



Survey of Private Sector Support for the Arts 2009

Summary of Key Findings

September 2009

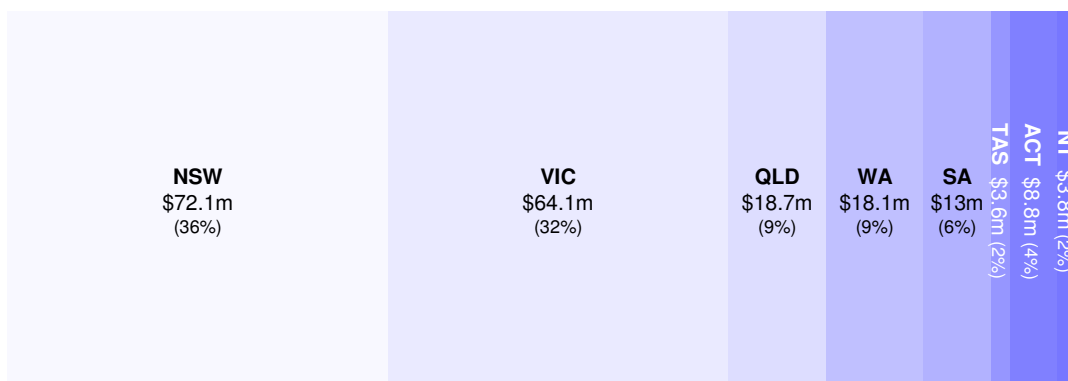
Total private support for the arts...

increased 18 percent from \$171.1 million to **\$202.2 million**

Support by state

The eastern states continue to attract the lion's share of private support, but while New South Wales has seen a net increase in sponsorship and donations from \$66.7 in 2006-07 to \$72.2 million in 2007-08, the state's national share has declined three percentage points from 39 to 36 percent.

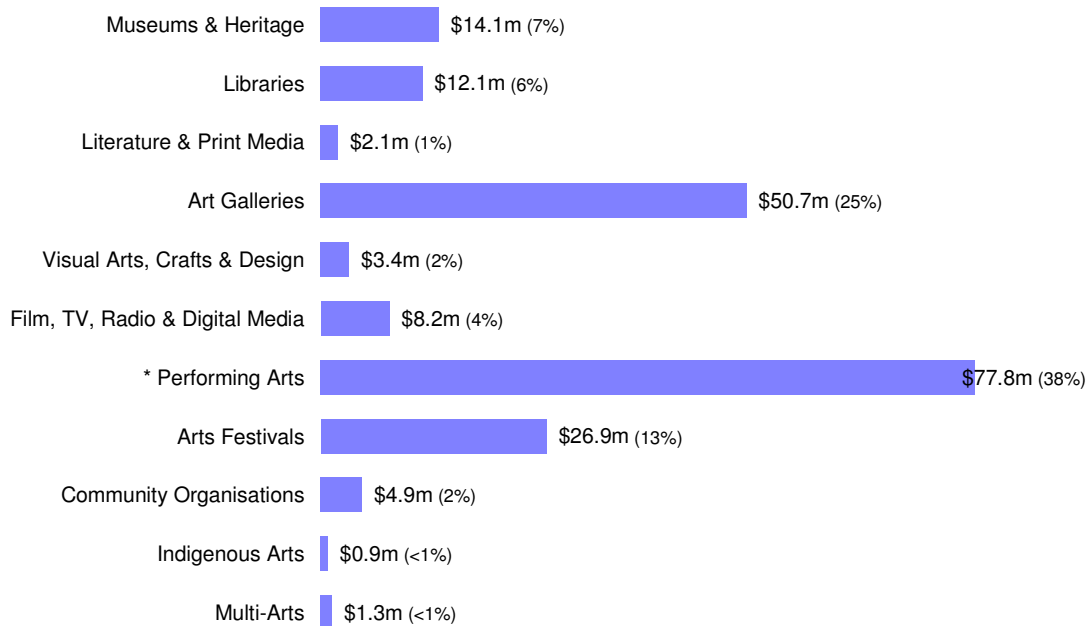
Private support has increased across all states and territories, but most significantly in Queensland, rising from \$10.4 million in 2006-07 to \$18.7 million in 2007-08, largely the result of a considerable increase in donations to the Queensland Art Gallery. Queensland's national share has increased three percentage points as a result and it is now approximately level with Western Australia.



