Melbourne Live Music Census 2017 Report

Prepared By Dobe Newton & Rosa Coyle-Hayward

April 2018

MUSIC VICTORIA

COLLARTS

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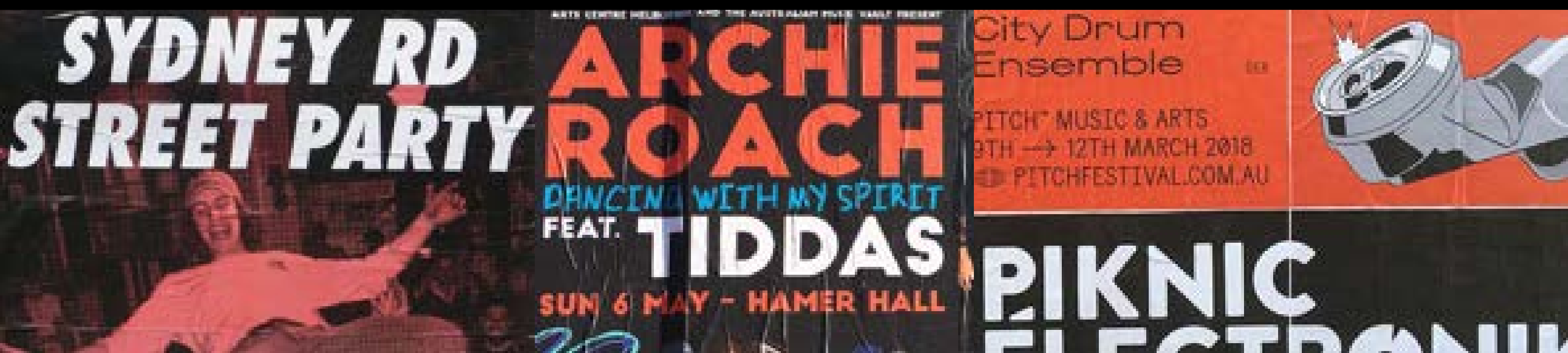

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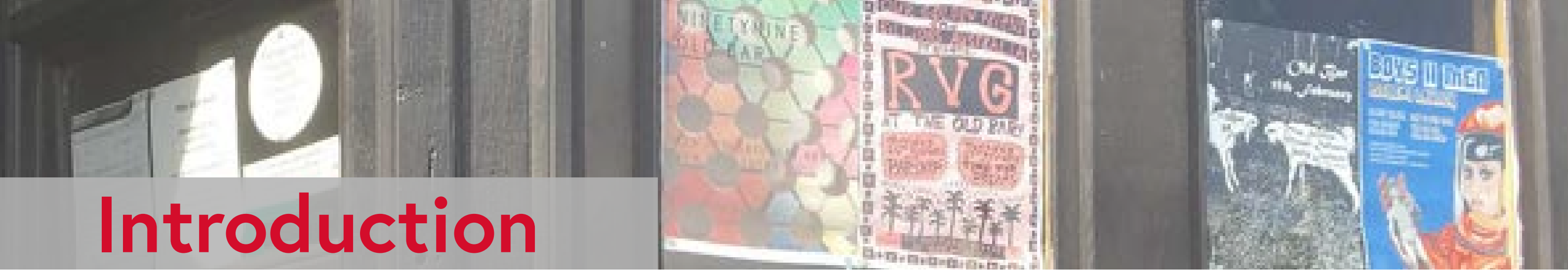


Introduction

The 2017 Melbourne Live Music Census is unique.

It updates the previous study conducted in 2012, providing a significant amount of comparative data to further inform the discussion on the economic, cultural and social value of live music performance in this city.

From the time, over one hundred years ago, that the city lent its name to Australia's first global music superstar, Dame Nellie Melba, music creation, production and presentation has been at the core of the city's social and cultural life.

Our passion for music was on display in the 1967 when an estimated **200,000** gathered at the Myer Music Bowl to send The Seekers off on their quest for world domination.

It was forcefully demonstrated again in 2010 when **20,000** fans, musicians and industry workers took to the streets for the Save Live Australia's Music (SLAM) rally when ill-considered regulations threatened the viability of our small live music venues.

It has been reported[1], that live music performance returns $3 in benefits – commercial, civic and individual, for every $1 invested. It adds to the human, social, symbolic, physical, knowledge and psychological capital of the community where it occurs – be it suburb, town, city, region, state, nation.

The scope of this report is limited to a detailed study of economic and social activity, especially in small 'grass roots' venues which are so often neglected or under-reported in major studies. It profiles the activities and attitudes of the practitioners who deliver the performances, the fans who attend them and the operation of the venues that host them.

I must admit that I approached the update with some trepidation, being only too well aware of the impact that development, regulation and increasing business costs have had on worldwide venue operations in recent years. It was surprising and gratifying to find that, despite these pressures and the inevitable changes in circumstances they have caused some operators, performers and fans, our live music scene continues to enjoy good health.

This report is dedicated to the memory of RMIT colleague Ed Montano, a passionate and committed fan, teacher, DJ and long-time supporter of this project.

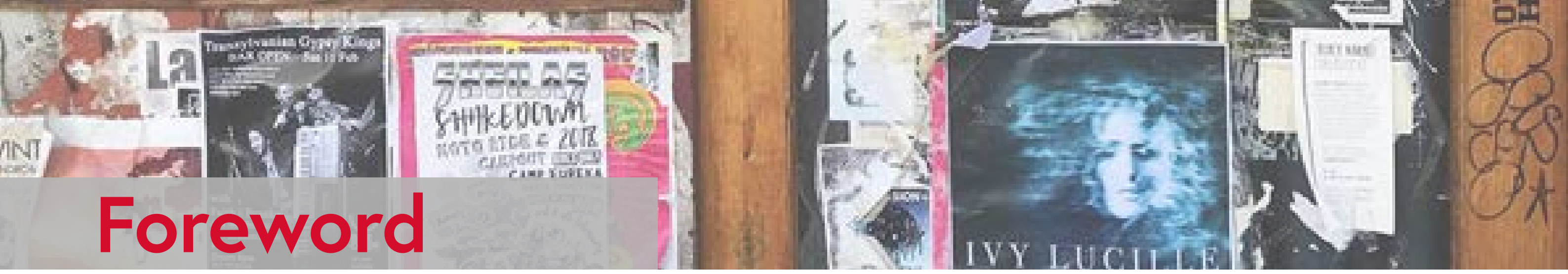
Dobe Newton
April 2018

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.

[1] *The Economic and Cultural Value of Live Music in Australia 2014'* The University of Tasmania for The Live Music Office and partners



Foreword

In 2012, the Melbourne (later Victorian) Live Music Census was conducted as a world first attempt to record real time data for live music performance in a major city.

The emphasis was unashamedly on activity in the small, 'grass roots' venues – pubs, clubs and bars, that are the backbone, as the project confirmed, of the extensive live music performance sector in this city.

Recording the operations in these hotels, bars and clubs was/is a labour-intensive exercise, which in part explains why they had previously flown under most statistical radars.

The information collected was then combined with data on large venue performances and festivals from various reports, information from public and private agencies and organisations and feedback from industry practitioners (musicians and DJs), venue operators and live music patrons to create a 'Big Picture' of annual live performance in Melbourne.

The limited resources available necessitated a simple and straightforward approach based on a quantitative assessment of output –
The number of venues offering regular (minimum two nights per week) live music performance.
The number of gigs taking place in those venues.
The workers involved delivering those performances – musicians, DJs, production and venue staff
The spending on door entry or tickets and patron spending directly associated with the presentation of those live music events

We acknowledged, at the time, that more sophisticated (and expensive) statistical models were beyond our remit and ability.

That said, the approach we adopted then, has subsequently been assessed, endorsed and refined by subsequent studies.
Their deliberations, methodologies and reporting have been invaluable in informing this current work.

It had long been our hope to conduct an update in order to benchmark current live music presentation and operation against those 2012 findings.
Therefore the findings reported for the 2017 year will be compared to those for 2012 wherever relevant and appropriate.

The opportunity presented itself last year thanks to the support of Music Victoria and their negotiations to bring the City of Melbourne, City of Yarra and the City of Port Phillip on board as project partners.
This allowed us to cover the basic costs and access the required personnel involved in the collection, analysis and reporting phases of this project.

We were also spurred to action by the fact that Melbourne in April 2018 will host the Music Cities Convention. It seemed like a perfect time to revisit and update that original Melbourne Live Music Census.

As in 2012, the core of the project relied on venue visits, by volunteer collectors, to as many live music venues as possible on Census night, Saturday, 25th November.

Collarts, through students in their music industry program, was our lead educational agency. Their numbers were augmented by students from RMIT University and TAFE, JMC Academy, SAE, Melbourne Polytechnic and Music Victoria professional members and staff.

The Collarts teaching staff – Jess Carroll, Katy Richards and Chrissie Vincent, were the key drivers who recruited and identified team leaders for Census night. With their assistance and guidance the students refined the venue lists, helped design the online surveys and then collected, recorded and analysed the observational data.

Foreword continued

Two years ago I had the privilege of teaching a unit in the Bachelor of Arts (Music Industry) degree at RMIT University. One of the best and brightest in a very impressive cohort was Rosa Coyle-Hayward, who I identified as a future music industry leader.
When this Census update became a possibility, she immediately sprang to mind as possessing the passion and skills to coordinate the project. She was the lynchpin of the exercise and its success is largely due to her efforts. Her design skills, evident throughout the report, were a significant bonus.

The Music Victoria team including CEO Patrick Donovan, volunteer coordinator Al Parkinson and Communications Manager, Laura Imbruglia, played vital roles in recruiting volunteers and spreading the word throughout the music community to generate responses to the online surveys and Facebook page which they hosted.
Patrick was instrumental in brokering the financial support from the Census partners without which, the whole project could not have taken place.

For the last three years, I have had the benefit of working with a large group of music industry professionals tasked with developing a music strategy for the City of Melbourne. In that advisory group, I was fortunate to work closely with Music Officer, Hannah Brooks, and she has been a constant and key supporter of this project, sourcing funding and providing me with access to key venue licensing information.

After the Melbourne Live Music Census 2012 was completed, we were contacted by Dr Adam Behr, Dr Emma Webster and Dr Tom Brennan from Edinburgh University who were keen to trial a live music Census in their city. We were happy to share our experience with them, and that successful trial expanded to include eight cities across the country. The UK Live Music Census was conducted in May 2017, and the team graciously shared their work with us.
The considerable refinements they have made, particularly to the online surveys, have played a major role in the design and implementation of our own.
Thank you!

Having produced useful data for the industry in 2012, it was an easier task to gain support from a broad range of important supporters.
APRA AMCOS's membership and venue licensing information was vital in helping in the all-important task of refining and confirming our final venue list with licensing information, and providing insights on the practitioners involved in Melbourne's live music scene. Thanks to Head of Member Services Dean Ormston for approving our access, and to stats whizz, Jo Perjanik for compiling and providing the essential data.
Special thanks to Adam Janke (Mushroom Group) for sharing significant information.

A great many people have provided advice, information and support during the project, but I would like to especially thank, Katherine Norman (Arts Centre Melbourne), Olivia Allen, Matt McCall and Brona Keenan (City of Yarra), Adele Denison (City of Port Phillip), Enna Giampicollo (Melbourne and Olympic Parks Trust), Christie Eleizer (Pollstar and The Music), Claudia Funder (Performing Arts Collection), Janine Barrand (Arts Centre), Alex Pinte, Karen Tinman (APRA AMCOS) and my numerous industry colleagues and friends who have put up with my (gentle) nagging and shared the survey links with their networks.

Thanks to copyright owners Shellie Tonkin and Zo Damage for their wonderful photos and permission to reproduce them. We have also used a number of photos courtesy of the Australian Music Vault and the Arts Centre Performing Arts Collection.

As was the case in 2012, this project rests firmly on the shoulders of the dedication, skill and determination of all those researchers and analysts whose work has been an inspiration and a source of vital and enlightening information.

Foreword continued

It was gratifying for industry 'veterans' to find so many young people - the next generation of industry leaders, who willingly got involved and contributed their energy, enthusiasm and professionalism.
Without their commitment the project simply could not have been contemplated nor completed.

Thanks especially to –

Alana Vandeleur
Alessandra Romania
Alex Pinte
Alexandra Padovano
Anthony Langdon
Cassandra Goff
Charlotte Egan-Schulz
Chau Nguyen
Chris Bettiol
Claire Cunningham
Deona Caiafa
Elliot Taylor
Erin Bridson
Fili Ianusi
Frida Vikander
Gabrielle Parker
Hannah Ryan
Harmanpreet Singh
Holly Panigas
Ignatius Job
Julie Insolia
Kate Watts
Kristen Wolfenden
Kristina Brooks
Lara Colling
Laura D'Urso
Liam Purden,
Louis Barnett
Madison Ebejer
Madison O'nions
Manuela Salazar
Mika Fuentes
Monica Drew
Morgan Lee
Nick Sowersby
Oliver Northam
Riya Raizada
Ryan Kearney
Sacha Havyatt-Reynolds
Sam Quinn
Sarah White.

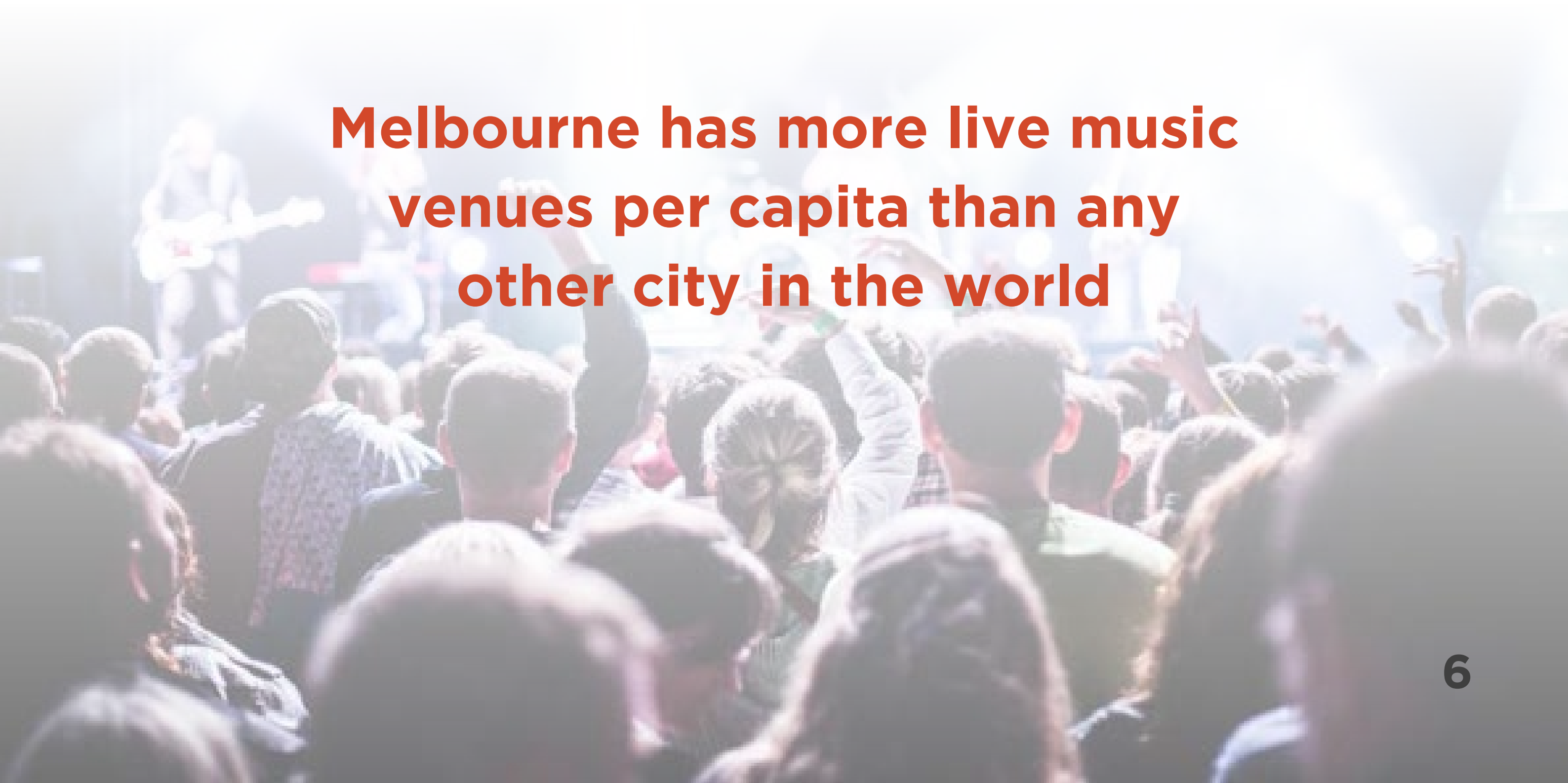
Dobe Newton
April 2018

Executive Summary

Live Music -
Melbourne's REAL Passion

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 has more live music venues per capita than any other city in the world

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. For Victoria, it showed that only cinemas (3.3 million visits - 70% of population) attracted more attendance than major live music events (2.7 million - 58% of population).[6]

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.

Dobe Newton &
Rosa Coyle-Hayward
April 2018

1 Census Context

As communities, we have always valued the social and cultural benefits associated with music creation, production and performance.
Only in recent years have we come to better understand the economic impact and significance associated with those activities.

A report prepared for the Australian Copyright Council by Price Waterhouse[1] reveals just how important the sector has become.
The copyright industry sector employed more than one million Australians in 2014 - 8.7% of the workforce. This placed it just behind the Netherlands (8.8%) and ahead of the USA (8.6%) and Canada (5.6%).
In 2014, it generated economic value of $111 billion (7.1% of GDP); greater than manufacturing and health care. In terms of GDP value-add ($115 million) it was the 4th largest industry sector behind financial services ($126 million), mining ($124 million) and construction ($122 million).

The copyrights attached to music's creative works, their recording, communication to the public and live performance, have always played a central role in this industry sector.
APRA AMCOS, Australia's performing rights organisation, represents 110,000 songwriters, performers and publishers, and issues paid licenses to those wishing to use their works and performances for commercial purposes. This revenue (minus admin costs) is then distributed to members.
APRA AMCOS's annual *Year in Review* report has consistently recorded increases in the distributed revenue. Gross revenue for 2016/17 was up 16% to $386 million and Public Performance revenue was up 20% to $77 million.Of this, $6.7 million was distributed as per Performance Returns submitted by the "road warriors performing in pubs, clubs, town halls etc". [2]

The revenue from Live Music licenses (issued to venues/promoters), rose 16% to $20.4 million, with significant sums distributed to Australian writers who supported acts such as Justin Bieber, Ryan Adams, Bruce Springsteen, Guns 'n Roses etc.

2012 Comparsion

In 2011/12 APRA AMCOS represented 81,000 members and issued 84,000 licenses.
Total revenue was $257 million.
Interestingly, in that year, Public Performance income at $56 million represented a 3% decline on the previous year.
Since then (2016/2017) –

- With another 30,000 creative personnel on the membership roll,
- Total revenue up by $129 million (50% increase),
- Performance licenses increased by 61,000 (70% increase) and,
- Public performance revenue up by $21 million (38% increase)

There is no doubt that that there has been significant growth in live performance activity and revenue since the inaugural Melbourne Live Music Census in 2012.

Victoria & Melbourne's 'Creative Leadership'

In 2013 and 2014, APRA AMCOS conducted a postcode analysis of 60,000 writer members which revealed that 9 of the leading 15 postcodes were in suburban Melbourne, with Brunswick and Northcote in the top two positions.

Data from the organisation for 2017, reveals that there are nearly 11,000 registered writer members in Greater Melbourne, with 7,000 of those residing in the CBD and inner-suburban music precincts.
Victoria's top 10 writer locations were – Brunswick, Northcote, Coburg, Preston, Fitzroy North/Clifton Hill, St Kilda, Thornbury, Fitzroy, Richmond, Elwood.

[1] *The Economic and Cultural Value of Live Music in Australia 2014'* The University of Tasmania for The Live Music Office and partners
[2] *'Year in Review 2016/2017'* APRA AMCOS

As global cities focus on the value of their late-night economies, the economic, social and cultural value of music performance has become increasingly important.

