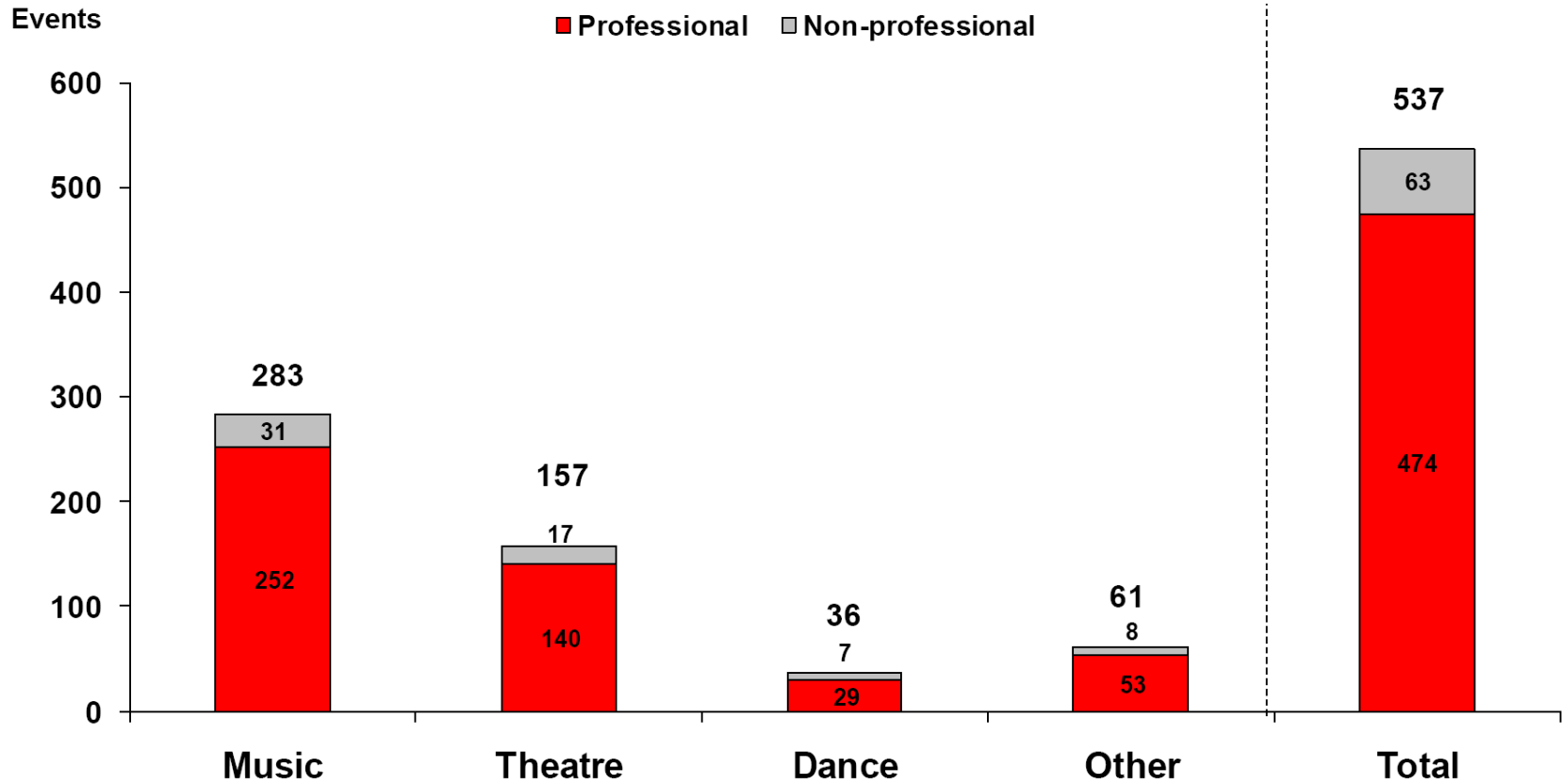
Brolga Theatre, Maryborough
Cairns Civic Theatre
Empire Theatre, Toowoomba
Gold Coast Arts Centre
Mackay Entertainment Centre
Pilbeam Theatre, Rockhampton
The Events Centre, Caloundra

Significant organisations not yet included in the ADVICE Queensland dataset:

Mt Isa Civic Centre, Riverways & Townsville Civic Theatre, Moncrieff Theatre Bundaberg