Support by art form: Major institutions and events lead the way

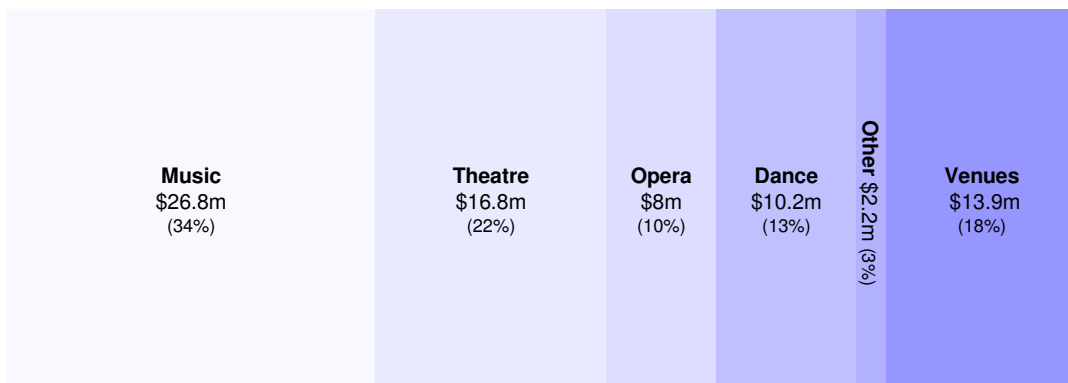
For this year’s survey we have expanded the range of arts forms analysed.

Collectively, art galleries, the performing arts and arts festivals received 76 percent of all corporate and private support for the arts in Australia (a figure that would be even higher if film festivals were included as arts festivals rather than within the film, TV, radio and digital media sector).



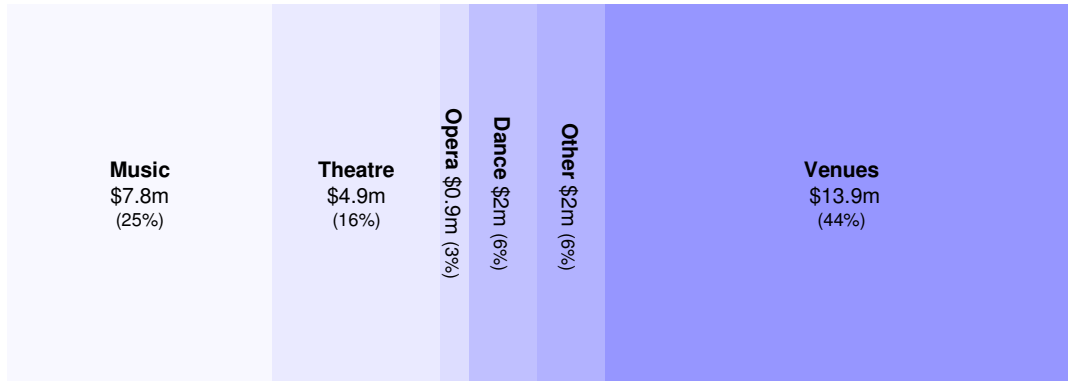
*** Support for the performing arts (including AMPAG companies)**

The twenty-nine member companies of Australia’s Major Performing Arts Group received \$46.3 million from corporate sponsorship and private donations in 2007-2008, representing 60 percent of total sponsorship and donations to the entire performing arts sector (72 percent if performing arts venues are excluded).



*** Support for the performing arts (non-AMPAG companies only)**

Non-AMPAG performing arts companies received \$31.5 million in support from the private sector, representing 40 percent of the performing arts sector as a whole.