One need only look at dramatic developments in music-related policy/strategy, regulatory change and increased financial support in recent years to appreciate how important the live music ecosystem has become in the life of this city.
Much of the development can be traced to the momentum generated by a special Melbourne moment:

SLAM (Save Live Australia's Music) Rally - 2010

SLAM is a volunteer-based 'activist advocate action group' which, in early 2010 organised a rally of music workers and fans to protest regulations linking live music with violence. These threatened – in particular, the ability of small venues to viably host live music events.
In the largest cultural protest ever seen in Australia, 20,000 people followed the route taken by AC/DC in their iconic 'Long Way To The Top' film clip through the streets of the CBD to the steps of Parliament.
The protest persuaded the government of the day to sign a Live Music Agreement with the industry which officially acknowledged that live music does not contribute to violence. A new law was passed in 2011 recognised live music in the Objects of the Victorian Liquor Licensing Act.

SLAM has subsequently been involved in national lobbying which saw the establishment of a national Live Music Office and was instrumental in advocating changes to South Australian licensing laws affecting live music venues. But nowhere has the effect been greater than in Victoria.

The momentum from the rally led to the commissioning, by Arts Victoria, of a major report by DeLoitte Access Economics - *'The Economic, Social and Cultural Contribution of Venue-Based Live Music in Victoria'* (June 2011), which resulted in the establishment of a state government Round Table which brought industry and numerous government agencies together to discuss best practice across licensing, planning laws and noise attenuation among other things.

Round Table - 2012

The Round Table was a unique initiative in an attempt to create a forum for various government departments to interact with the music industry (particularly live performance) in an attempt to create a whole-of-government interaction with key music industry stakeholders.
It was responsible for persuading government to abandon legislation and regulation linking live music to violent, anti-social behaviour, and was responsible for enshrining the agent-of-change principle in planning laws.

Note:
The Round Table has just announced (March 2018) a trial program with nine venues to develop best-practice re the training of venue staff to address concerns about sexual harassment and assault at live performance events. This year's Census specifically sought feedback re this issue from attendees at live music events (See Audience Survey section).

Perhaps the Round Table's most important achievement of recent times involves the Agent of Change.

Agent of Change

In 2014, the Victorian State Government introduced Agent of Change (Clause 52.43) as part of the Planning Scheme Amendment VC120.
The rule defines the 'agent of change' as the developer behind any change within community building plans, and requires a developer to include noise attenuation measures when a proposed residential development is within 50 metres of an existing live music performance venue. Ultimately, it aims to protect live music venues from residential encroachment, but it also works the other way round. Any new venues must be soundproofed so established residences in the area are not disturbed by the noise. The 'agent of change' principle is triggered automatically when a new planning permit application is lodged.

Case Study
Stoll Long, a developer building an apartment block across the street from live music venue The Night Cat (Fitzroy), was unable to obtain a planning permit until they committed to compliance under SEPP N-2 (a state noise ordinance law).
After crunching the numbers, they realised it was far cheaper to soundproof the Night Cat's roof than the apartments. The total cost of the work was estimated at A$180,000, of which The Night Cat paid nothing.

The enshrining of the Agent of Change in planning legislation led directly to a State Government funding commitment to assist venues with noise attenuation.
(See Good Neighbours below).

City of Melbourne Music Strategy

In 2014, the Council endorsed a proposal to develop a detailed three year strategy to support and promote the city's vibrant music sector as part of the City of Melbourne's vision for an inspirational, sustainable, prosperous and creative city. This strategy was developed in conjunction with a dedicated industry-based Advisory Committee, who worked with Council over a four year period to implement the actions in the strategy.
The strategy was built around six themes

- Visibility
- Promotion & positioning
- Spaces & collaboration
- Funding & support
- Policy reform & advocacy
- Research & information.

Many initiatives were undertaken during the first three years, including an inaugural national Symposium (We Can Get Together) which provided a platform for industry leaders to discuss the issues and challenges affecting music cities around the world, such as the availability and viability of venues and spaces, the role of festivals and events, education and employment, research and demographic analysis and resolving tensions between amenity and development and music performance.

It featured a keynote from Music Canada's Amy Terrill joint author of the *Mastering of a Music City* report.

In 2014, the Council endorsed a proposal to develop a detailed strategy to support and promote the city's vibrant music sector as part of the City of Melbourne's vision for a bold, inspirational, sustainable and creative city.
More than 1000 people, including the arts sector and community, took part in the comprehensive two-stage community engagement process to develop the strategy through online forums, polls and discussions.

The Melbourne Music Plan 2018-2021 was endorsed in March 2018 by City of Melbourne Councillors and is the third iteration of strategic policy to support Melbourne's music sector into the future. The enhanced vision in the new plan is for Melbourne to be a global music capital with an inclusive and culturally diverse music scene. The four key focus areas of the new plan are –

- Industry development and diversity
- Innovation and technology
- Visitor economy and international profile
- Regulation, urban growth and infrastructure.

Victorian State Government Music Strategy

In 2014, the newly-elected Labor State Government, honouring an election promise, announced an unparalleled support package of $22.2 Million for contemporary music.

The Music Works Major Funding program offers grants of $2,500 - $20,000 for individuals and $2,500 - $75,000 for groups/organisations for projects and programs that will develop and bring dynamism to Victoria's contemporary music sector, increase employment and build cultural capital. The program is open to new ideas, new modes of practice and new approaches to the delivery of contemporary music that will build on Victoria's position as a world famous live music capital and Australia's contemporary music hub.

Complementing the main Major Funding grants program, **Quick Response Grants** enable contemporary music artists and organisations take up significant career or business opportunities that arise at short notice and outside of the major bi-annual funding rounds. Grants of $1,000 - $5,000 for individuals and $1,000 - $15,000 for groups/organisations support activities such as local and international tour invitations, professional development workshops, and attendance at major trade fairs such as SXSW, Folk Alliance International and Bigsound. Specific funding is also available under the Quick Response banner to support activities in regional areas.

The **Music Passport** program includes a suite of initiatives and opportunities that will support Victoria's music industry to establish global links, learn from the best in the world and break into new international markets. Delivered by the Victorian Government in partnership with the Australian Independent Record Labels Association, the Association of Artist Managers, Sounds Australia and Face the Music, Music Passport includes an international fellowship program for music managers and record labels, international showcase activities and inbound trade missions to bring global music leaders to Victoria.

Good Music Neighbours is a sound attenuation program offering matched funding of up to $25,000 to venues across the state for projects that help them limit the emission of sound into the local neighbourhood. Funding is also available for venues to conduct an acoustic assessment.

Music Under Wings is a $1.6 million professional development program for emerging contemporary music artists, industry personnel, live music events and venues, managed by APRA AMCOS, The Push and Music Victoria on behalf of the Victorian Government. It offers mentoring by established musicians and industry leaders, as well as masterclasses, skills development programs and
business development training for young people (under 25) in the early stages of their music career.

Rockin' The Laneways is designed to enliven public places; attract tourism and community activity, and imbed our proud music heritage in the fabric of our cities, suburbs and regions.
It provides grants of up to $25,000 to support innovative public projects that celebrate Victoria's popular music history. While rock 'n' roll and laneways are icons of Melbourne's music scene, the program will embrace all music genres and locations across the state.
Projects could range from signs that mark key music sites; the creation of walking or discovery trails to link places of musical significance; digital projects focused on Victoria's music history; or installations, activities and events that enliven locations that are key to the story of contemporary music in Victoria.

The **Australian Music Vault** is a dynamic new space at Arts Centre Melbourne charting the story of Australian music. Drawing on the rich pool of stories and items from leading Australian performers and music identities, and Arts Centre
Melbourne's extensive national performing arts collection, the Australian Music Vault will celebrate the people and events that have shaped – and continue to shape – contemporary Australian music. It will also house the Australian Recording Industry Association (ARIA) Hall of Fame.

The final initiative is the **Music Development Office** to be hosted by Music Victoria in the Collingwood Arts Precinct. With a staff of five it will focus on 'big picture' sector development. Details will be released to coincide with the release of the Census and the Music Cities Convention.

The ***Sexual Harassment and Assault in Licensed Live Music Venues Pilot Program*** (announced March, 2018) will improve the safety of live music venues by training staff and patrons how to identify and respond to sexual harassment and assault. Posters and other materials will be rolled out in venues from late April, with training currently being delivered to staff.
Nine well-known live music venues across Melbourne and regional Victoria, including:

- The Corner Hotel, Richmond
- Howler, Brunswick
- Revolver Upstairs, Prahran
- The Toff in Town, Melbourne CBD
- The Gasometer, Collingwood
- The Croxton Bandroom, Thornbury
- The Chelsea Heights Hotel, Chelsea Heights
- The Workers Club, Geelong
- Karova Lounge, Ballarat

A task force made up of government agencies, Victoria Police, academics, licensed venues and the live music industry oversaw the development of the pilot program. The program will run for 12 weeks and be independently evaluated.

The Melbourne Live Music Census 2012 & 2017

The SLAM rally and the greatly enhanced public and private interest in the live music sector that it generated, was largely responsible for inspiring the 2012 Live Music Census project.
A determination to maintain the momentum and provide essential data to promote our sector and assist practitioners and decision makers to confront their ongoing challenges, provides the context for this update.

Dobe Newton
April 2018

2 Melbourne As a Music City

In November 2016, the City of Melbourne convened a symposium, '*We Can Get Together*' to examine a broad range of issues impacting the music industry.

The event arose from the recommendations of the city's Music Strategy Advisory Group which, among other things, determined that:

"*Music will be a centrepiece of life in Melbourne. Musicians of all cultural backgrounds and genres will be a common sight in the streets and at outdoor/indoor venues, and people will know where to go to hear live music during the day and at night. Having ready access to live music will increase community pride and wellbeing, and make Melbourne a more welcoming, vibrant 24-hour city for residents and visitors.*"

Amy Terrill, Vice President Public Affairs at Music Canada, delivered a keynote which spoke to the recently released '*Mastering of a Music City*' report (2015) on which she was lead author.

That report resulted from a great deal of recent international interest -

"The term 'Music City' is becoming widely used in cultural communities and has penetrated the political vernacular in many cities around the world. Once identified solely with Tennessee's storied capital of songwriting and music business, Nashville, Music City now also describes communities of various sizes that have a vibrant music economy which they actively promote. Alliances are being formed among cities that see value in partnering to enhance their music success, Music City accreditations are being discussed and defined, and Music City panels are popping up at conferences around the globe. Outside the cultural community, there is growing recognition among governments and other stakeholders that Music Cities can deliver significant economic and employment benefits beyond the long-acknowledged cultural and social benefits. Quite suddenly there is a lot of interest in becoming a Music City, and how to make one succeed." [1]

Terrill explained that although there is no strict definition of a Music City, the most successful have certain elements in common.

Participants in two international focus groups (including Music Victoria CEO Patrick Donovan) identified five elements as essential components of a true Music City –

- Artists and musicians
- A thriving music scene
- Access to spaces and places
- A receptive and engaged audience
- Record labels and other music-related businesses.

They identified a further list of characteristics exhibited by the most successful

- Multi-level government support for music
- Broader city infrastructure
- Music education
- Music history and identity
- Music tourism
- Recognition of music as an economic driver
- Strong community radio supporting local independent music
- A distinct local sound or sounds.[2]

The members of the Music Strategy Advisory Group recognised this worldwide interest in exploring the music city concept and endorsed one of the report's core assertion – "A thriving music scene generates a wide array of benefits for cities, from economic impacts to cultural development. ."

Key benefits include:

- Economic impact
- Music tourism
- City brand building
- Cultural development and artistic growth
- Attracting and retaining talent and investment outside of the music industry
- Strengthening the social fabric
- Validating music as a respected and legitimate industry.

[1] *'The Mastering of a Music City'* p.10
[2] *'The Mastering of a Music City'* p.17
[3] *'The Mastering of a Music City'* p.22

One obvious reason for all this interest is an increasing global awareness of the contribution of the 'copyright industries' to national GDP, and music's central place in the Intellectual Property framework.
Another, is the growing interest in the 'night-time economy' as a generator – in particular, of cultural tourism and the economic benefits and job creation that accompany it.

One of the most interesting and thought-provoking contributions in recent times is from Melbourne academic Dr Andrea Baker (Monash University), *Algorithms to Assess Music Cities: Case Study—Melbourne as a Music Capital.* 2017

Much of the article focuses on the various algorithms traditionally used to define and measure the output of 'music cities', and was prompted by the 2015 release of the *'Mastering of a Music City'* report.
Baker laments the lack of uniformity of methodologies in the various reports assessing and measuring of 'music cities', and makes a strong case for use of an expanded list (14) of algorithms (outlined in *'Mastering …'* to move beyond the concentration on economic input/output data (financial impact, audience participation, live music venues, employment) to account for such things as talent, musical heritage, music education, community involvement etc.

Dr Baker calls for 'mixed methods research' which would combine quantitative and qualitative data to provide a definitive overview of music's place in a global city.
In the case of Melbourne, and most global cities, it's a study-in-waiting, requiring resources well beyond the scope of most researchers and studies.

Melbourne's name has been mentioned often in recent years in relation to the term 'music city', but our live music scene has long been lauded. In 1994, the industry 'bible', Billboard Magazine, ran a feature on Melbourne's music scene, dubbing it the 'Austin of the Southern Hemisphere'.

Late last year, Dr Shain Shapiro, founder of Sound Diplomacy the leader of the Music Cities movement, told the gathering at the Music Cities Convention (October 2017, Memphis) that Melbourne was "the live music capital of the world".
As he was previewing the next Music Cities Convention to be held in Melbourne in April 2018, was he just being polite?

Melbourne and the National/Global Music City Perspective

As many commentators and 'music city' observers have noted, although there has been increased interest and more data available in recent years, measurement criteria are rarely consistent across reporting, making comparisons difficult.

With that limitation in mind, the 'my-city's-more-live-than-yours' game is fun to play!

Global – Austin or Melbourne?

In 2012, a comprehensive literature review/search, failed to uncover much in the way of city-specific live music research or data.
The most 'interesting', was released at the 2012 London Olympics by then Mayor Boris Johnson.
The *'World Cities Culture Report'* - a comprehensive analysis of 12 of the world's major cities (not including Melbourne) was compiled by BOP Consulting.
In that report comparative data on live music venues showed -
New York (8.2 million population) – 277 live music venues – 1 per 29,600 residents
Paris (11.7 million) – 423 venues – 1 per 27,660
London (7.8 million) – 349 venues – 1 per 22,350
Berlin (3.5 million) - 250 venues – 1 per 14,000
Tokyo (13.1 million) – 385 venues - 1 per 34,000
Sydney (4.6 million) - 89 venues - 1 per 51,685

Neither Austin, the self-proclaimed 'Live Music Capital of the World' (Austin City Council 1991) nor Melbourne was included in the report.
So, we applied our census method and checked the actual offerings of the venues listed on the website run by Visit Austin[4], a division of city government responsible for promoting (among other things) the city's music scene.

[4] www.austintexas.org/music-scene/

By comparison, the Melbourne Live Music Census 2012 recorded 465 active, regular live music venues in Melbourne – 1 venue per 8,915 residents.

The Current State of Play

Comparisons are still difficult because there is no consistent definition of what constitutes a live music venue across various reports.

However, we stand by our 2012 definition that a genuine live music venue is one which presents live gigs ‘regularly’ – a minimum of 2 days per week for the majority of the year.

The many other venues which present live music on a less frequent basis – but where a featured artist is identified in advertising, are categorised as ‘occasional’.
Then there are a range of venues which host private events with non-featured live music performances. These are identified as ‘function’ venues.

The ‘World Cities Culture Report’ was updated in 2015/16. This time, it expanded the list of cities from 12 to 33, and included Melbourne, Sydney and Austin.
Based on the updated 2015 figures –
New York (8,405,000 population) – 453 live music venues – 1 per 18,554 residents
LA – (10,000,000) – 510 live venues – 1 per 19,607 residents
London – (8,416,000) – 245 live venues - 1 per 34,350 residents
Austin – (912,800) – 117 live venues – 1 per 7,801 residents
Sydney – (4,840,000) – 435 live venues – 1 per 11,126 residents
Melbourne – (4,440,000) – 549 live venues – 1 per 8,087 residents

So, these figures would seem to endorse Austin’s claim. But, as previously, the statistics underpinning the reporting need to be treated with caution.
In determining ‘live venue per resident’ we are not always comparing consistently.
Some cities report population based on central municipal/local government boundaries (Austin), others on larger consolidated metropolitan and suburban areas (Melbourne).
In this case, Greater Melbourne is not being compared with Greater Austin, but with the smaller city municipal area.
If Greater Austin (population 2 million) was the measure, then the venue per resident figure would be 17,094.

BOP Consulting is quite likely not in a position, nor almost certainly has not been tasked, to check on actual live music presentation, with lists of live music venues supplied being accepted at face value.

The 549 live music venues listed for Melbourne – the most for any city in the report, including cities more than double our size – London, New York, LA, were sourced from lists of licensed venues supplied by APRA AMCOS.
As our research has consistently revealed, these lists include venues which have registered as live music venues and secured licenses, but do not present regular live music.
The lists also contain venues that have multiple licenses (live music, featured recorded music, featured recorded music for dance, karaoke, café etc), and should not be double-counted. In addition, several reports identify the fact that not all venues that present live music have registered with APRA AMCOS for a licence.

Note:
It is also important to note that venues which may count for one music license may also present multiple live music performances in their venues. In Melbourne, it is not uncommon for venues to hold multiple live music events within the same building even in a small venue. The Tote Hotel can have up to three gigs on any one night with a large bandroom, a smaller bandroom and the front bar all hosting bands or the CBD club, The Bottom End has two separate club rooms within the same building. Although beyond the scope of this report, if these were to be counted as separate ‘venues’ we could be looking at a much higher number of venues.

So, Austin or Melbourne?

Adopting the same approach as previously, we have not taken lists, nor operator intentions, nor the mere registration for a licence as evidence of actual live music presentation.
We have cross-checked listings against event calendars and details on venue websites and/or social media pages.

Currently, Visit Austin claims that the city has 250 live music venues. However, they only list 181 on the linked Venue Guide.
When those listings were subjected to the same scrutiny that we applied in our Census (2 days per week on a regular basis) we found that Austin's 87 such venues in 2012 had been reduced to 64.
There were 92 whose calendar of gigs (one per week, or less frequent) would place them in our 'occasional' category. The other 25 on the list had no information about live music.

Based on a reported 2016 population figure of 931,000, this equates to one regular live music venue per 14,546 residents.
If the same 'Greater Austin' statistical area population figure (2,000,000 in 2016) was utilised, the venue per resident number would be much higher.

The same criterion applied to Melbourne – population 4,400,000, 463 regular live venues, produces 1 live music venue per 9,503. A small increase on the 2012 figure.

It would be interesting to subject all city's live venue claims to the same scrutiny, but as the only reliable method is to exhaustively cross-check lists from various sources against the details of live performance presentations by venue operators based on advertising/promotion (street press/gig guides: printed and web), websites and social media event postings in each city, it is unlikely to happen any time soon.

Undertaking these comparisons and reproducing this data is not about bragging rights. Rather it serves to illustrate the very significant commitment of Melbourne's residents, music industry practitioners and state and local government to a particular form of cultural production. A commitment that is arguably unequalled in this country or in any other major world city. It continues a long and celebrated tradition in the city which now hosts the long-awaited Australian Music Vault (Arts Centre), where it is on display for all to share.

The National Context – Melbourne or Sydney?

As noted above, extreme caution needs to be exercised in utilising venue licensing (especially) as a marker of actual live performance activity.

It is the contention of this report that accepting the raw numbers does not provide an accurate picture of the venue's live music presentation.
Nor does it illuminate the creative practice underpinning their operations – their role in connecting and nurturing a music 'community' (fans and practitioners) that has important social and cultural significance beyond the economic.

Dr Baker, in the article referred to above, cites APRA AMCOS licensed venue data to suggest that Sydney not Melbourne could claim to be Australia's live music capital.

However, it is apparent from the raw numbers that the majority of the licensed (for music) venues on the APRA AMCOS Sydney list are registered licensed sporting and cultural clubs which stretch the definition of 'regular live music venue' beyond breaking point.

Although live music takes place in those venues – sometimes on a weekly basis, it is not central to their operations which are focused on member and visitor amenity in terms of access to cheap meals and drinks subsidised by extensive gaming operations.

The largest, often referred to as 'pokie palaces', are associated with professional sporting clubs and feature multiple bars, eating areas, auditoriums and other recreational facilities.
The live entertainment which takes place is usually ancillary in purpose.
From observation and experience, the artists and genres presented in live music events in these venues are predominantly tribute and heritage pop and rock acts reflective of the tastes of the older demographic of the majority of patrons. Oft times performances take place in the gaming rooms where artists 'compete' for attention with big screen sport and poker machines.
To categorise these as genuine live performances is not, I would suggest, entirely accurate.