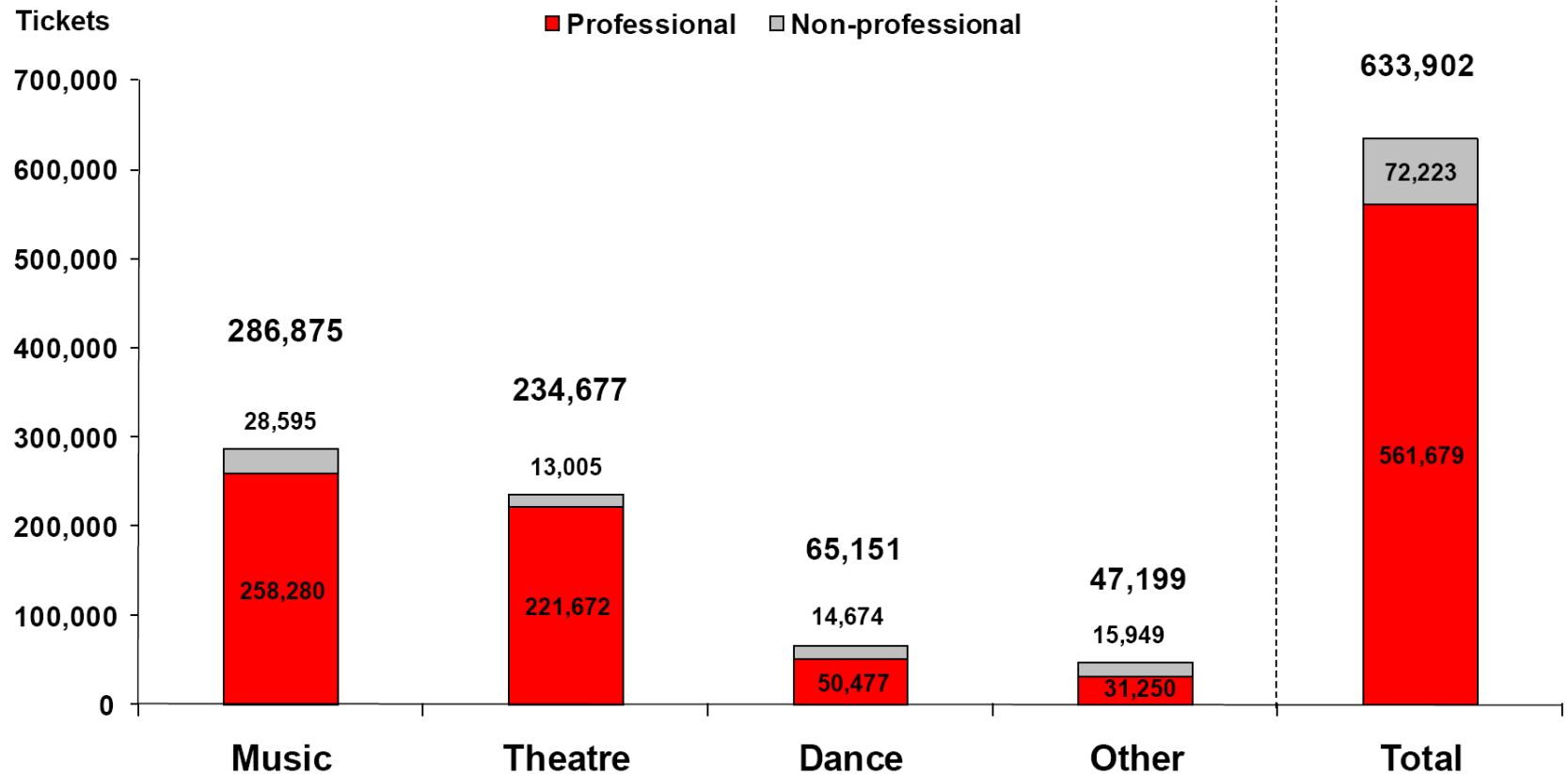
Chart 45: Queensland summary of events



Source: ADVICE dataset – tier 1 events, January–June 2010



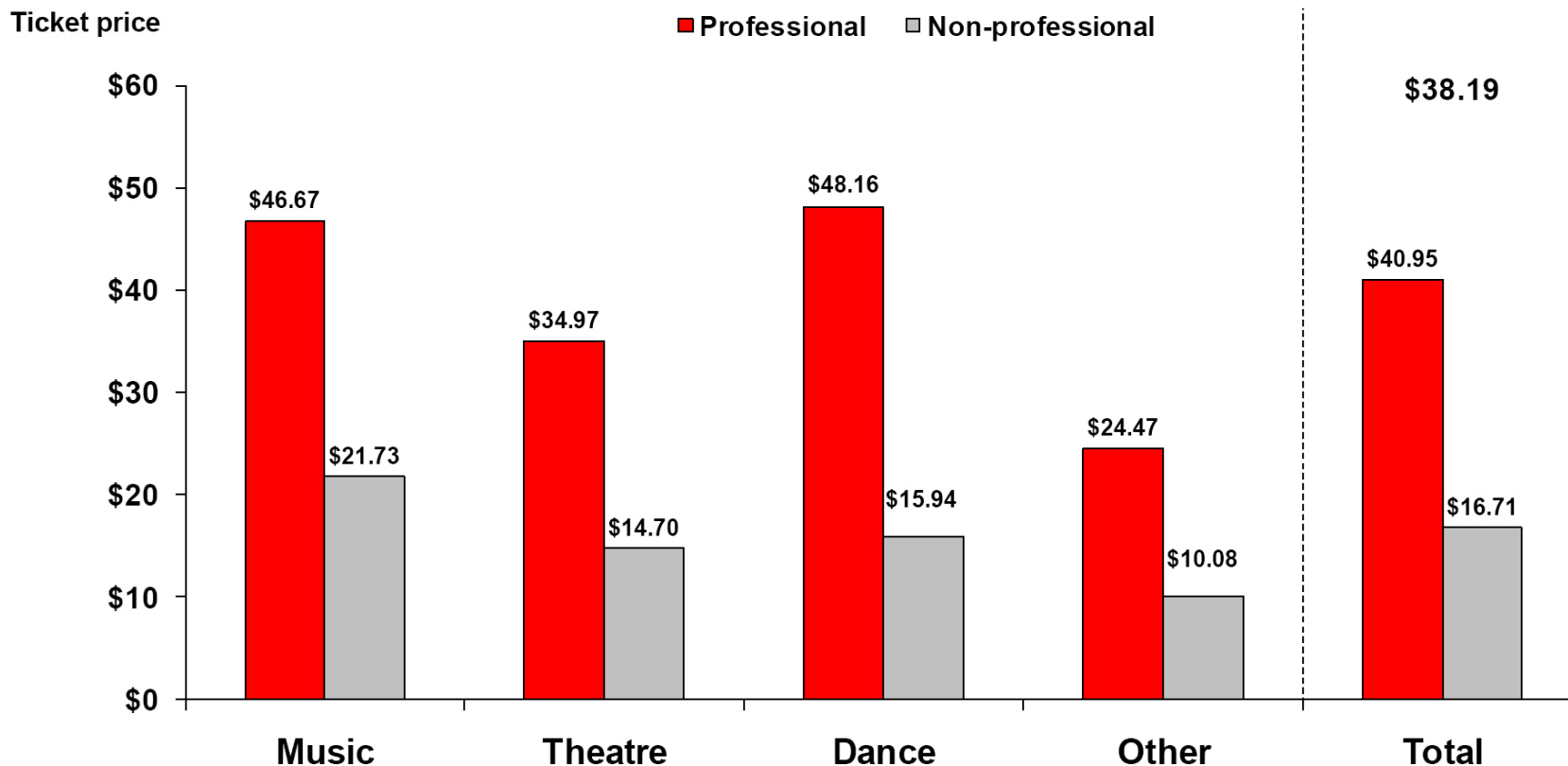
Chart 49: Queensland summary of ticket sales