Sponsorship...

increased 14 percent from \$84.4 million to **\$96.3 million** (48 percent of total private support)

Donations...

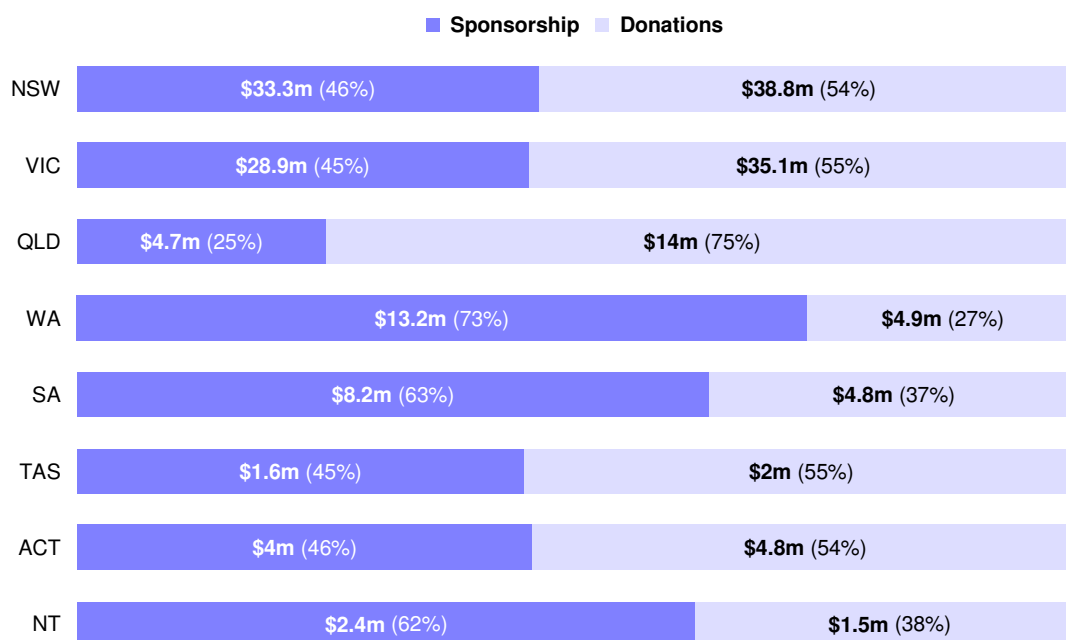
increased 22 percent from \$86.7 million to **\$105.9 million** (52 percent)

Sponsorship & donations by state/territory

While donations remained relatively static in New South Wales, sponsorship increased from \$27.1 million to \$33.3 million, bringing the ratio into closer balance.

The opposite occurred in Queensland, with donations accounting for 75 percent of total support in 2007-08, compared with 60 percent in 2006-07.

Western Australia continues to attract the greatest proportion of sponsorship between all the states, but the share of donations in WA increased, accounting for 27 percent in 2007-08 compared to 20 percent in 2006-07.