It was not always so. In the halcyon days of Aussie pub rock (80s), even the largest (leagues) clubs in Sydney presented the most popular, high-profile contemporary rock/pop acts of the day on a regular basis – eg. Midnight Oil, Angels, Cold Chisel, MiSex Although the clubs provide income and employment opportunities for artists and production crew, they are in no way reliant on live music for their own income. Rarely is there any sense of a music 'community' associated with their presentation, although a small number of clubs in the outer suburbs do have regular music 'club nights' – usually genre-specific and most often country/roots/blues.

In contrast, under Victoria's historically restrictive licensing regime, licensed clubs were prevented from installing and operating gaming facilities on the scale of their NSW and Queensland counterparts.
As a result, club premises in Melbourne were, and still are, far more modest in scale and, only in recent years, have a handful generated the gaming income allowing for the creation of facilities and entertainment programs to rival some of the facilities in the northern states. As a consequence, live music – always a significant part of Melbourne's cultural heritage, has never been a core activity of the licensed club sector.

Instead, it has thrived in recent decades in the smaller hotels, bars and ex-commercial spaces with which inner Melbourne is blessed.
The wealth associated with the gold rush resulted in a building boom in the CBD and surrounding inner suburban ring. Suburbs like Fitzroy, Collingwood and Brunswick, which had previously had a shady reputation, experienced an explosion of commercial building and residential accommodation. Large (mostly) corner hotels became a feature of the landscape during the decades before the end of the 19th century when the city was dubbed 'Marvellous Melbourne'.

When rock and pop became our truly popular music AND Victoria relaxed its draconian liquor licensing laws (hotels closed at 6pm until 1966), this network of inner urban hotels supplied the ready-made built infrastructure for the thousands of annual gigs that are a feature of the live music scene.

These small venues were famously described by Paul Kelly in his SLAM speech in 2010 as 'the university' where he learned and honed his performance craft.
These same inner suburbs have also, beginning with the concentration of actors and cultural activists in Carlton in the 1960s, supplied accommodation for musicians and music industry operatives.

Although increasing rents and land values are impacting on this music 'community', APRA AMCOS's postcode analysis of registered songwriter members (2014) confirmed that inner Melbourne suburbs were the runaway leaders with 10 suburbs in the 'musically active' Top 15, including the top two Brunswick and Northcote. Sydney, by contrast, had five in the Top 15.

The built environment in Sydney contrasts dramatically with retail and business development in the CBD, beginning in the 1960s and 1970s, all but eliminating live music venues.
Property prices in Sydney's inner suburbs have long mitigated against the maintenance of music 'community' there, as has the physical divide created by the harbour which makes networking and interaction much more difficult and problematic than in Melbourne.

In recent years, further relaxation of licensing provisions, has seen a veritable explosion in the creation of bars in the famous network of lanes that are a feature of Melbourne's CBD and inner suburbs.
These long-neglected spaces are now a tourist attraction and many have enthusiastically embraced live music presentation as a feature of their operation.

Issues & Challenges

Neither city has been without challenges to live music presentation.
Both have experienced the impact of global inner-urban building development which has seen the re-purposing of factories and warehouses for residential accommodation. Over the last decade a number of Melbourne's iconic hotels, many prominent live music venues, have been unable to withstand the pressure of increasing lease prices and/or competition from potential developers with deep pockets.

As the *'Mastering of a Music City'* notes –
"*Even the most successful Music Cities around the world struggle to address competing demands on land and spaces. Music landmarks all over the world, many steeped in history like London's 12 Bar, Nashville's RCA Studio A, The Silver Dollar Room in Toronto, Melbourne's Palace Theatre, and the childhood homes of John Lennon or Sir Paul McCartney in Liverpool, have been threatened by growth around them. Some have been saved while others have not. Each situation is different, but in many cases the pattern goes like this:*

1. *A low rent area, possibly a bit downtrodden, becomes attractive for music venues, recording studios or rehearsal spaces and artists in general because it is more affordable;*
2. *Artists and music businesses move in, and over time make it an attractive, cool area to visit;*
3. *Property values rise and more people and businesses want to move to the area;*
4. *Landowners see the opportunity to sell their properties to developers who build residential units or condominiums;*
5. *Rising costs (sometimes resulting from new requirement for noise reduction) and/or higher rents cannot be met by music venues, studios or artists, forcing them to go elsewhere.'* [5]

Beyond the challenge of gentrification, which often drives up property values and rents to an unsustainable level for music businesses, the music businesses that initially made an area attractive are often perceived as unwanted neighbours.

A recent survey of more than 100 music venues in the UK has identified the problem as one of noise versus nuisance. Music Venue Trust's Mark Davyd explains that in the UK, by consequence of law, "*Music is identified as a noise, noise is identified as a nuisance, and nuisance is the responsibility of the person who created it.*"
To compound the problem,
the music community has not done a good job explaining the value of small clubs. As a result, many venues are challenged on issues of noise or planning and don't have the money to mount a proper defence or to upgrade their facilities in order to meet stricter requirements. This, in addition to the challenging economic environment for small clubs,
has resulted in a significant decline in their numbers.
In London in 2010 there were 400 small clubs; it is estimated that there are 100 fewer today.
London is not alone. [6]

London - A Cautionary Tale

The UK is now considering the introduction of 'Agent of Change' legislation, but the damage has been done. The Small Venues Trust[7] reports that in 2016 the number of small venues in London stabilised after 15 years of decline.
Even so, the capital struggles to recover from the prolonged downturn. In 2016
Small venue attendance – 1.3 million (down 13% on 2015)
Music tourist visits – 343,000 (down 15%)
Spending by music tourists - $130 million (down 16%)

Another challenge shared by most global cities has been the need to respond to a world-wide emphasis on creating safer environments in 24-hour cities in ways which ensure amenity for residents and patrons while, at the same time, ensuring the viability of creative spaces.

In many cases the result has been a largely unsubstantiated (on available empirical evidence) link between late night (especially) venue activity and physical violence.
When legislation to enhance security, and thus increase costs, in Melbourne's small venues featuring live music was mooted in 2010, the reaction was immediate and dramatic.
20,000 music workers, musicians and fans took to the streets of Melbourne in protest, and proposed legislation was shelved. Crisis averted!

Pressure was brought to bear in Brisbane and Sydney following widely publicised physical assaults associated with a small number of late-night venues, not necessarily featuring live music.
In Sydney's case, the result was legislation to restrict patron access to a range of late-night venues, commonly referred to as lock-out laws.
Venue operators and patrons protested the blanket targeting of venues as indiscriminate and unfair, but to no avail.

Fears that live music presentation would be a casualty of this law-and-order related legislation, have been confirmed by APRA AMCOS licensing data. From 2013/2014 licence receipts and venue spending on live music were down 15%, door receipts were down 30% and attendance down 20% in the areas where the lock-outs operated.
The ability of many venues to present commercially viable live music has obviously been compromised, and many have been forced to close.

[5] *'The Mastering of a Music City'* p.22
[6] *'The Mastering of a Music City'* p.17
[7] *Wish You Were Here 2017: The Contribution of Live Music to the UK Economy*

Finally, there is another comparison that sheds light on live music presentation in our two major cities. There is little doubt (from LPA figures) that Sydney hosts a significant number of live music concerts and festivals, and attracts larger audiences and generates greater ticket revenue than Melbourne.
However, it is the small venue activity that truly defines a music city and in this case, capital.

In order not to disparage Sydney's live music scene unfairly, the census project undertook a comparison of live music promotion in the street press that has serviced the two cities for many years – *The Brag* (Sydney) and *Beat Magazine* (Melbourne).
The comparison is based on the premise and assumption that venues and artists with a commercial imperative would naturally take advantage of free advertising to promote gigs to potential patrons.

The first comparison was undertaken in 2016, comparing listings (hardcopy and online) for the week Wednesday August 2nd to Tuesday August 8th.
Sydney – 267 individually advertised gigs in 68 venues
Melbourne – 794 individually advertised gigs in 124 venues.
Of the Sydney gigs, 127 featured DJs or solo/duo acts and 140 bands.
In Melbourne, the makeup was 237 DJ/solo/duo gigs and 557 bands.
In Sydney only 10 venues advertised gigs on 3+ night.
In Melbourne the equivalent number was 59.

The second comparison was done as part of this year's census project, covering the week Wednesday 15th November to Tuesday 21st November, 2017
Sydney – 70 individually advertised gigs in 20 venues.

Melbourne – 802 individually advertised gigs in 124 venues.

Interestingly, the analysis (*Beat Magazine*) conducted for the Victorian Live Music Census 2012 for the equivalent November week, recorded 785 individually advertised gigs for Melbourne.

While it is beyond the scope of this study to offer a detailed analysis of the apparent significant decline in live music presentations in Sydney's small venues, there would seem to be – by our consistent measures anyway, little doubt that Melbourne's live music scene continues to enjoy good health.

Note:
Sadly at the time of writing, Sydney's iconic Basement, one of the last major CBD venues, has just shut its doors.

Melbourne's Cultural Tourism

In 2016, the Victorian State Government commissioned Boston Consulting Group to evaluate and comment on Melbourne's cultural tourism.
Their report – '*Melbourne as a Global Cultural Destination*' makes for fascinating reading.
Some of the data is drawn from the previously cited '*World Cities Culture Report*', including number of live music venues which we noted needed to be treated with some caution in comparing world 'music' cities.

That said, the report contains much information drawn from their own research and data provided by other agencies – eg. Creative Victoria, Tourism Victoria, Roy Mogan etc.

Cultural tourists represent 40% of all visitors to Melbourne. A 'cultural tourist' is defined as one who includes at least one cultural activity on their itinerary (see below).

In 2017, 1.8 million international cultural tourists visited Melbourne – up 100,000 on the previous year, and growing at a consistent rate since 2006.
They stayed 46.9 million nights in Victoria. On average staying 26 nights – three nights longer than non-cultural visitors.
In 2017, 4.1 million domestic cultural tourists stayed 15.5 million nights. On average staying four nights – twice as long as non-cultural visitors. Half of these domestic cultural tourists came from regional Victoria and NSW. Cultural tourists spend 20% more than other visitors.

The rate of growth in cultural tourism for Melbourne is greater than that for any other Australian city other than Hobart.

In 2015, cultural tourists spent $2.5 billion.

The primary reasons for visiting Melbourne were:

Domestic Visitors
Friends (31%)
Creative events/experience (18%)
Sports (16%)
Shopping (12%)
Dining (11%)
Nature (9%)

International Visitors
Friends (26%)
Nature (22%)
Creative events/experience (21%)
Shopping (9%)
Sports (8%)
Dining (8%)

Museums galleries and heritage and historic buildings were the major attractions (60%), but for international cultural visitors festivals (34%) and concerts and performing arts events (25%) were the next most popular.

Likewise, domestic cultural visitors favoured the same top two but reversed the order for 3rd and 4th; concerts and performing arts events (25%) and festivals (22%).

Value of Melbourne's Music Tourism

So what do these figures tell us about the value of cultural visitor spending that can be specifically ascribed to contemporary music-related performance.
The answer is not much. Well, not much beyond some educated guestimates.

By considering these figures in light of other sources (Live Performance Australia, Australia Council for the Arts, Live Music Office, Melbourne Live Music Census 2012 & 2017), which identify contemporary music as by far the largest contributor to the annual audience for the performing arts (66% in Victoria in 2016) and the revenue from box office (69% in Victoria in 2016), there would seem little doubt that a sizeable amount of that $2.5 billion spend by cultural visitors in 2016 was live music-related.

UK Tourism Value

The first report that attempted to quantify the financial contribution of music tourists to the UK was - *'Contribution of Music Festivals and Major Concerts to Tourism in the UK'*[8]

It found music tourist attendances at UK major concerts and festivals (2010) - 7.7 million generating total of A$2.2 billion and created 19,700 FTE jobs.
In London (2010), music tourists spent at least A$656 million, adding A$400 million in value and creating 4,445 full time jobs.

We now have access to a 2016 update by UK Music – *'Wish You Were Here 2017: The Contribution of Live Music to the UK Economy'*
Music Tourist attendances at UK major concerts and festivals – 12.5 million (40% of all attendances) generating a total of A$4 billion and creating 47,000 FTE jobs.
Activity in London accounted for 43% of the total attendees and spending.

Interestingly, the report noted that the number of small venues in London stabilised in 2016 after fifteen years in decline.
Despite this, tourist visits to small venues at 343,000 declined by 15% on the 2015 figure, as did spending (-16%).

Music tourists spend 38% on tickets, 17% on site and 46% off site (accommodation, meals, shopping etc)
Overseas music tourists (823,000) spend an average of $1700 per visit.

Until we have an equivalent report to Music UK's *'Wish You Were Here: The Contribution of Music Tourism to the UK Economy'*, we will struggle to do more than highlight the importance of the area.

For several years, we have tried to encourage relevant agencies to begin the process by analysing the postcodes of the purchasers of tickets to major concerts, festivals, music theatre to identify intrastate and interstate 'music tourists' to Melbourne. Unfortunately, there has been no movement on that front as yet.

[8] International Centre for Tourism & Hospitality Research, Bournemouth University, 2011

Cautionary Notes

The '*Melbourne as a Global Cultural Destination*' report also included some very interesting information on perceived 'weaknesses' in Melbourne's cultural tourism offer and infrastructure, based on visitor surveys and feedback from a number of 'Thought Leaders' drawn from our major performing arts organisations, agencies and businesses.

57% of cultural visitors think Melbourne is a great cultural city (Sydney 16%), and 37% think Melbourne is Australia's live music capital (Sydney 25%).
However, 36% of visitors are "very likely" to recommend Melbourne as a creative destination **after** visiting – as opposed to only 16% **before** visiting.

90% of the 'Thought Leaders consulted', are of the opinion that there are distinct weaknesses in Melbourne's cultural offer, and the branding and marketing associated with the offer.
In particular, they identified the lack of a central and integrated source of information for cultural visitors, making it difficult for them to access the depth and breadth of Melbourne's attractions.

Melbourne's 15 million social media followers (spread across 3-4 sites) was compared unfavourably with the 50 million+ enjoyed by London, Paris and New York.

They also warned – as have Sound Diplomacy's Dr Shain Shapiro and many others, about the so-called 'doughnut effect' – the hollowing out of the city's creative centre due to increasing cost-of-living pressures for creative practitioners and affordability of creative presentation spaces (especially venues) due to rising business costs.

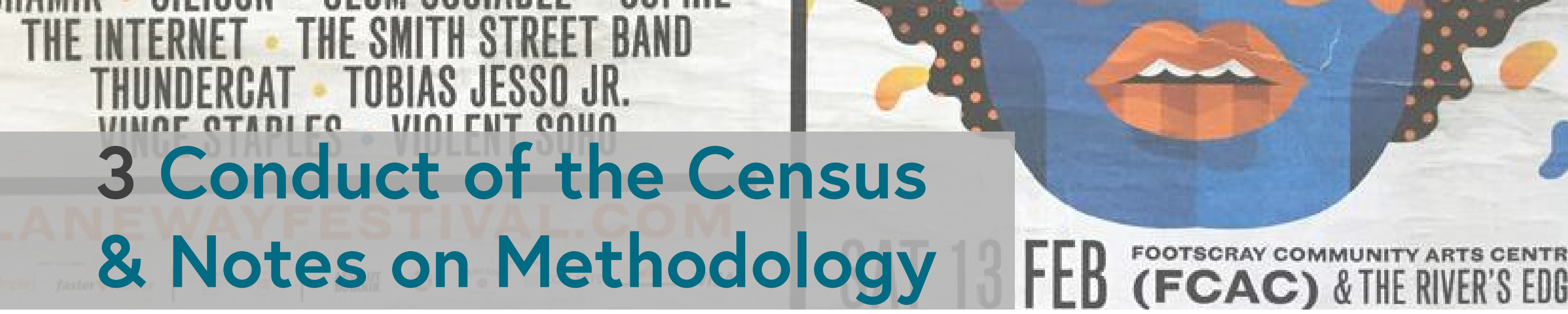
San Francisco was cited as a specific example where rapidly increasing business costs and inner-city development largely removed the 'creative buzz' that had previously characterised the city.

Recommendations:

That industry, local and state government agencies initiate a study to specifically quantify the value of music-related tourism to the Melbourne and Victorian economies.

That the results of the study be utilised – by industry and stakeholders working together, to identify target markets and refine the branding, marketing and communication of Melbourne's cultural visitor offer as a world-leading music city destination.

Dobe Newton
April 2018



3 Conduct of the Census & Notes on Methodology

Volunteer Enlistment

As the Census process relies heavily on volunteers to conduct the observational phase of the project, the early focus was on enlistment.

We were fortunate indeed that Collarts (Australian College of the Arts Pty Ltd) agreed to become involved as our leading education provider. They have been providing tertiary education in the creative arts area for 30 years, having taken over and expanded on programs previously offered by AusMusic. I was personally delighted by the association, as I'd worked for AusMusic in the 1990s coordinating Australian Music Week.

Collarts senior staff Katy Richards, Chrissie Vincent and Jess Carroll agreed to make the Census project part of their curriculum and began to recruit volunteers from their student cohort.

We developed information sheets and a volunteer form which were distributed to Collarts students and students in a variety of music industry courses at RMIT University, Melbourne Polytechnic, SAE and JMC Academy via representatives from those institutions.
The call for volunteers was also spread through Music Victoria's membership database and electronically through the City of Melbourne and Creative Victoria's networks.

Volunteers were required to officially sign on. This resulted in some 80 enrolments.

Documentation & Design - Observational & Online Surveys

Led and supervised by Jess Carroll, students from Collarts helped develop and design Observational Survey sheets that volunteers would complete for each venue they visited on Census night.
They used the sheet we had developed for the 2012 Census so that, wherever possible, we would have the ability to compare the 2017 information with data collected in that original project.

The Observational Survey was kept to one page – mainly so volunteers could complete their visits in one night. Their job in essence, was to record who was playing in the venue, who was working there on the night, who was watching and whether there was a door cost or ticket needed for the event.

They also used the online surveys we developed in 2012 (Musicians and DJs, Venue Operators and Audience) to make suggestions for this update. Again, they were encouraged to develop questions which, wherever possible, provided bases for comparison.

A particular stroke of good fortune was the fact that the UK Music Census had already been conducted in May 2017.

The UK team – Drs Emma Webster, Matt Brennan Adam Behr, Professor Martin Cloonan and Jake Ansell agreed to share their extensive and very thorough online surveys with us.
We were very grateful and utilised some of their questions. Our study was also informed by their methodologies.
The surveys were then designed by Rosa Coyle-Hayward and posted on Survey Monkey.

Venue Lists and Maps

The Collarts students were then supplied with venue lists that were an amalgamation of licensing information from APRA AMCOS, City of Melbourne lists and updates that I had regularly undertaken based on the original venue master list from 2012.
Their job was to confirm those venues currently presenting live music and identify those no longer functioning or that had ceased featuring live music.
(See further explanation below in Methodology Notes)

Jess Carroll and her students then developed maps of venue areas to be used by teams on the night.

Volunteer Briefing

On Tuesday 21st November, we (Collarts staff, Rosa and I) conducted a briefing for team leaders at the Fitzroy Victoria bowls club.
Teams were allocated areas and supplied with maps and venue lists.
The meeting concentrated on safety aspects –

- Team members to work in pairs and team leaders to be responsible for signing team members on and off at the beginning and end of Census night.
- Team leaders to be responsible for gathering venue record sheets from team members and submitting them for recording and analysis.

Volunteers were also provided with an identifying lapel badge and a letter to venues explaining the process and requesting entry.
We did our best to contact all venues by email to give them a heads-up about the Census project and the volunteer's visit.

They were supplied with Venue Observation record sheets, and instructed, wherever possible, to collect from venue staff whatever information they could gather on the venue's general live music operation – eg. audiences on other nights.

Teams were allocated to 10 areas in the CBD (including Southbank, Carlton, and North Melbourne) and inner-suburban music precincts –

- Abbotsford/Collingwood
- Brunswick/Coburg
- Fitzroy/Collingwood
- Northcote/Thornbury
- Prahran/South Yarra
- Richmond/Hawthorn
- St Kilda/Windsor/Elsternwick
- South Melbourne/Port Melbourne

On The Night – Saturday 25th November

Team leaders gathered their volunteers at an appropriate location, signed them on and sent them on their way to observe and collect data.
Arrangements were also made for the submission and collection of their team data sheets.

