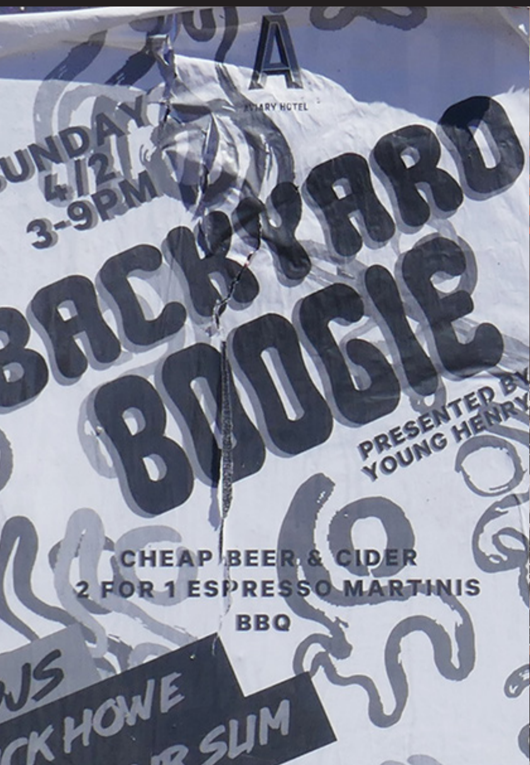
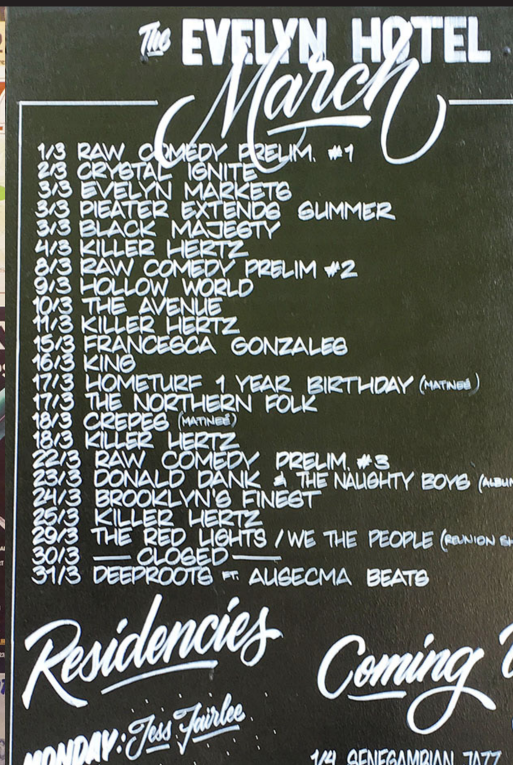
Executive Summary
Melbourne Live Music Census 2017

Live Music -
Melbourne's REAL Passion





MUSIC VICTORIA · COLLARTS · CITY OF MELBOURNE · CITY OF YARRA · CITY OF PORT PHILLIP · RMIT UNIVERSITY

Contents

Key Numbers 1

Melbourne Live Music Census Results 2

Live Performance: The Big Picture 3-5

Comparative Data 6

Online Survey Results: Key Figures 7

Conclusion 8

About the authors:

Dobe Newton has been a professional musician for 47 years - all in the same band! He has been a music industry teacher for 25 years and consulted widely to local, state and federal government and major industry organisations and agencies.
He was project manager and author of the Melbourne Live Music Census 2012 and the Victorian Regional Live Music Census 2013.

Rosa Coyle-Hayward is currently completing a Bachelor of Arts degree (Music Industry) at RMIT University and works as a band manager, concert promoter and publicist. She has been active in community radio and online journalism and has a particular interest in the post-punk music scene. Above all else, she is a regular patron and advocate of many Melbourne live music venues.