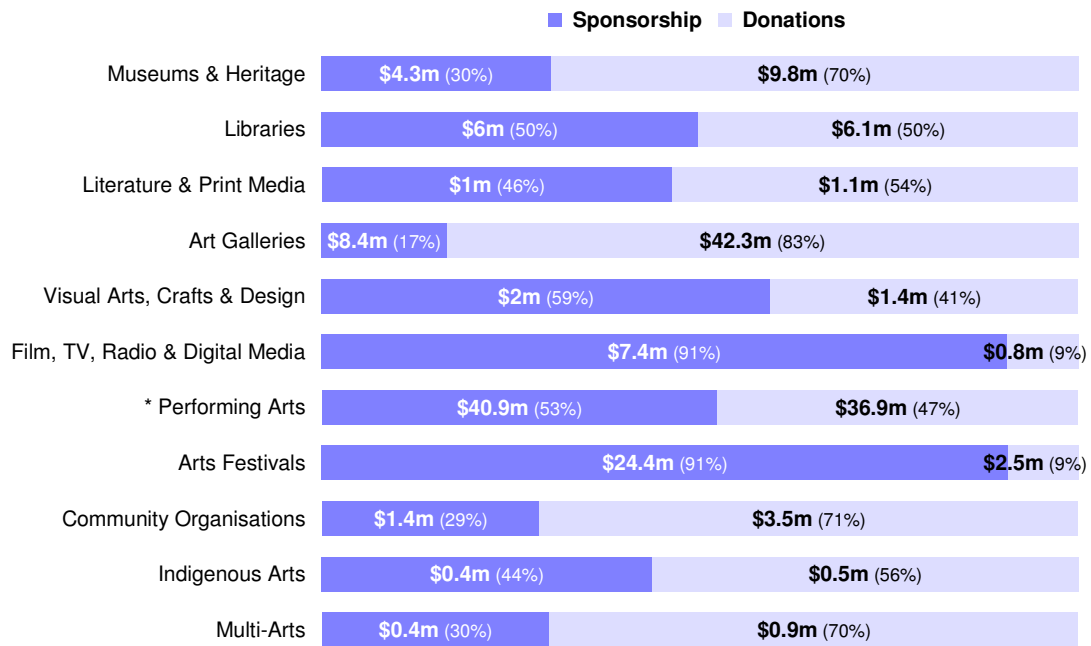


Sponsorship & donations by art form

Art galleries receive a greater proportion of donations than any other sector, including museums and community organisations, reflecting not just the attraction of the visual arts for donors but also the individual wealth and connections of the sector's numerous influential board directors.

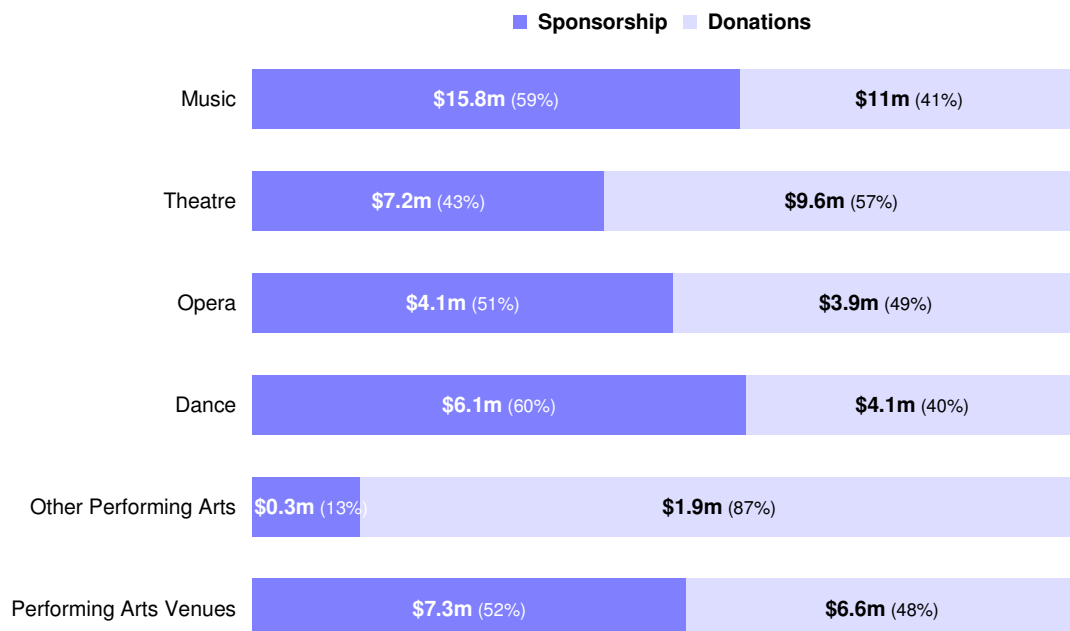
Arts festivals and the niche audiences who attend them are extremely attractive for sponsors and brands seeking to enhance brand recognition and leverage, corporate reputation, media presence, and staff/client hospitality opportunities.