All team members were supplied with a quantity of business cards advertising the links to the online Audience and Musician/DJ surveys (Survey Monkey), and the Live Music Census Facebook page.
They were instructed to hand out the cards to patrons and musicians in the venues they visited, and to use their individual contacts and social media networks to spread the word.

On the night, we experienced the 'usual' (as had happened in 2012) dropouts with sickness, competing priorities etc
Unfortunately this meant that we were unable to visit all the venues that had identified but teams did cover 75% of the target area.
As was the case in 2012, we did not have the personnel to physically visit the venues in the outer suburbs.
These 100+ venues were followed-up with requests to complete the online venue survey.

Data Recording, Analysis & Surveys

The data collected by Collarts students was then entered into spreadsheets during class time. All observational information was then transferred to Survey Monkey in order to take advantage of their analytics.

Online Surveys

The surveys developed for Musicians/DJs, audience and venue operators were available on Survey Monkey and a link was hosted on Music Victoria.
Volunteers and Collarts staff used their networks to promote the surveys and encourage responses.
We also had the specific support of the City of Melbourne, Creative Victoria, Music Victoria and The Music in spreading the word.

Notes on Methodology

From our research, we assembled email contacts for 95% of all the venues we had identified as live music presenters. Rosa sent three individual emails requesting completion of the online survey.

Rosa and I collated and analysed the online responses.

The focus of the Census project was on gathering information on what was happening in Melbourne's live music venues on the night of the Census and, by combining that data with responses to online surveys and the findings of other relevant reports and studies, creating a comprehensive picture of live music presentation in Melbourne in 2017.

Definition of a Live Music Performance

There are many definitions of what constitutes a live music performance.
For the purposes of this study (and many others) a live music performance is defined as 'a creative presentation of music by a featured performer (see below) in the presence of an audience gathered in a public space designated for the performance where appropriate technology is utilised to communicate that performance to those in attendance'.[1]

As it was in 2012, our primary focus was on small venues presenting live music on a 'regular' basis. We have consistently defined this (since 2012) as minimum of two advertised presentations by 'featured' performers on a weekly basis.

A 'featured' performer (musician/band/DJ) is one who is specifically named in advertising/promotion. Where performers were not named – eg. 'open mic' nights, 'club/party nights with DJs', they have not been included in our determination of regular presentation.
This allows us to be conservative in our calculations.

Venues

The credibility and accuracy of the Census relies on the robust nature of our venue list.
As was the case in 2012, our major task was to ensure this was our major focus in the lead up to the conduct of the project.
We are confident that we have taken every precaution to create lists that accurately reflected live music presentations at the time of the Census.

1. The venue lists that we used in 2012 have been regularly updated – most recently in November 2016.
2. We had access to venue licensing data from the City of Melbourne and from APRA AMCOS. This information was extremely helpful, but was treated with the usual caution. APRA AMCOS issues a range of licenses – live performance, featured music for dance, featured music , café/restaurant ('background'), karaoke. Many venues may have multiple licenses, so the raw numbers alone are not a definitive reflection of the number of venues. Nor, as APRA AMCOS acknowledges, do all venues presenting live music apply for a license. The City of Melbourne information needed close scrutiny to eliminate venues with an existing license but with limited or no live performances.
3. The students from Collarts were supplied with our existing lists and this licensing information. Their task was to verify the information. They did this by utilising the free gig guides in Beat Magazine (print and online), checking venue websites and social media pages.
4. Websites are useful, but many still exist where the venue does not – or when the venue has changed the nature of its operation – eg. ceased presenting live music, or scaled back the number of gigs. Facebook was an invaluable verification tool in these instances.
5. We did not doubt the diligence of our volunteers, but Rosa and I then repeated the exercise on their 'draft' lists – checking websites and social media for all venues. This allowed us to exclude some venues and, just as importantly, to include new venues. Where we were unsure – they were excluded.
6. Venues that did not meet the two gig per week criteria we set to determine 'regular' live music presentation were noted as 'occasional' presenters. There were approximately 100 of these. They were not included in our calculations. Likewise we identified a large number of venues (approx. 150) particularly in the outer suburbs which cater primarily for private functions and/or present live music on special occasions and holidays. Even though performances in venues in both these categories obviously contribute to attendance, spending and job creation, they were noted but excluded from calculations.

[1] *'The Mastering of a Music City' and 'UK Music Census'*

We are therefore confident that we have erred on the side of caution and that the findings in this report, as they apply to live music presentation in Melbourne's small venues, are as accurate as possible and providea reliable basis for comparison with other findings and the results reported in the Melbourne Live Music Census 2012.

All calculation of small venue door revenue and patron spending have been based on a 50-week year to allow for seasonal variation (eg. the odd 'dark' night).

In calculating the contribution of the 100+ outer suburban venues, which it was not possible to include in the physical Census, we have utilised the approach verified for the Census in 2012. That is, a week's economic activity in those venues equates to (a minimum) one premium night in the precinct venues. While many of these outer venues operate on multiple nights per week, and this is almost certainly under-reporting their contribution, we have done so to avoid any suggestion of over-inflating the result.

We are therefore confident that the results we have reported for attendance, income generation and employment are as accurate as possible.

Live Performance Australia – Revenue & Attendance – Major Venues

LPA's annual Revenue & Ticket survey has been relied on by all previous studies, including the 2017 Census, for definitive information on audience numbers and box office revenue from presentations at large venues (arenas, theatres, concert halls, festivals) across the performing arts.
Their auditors, Ernst & Young, collate box office information supplied by major ticketing agencies and the extensive group of performing arts presenters – organisations, companies, venues, promoters.
Their annual report obviously does not include those who ticket their own events direct to the public, but these are relatively few in number compared to the whole.

Some of our top-end smaller venues (eg. The Corner Hotel, Northcote Social Club, Max Watts) regularly use the same ticket agencies (Ticketek, Ticketmaster, Moshtix) that supply LPA with their data.
The University of Tasmania report[2] suggested that there was little overlap in these figures.
However, to avoid any suggestion of double-counting, we have discounted the LPA concert ticket revenue by 10% and likewise discounted the attendance total by 10% in calculating patron ancillary spending.

From the LPA data, we have included – Contemporary Music, Classical Music, Opera and Contemporary Music Festivals (Melbourne based).
We have excluded Ballet & Dance as it is not possible from the data to accurately determine the 'live music' component.

We have however included a portion of the revenue and audience data from LPA's Music Theatre category.
The productions presented at Melbourne's three major theatres in the CBD (Her Majesty's, Princess and Regent), and the State Theatre (occasionally), are based on live music performance.
However, in order to allow for dramatic content, revenue and attendance figures have been discounted by 30% in constructing the annual 'Big Picture'.

Importantly, the Melbourne Live Music Census 2017 is the only report which combines 'grass roots' small venue information with LPA major event data specifically for the city of Melbourne.

Ancillary Spending

In calculating the spending associated with live performances it is obvious that patron spending on tickets and door entry represents only a portion of the outlay.
In the 2012 Census, we based our calculations on the feedback from patron and audience surveys from that project and previous reports authored by DeLoitte and Ernst & Young.
For this update, we again have the results from our audience surveys (500+), but also the benefit of previousand additional work – the 'Live Music Census 2012' (Music Victoria), 'The Adelaide Live Music Census 2016' (Music SA & Live Music Office), 'The Economic and Cultural Value of Live Music in Australia in 2014' (University of Tasmania, The Live Music Office and partners), 'Wish You Were Here 2017: The Economic Contribution of Live Music to the UK Economy' (UK Music).

[2] *The Economic and Cultural Value of Live Music in Australia 2014*

These confirm our findings that tickets account for only 20-25% of patron outlay, and that spending on food, drink, transport and merchandise associated with attendance at live music performances accounts for 50%+ of overall outlay.

We have discounted the audience figures (by 6%) used to calculate ancillary spending to reflect the audience survey respondents who report spending $0 on food, drink, transport connected with their attendance at live music.

Online Surveys – Audience, Musicians/DJs, Venues

We are confident that the sample sizes (see individual sections) are appropriate to verify the reported findings. The 2017 surveys have provided important insights re the attitudes and activities of live music patrons; the nature of live music practice, the way venues present and promote live music and the facilities they provide.

Exclusions

We also note that there are a number of events in the CBD and suburbs that have a significant popular music component but are free, or have a free live music component - eg. St Kilda Festival (estimated 400,000 attendance – City of Port Phillip), Brunswick Music Festival Street Party, various Federation Square music series, free MSO concerts at the Sidney Myer Music Bowl, Melbourne Music Week, White Night, Face The Music, Moomba, Darebin Music Feast, Moomba, White Night etc.
A number of free-entry and ticketed, visitor-based attractions have recently added live music performances to their offerings – Melbourne Museum, Royal Melbourne Zoo, National Gallery of Victoria, Royal Botanical Gardens, Australian Open (tennis).
While these performances do not generate direct ticket/door revenue, they certainly generate additional patron spending associated with attendance.
We have not attempted to quantify that spending.
It is worth noting also that when these events occur they may have an effect on attendance and revenue of music events elsewhere.

Also beyond the scope of this study is an analysis of the popular music component of the programs of events that sit in Live Performance Australia's 'multi category' festivals – eg. Melbourne International Arts Festival, Australian World Music Expo, Melbourne Fringe Festival. There is no doubt that significant income and spending takes place, but Live Performance Australia's figures do not provide an accurate breakdown. Further work needs to be done to analyse the live music component of these events.
The summary which follows is conservative in nature, and provides the most comprehensive figures so far on the annual economic contribution of music live performance in Melbourne venues.

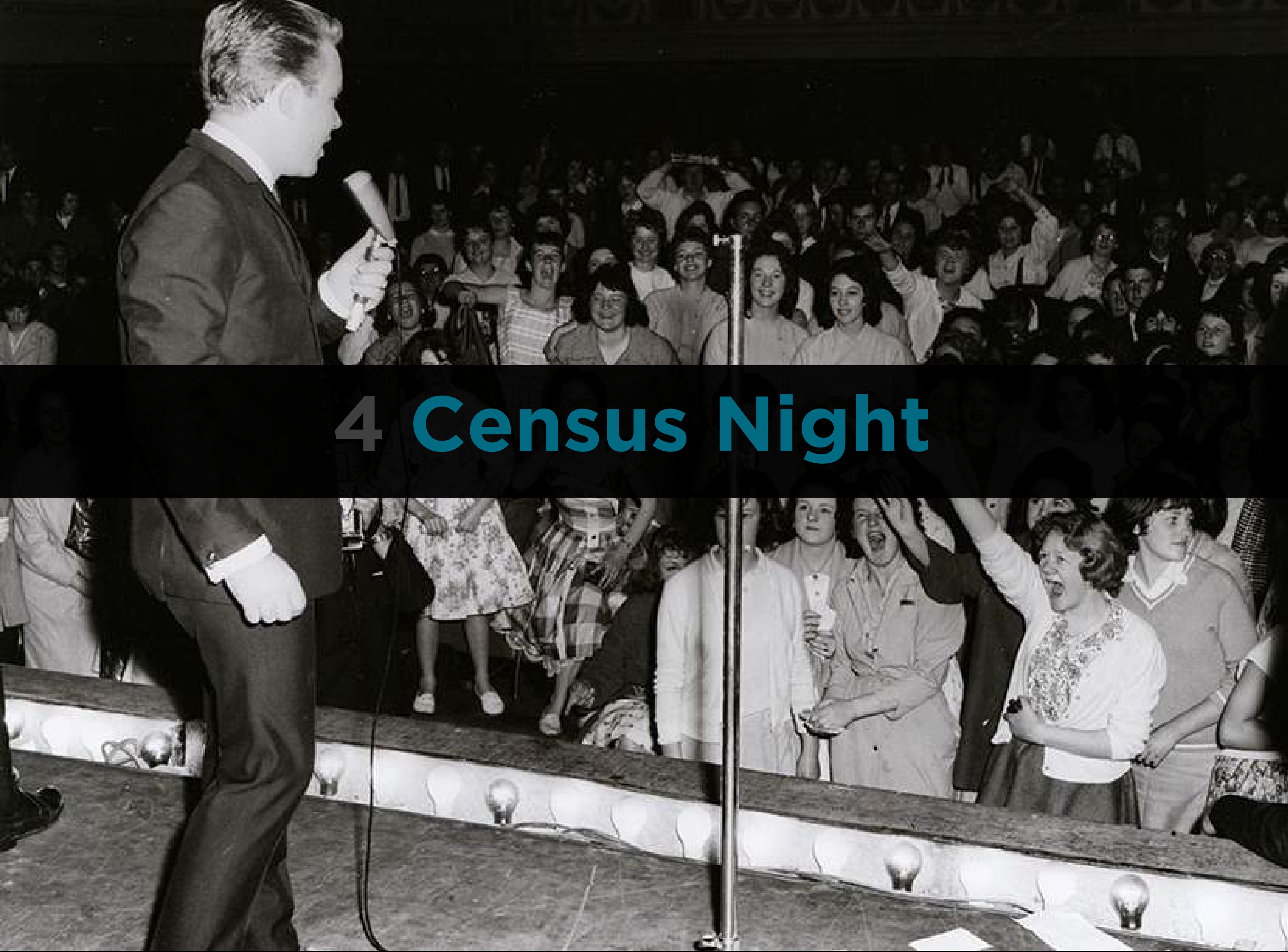
Disclaimer:
The Victorian Live Music Census does not claim to be THE definitive source of all information on the live music sector. It lacks, for instance, the measurement tools and economic expertise to accurately measure the 'value add' which was a feature of some other consultant's reports.

However, it's rigorous process has produced the most accurate and up-to-date list of Melbourne's live music venues available, and therefore extremely credible estimates re the operation of live music in those venues – ticket and door entry revenue, patron attendances and venue staff/production staff/musician/DJ employment.

This work owes a considerable debt to a number of authors and researchers whose work has greatly added to our knowledge and appreciation of the importance of live music presentation in the fabric of this and many other global cities. They are acknowledged in the body of the report where specific information has been sourced.

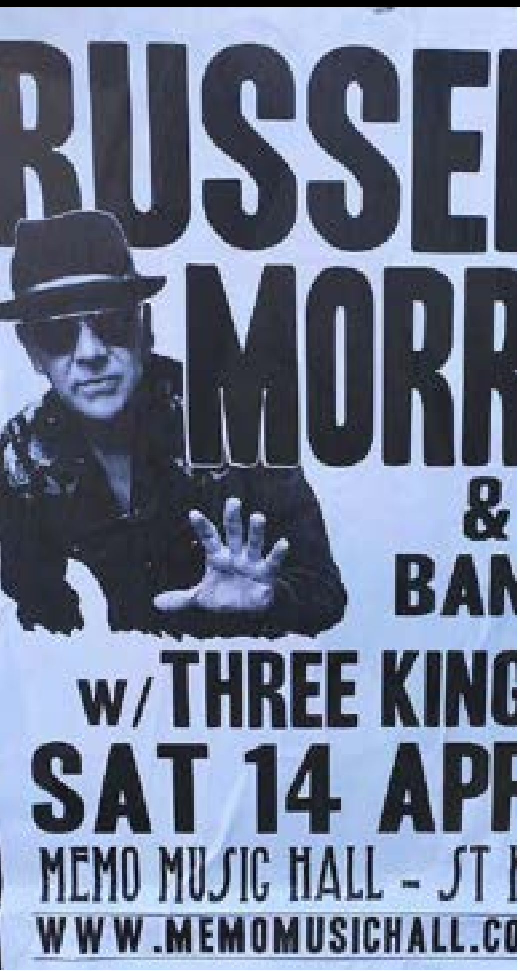
The report contains some comments, observations and conclusions.
Many are based on the collected Census data, industry reports and studies.
Where they are more general in nature, they are based on the author's 47-year professional involvement in Australia's live music scene as a performer, manager, promoter, industry consultant, educator and project manager of the Melbourne Live Music Census 2012 report.
Any errors or omissions are entirely mine and not the responsibility of the many individuals and agencies who have so generously contributed to this work.

Dobe Newton
April 2018



4 Census Night

25 November 2017



4 Census Night

Working with venue lists based on information from APRA AMCOS and the City of Melbourne and refined by Collarts staff and music industry students as well as the Melbourne Live Music Census 2017 team, volunteer collectors visited some 250 Melbourne music venues.
They were tasked with recording what was happening in those venues –

- Who was playing
- Who was working
- Who was watching

They were also instructed, wherever possible, to speak with venue staff about their overall operations – eg. gigs, audience on other days of the week, and details of door/entry charges.[1]

Each team had 20-25 venues on their list and a map identifying addresses. Team members were required to operate in pairs for safety reasons.

A small number of venues were not operating on that particular night, a small number were running private functions and several did not allow access, despite the accreditation each carried.[2]

4.1. The Venue List
The Census, and follow-up checking and online survey responses confirmed that there are 463 venues in the Greater Melbourne area regularly providing live music performances. [3]

There are 136 small venues (pub/club/bar) in the CDB, plus 17 larger venues either in the CBD or nearby – theatres, concert halls, large nightclubs.
There are 216 venues in the famous inner-suburban music 'precincts' – clusters of live venues in close proximity to one another - in Collingwood/Abbotsford/Fitzroy, Brunswick/Coburg, Northcote/Thornbury/Preston, Richmond Hawthorn, South Yarra/Prahran/Windsor, Port Melbourne/South Melbourne and the St Kilda area.
Outside this inner music 'ring' centred on the CBD, there are a further 95 small live music venues operating regularly, scattered across the outer suburbs. [4]

There are also an additional 100+ RSLs, town halls, restaurants, sporting clubs, cultural and community centres etc that feature popular live music performance at a variety of public and private functions.

We have classified these as 'occasional', and excluded them from the reported results.

On Saturday 25th November, 2017 93% of venues in the CBD featured a live performance (92% in 2012), and 96% of those in the music precincts (94% in 2012).

4.2 Venues By Type
It was unsurprising to find that, compared to 2012, the number of bars has increased in both the CBD – 42% to 52%, and the music precincts 45% to 47%.
The number of hotels has remained fairly stable with only a small (2%) decrease recorded in all areas.
(See Figure 4.1)

4.3 Precinct Venue Numbers
In addition to the 153 venues recorded for the CBD[5], the Melbourne Live Music Census 2017 confirmed 216 live music venues in the music precincts.
All areas, with the exception of South and Port Melbourne, recorded an increase in numbers compared with 2012.
(See Figure 4.2)

[1] See Appendices for a copy of the Observational Census Night record sheet that volunteers completed for venues visited on Saturday 25th November.
[2] For full details see 'Conduct of the Census and Notes on Methodology'
[3] For the purposes of this study, a venue is deemed to be a 'regular' provider if it presents live music performances on a minimum 2 nights per week, every week
[4] For See Appendix C for full venue list
[5] When we refer to the CBD, we are in fact referring to the City of Melbourne municipal boundary. As such, this includes venues in Southbank, Docklands, Carlton and North Melbourne.