Source: ADVICE dataset – tier 1 ticket sales, January–June 2010



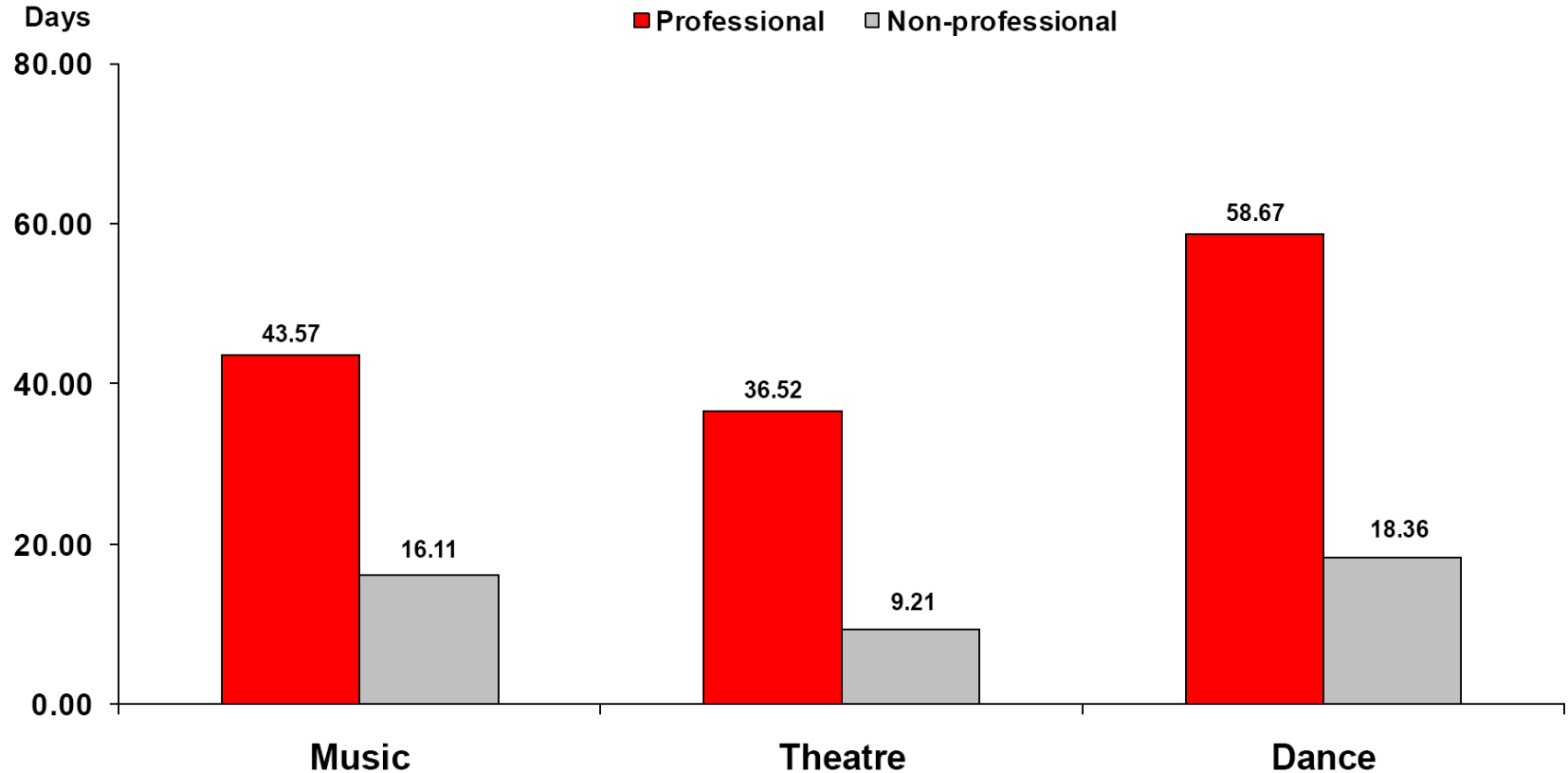
Chart 51: Queensland summary of average ticket prices