Just as AMPAG has found in its annual studies, donations appear to be making an increasing contribution to overall private support for the performing arts. In 2007-08, donations were almost on par with sponsorship.



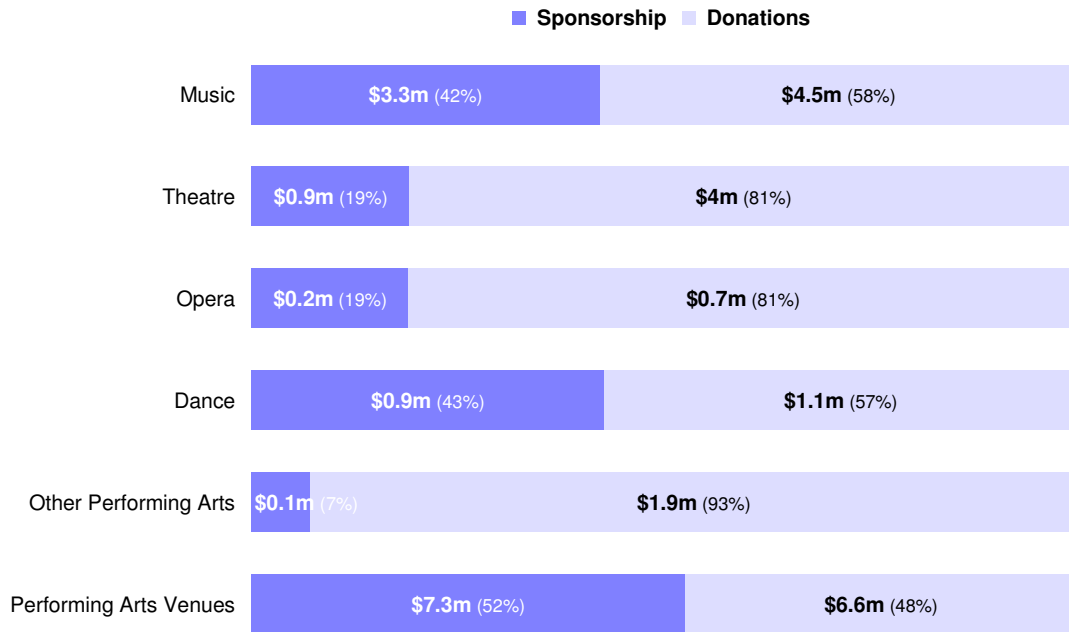
*** Sponsorship & donations for the performing arts (including AMPAG companies)**

‘Other’ performing arts companies such as circus organisations and puppet theatre companies receive far less corporate support, proportionally, compared with traditional music, theatre, opera and dance companies.



*** Sponsorship & donations for the performing arts (non-AMPAG companies only)**

All non-AMPAG performing arts organisations attract lower sponsorship income on a proportional basis than member companies, a distinction most evident for opera and theatre companies.