Figure 4.1

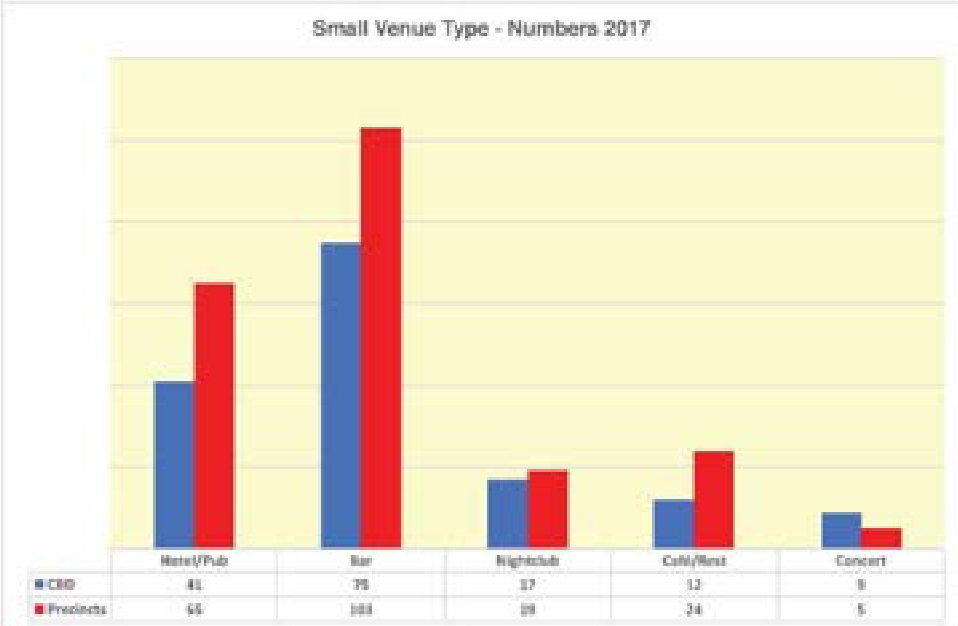
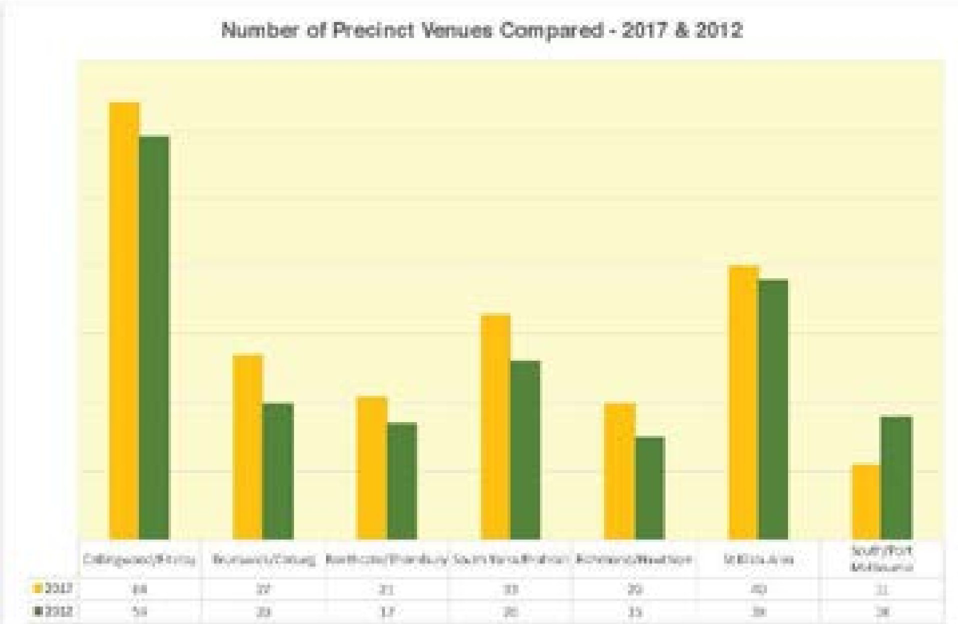


Figure 4.2



4.4 Venue Audiences

Census volunteers recorded the audience in the venue at the time they visited, but were required to seek information from staff about the maximum attendances expected on the night. They also recorded information on typical audience numbers on other nights of the week during the summer and winter months.

On Census Night, 112, 522 patron visits were recorded for live music venues operating in the CBD, music precincts and outer suburbs.

Table 4a

CBD Small Venues	43,724
CBD Large	4,855
Music Theatre (70%)	4,235
Precinct Small Venues	44,180
Outer Small Venues	15,528
TOTAL	**112,522**

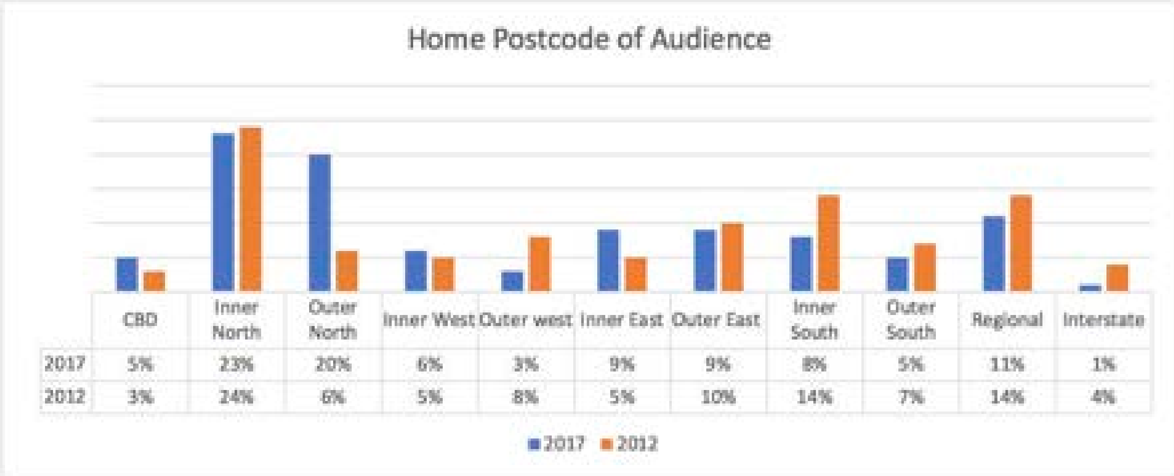
Table 4b

Collingwood/Fitzroy	14,218
Brunswick/Coburg	7,458
Northcote/Thornbury	4,180
South Yarra/Prahran	9,868
Richmond/Hawthorn	3,724
St Kilda Area	7,075
Port/Sth Merlbourne	2,075
TOTAL	**48,598**

Saturday night audiences in both the CBD and precincts are the largest for the week. Friday night is almost as big in the precincts (down 3% a Saturday), but is 11% doen in the CBD.

Comparing the equivalent figures –
The audience in CBD small venues on Census Night 2017 was 11% (4,919) larger than that recorded in 2012. In the precincts, the increase was 16% (8,631).

Figure 4.3



Note:
These audience figures represent the number of patron visits to venues rather than the number of individual patrons. Given the physical proximity of venues in the CBD and precincts and the relative ease of travelling between the CBD and these inner suburban venue clusters, it is highly likely that some patrons will attend more than one venue on a particular night; especially between venues with no (or low) door/ticket charge.

4.5 Venue Door/Entry Income
The Census produced detailed figures on the door/entry charges in the CBD, precinct areas and outer suburbs.

The calculation of patron spending on venue entry is based on the observations of our collectors on Census Night, and responses to Audience and Venue online surveys.

The range is very broad, varying from venues do not charge for any of their live music, through those who charge for a percentage, to those who have a door charge for all of their gigs.
The average across all in 2017 was a door charge for 51% of gigs (average 44% in 2012).
There was also significant variation, from $5 to $50 dollars.
The day of the week the gig is held also affects the amount charged.

For small venues, the averages, based on venue observation and survey responses, were –
Monday to Thursday $10, Friday & Saturday $18 and Sunday $13 in the music precincts.
Door entry charges were slightly higher on average for venues in the CBD – Monday to Thursday $15, Friday & Saturday $22 and $15 on Sunday.
Small venues in the outer suburbs reported an average $12 door charge on Saturdays.

Table 4c

CBD Small Venues	$490,964
CBD Large	$53,405
Music Theatre (70%)	$251,982
Precinct Small Venues	$397,620
Outer Small Venues	$64,934
TOTAL	**$1,258,905**

4.6 Venue Ancillary Spending

Patron spending on tickets and door entry represents only a portion of the outlay associated with at live music gigs attendance.
Transport costs, the purchase of food and drink, merchandise, memorabilia, souvenir programs, are all significant expenditure items. In fact, all reports suggest that this 'ancillary' spending is by far the greater amount.

Our calculations for this Melbourne Live Music Census 2017 update are based this year's audience surveys (500+), and recent reporting – *'The Adelaide Live Music Census 2016'* (Music SA & Live Music Office), *'The Economic and Cultural Value of Live Music in Australia in 2014'* (University of Tasmania, The Live Music Office and partners), *'Wish You Were Here 2017: The Economic Contribution of Live Music to the UK Economy'* (UK Music).

Utilising these various sources, we estimate that ancillary spending in small venues (hotels, bars) averages $51 - $60 in larger non-concert venues (music clubs, nightclubs) - $80 at concerts, $110 at festivals and between $95 and $105 at opera, classical music and music theatre performances.

Table 4d

CBD Small Venues ($51)	$1,967,580
CBD Large Venues ($60)	$291,997
Music Theatre ($95) 70%	$281,627
Precinct Small Venues ($45)	$1,898,100
Outer Small Venues ($45)	$608,760
TOTAL ANCILLARY (95%)	**$4,795,660**

Note:
The audience figures used to calculate the ancillary spending have been discounted by 5% to reflect those audience survey respondents who report $0 ancillary spending when they attend live music gigs.

The total spending of $6 million on Census Night 2017 compares to the $5.3 million recorded in 2012. An increase of 13%.

4.7 Venue-Based Employment

On Census Night, some 490 live music gigs across the CBD and music precincts created employment opportunities for –
3,696 musicians, 1,765 DJs, 1,059 production staff, 2,118 security personnel and 7,225 venue staff.

Table 4e

	CBD	Precincts
Musicians	1,470	2,226
DJs	735	1,035
F&B Staff	2,617	3,226
Door Staff	441	618
Production	441	618
Security	882	1,236
Management	147	206

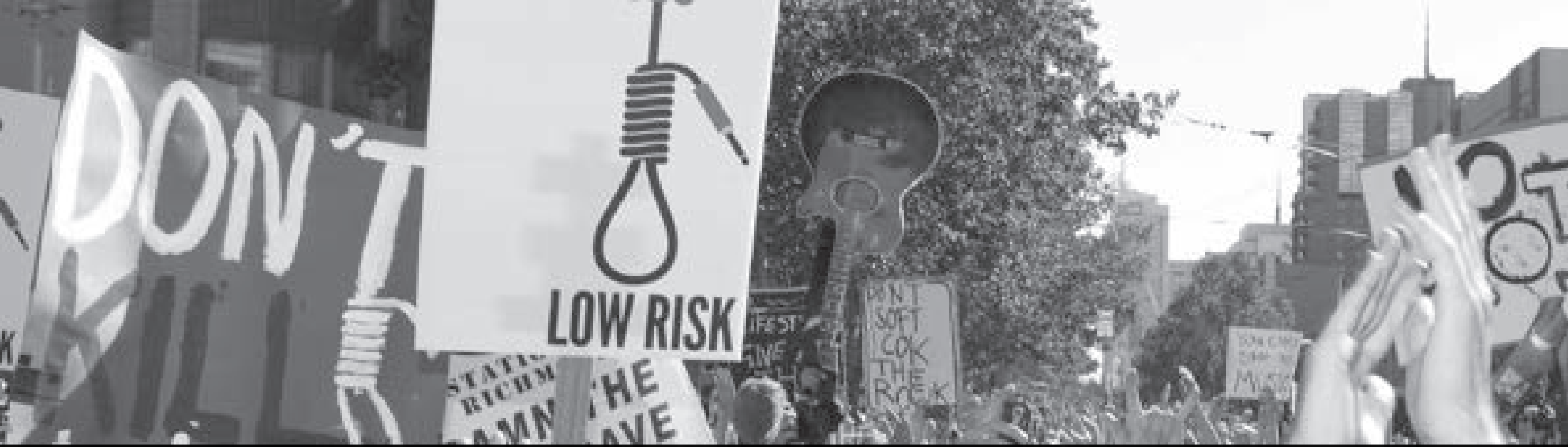
Theatre and concert presentations on Census Night employed an additional 148 musicians, 40 production staff and 665 venue staff.

Conclusion

The operations of our Census teams on the night of 25th November, 2017 and the data from survey follow-ups, confirm that Melbourne's live music scene is in good health.
In terms of the number of live music venues operating on a regular basis, the number of gigs they present, the number of patrons attending and the employment opportunities created for practitioners and workers across the industry sector, the results were almost universally positive with significant increases recorded in key area compared to the Census conducted in 2012.

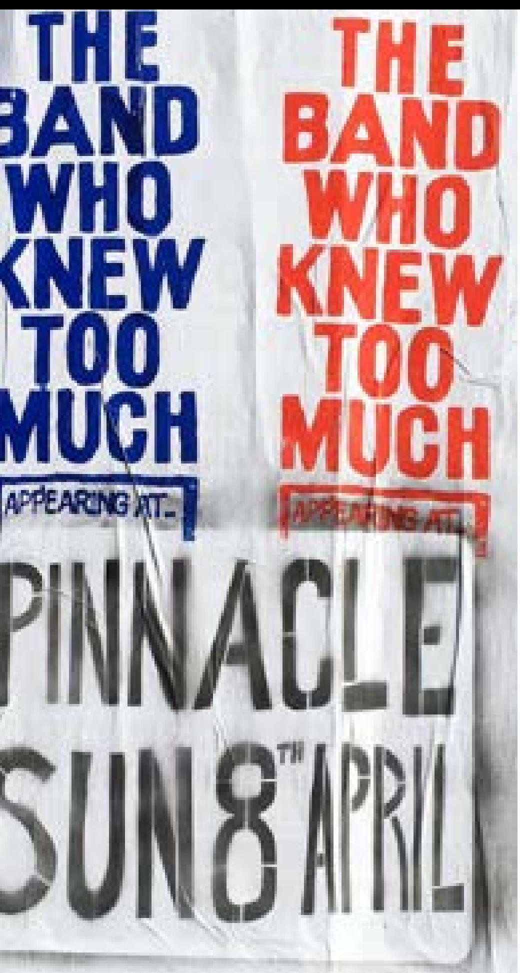
Dobe Newton
April 2018

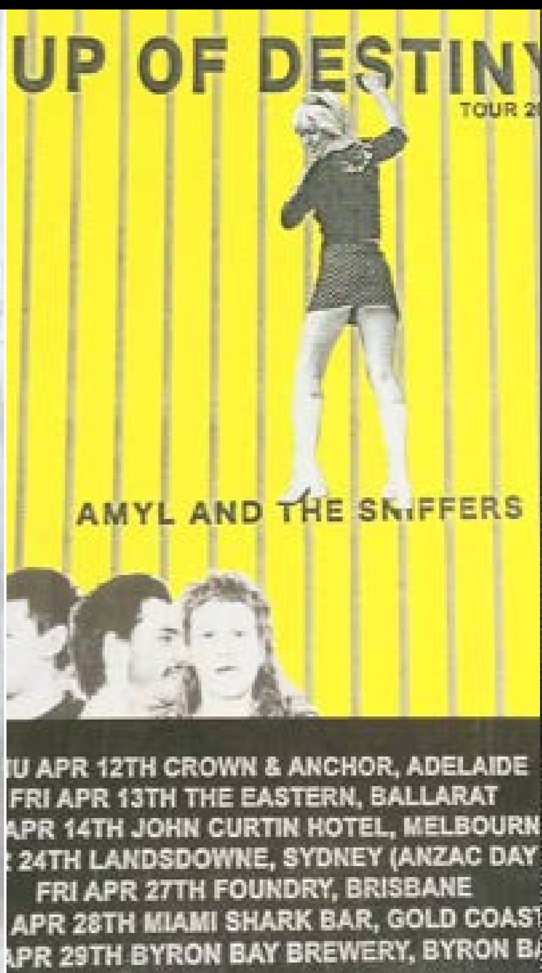
Census Night title page image courtesy courtesy of the Performing Arts Collection, Arts Centre Melbourne



The Big Picture

A Year of Live Music Performance





5 The Big Picture

Annual Venue Operation

Venues are at the centre of live music activity. By examining the nature of the gigs they present, the audiences they attract and the spending that takes place at those gigs, we are able to accurately report annual activity and economic generation for 2017.

The process involves two major tasks –
1. The analysis of audience and spending data collected through the census process from the 460+ small venues we have identified. Plus the analysis and reporting of,
2. The analysis and reporting of corresponding data associated with performances taking place in a broad range of larger venues across the metropolitan area.

Fortunately, in the latter, we are able to access and rely on comprehensive information provided by Live Performance Australia's annual Revenue & Ticket Survey of the performing arts.

5.1 Major Music Venue/Event Activity - Live Performance Australia
Live Performance Australia is a 100 year-old advocacy group with a national membership of promoters, ticketing agencies, major venue and festival operators and key arts organisations. Most of the latter comprise the Australian Major Performing Arts Group – mainly state-based dance, theatre, opera and classical music companies.
LPA's auditors, Ernst and Young, collect information from all, and issue an annual national Ticket and Revenue Survey summarising attendance and box office revenue across all sectors of the performing arts – contemporary music, opera, dance & ballet, circus, comedy, classical music, music theatre, single category festivals, multi category festivals, theatre and drama.

The figures reflect operations and events in major venues and do not, in the main, reflect attendances or revenues from the smaller venues and community events that are such a vital part of the contemporary music sector.

5.2 The LPA National Picture 2016
In the 2016 year, 18.8 million tickets were sold nationally for performances across the performing arts (up from the 17.3 reported in 2011). These tickets generated $1,430 million in revenue (up from $1,307 million in 2011).

Victoria's share of the national performing arts total was 5.4 million tickets (29% of the national total) generating $440.3 million in revenue (31% of the national total).

Contemporary Music performances accounted for 30% of all live performance tickets sold (5.6 million) and 32% of revenue ($440 million).
As Ernst and Young, the LPA's auditor points out, this sector of live performance is the most volatile in being subject to significant cyclical swings reflecting the profile and popularity of international acts that tour in any one year, and the viability of large contemporary music festivals.
Ernst & Young noted that although contemporary music attendance increased in 2016 by 2% from 2015, revenue decreased 8%.
They noted that 2016's major tours – Coldplay, Prince, Madonna, Black Sabbath, Keith Urban, did not match the drawing power of the 2015 visitors – Fleetwood Mac, AC/DC, Ed Sheeran and One Direction.
They also noted that fewer acts included Adelaide and Perth on their itinerary, thus impacting negatively on national results.

It is extremely likely that the cyclical nature of the sector will be emphasised when 2017's results are reported (August 2018), as they will include the reporting from a hugely successful tour by Adele in 2017, which sold 600,000 tickets for just eight stadium concerts. In two shows at Melbourne's Etihad Stadium (75,000 and 77,000), she established a new single event attendance record on consecutive nights, breaking the previous 70,000 mark set by the Jehovah's Witness Convention in 2014.

2018 looks set to produce stellar results with Ed Sheeran having already sold 170,000 tickets for three Melbourne shows, plus the scheduled return of Melbourne's favourite performer Pink who on 2013's *Truth About Love* tour sold out an amazing 18 Rod Laver Arena shows (capacity 16,000). This eclipsed her previous record (17 shows) on 2009's Funhouse tour.

5.3 Other Live Music Categories – National

- Opera – 408,000 ticket sales (2.2% of industry) generated $46 million in revenue (3.2%) of industry).
- Classical – 1,200,000 tickets (6.5% of industry) generated $76.6 million in revenue (5.4% of industry).
- Contemporary Music Festivals – 673,000 tickets (3.6% of industry) generated $80 million in revenue (5.6% of industry).
- Music Theatre – 3,300,000 tickets (18% of industry) generated $347 million in revenue (24% of industry).

Note:
There is also a category called Multi-Category Festivals.
It includes events such as the Melbourne International Festival and The Melbourne Fringe Festival.
Although these events have a significant live music program component, the decision has been made not to include them in calculations. Firstly, because the figures for Victoria include the Falls Music & Arts Festival which would substantially skew figures in that category. Secondly, South Australia reported $24.7 million in revenue from 779,000 ticket sales – nearly 50% of the national totals in both categories. This compared to NSW's $2 million from 41,000 tickets.
This throws considerable doubt on the reliability of data in this category.

The table below compares the LPA findings for national live music performance categories for 2016 and 2011 (the previous Census).

Table 5a

	Revenue 2016	Revenue 2011	Audience 2016	Audience 2011
Contemporary Music	$440,000,000	$482,000,000	5,659,000	5,484,000
Contemporary Music Festivals	$80,000,000	$98,000,000	673,000	1,619,000
Opera	$46,000,000	$48,000,000	408,000	91,000
Classical	$77,000,000	$61,000,000	1,219,000	1,254,000
Music Theatre	$347,000,000	$203,000,000	3,298,000	2,224,000

5. 4 The 2016 Victorian Profile – Live Performance Australia

LPA reports that Victorians in 2016 lead the nation in terms of per capita spending on the performing arts ($70).

Victoria's share of the national total - 5.4 million tickets (29% of the national total) generating $440.3 million in revenue (31% of the national total), can be broken down by music-related category.

Table 5b

	Revenue 2016	Industry Share	Audience 2016	Industry Share
Contemporary Music	$130,000,000	30%	1,600,000	29%
Contemporary Music Festivals	$21,000,000	18%	89,000	14%
Opera	$11,000,000	25%	86,000	21%
Classical	$20,000,000	26%	391,000	32%
Music Theatre	$129,000,000	37%	1,200,000	37%

A downturn in the figures for the Contemporary Music categories (concerts and festivals) for Victoria reflected the national trend in 2016.
Although ticket sales for Contemporary Music Festivals were equivalent to 2015, revenue declined by $27 million. This was largely due to the cancellation in 2016 of major events, Future Music and Stereosonic.