Source: ADVICE dataset – tier 1 average ticket price, January–June 2010

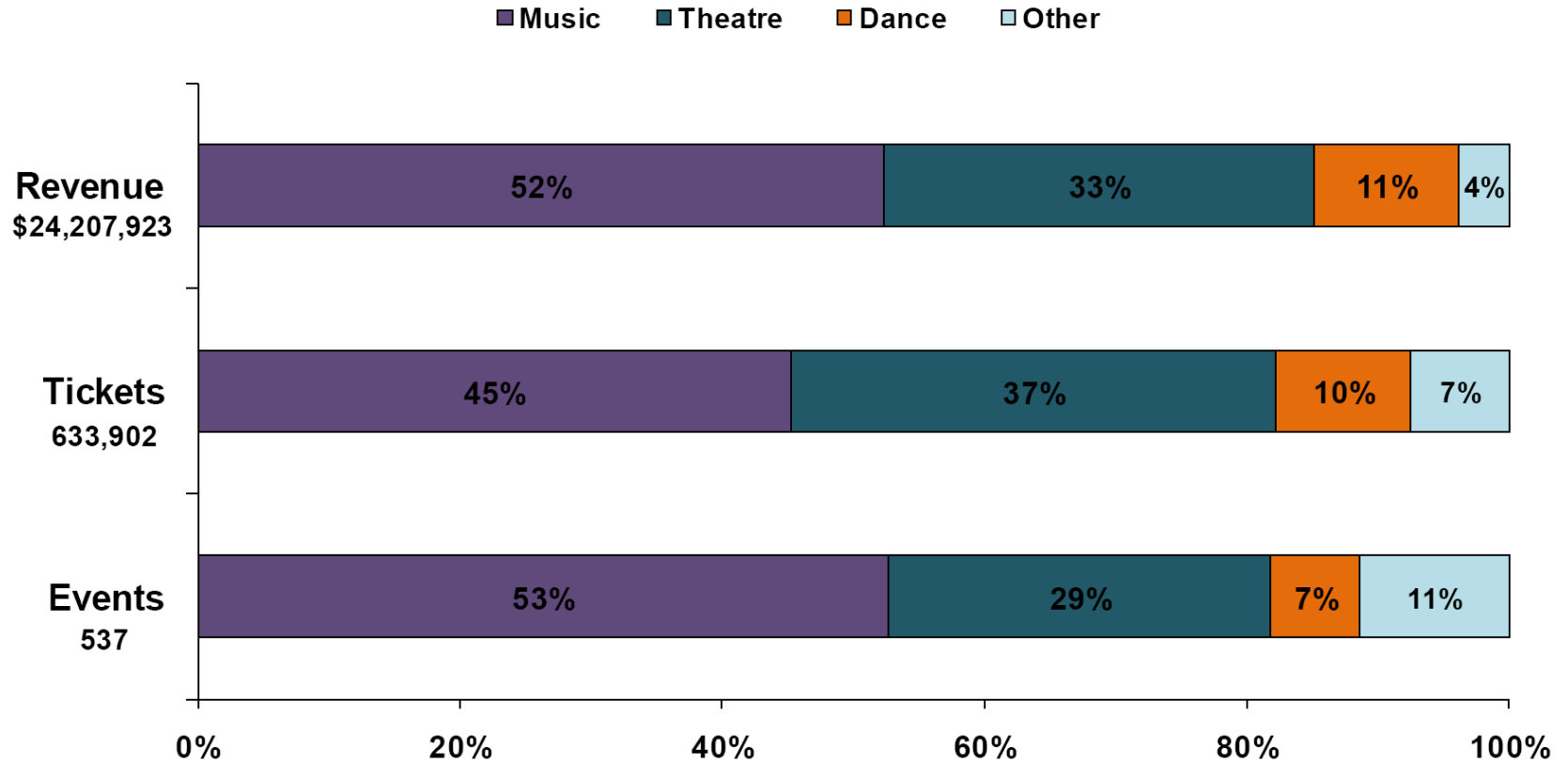


Chart 52: Queensland summary of average booking time



Source: ADVICE dataset – tier 1 average booking time, January–June 2010

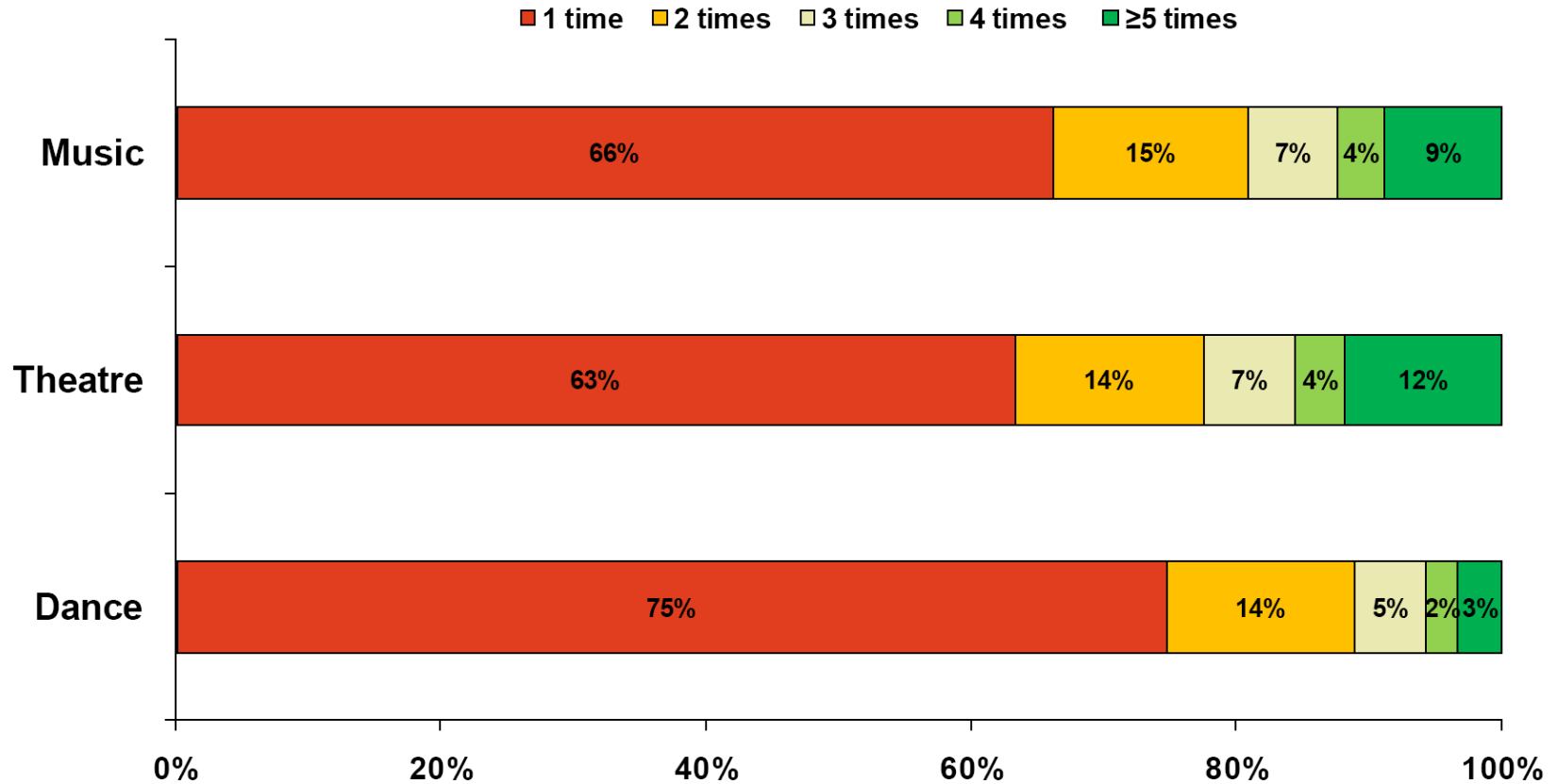
Chart 46: Queensland summary of total events, tickets and revenue



Source: ADVICE dataset – tier 1, January–June 2010



Chart 53: Queensland household attendance by artform



Source: ADVICE dataset – professional events only, January–June 2010

Base: Queensland Households



Table 33: Queensland summary by location – tier 1 (professional)

	Events	Tickets	Revenue	Avg. ticket price	Avg. booking time (days)
Music					
Metropolitan	140	174,423	\$9,154,074	\$52.48	47.68
Regional	112	78,470	\$2,811,590	\$35.83	34.85
Theatre					
Metropolitan	79	185,377	\$6,882,150	\$37.13	38.91
Regional	61	34,132	\$834,242	\$24.44	24.44
Dance					
Metropolitan	17	42,164	\$1,962,935	\$46.55	65.01
Regional	12	7,953	\$447,532	\$56.27	26.30

Source: ADVICE dataset – tier 1 (professional only), January–June 2010

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Table 34: Queensland music summary – tier 2

	Events	Tickets	Revenue	Avg. ticket price	Avg. booking time (days)
Professional	252	258,280	\$12,053,156	\$46.67	43.57
Popular music	122	79,455	\$4,187,092	\$52.70	35.45
Classical music	51	33,325	\$1,367,841	\$41.05	58.21
Music theatre/Musical	44	115,071	\$5,207,356	\$45.25	42.72
Opera	4	9,626	\$501,248	\$52.07	66.95
Contemporary	8	6,276	\$350,815	\$55.90	52.04
Other*	3	1,172	7,533	\$6.43	na