A quick thanks to:

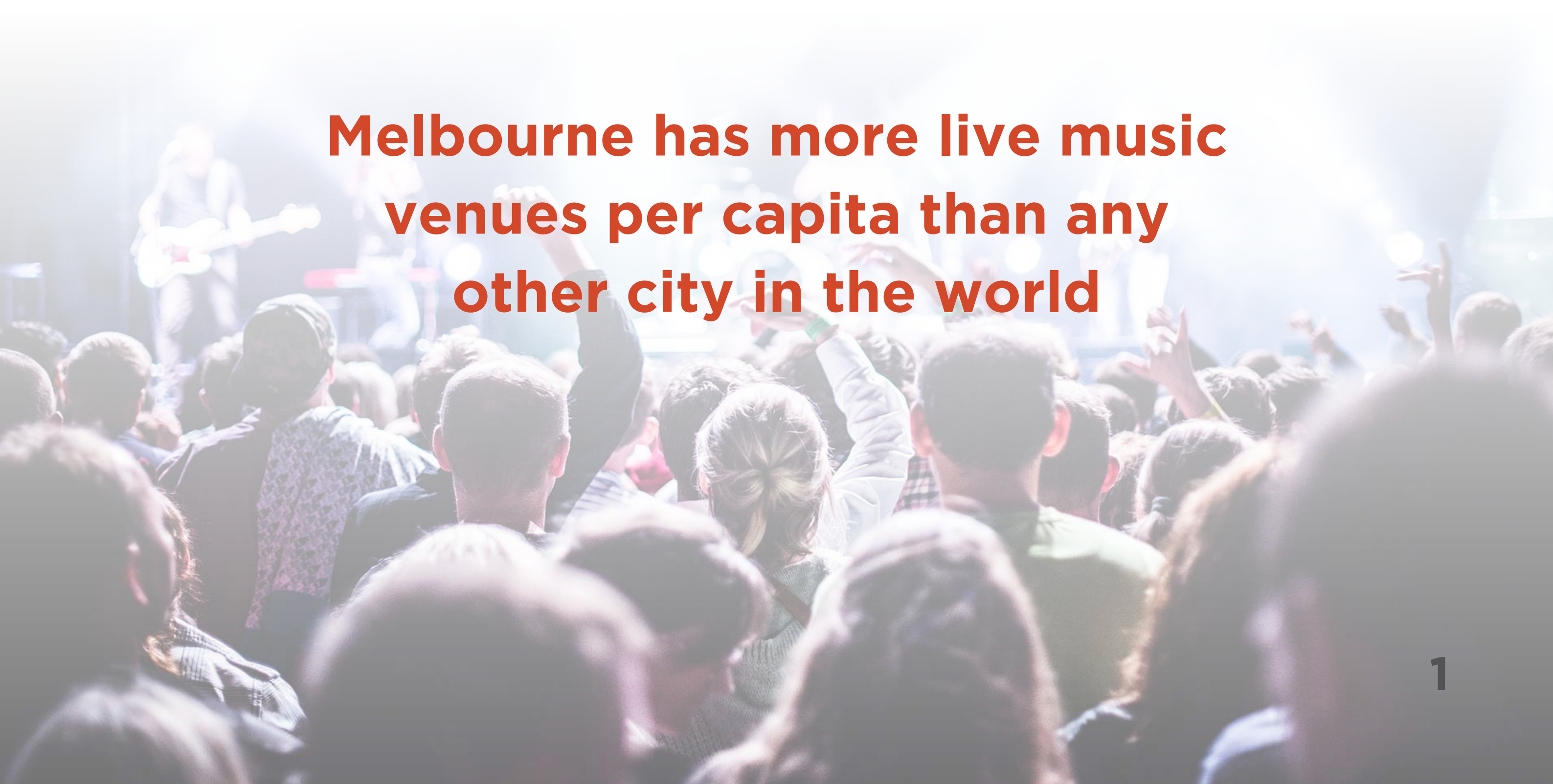
(for full list of acknowledgements see full report Foreword)

Patrick Donovan, Laura Imbruglia and Al Parkinson at Music Victoria
Hannah Brooks at City of Melbourne
Jess Carroll, Katy Richards and Chrissie Vincent at Collarts
Ed Montano and Music Industry Department at RMIT University
Olivia Allen, Matt McCall and Brona Keenan at City of Yarra
Adele Dennison at City of Port Philip
Jo Perjanik at APRA AMCOS
Katherine Norman at Arts Centre Melbourne
Enna Giampicollo at Melbourne and Olympic Parks Trust
Floodslicer, producers of the census animated video.
and all the volunteers who visited venues to collect invaluable small venue data.