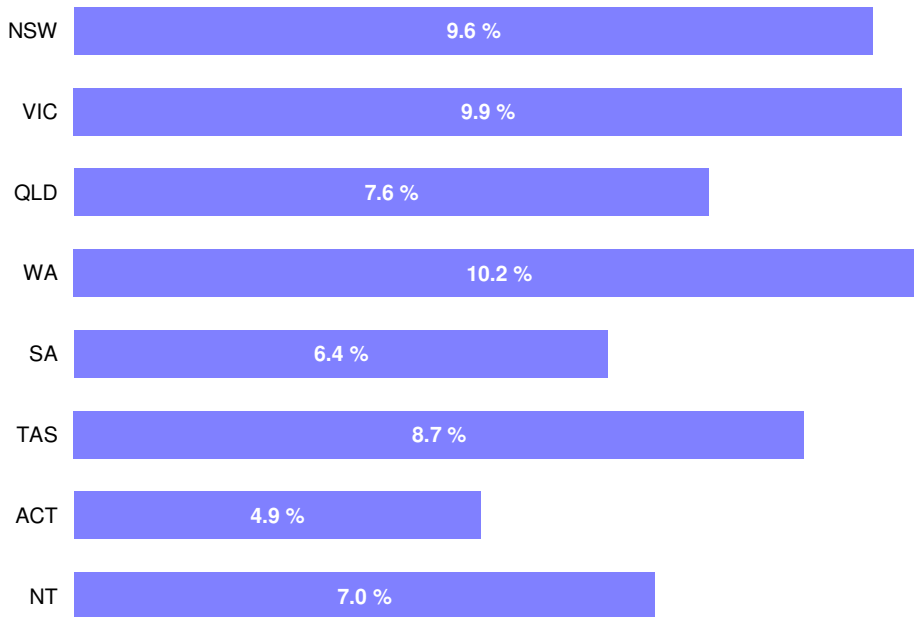


Support as a percentage of total income...

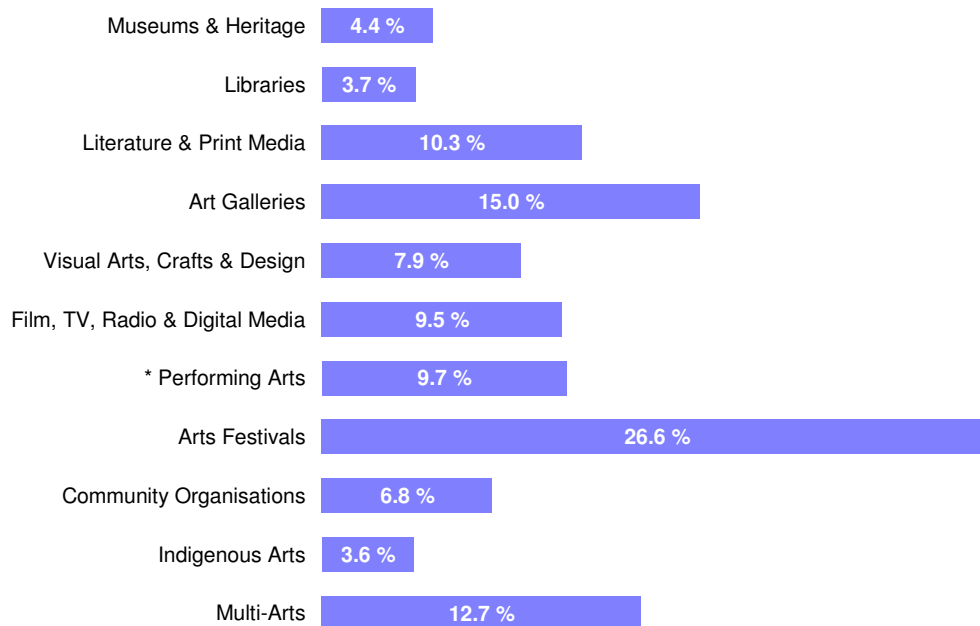
increased to 8.8 percent from 7.8 percent in 2006-07

Support as a percentage of income by state

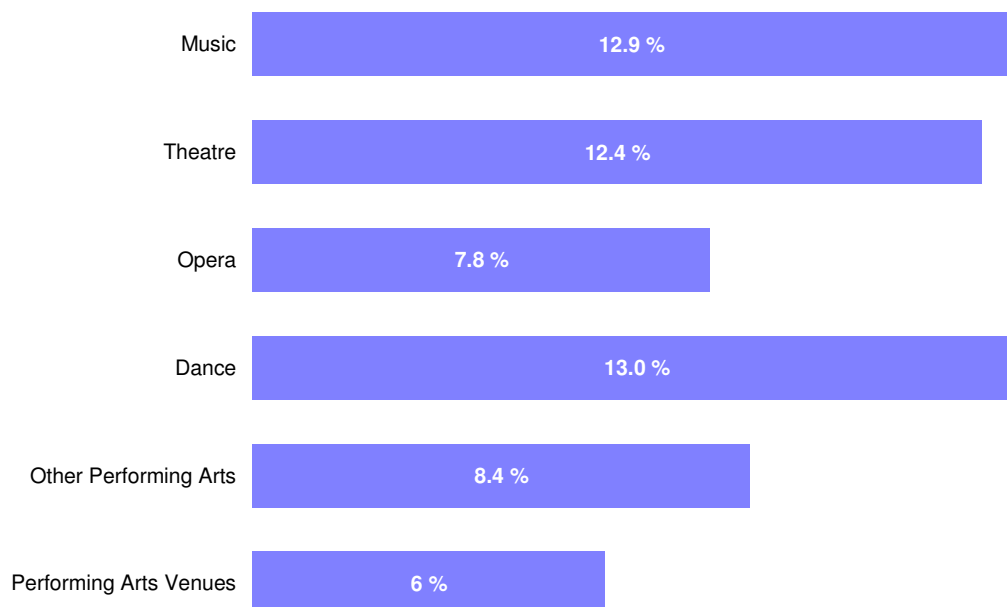
Arts organisations in Western Australia received the most private support as a percentage of total revenue (including operational funding, but excluding any capital funding), while those in the Australian Capital Territory received the least.