LPA's reporting for Victoria is almost exclusively Melbourne-based according to the auditors. The exception being the Contemporary Music Festival category where a significant number of events (eg. Meredith, Golden Plains, Falls Music & Arts Festival, Groovin' The Moo, Port Fairy Folk Festival, Wangaratta Jazz, Day On The Green etc) take place in regional centres.
We also need to consider that there are a significant number of Melbourne suburban events that, as free events, do not feature in the LPA survey but generate significant employment and ancillary spending from their extensive live music components. Among these is the massively attended St Kilda Festival (est 400,000 audience) and smaller events such as The Brunswick Music Festival and Street Party, Darebin Music Feast and Moomba to mention just a few.

5.5 Victorian LPA Audience & Revenue Compared – 2016 & 2011

This report expands the range of live music performance to include opera and classical music and a conservative 70% of the attendance and spending associated with the presentation and consumption of music theatre productions.

Table 5c

	Audience 2016	Industry Share	Audience 2011	Industry Share
Contemporary Music	1,600,000	29%	1,800,000	30%
Contemporary Music Festivals	89,000	14%	218,000	22%
Opera	86,000	21%	125,000	27%
Classical	391,000	32%	285,000	27%
Music Theatre	1,200,000	37%	1,100,000	38%

Table 5d

	Revenue 2016	Industry Share	Revenue 2011	Industry Share
Contemporary Music	$130,000,000	30%	$157,000,000	29%
Contemporary Music Festivals	$21,000,000	18%	$20,000,000	21%
Opera	$11,000,000	25%	$11,000,000	24%
Classical	$20,000,000	26%	$14,000,000	23%
Music Theatre	$129,000,000	37%	$91,000,000	37%

5.6 The Nature Of Melbourne's Large Venues

In addition to its hundreds of small venues presenting live music, the city is blessed with a range of larger capacity stadiums, arenas, concert halls, theatres and open-air spaces.

Some are multi-purpose, hosting a range of sporting, live performance (non-music), corporate and community events as well as live music.
Others are almost exclusively utilised for live music presentations.

Etihad Stadium (capacity 70,000), AAMI Park (30,000) and the Melbourne Cricket Ground (90,000) predominantly host major sports – AFL, cricket, NRL, soccer, basketball and netball but, when they do host music events, obviously generate significant box office and patron spending.
For example, Adele, who has previously mentioned broke previous records for a single event attendance on consecutive nights (75,000 and 77,000). Ticket prices ranged from $100 to $800 dollars.

Below these stadiums sit a range of large event spaces which are much more music-focused. Hisense Arena (10,300), Rod Laver Arena (16,000) and Margaret Court Arena (8,500).

Rod Laver Arena is renowned as the home of The Australian Open, one of the world's most significant Grand Slam tournaments.
However, it operates for the rest of the year as the city's premier contemporary music concert venue.
On average, it hosts some 38 music concerts per year[1], unless Pink is in the house[2].

When it operates in concert mode, Rod Laver provides 7-8 hour shifts for 533 front and back of house staff and 100+ loaders and production staff.

Hisense Arena hosts an average of 10 music events per year employing 200 event staff and approx 100 production personnel.
Margaret Court Arena hosts an average 24 music events per year with 220 staff and 80+ production personnel.

Some of the larger venues are definitely in the 'occasional' category with irregular live music presentations - Plenary Hall (3,500), Sidney Myer Music Bowl (20,000), Athenaeum Theatre (500), Federation Square (3,000), Melbourne Showgrounds (60,000), Melbourne Town Hall (2,000), Palais Theatre (2,800), National Theatre (780).

Others are utilised almost exclusively to present live music on a 'regular' basis with significant event schedules. State Theatre (2,000), Forum Theatre (2,300), Hamer Hall (2,500), Her Majesty's Theatre (1,700), Festival Hall (5,100), Melbourne Recital Centre (1,150), Princess Theatre (1,500), Regent Theatre 2,100).

The Melbourne Recital Centre, our newest concert venue (2009), has made a great success of presenting an incredibly eclectic range of performers across musical genres including classical, jazz, popular, cabaret and world music.

[1] Rod Laver Arena hosted fewer shows and generated $8 million less in revenue in 2017 as it underwent "comprehensive modernisation works" after the 2017 Australian Open.

[2] Rod Laver Arena is famous worldwide in concert circles as the host venue for a record 18 sold-out shows (288,000 tickets) by pop diva Pink in 2014.
Pink is scheduled to return in 2018, so we can expect another spike in revenue.

In 2017, there were 567 performances which attracted an audience of 200,000 (12% up on the previous year). Of those, 471 were identified as music-only.
They took place in the Dame Elisabeth Murdoch Auditorium (1,000) or the smaller Salon (140).

Hamer Hall, on the other hand, is the permanent home of the world-class Melbourne Symphony Orchestra. The 180 gigs at Hamer Hall in 2017 (128 by the MSO) attracted 250,000 attendees and generated over $10 million in ticket revenue.
The MSO gigs involve 80+ musicians and each performance generates work for 57+ employees.

Our three heritage theatres – The Princess, Regent and Her Majesty's, provide the venue for Melbourne's thriving music theatre scene. They are closed for only the short time it takes to bump out the last production and install and rehearse the new. In 2016, they hosted long and popular runs of musicals – The Sound of Music, Kinky Boots and Matilda.
The seven weekly performances typically involve 20 musicians and production staff and 35 + font and back of house staff at each venue.
Their activity is enhanced by the State Theatre's music theatre productions.[3]

5.7 LPA Calculation Considerations – Audience and Spending
There is a small amount of cross-over with some of the larger 'small' venues who utilise the ticketing agencies – Ticketek, Ticketmaster, Moshtix etc for some of their shows.
So, as we did in the 2012 Census, we have discounted the LPA figures by 10% to avoid double-counting of ticket revenue.

One of the most significant factors in determining the economic generation associated with attendance at live music events, is the amount patrons spend travelling to and from gigs and on food and drink, merchandise etc once they are actually at the venue.
We have labelled this as 'ancillary' spending for the purposes of this report.
Based on the previous Census and responses to the 2017 online Audience survey, we estimate this spending to be $80 per patron at concerts, $110 at festivals and between $95 and $105 at opera, classical music and music theatre performances.

We have again discounted the LPA audience figures by 10% to avoid double counting, and by a further 6% to allow for that percentage of respondents to our audience survey who report no spending at live music gigs.[4]

5.8 Small Venues – Geographic Scope
As we did in the original Melbourne Live Music Census (2012), we divided Greater Melbourne into three distinct areas in considering venue operations –
Melbourne CBD venues: a mix of small (mostly) and large venues
Inner suburban venues: numerous live music venues in close proximity – 'precincts'
Outer suburban venues

Our focus is on identifying spaces we regard as 'regular' presenters of live music performances – a minimum of 2 nights per week, every week.
We are aware that there are many other venues with a commitment to live music, but it is not central to their operation. These we identify as 'occasional'.
There are also many who provide a space for hire for private celebrations. Many of these will involve live music, others will not. They are noted, but not part of our calculations.

5.9 Calculating The Number of Small Venues
In determining the number of small venues presenting live music across Greater Melbourne, we were greatly assisted by information from APRA AMCOS who issue the appropriate licenses to premises presenting performances.
In 2017, they recorded 610 'Featured Music Licenses' –
186 'Featured Recorded Music' (30%), 20 'Karaoke' (3%), 276 'Live Music' (46%), 76 'Recorded Music for Dance Use' (12%) and 52 Restaurant/Café 'Featured Music' (9%).

Analysing the APRA AMCOS premises data by postcodes, revealed the following number of licensed venues in the CBD and music precincts –

[3] Sources: Melbourne Olympic Park Trust, Arts Centre, Melbourne Recital Centre.
[4] See Section 5.21 for full details of ancillary spending at LPA events.

Table 5e

CBD	180
Brunswick/Coburg	36
Fitzroy/Collingwood	69
Northcote/Thornbury	27
Richmond/Hawthorn	37
St Kilda Area	49
South Yarra/Prahran	50
Sth Melb/Port Melb	16

We also had access to helpful licensing information courtesy of the City of Melbourne.

This was a good starting point, but it's not definitive.
Some venues have multiple licenses, some have a license but are not active as presenters, some have ceased to operate and yet others are presenting live music without a license.

Using websites, social media pages and events as well as print and online gig guides to verify current activity, we were able to create a final list of 464 regular venues –
153 in CBD
216 in Precincts
95 in inner and outer suburbs

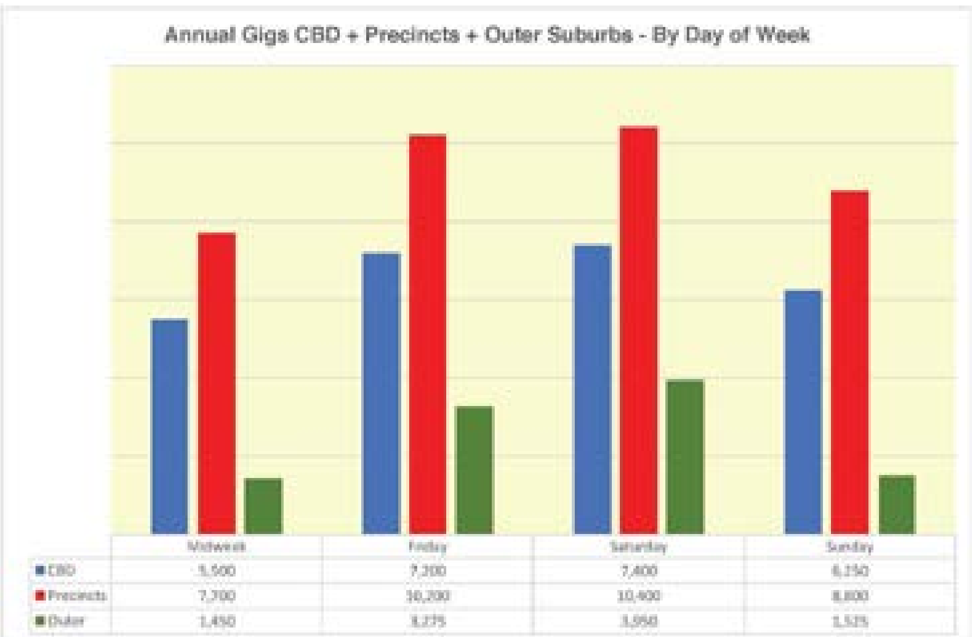
Table 5f

CBD	153
Brunswick/Coburg	27
Fitzroy/Collingwood	63
Northcote/Thornbury	21
Richmond/Hawthorn	21
St Kilda Area	40
South Yarra/Prahran	33
Sth Melb/Port Melb	11

On a typical Friday night a minimum of 89% of CBD and precinct venues host gigs. On Saturday the minimum is 93%.
44% of venues regularly feature live music 4 nights per week.

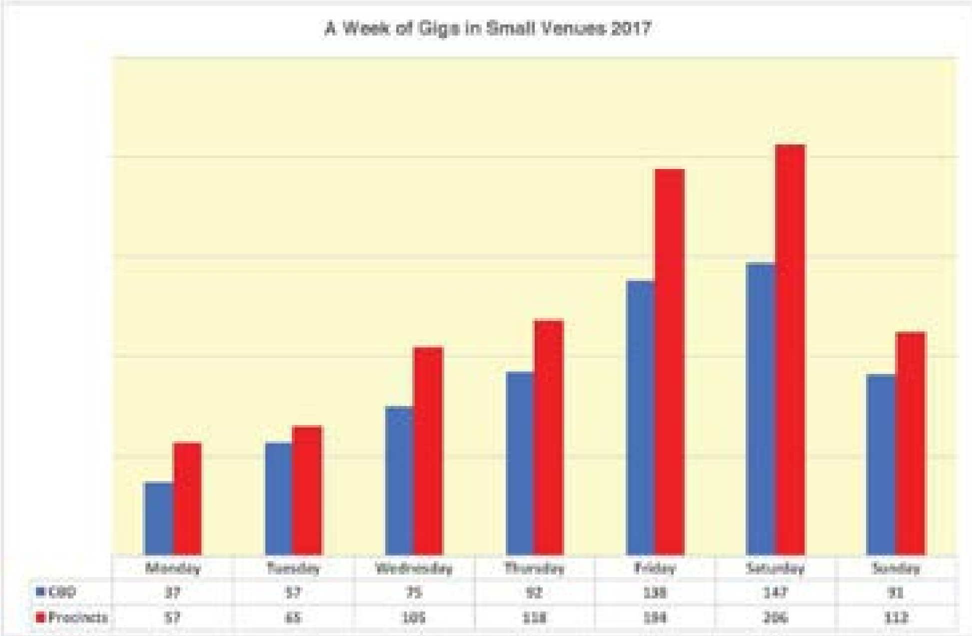
5.10 Number of Gigs in Small Venues
In 2017, small venues in Greater Melbourne hosted 73,650 advertised live music performances.
This compares to the 62,000 recorded in 2012 – a 19% increase.

Figure 5.1



Note:
The CBD total includes 2,800 gigs in theatres and concert halls. These have been recorded for the total gigs and ancillary spending but, as mentioned previously, not counted for box office revenue/audience numbers as that data is included in the Live Performance Australia reporting.
Venues in the outer suburbs were not visited. The calculation of annual gig numbers in those venues is based the assumption (confirmed by the 2012 and 2017 Census process), that one week's operation is equivalent to one weekend night in precinct venues.

Figure 5.2



In terms of the nature of the performers involved, the breakdown for advertised gigs across the CBD and precincts was – Musicians (solo/duo/band) – 66% and DJs 34%.

Note:
Our figures are confirmed by the venue operator survey response. They estimated the presenters of live music in their venues as – Musicians 64%, DJs 36%.

5.11 Nature of Small Venues

Figure 5.3

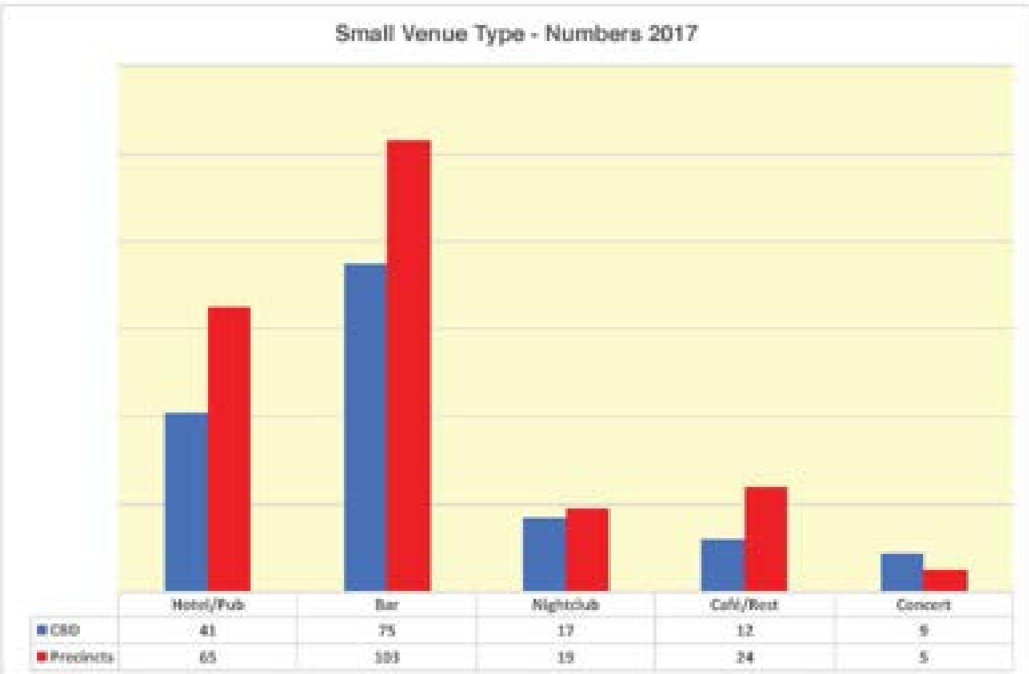
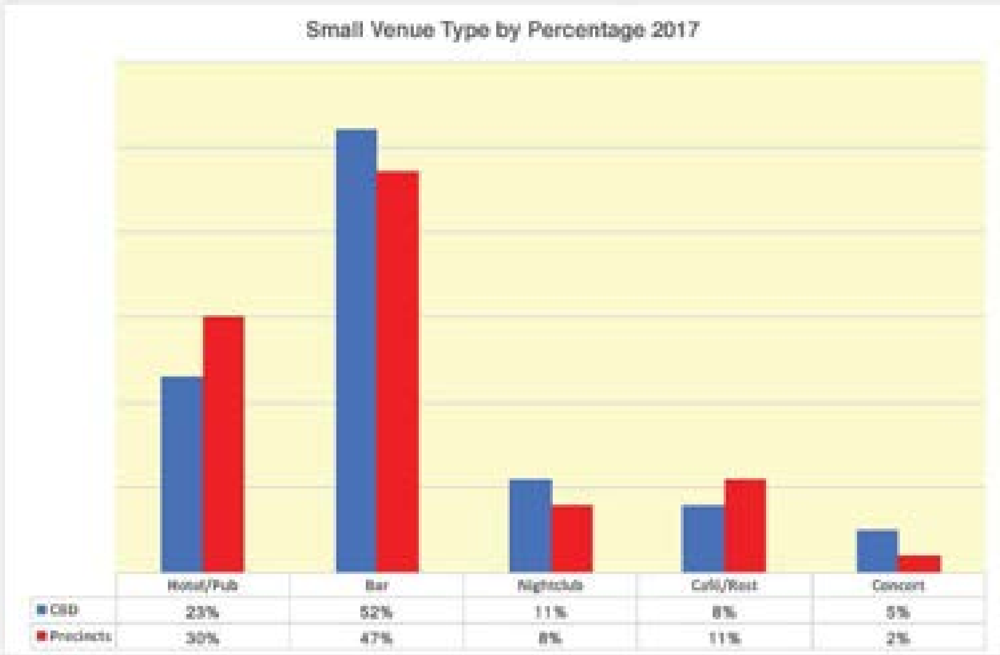


Figure 5.4



Note: Non-Traditional Music Venues
Since the last Census, there has been a noticeable increase in the use of non-traditional spaces for live music presentation. At the smaller end of the scale, house and parlour concerts have become popular, providing many artists with the ability to supplement their income and, in many cases, helped artists tour locally, regionally, nationally and internationally.

The growing 'small halls' movement has especially increased the viability of regional touring.

The increased use of live music as entertainment and drawcard has also been embraced by a variety of major organisations and presenters to attract patrons. The Melbourne Zoo, Melbourne Museum, State Library Victoria and the National Gallery of Victoria now all feature live music as one of their regular offerings.
Night markets, which are becoming increasingly popular in the CBD and suburbs, all feature live music as one of their attractions.

Although welcomed by all, but they have not been included in calculations.

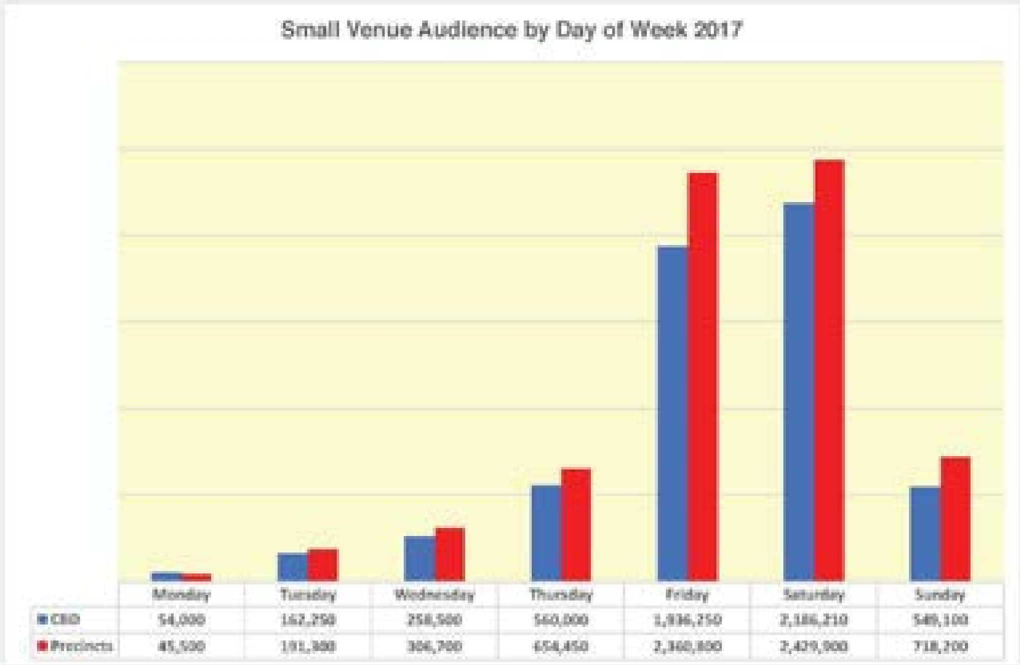
5.12 Annual Audience in Small Venues
The most crucial element in determining the economic scope of live music presentation is an accurate assessment of audience attendance.
With no recording system in place across hundreds of small venues, this presents a unique challenge.
However, we are confident that by cross-referencing the observational data collected by volunteers with venue and audience responses to online surveys has produced accurate and credible reporting of numbers.