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Table 35: Queensland theatre summary – tier 2

	Events	Tickets	Revenue	Avg. ticket price	Avg. booking time (days)
Professional	140	221,672	\$7,751,725	\$34.97	36.52
Comedy	 74	61,712	 \$1,811,908	\$29.36 	25.70
Drama	 31	87,521	 \$3,545,161	\$40.51 	49.38
Physical theatre	20	65,346	\$2,266,084	\$34.68	29.77
Contemporary	3	1,450	\$33,341	\$22.99	8.19
Other*	9	1,462	19,791	\$13.54	na

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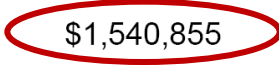
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Table 36: Queensland dance summary – tier 2

	Events	Tickets	Revenue	Avg. ticket price	Avg. booking time (days)
Professional	29	50,477	\$2,431,152	\$48.16	58.67
Contemporary	 13	10,750	 \$403,942	\$37.58	42.83
Ballet	 5	31,592	 \$1,540,855	\$48.77	63.71
Other*	7	2,306	53,406	\$23.16	na

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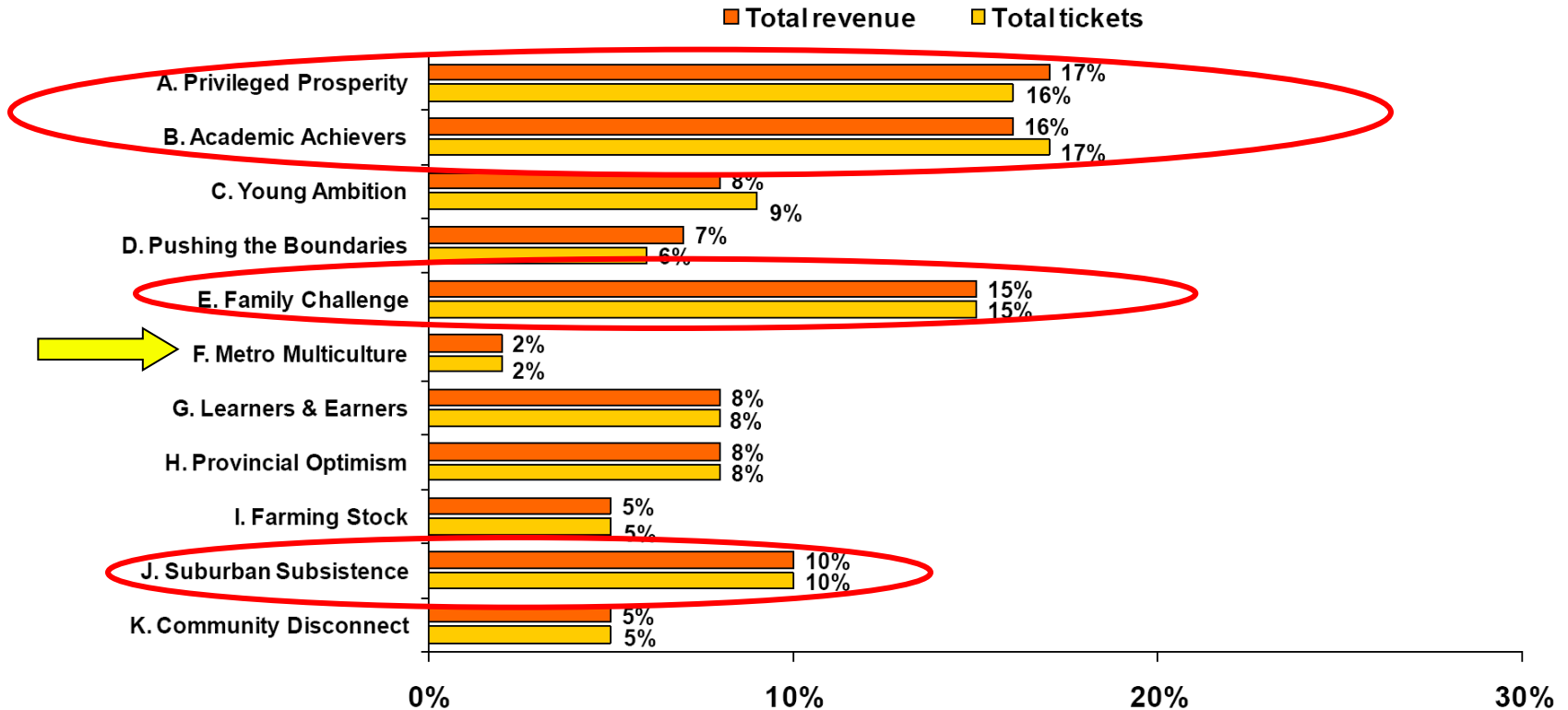


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What Mosaic can tell us about our audiences.