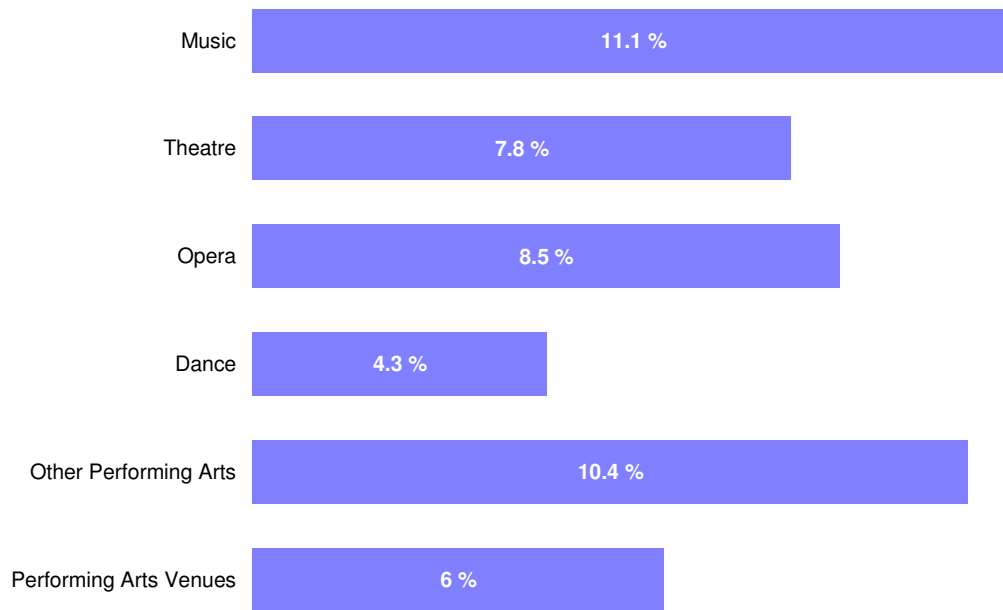
Support as a percentage of income by art form



*** Support as a percentage of income for the performing arts (including AMPAG companies)**



*** Support as a percentage of income for the performing arts (non-AMPAG companies)**



Data sample & collection

This year's survey incorporated the financial data of 276 arts organisations across Australia from a sample of more than seven hundred. Of the respondents:

- 84 percent were **metropolitan** based
- 16 percent were based in **regional** Australia.

Figures were collected and compiled by the Australia Business Arts Foundation in collaboration with the Australia Council for the Arts.

Art forms have been categorised differently compared with last year's survey. A future report will provide more detailed comparisons of current and previous year art form data.

Notes

Since private investment in the arts tends to respond quite slowly to economic change, it is likely that the full effect of the financial crisis won't be reflected until the next annual survey. Sponsorship investment is likely to decline to some extent. However, it is also possible that donations to the arts will exhibit an increase during the downturn, thus helping to offset any decline in sponsorship.