In 2017, live music events in the CBD and music precincts attracted an audience of 11,486,200 compared to the 10,085,200 recorded in 2012 - an increase of 14%.

CBD venues recorded 5,204,350 attendances - an increase of 651,000 (14.2%) on the 4,553,850 for 2012.

Music precinct venues recorded 6,281,850 attendances - an increase of 750,000 (13.5%) on the 5,531,850 for 2012.

Figure 5.5



5.13 Additional Live Music Audience – CBD Large Venues & Outer Suburbs
Large venues in the CBD - predominantly nightclubs and larger capacity venues, recorded 628,000 attendances - an increase of 95,000 (17%) on the 533,000 for 2012.
In 2017, outer suburban venues recorded 2,060,800 attendances - an increase of 126,050 (7%) on the 1,934,750 for 2012.

Table 5g

CBD Small	5,204,350
CBD Large	628,000
Precincts	6,281,850
Outer Suburbs	2,360,800
TOTAL	14,475,000

This is compared to 12,552,950 in 2012

5.14 LPA Concert & Festival Attendances
Live Performance Australia reported the following attendance figures for 2017[5] –
Contemporary Music Concerts 1,546,191 (1,638,000 in 2012)
Contemporary Music Festivals 147,000 (219,000 in 2012)

Table 5h

CBD Small	5,204,350
CBD Large	628,000
Precincts	6,281,850
Outer Suburbs	2,360,800
TOTAL	14,475,000

Compared to 14,409,950 in 2012 – an increase of 1,858,241 (13%).

5.15 LPA Additional Live Music Audience – Other Live Music Genres
We have included a percentage (70%) of Melbourne's Music Theatre audience for 2017 – as we did in 2012, and have added the audience for opera and classical concerts to capture the whole spectrum of live music performances.

[5] The LPA figures have been discounted by 10% to avoid double counting tickets sold for gigs at a small number of venues through the same ticket agencies that report to LPA.

Table 5i

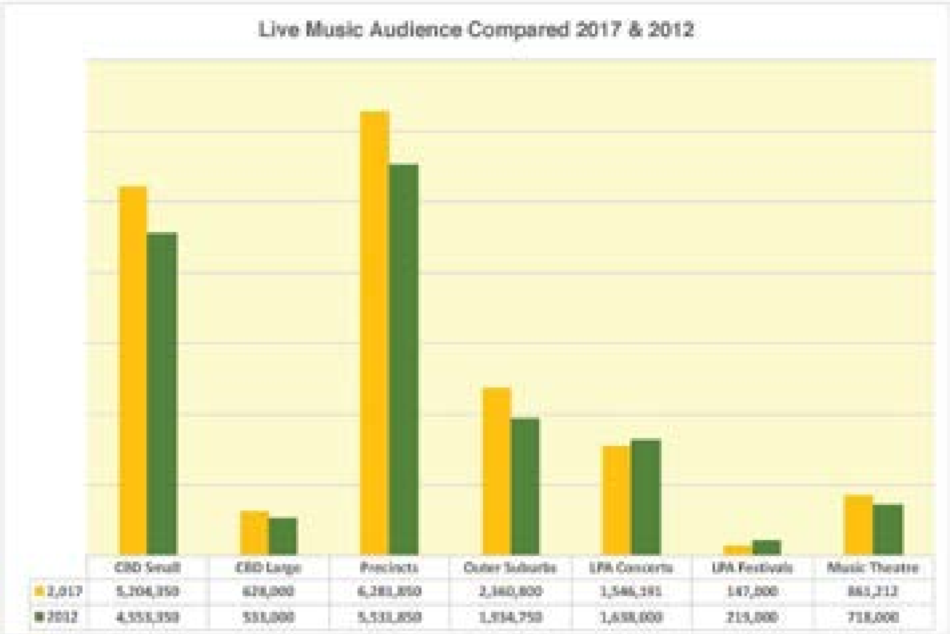
CBD Small	5,204,350
CBD Large	628,000
Precincts	6,281,850
Outer Suburbs	2,360,800
LPA Concerts	1,546,191
LPA Festivals	147,000
Opera	86,713
Classical	391,440
Music Theatre (70%)	861,212
TOTAL	17,507,556

Total Live Music Audience 2017 – 17,507,556 – an increase of 1,900,552 (12%) on 2012.

5.16 Audience Comparsion 2017 & 2012

Leaving out the audience for opera and classical music performances – as they weren't included in 2012, these are the comparative figures from our two Census reports –

Figure 5.6



5.17 Live Music Venue Revenue – Tickets & Door Entry

The calculation of patron spending of door entry (small venues) and ticket purchase is based on observational and online surveys (small venues) and box office revenue reported by Live Performance Australia (concerts, festivals, theatres etc).

With regard to small venues –
There is a very broad range across the CBD, music precincts and outer suburbs. Some venues do not charge for any of their live music gigs, while others have a door charge for all of their gigs.
The average across all was a door charge for 51% of gigs (average 44% in 2012).
Where there was a door charge, there was also significant variation $5 - $50 dollars.
The averages (based on venue reporting), were – Monday-Thurday $10, Friday & Satday $18 and Sunday $13 in the music precincts.
Door entry charges were slightly higher on average for venues in the CBD – Monday-Thurday $15, Friday & Satday $22 and $15 on Sunday.

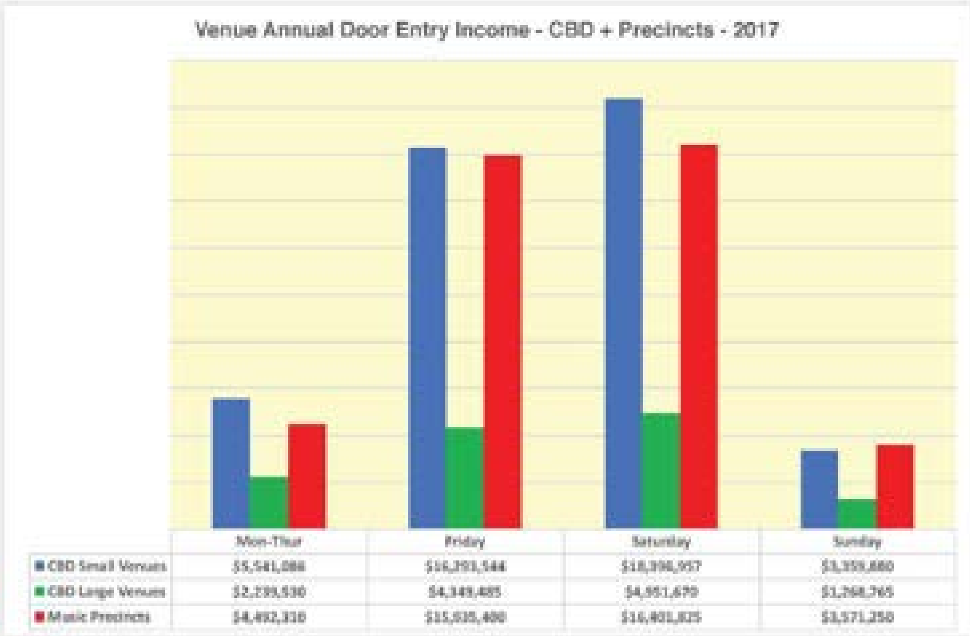
We have therefore discounted audience figures appropriately in order to calculate door entry spending by patrons.

Note:
Based on audience survey responses, 25% of patrons ONLY attend small venue gigs where there is no door charge. We have likewise adjusted attendances in small venues to produce the annual revenue.
With regard to large venues, we are confident that the Live Performance Australia revenue survey accurately captures the box office for concerts, festivals etc in large venues.
However, as we have consistently done in this and the previous Census, we have discounted ticket sales by 10% in order to prevent any double-counting.

5.18 Small Venue Door Entry Revenue 2017

In 2017, Patrons attending live music gigs in the CBD, Music Precincts and the Outer Suburbs spent $112.74 million on entry to venues.

Figure 5.7



Entry to live music events in outer suburban venues produced an additional $15.94 million.

5.19 LPA Concert, Festival & Other Music Genre Revenue

In order to produce a total revenue figure for live music performances in 2017, we need to add the box office figures generated by patron ticket purchases to major events as reported annually by Live Performance Australia. The LPA figures are based on 90% of attendance as, although these are 100% ticketed events, we wish to avoid double counting and allow for larger 'small' venues that utilise the same ticketing agencies that are the basis for LPA calculation.

The average ticket price for LPA-reported events in 2017 was $80.

Table 5j

LPA Major Concerts	$129,198,499
LPA Festivals	$19,366,622
Music Theatre (70%)	$96,438,949
Opera	$11,438,197
Classical	$20,043,267
TOTAL	$276,485,534

In 2017, the total door entry/ticket revenue generated by live music gigs in Melbourne was $389.2 million.

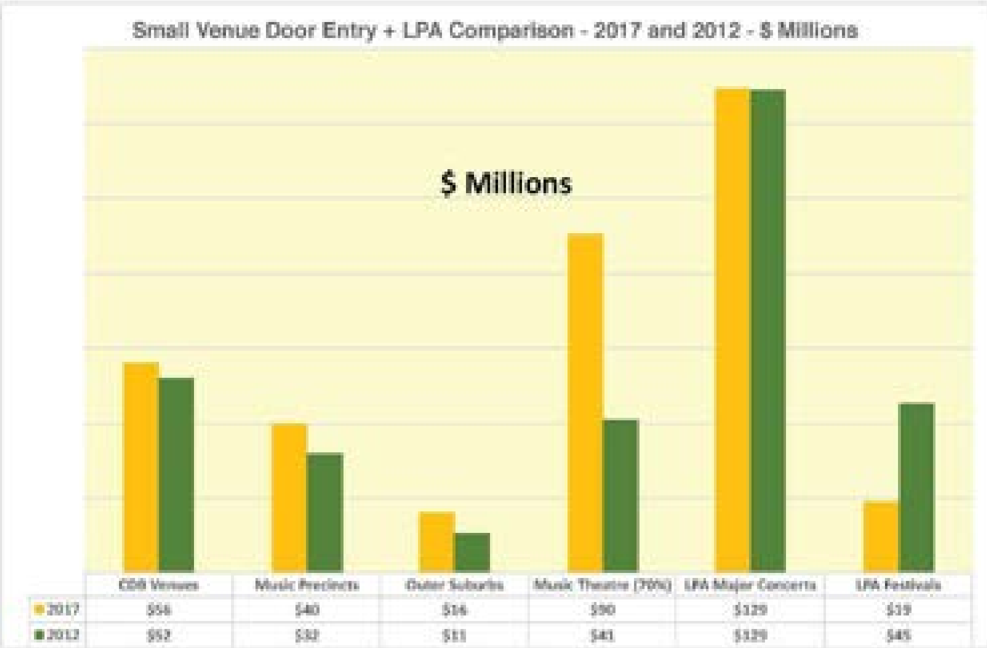
Table 5k

CDB Venues	$56,400,917
Music Precincts	$40,400,785
Outer Suburbs	$15,935,400
LPA Major Concerts	$129,198,499
LPA Festivals	$19,366,622
Music Theatre (70%)	$96,438,949
Opera	$11,438,197
Classical	$20,043,267
TOTAL	$389,222,636

Note: In 2012, we reported that music-based festivals in regional Victoria generated $25 million in ticket revenue. Although there has been no recent study updating that University of Wollongong data, we are confident that considering the significant Consumer Price Index (CPI) increases since then, a $25 million dollar figure is extremely conservative. However, we have not reported it in our 2017 findings.

5.20 Door & Ticket Revenue Compare – 2012 & 2017
Excluding revenue generated by opera and classical music ticket sales – as they weren't included in the 2012 Census, shows a 12.5% increase in overall revenue - $348.8 million (2017) compared to $309.9 million (2012)

Figure 5.8



5.21 Live Music Venue Revenue – Ancillary Spending
In calculating the spending associated with live performances it is obvious that patron spending on tickets and door entry represents only a portion of the outlay associated with their attendance.
Transport costs and the purchase of food and drink, merchandise, memorabilia, souvenir programs etc, were all significant expenditure items.

In the Melbourne Live Music Census 2012, we based our calculations on the feedback from our patron and audience surveys and previous reports authored by DeLoitte Access Economics[6] and Ernst & Young[7].

For this 2017 update, we again have the results from these reports and findings from this year's audience surveys (500+).
We have also had the benefit of additional work – 'The Adelaide Live Music Census 2016' (Music SA & Live Music Office), 'The Economic and Cultural Value of Live Music in Australia in 2014' (University of Tasmania, The Live Music Office and partners), 'Wish You Were Here 2017: The Economic Contribution of Live Music to the UK Economy' (UK Music).
These sources confirm our previous findings that tickets account for only 20-25% of patron outlay, and that spending on food, drink, transport, merchandise etc accounts for 50%+ of overall outlay.

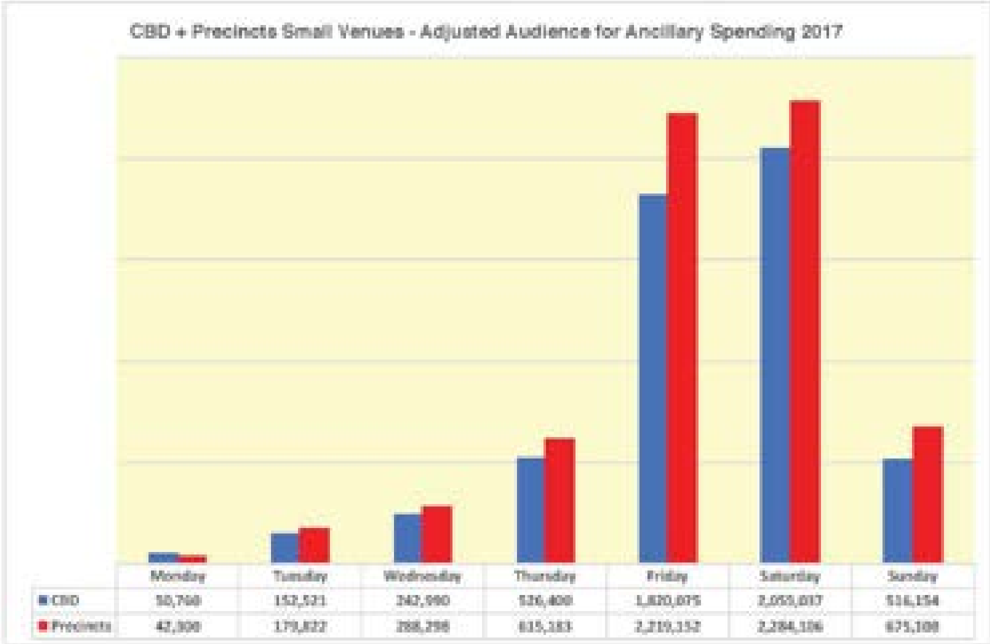
Utilising these various sources, we estimate that ancillary spending in small venues (hotels, bars) averages $51 - $60 in larger non-concert venues (music clubs, nightclubs) - $80 at concerts, $110 at festivals and between $95 and $105 at opera, classical music and music theatre performances.

Note:
Interestingly, UK Music's 2017 report on music tourism found that patrons attending live performances in small venues spent an additional average A$40 (is this exchanged? or is it in pounds) on the way to or from the gigs they were attending. We have not factored this into our calculations.
Likewise we have not attempted to estimate the considerable food and beverage, accommodation and general retail expenditure connected with visits to major concerts, festivals and other 'exclusive' Melbourne events – other than to note here that it is obviously significant.

Note:
All audience figures have been discounted by 6% to allow for that number of patrons who reported spending $0 at venues in responses to our 2017 Audience Survey.

[6] *Economic, Social and Cultural Contribution of Venue-Based Live Music in Victoria,* 2011.
[7] *Economic Contribution of the Venue-Based Live Music Industry in Australia'* 2011

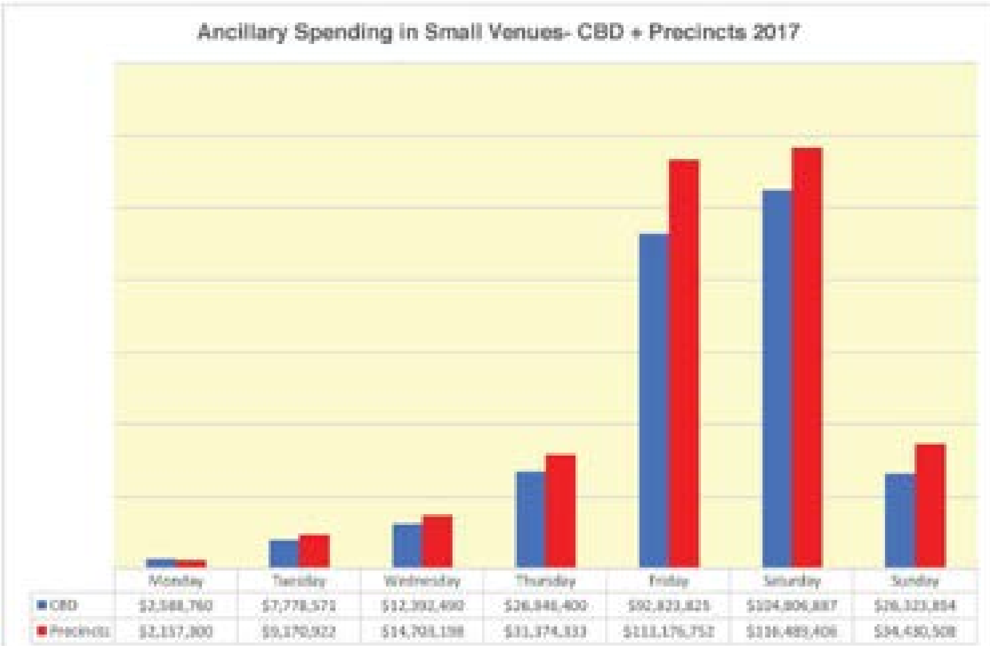
Figure 5.9



5.22 Ancillary Spending in Small Venues

So, using the $51 average per punter on adjusted audience, attendance at small venue gigs in the CBD and music precincts generated a total of $630 million in additional spending.

Figure 5.10



5.23 Ancillary Spending at Other Live Music Venues/Events

Using the same discounted audience figures, ancillary patron spending associated with attendance at larger live music events – concerts, festivals, theatres etc and performances in the outer suburbs of Melbourne generated an additional $399.6 million.