Chart 54: Queensland ticket sales and revenue by Mosaic segment



Source: ADVICE dataset – professional events only, January–June 2010

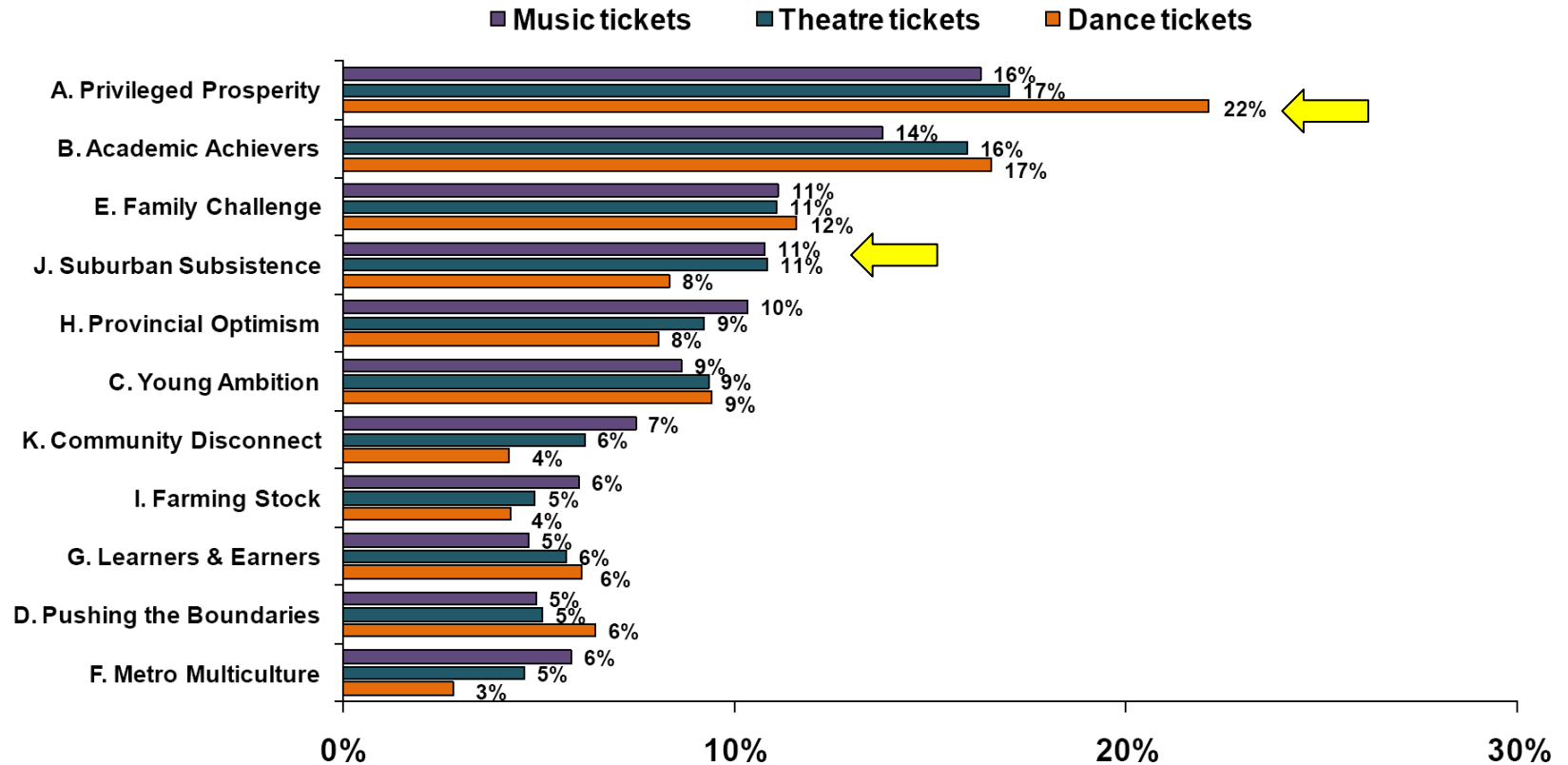
Base: Available data – music, theatre, dance

Tickets = 221,638 (42% of total tickets)

Revenue = \$10,407,103 (47% of total revenue)



Chart 2: Mosaic segments by main artform – Tickets sold (National)