Front cover photo (The Punters Club) reproduced courtesy of the copyright owner Shellie Tonkin

Key Numbers

73,000+	**annual gigs** (increase of 19%)
553	**Greater Melbourne live music venues**
17.5 million	**annual patron visits** (increase of 12%)
$1.42 billion	**spent in small venues and at concerts and festivals** (increase of 16%)
55%	**of venues reported an increase in 2017 audiences**



Melbourne Live Music Census 2017 Results

Venues:

The Melbourne Live Music Census 2017 confirmed that Greater Melbourne had 553 venues that hosted live music performances.[1]

The majority of the regular venues are situated in the CBD (153 **– compared to 137 in 2012**) and in inner-suburban venue clusters we designate as music 'precincts' (216 **- compared to 194 in 2012**) – Collingwood/Fitzroy, Northcote/Thornbury, Brunswick/Coburg, South Yarra/Prahran, Richmond/Hawthorn and the St Kilda area.
Another 95 are scattered across the inner and (mainly) outer surburbs.

There are an additional 89 classified as 'occasional' (regular live gigs but less than 2 nights per week), compared to the **50** recorded in 2012.
In addition, there were 104 identified as 'function venues', hosting live music on an irregular basis. The 2012 Census recorded **60** of these.

Bars, nightclubs and concert venues are features of the CBD, while hotels are a more significant presenter in the precincts.
Licensed clubs, community centres and hotels are the dominant occasional and function presenters – especially in the outer suburbs.

On a typical Saturday night – including Census Night, 93% of venues in the CBD and 96% of venues in the precincts featured live performances.
They presented a total of **800+** advertised performances by musicians and DJs.
We estimate that another **150+** performances took place in the outer suburbs.
35% of venues had more than one space/room hosting live performance

Attendance – A Grand Final every Saturday night!

Every Saturday night (and Friday as well), 110,000+ fans attend live music performances in Melbourne's small and large venues.

This number obviously increases when Melbourne hosts a major stadium or arena concert and/or festival, which it regularly does.

Census Night – Saturday, 25 November 2017

Audience

On Saturday, 25 November 112,522 patrons (**97,390** in 2012) attended 490 advertised gigs (**426** in 2012) at 437 venues (**418** in 2012) across the Melbourne CBD, music precincts and outer suburbs.

Patron Spending – Economic Generation

On Saturday 25 November 2017, live performances in Melbourne venues generated $6 million in turnover (**$5.3 million** in 2012) – door charge/tickets (50% of venues) generating **$1.25 million**, plus ancillary spending by patrons at gigs - food and drink, transport, merchandise etc. generating $4.75 million (**$3.7 million** in 2012).
Based on our Melbourne Live Music Census 2012 and survey feedback, we estimate that at least an additional **$1 million** was generated in outer suburban regular and occasional venues.

Employment – Census Night

On Census Night, live performances in small Melbourne venues, which we observed (CBD and music precincts), created employed an estimated **3,696** musicians, **1,765** DJs, **1,059** production staff, **2,118** security personnel and **7,255** venue staff.
Theatres and concert venues operating on the night employed a further **148** musicians, **40** production staff and **665** venue staff.

[1] 464 of those were classified as 'regular' (minimum of two nights per week, every week), compared to 465 recorded in 2012. The performers involved in performances in these venues were 'featured' (named) in advertising/promotion.

Live Performance - The Big Picture

Combining the observational data from the Census Night, with responses to online audience, musician/DJ and venue surveys and the findings of a number of relevant reports and studies, allows us to produce a comprehensive snapshot of annual live music activity in Greater Melbourne.

2017

Venue - Gigs

To allow for the fact that even 'regular' (2 nights per week minimum) live music venues have the odd night without live music, and that there is a small seasonal variation in audience and gig numbers, and being conservative we have based calculations on a 50-week year.

On an annual basis, 44% of regular venues feature live music on four nights per week, 28% on five nights and 10% on seven nights.

Greater Melbourne's small and large venues presented 73,605 advertised gigs in 2017 (62,000 in 2012) – an increase of 19%.

These gigs (most commonly multi-act bills) created 680,000 performance opportunities for musicians, 361,000 for DJs and created 234,000 shifts for production personnel and 1,233,000 for venue staff across the calendar year.

What's Not Included:

There are a number of significant events that take place in Greater Melbourne with significant live music components that we have not included due to lack of quality data.

The Melbourne International Festival and Melbourne Fringe Festival are ticketed events, but are reported in Live Performance Australia's data as 'multi- category festivals'. It is not possible to isolate the music live performance component with certainty, especially to isolate the ticketed events from the free events.

However, the majority are covered in LPA's 'Contemporary Music Festival' category. They include Sugar Mountain, Laneway Festival, Freedom Time, Australian Open Festival, Let Them Eat Cake, Brunswick Music Festival, Stonnington Jazz Festival, Pleasure Garden, Queenscliff Music Festival, Melbourne International Jazz Festival, Ultra Music Festival, Moomba, Eltham Food & Jazz Festival, Darebin Music Feast, Holi Tribe, Let Go Festival, Transmission, Face The Music, White Night etc.

Most notably, this category also includes Melbourne Music Week which was happening at the time of the Melbourne Live Music Census 2017.

Finally, there are a number of (usually) community-based events which present free live performances, often on a significant scale. The City of Port Phillip estimates that 400,000 people attend the annual St Kilda Festival. There are also large crowds for the Melbourne Symphony Orchestra's annual series of free concerts at the Myer Music Bowl, free concert series in Federation Square, at Melbourne Zoo, Queen Victoria Market, National Gallery of Victoria.

To be conservative in our reporting, we have excluded all these from calculations.

Live Performance: The Big Picture continued

Annual Attendence

According to the data collected in our online Audience Survey, Melbourne's live music fans attend an average of **four gigs per month** in small venues and three to four concerts/festivals per year.

On an annual basis, there are **17.5 million** patron visits to live music performances in Greater Melbourne (**15.6 million** in 2012)[2] - A **12%** increase.

	2017	2012
CBD Small	5,204,350	4,553,350
CBD Large	628,000	533,000
Precincts	6,281,850	5,531,850
Outer Suburbs	2,360,800	1,934,750
LPA Concerts	1,546,191	1,638,000
LPA Festivals	147,000	219,000
Music Theatre	861,212	718,000
Opera	86,713	96,831
Classical	391,440	382,223
TOTAL	**17,507,556**	**15,607,004**

Note:
In response to the 2017 online venue survey, 55% of venues reported that their audience had increased in the last 12 months.
29% reported the numbers had remained the same, and only 16% reported a decrease.

Annual Income/Expenditure

It's a billion-dollar industry!

Live performance in 2017 generated $1.42 billion in box office revenue and patron spending directly associated with attendance at gigs.
This represents a 16% increase on the $1.22 billion recorded in 2012.

Door entry/ticket sales generated **$389.2 million** (**$350.6 million** in 2012), and ancillary spending (food, drink, transport, merchandise, etc) by patrons attending live music performances generated an additional **$1.03 billion** (**$846.1** million in 2012).

Door/Ticket Revenue[3]

	2017	2012
CDB Venues	$56,400,917	$57,355,000
Music Precincts	$40,400,785	$31,819,450
Outer Suburbs	$15,935,400	$10,606,750
LPA Major Concerts	$129,198,499	$129,653,124
LPA Festivals	$19,366,622	$45,006,500
Music Theatre (70%)	$96,438,949	$49,760,400
Opera	$11,438,197	$9,301,614
Classical	$20,043,267	$17,142,310
DOOR/ TICKET TOTAL	**$389,222,636**	**$350,645,148**

[2] LPA figures have been discounted by 10% to avoid the possibility of double counting.
[3] Attendance figures for small venues (CBD, precincts, outer suburbs) have been discounted by 5% to reflect the percentage who predominantly attend events with no door charge. This is consistent with 2012.
LPA figures for major concerts and festivals have been discounted by 10% to avoid double counting.