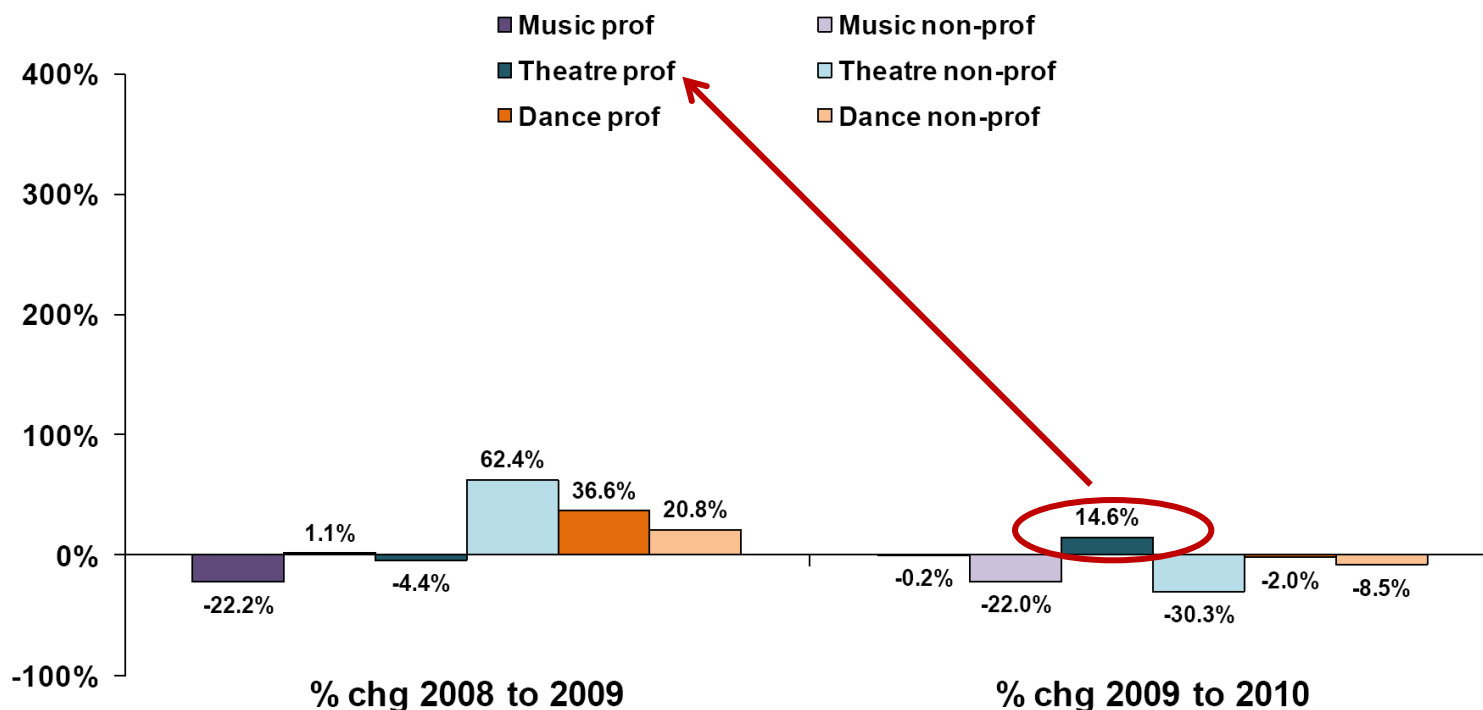


Source: ADVICE dataset – professional events only, January–June 2010
 Base: Available data – music, theatre, dance



Note: this trend analysis is taken from the 40 organisations that have supplied complete transaction history for the period 2008–2010. Trends identified are only for the ADVICE trend dataset and are not necessarily reflective of the entire sector.

Chart 80: ADVICE trend dataset – tickets sold



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The future for the ADVICE project.



State based reporting

For state and territory arts agencies to assist with:

- Evidence based policy development
- Audience engagement and participation strategies
- Cultural infrastructure planning and development
- Reporting on festivals and touring audiences

Possible regional reporting groups

- Brisbane metro (inner Brisbane venues including QPAC, La Boite, QUT Gardens Point, Brisbane Powerhouse)
- Outer Brisbane (to include Ipswich, Logan, Moreton and Redlands venues)
- SE Coastal (to include Gold Coast, Caloundra, Nambour, Maroochydore, Noosa etc)
- Central and Western Queensland (including Toowoomba, Maryborough, Bundaberg, Rockhampton, Mackay and Proserpine)
- Northern and Far Northern Queensland (including Townsville, Cairns and Mt Isa)

Possible seating capacity break-ups

1500+ 901-1500 601-900 401-600 201-400.



Audiences Australia concept

- Modelled on Audiences UK
- Incorporates Purple Seven's Vital Statistics software (eg Audiences London's *Snapshot London*)
- Discussion paper explores: objectives, core service offer, membership, governance, staffing, revenue and cost structures

The Vision An industry driven and self-sustaining organisation that promotes a sophisticated, evidence based approach to engaging with arts audiences.



Audiences Australia concept

Audiences Australia would have three overarching objectives:

- 1. Existing Audiences** A focus on growing existing audiences by increasing their engagement and participation through understanding, responding to and challenging audiences and maximising economic returns from the existing audience base.
- 2. New Audiences** Identifying, attracting, engaging and retaining new audiences through evidence based strategies to build demand, grow audiences and increase economic returns.
- 3. Sustainability** Building audiences to underpin the creative and economic sustainability of member organisations and reduce dependency on competitive funding programs.



Audiences Australia concept

1. **Member resources** - Offer a range of practical information primarily delivered online including specially developed or adapted guides, toolkits and resources to assist with audience development and marketing.
2. **Data services** - Employ software to extract and analyse data from box office ticketing systems using proprietary systems such as Purple Seven's Vital Statistics or Mosaic's geo-demographic segmentation tool.
3. **Professional development**- Deliver a series of workshops and seminars tailored to the professional development needs of performing arts venue staff particularly in the marketing, box office and ticketing roles.
4. **Consultancy** – Bring together expertise in the fields of arts marketing, data analysis and research to individually tailor expert advice to a member organisation's specific operating environment.
5. **Industry networking** – Create opportunities for arts marketing staff to exchange knowledge and ideas, work collectively to solve mutual problems and develop professional networks.



Your feedback on ADVICE:

1. What's working/not working now?
2. Where should we go in the future?