Live Performance: The Big Picture continued

Ancillary Patron Spending[4]

	2017	2012
CBD	$309,979,450	$254,900,750
Precincts	$338,502,419	$248,933,250
Outer	$113,176,752	$87,063,750
LPA Concerts	$126,273,563	$121,500,500
LPA Festivals	$21,799,800	$44,000,000
Opera	$7,743,470	$5,182,430
Classical	$39,955,592	$30,878,680
Music Theatre (70%)	$76,906,608	$53,725,400
TOTAL	**$1,034,337,654**	**$846,184,760**

Note - Regional Victoria:
In 2013 we conducted research on live music performances in regional Victoria to supplement the Melbourne Live Music Census 2012 which covered the Greater Melbourne activity.
Although a regional update was beyond the scope of this present study, it is worth noting those findings.
In 2012, live music performances at an estimated **368** small venues generated an annual door/entry income of **$10.6 million** and attracted **1.9 million** patrons who spent an additional **$87 million** at those performances.

In addition, there were/are a number of significant regional festivals and we estimated that these events attracted **a million** patron, generating **$25.4 million** in ticket revenue and generated an additional **$98.4 million** in ancillary spending.

Annual Employment

Estimating the employment created by annual live performance is the most difficult calculation, given that the vast majority of the workforce is casual/freelance and data is not widely reported. Also, many of the larger (festival) events rely heavily on a volunteer workforce to deliver their events.

Nevertheless, the direct census observation of small venue operations, responses to online surveys and the cooperation of large venue concert presenters, has provided solid data.

We estimate that the 73,000+ annual live gigs in Greater Melbourne in 2017 created 18,331 part-time jobs[5] for musicians (3,590), DJs (2,233), venue staff (8,742), production staff (1,854) and security personnel (2,233).

Note - Regional Victoria - Venues & Employment:
In 2013 we conducted the Victorian Regional Live Music Census 2013. Although we have not had the opportunity to update that report, we note that in that year live music performances at an estimated **368** small venues generated an annual door/entry income of **$10.6 million** and attracted **1.9 million** patrons who spent an additional
$87 million at those performances. These performances also produced –

3,063 part time jobs for musicians and DJs
700 part jobs for production staff
4,150 part time jobs for venue staff

In the Melbourne Live Music Census 2012 report we also cited a 2011 report by the University of Wollongong which estimated that festivals in regional Victoria created significant employment for venue staff –
1,070 part time jobs during the planning phase and **3,140** during the operational phase.

[4] Attendance figures for small venues (CBD, precincts, outer suburbs) have been discounted by 5% to reflect the percentage who predominantly attend events with no door charge. This is consistent with 2012.
LPA figures for major concerts and festivals have been discounted by 10% to avoid double counting.
[5] The Australian Bureau of Statistics classifies a part time job as one involving 1,000+ hours of work per annum. The total corresponds closely to that reported for Victoria in the 'Economic and Cultural Value of Live Music in Australia 2014' report.

Comparative Data
Music - Melbourne's Passion!

Cultural Data

In 2015, the Australian Bureau of Statistics (ABS) issued a report (the latest available) on cultural event attendance in Australia.

Sport

Australians are often referred to as 'obsessed' with sport, and Melbourne is often referred to as the nation's 'sporting capital'.
However, this report (as well as many others) demonstrates that attendance at major sports events is dwarfed by attendance at live music performances.

We love music more than sport!

AFL	4.66 million
Spring Racing Carnival	0.69 million
A League	0.24 million
Basketball & Netball	0.18 million
Rugby (NRL & Rebels)	0.28 million
Cricket	0.50 million
Australian Grand Prix	0.29 million
TOTAL	**6.84.million**

Annual Live Music Attendance in Melbourne 2017: 17.5 million

In fact, Melbourne's live music attendance is more than the combined national attendance for all these sports.[7]

Note:

For years the music industry has lamented the fact that the Victorian Government, through its major events arm, has outlaid tens of millions of dollars to attract major sporting events to Melbourne – Grand Prix, NRL State of Origin, Soccer World Cup qualifying matches, Bledisloe Cup Rugby and many others, while apparently ignoring the fact that Melbourne's ***REAL*** passion is music.

A recent report on Melbourne as a cultural destination identified cultural activities as 2nd priority for domestic visitors and 3rd priority for international visitors (after 'visiting friends'), as the major reason for visiting Melbourne.

Ahead of sport in both instances.

Live Music Capital

The live music capital of Australia[10]
The live music capital of the world![11]

Comparing international data with the findings from this Melbourne Live Music Census 2017 and data from 2012, Melbourne has the most live music venues and more live venues per capita of any global city.
The findings of Melbourne Live Music Census 2017 and other reported data[9], confirm that Melbourne has **1** live music venue **per 9,503** residents.

[6] ABS 4114DO001 – 'Attendance at Selected Cultural Events in Australia'.
[7] Austadiums.com.au, Wikipedia, AFL and individual sport websites.
[8] Boston Consulting Group - 'Melbourne as a Global Cultural Destination'.
[9] BOP Consulting – 'World Cities Cultural Report 2016
[10] See 'Notes on Music City and Music Capital' section for details
[11] See 'Notes on Music City and Music Capital' section for details

Online Survey Results - Key Figures

To accompany the data, gathered in observation and research we ran three online surveys directed at different operators within the live music industry to gain more insight from broader perspectives. The three targets were audience members, musicians and venue operators.

Venue Operator Survey

According to Census Night observations and online Venue Survey responses, a live venue in Melbourne typically:
- is a hotel or bar in the CBD or inner suburbs which has been operating for an average of 8 years and, in **50%+** of cases, presents live music four nights per week.
- increases its food and beverage sales when it presents live music (**74%**), with **44%** reporting a significant increase.
- has an in-house PA (**92%**), employs regular sound engineers and predominantly features musicians (**63%**) and/or DJs (**37%**) playing original material (**62%**).
- is affected by a number of noise-related (**67%**) and development/planning (**47%**) issues, and reports the impact on operation to to 'strong' or 'extreme' in **45%** of cases.
- desires a better working relationship with local government to address these issues.
- has increased (**47%**) or maintained (**41%**) the number of live music gigs it presents compared to 2016.
- has increased (**55%**) or maintained (**29%**) its live music audience compared to 2016.

Attendance Survey

The Attendance Survey with **516** respondents, has given a broad picture of the average Melbourne live music attendee:

- most likely to be between 18-24 years old. (**28%**)
- very likely to listen to community radio (RRR **53%** or PBS **48%**) or Triple J. (**47%**)
- find out about gigs from social media (**87%**) and word of mouth. (**71%**)
- on average, attend **30+** gigs per year.
- more likely to attend Melbourne's small live music venues more often, **74%.**
- most likely to attend gigs that are indie (**63%**), rock (**71%**) or singer/songwriter (**52%**) performances.
- believe that most live music venues provide a safe and inclusive environment. (**80%**)

Musician Survey

The Musician/DJ Survey with **495** respondents, indicates that the typical musician:

- Is a male (**60%)** or female (**40%**) in their mid-30s who has been in the industry for **12-15** years, is self-managed and identifies predominantly as a full-time or part-time worker, spending **50%** of their week on musical activities.
- lives in the inner suburbs (**60%**) but with the outer northern suburbs fast becoming a preferred residential area.
- is a local (**60%**) but a substantial proportion have relocated from regional Victoria (**35%**) or interstate (**50%**) to take advantage of increased industry opportunities in Melbourne.
- earns **35%** of their income from music, and **70%** of that from an average **4-5** live performances per month.
- The majority (**70%**) supplement their income with work outside the industry.
- plays many genres of music, and most likely to be in a band performing rock (**53%**), indie (**30%**) with a **40%** original repertoire.
- has experienced physical and/or mental health issues (**40%**) associated with their music practice, but usually self-manages the issue/s.

Conclusion

Live music has long been at the heart of this city's social and cultural life.
This study, while admitting its limitation, underscores that live music is also a vitally important and significant economic generator.

Ideally, the information in this report will encourage investment in a whole-of-industry study to collect information/data on the significant industry activity not capable of capture here such as recording, publishing, distribution, marketing, etc. Although challenging as such a report would be, it would hopefully adopt an approach which drills down to capture the 'grass roots' activity - the life-blood of our music scene, in those sectors as well.

Impressive as the figures reported in this study are, they do not capture the indirect economic value generated by patron visits to live music events.
UK Music's report on music tourism cited elsewhere, has calculated that **46%** of spending associated with 'music tourist' visits to events takes place outside the venue.

Now that's a story worth telling.