Table 5I

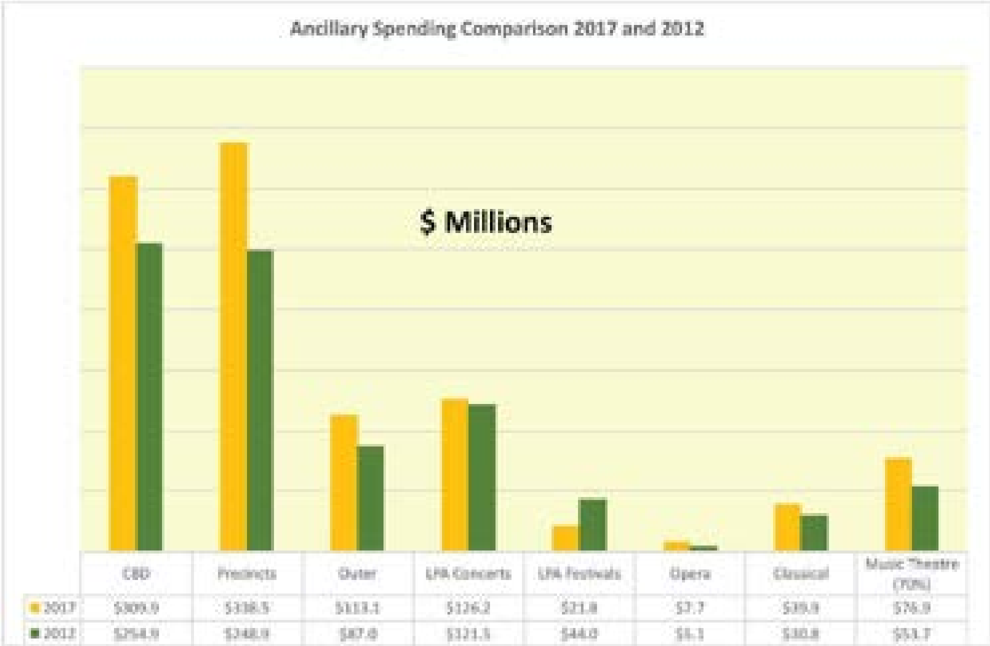
CBD Large	$35,419,200
Outer	$113,176,752
LPA Concert	$126,273,563
LPA Festivals	$15,199,800
Opera	$21,743,470
Classical	$39,955,592
Music Theatre (70%)	$76,906,608
TOTAL	$428,674,985

The total ancillary spending by patrons attending live music venues and events in 2017 was $1.034 billion.

5.24 Ancillary Spending Compared to 2012

We have not included opera and classical Music figures in this comparison as they were not included in the Census in 2012.
Where comparison is relevant, the results show that ancillary spending increased by 14% between 2012 and 2017 – from $847.1 million to $994.7 million.

Figure 5.11



5.25 Employment - Live Music Gigs 2017

Employment associated with live music performance, by its very nature, predominantly involves a casual or freelance workforce.
There are a number of permanent, full time jobs associated with the management of venues, but the majority of the workers involved – performers, food and beverage service, general venue staff, production and security personnel, are basically involved as casual (shift) workers.

Employment is also generated in industry sectors that support the presentation of live performances – rehearsal facilities, production equipment companies, food/beverage suppliers, designers, printers, publicists, agents, bookers etc.
A considerable amount of the activity in commercial recording studios and replication businesses is undertaken so artists can launch product 'live'. Likewise, a percentage of outlay on musical instruments, stage gear, DJ equipment and software is directly related to live performance.
However it is beyond the scope of this report to estimate outlays or the employment created.

What we are able to do is accurately estimate employment directly related to performances in small and large venues, based on the observational data collected on Census night, the responses to online surveys and the data shared by venue operators.

5.26 The Nature of Employment

Based on our previous Census, extensive industry experience and communication with practitioners and venue operators, we have based our calculations on the following shift average –
Musicians & DJs – 5 hours per gig
Production Staff – 6 hours per gig
Venue Staff – 6 hours per gig
Security – 5 hours per gig
Loaders/Riggers/Runners (major concerts) – 6 hours per gig

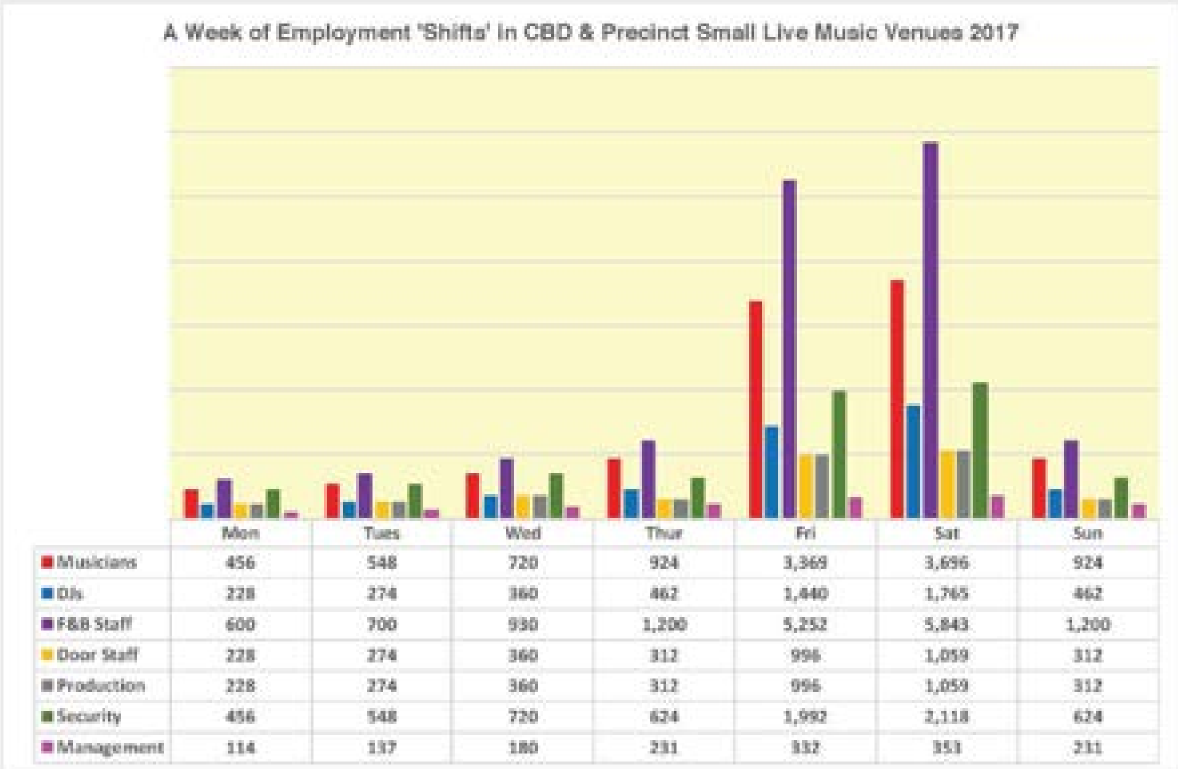
On Census night 2017, we recorded casual employment opportunities across small venues in the CBD, music precincts and outer suburbs for –
3,240 DJs, 5,685 musicians[8], 10,325 venue staff, 1,540 production personnel and 2,592 security personnel.

[8] A single 'gig' often involves multiple musicians and DJs on a multi-artist bill. This is particularly so in venues that operate more than one live music space. The Tote Hotel, for example, operates seven days of the week. A dozen 'gigs' across that week often involves 100+ musicians. This is not an unusual scenario.

5.27 Small Venue Employment

A week of employment opportunities in small venues in the CBD and music precincts, the major generators of live music work, looks like this –

Figure 5.12



5.27 Additional Venue Employment

Added to these opportunities for workers in small venues in the CBD and precincts, there is considerable employment generated in outer suburban small venues, CBD large venues and concert halls and theatres.
We can report data from these latter venues this year due to the generosity of producers and venue operators sharing their information with us. We did not have that access in 2012.

Note on Festivals:

The large number of festivals that take place annually across the city and create a great deal of employment.
Even though they almost all rely on a large number of volunteers to help deliver their events, there is no doubt that they create significant employment. Large events like the St Kilda Festival and Melbourne Music Week featured hundreds of musicians and DJs in events across dozens of venues.
We are not in a position to report on their workforce, but note that in addition to the industry workers we usually associate with the delivery of live music, festivals also rely on a broad range of vendors/contractors to deliver products and services to patrons.

5.28 Annual Venue Employment

By calculating the number of shift hours worked by musicians, DJs, venue staff, production and security personnel across a year of gigs, we estimate that live music performances in 2017 created a minimum of 18,330 part time jobs.

Annual Employment Personnel Numbers for Live Gigs - 2017

Table 5m

	Musicians	Venue Staff	Production	Management	Security	DJs
Small Venues	643,150	1,155,500	207,950	89,200	415,900	351,300
Concerts	24,941	55,611	17,490	6,051	6,475	3,820
CBD Large	10,584	35,940	5,130	1,710	8,260	6,550
Music Theatre	1,350	3,375	3,375	1,350	675	0
TOTAL	**680,025**	**1,250,426**	**233,945**	**98,311**	**431,310**	**361,670**

Annual Employment Personnel Hours for Live Gigs - 2017

Table 5m

	Musicians	Venue Staff	Production	Management	Security	DJs
Small Venues	3,215,750	6,933,000	1,247,700	535,200	2,079,500	1,756,500
Concerts	257,814	579,126	396,209	261,200	102,288	125,000
CBD Large	52,920	215,640	30,780	10,260	31,300	30,200
Music Theatre	63,000	157,500	180,000	50,400	20,000	0
TOTAL	**3,589,484**	**7,885,266**	**1,854,689**	**857,060**	**2,233,088**	**1,911,700**

Note on Regional Victoria Employment:
In 2013 we conducted the Regional Victorian Census. Although we have not had the opportunity to update that report, we note that in that year 360+ small venues across regional Victoria 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 2012 Census report we also cited a 2011 report by the University of Wollongong which estimated that festivals in regional Victoria activities created significant employment for venue staff – 1,070 part time jobs during the planning phase and 3,140 during the operational phase.

5.29 Conclusion

With more gigs, bigger audiences and more spending compared to the last Census, there is little doubt that Melbourne's live music scene in 2017 is in good health. It confirms that live music is the city's dominant cultural and social pursuit and a significant contributor to the city and state economies.

Dobe Newton
April 2018

Big Picture title page image is reproduced courtesy of the copyright owner Zo Damage

6 Audience Survey Findings

6 Audience Survey Findings

There were 516 responses to the Audience Survey which aimed to gain broad insight on their music activities in general, as well as, about live music attendence. There was a strong focus on safety and inclusivity which are topical issues in the Melbourne live music scene currently.
Where appropriate and possible we have compared our findings to those reported in the 2012 Census.

Portrait of a Live Music Attendee

~ Is a female (60%) or a male (38%) who is between 18-24. (28%)

~ lives mostly in the inner northern suburbs (23%) or outer northern suburbs (20%) and is increasing choosing the outer north over the inner southern suburbs which has historically been more music venue rich areas.

~ Is an Australian citizen. (94%)

~ Works full time (36%) or is a student. (26%)

~ Listens predominately to community radio (40%) or publicly funded programming i.e. ABC/Triple J (34%) with PBS, RRR and Triple J as favourite stations.

~ Reads Beat magazine (52% in print or 12% online) and prefers local blogs and websites such as Tone Deaf (13%) or The Music (12%). Also may read Pitchfork if they read an international website. (12%)

~ Gets new music from streaming services (69%) but also still buys CDs (54%) and vinyl. (47%)

~ Goes to at least 1-2 gigs per month (43%) if not 3-4 per month. (28%)

~ Prefers to attend Melbourne's small live music venues more often, 74% of responders said they had been to a small dedicated live music venue (<350 capacity) in the last 12 months.

~ Likes to attend gigs that are indie (63%), rock (71%) or singer/songwriter (52%) performances.

~ Spends between $10-50 a month of live music tickets/door charge (30%) or even between $50-100. (29%)

~ Travels to venues via Public Transport (76%) usually from a 5-10 kilometre radius. (35%)

~ Spends either $10-50 on food and alcohol at those gigs (30%) or between $50-100. (30%)

~ Favourite venues are iconic small venues, The Corner, The Tote, Northcote Social Club and new venue, Howler while likes to attend The Forum for larger live music events.

~Thinks that Victorian venues provides a safe and inclusive environment (80%) only feeling unsafe or uncomfortable at a venue rarely. (48%)

~ Doesn't use hearing protection at live music events. (52%)

~ Would go to more gigs if tickets were cheaper (65%) and public transport ran later. (53%)

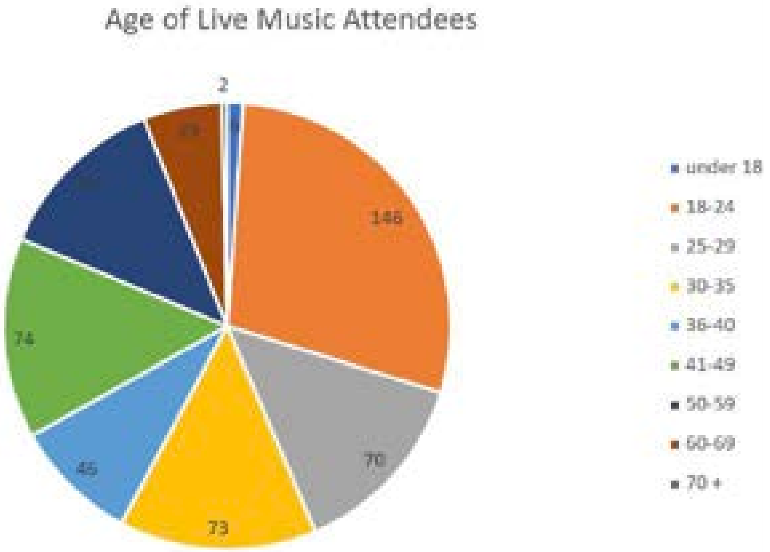
Question Responses:

Question 1
What Is Your Gender Identity?
Number of Responses=514

Female - 60%
Male - 38%
Other (Unspecified) - 2%

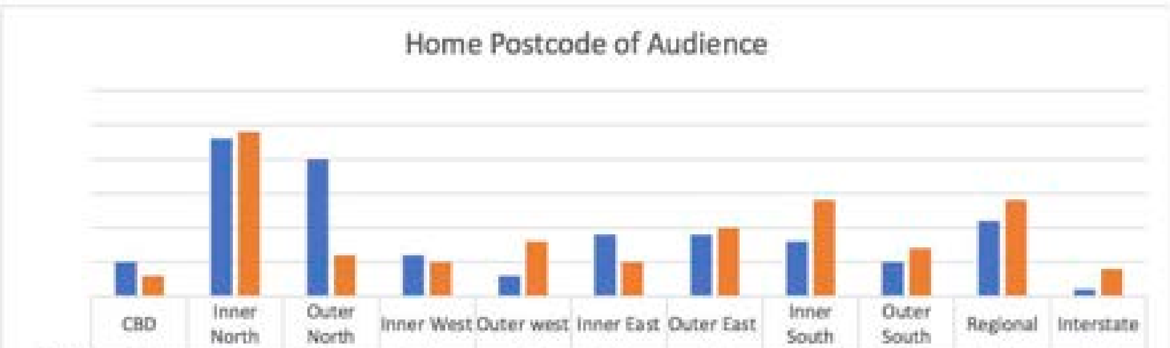
Question 2
How Old Are You?
N=513

Figure 6.1



Question 3
What is Your Home Postcode?
N=515
Live music fans still overwhelming, live in the inner northern suburbs close to the majority of live performance venues in the CBD and music precincts. There has been been a big increase in the number of people living in the outer northern suburbs (under 10 kms from the city) so that it is almost the same number as in the inner northern suburbs. This is due to a movement out of the inner southern suburbs where number of music venus are decreasing.

Figure 6.2



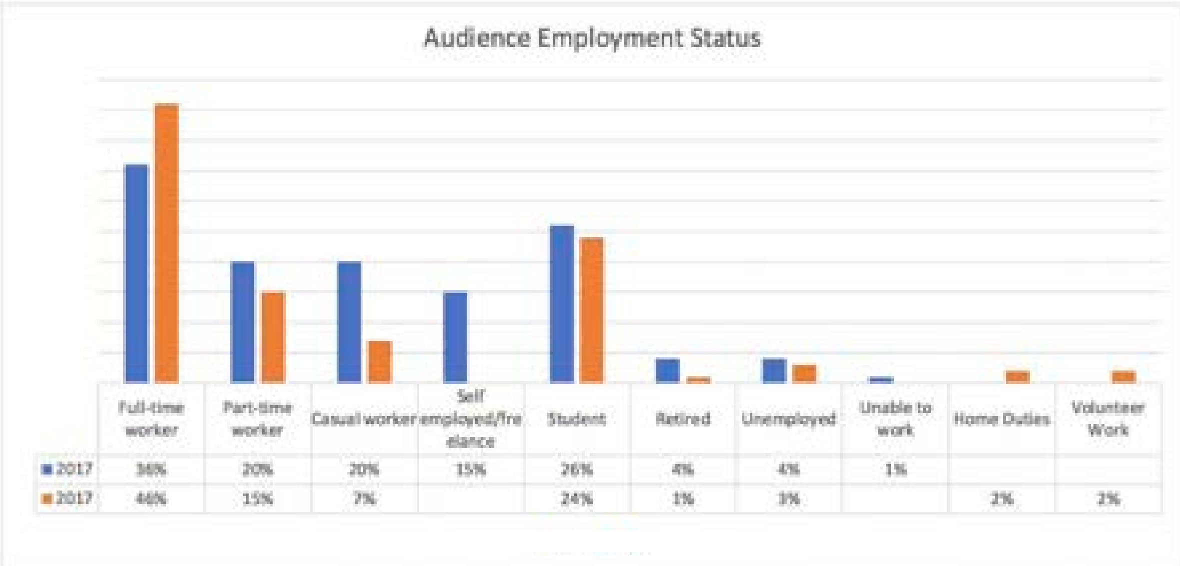
	CBD	Inner North	Outer North	Inner West	Outer west	Inner East	Outer East	Inner South	Outer South	Regional	Interstate
2017	5%	23%	20%	6%	3%	9%	9%	8%	5%	11%	1%
2012	3%	24%	6%	5%	8%	5%	10%	14%	7%	14%	4%

Question 4
Are you an Australian citizen?
N=507
94% of respondents were Australian citizens.

Question 5.
If not, please state your country of origin.
N=137
Those who weren't, were mainly from New Zealand (2%) or United Kingdom(2%)

Question 6.
What is your current occupation or status?
N=510
Compared with 2012, there has been a marked increase in audience members who say they work on a part time or casual basis.
It is worth noting that we did not restrict responders to a single response with many people clicking one or more answers. It is highly likely that many who said they were students are who also chose casual or part time work as an option.

Figure 6.3



Question 7
Select the radio stations that you listen to regularly?
N=493

Figure 6.4

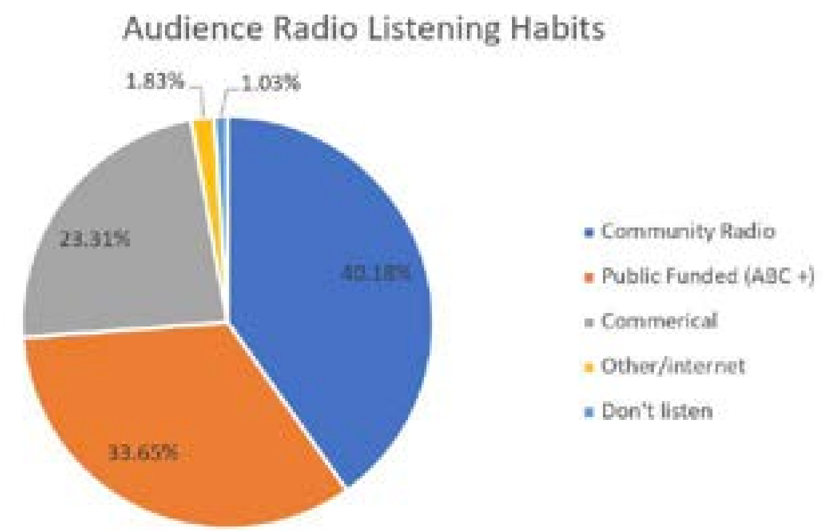


Table 6a

ABC RN	112
RRR	261
MMM	61
PBS	239
SYN	38
MIX	13
Gold 104	123
KIIS	50
Triple J	234
Nova	50
Double J	86
ABC 774	21
Internet radio	9
3CR	7
Smooth	9
MBS	4
3AW	3
FOX FM	5
Joy FM	3
ABC Classic	3
Triple j unearthed	3
Don't listen	14
Other	16

Question 8
What are the music publications you read regularly?
N=403
There were various responses with many listing online publications which will be covered in the next question. The outstanding forerunner in this area is *Beat Magazine* which unparalleled in numbers (210) of readers. Other publications which received multiple mentions, *The Music* (97) and *Rolling Stone* (39).

Question 9
Which music websites or blogs do you regularly visit?
N=407
There were a high number of respondents who mentioned mostly Australian blogs and websites, showing the diversity of voices and sources to access music information online.
There were some online publications that stood out in the responses including the online iteration of the both *Beat Magazine* (50) and *The Music* (48) as well as local online publications *Tone Deaf* (52) and *Music Feeds* (28). *Triple J* has a significant online presence with written content and was mentioned by 34 respondents also.
The only international publication that was repeatably mentioned was American alternative 'bible' *Pitchfork* (50).

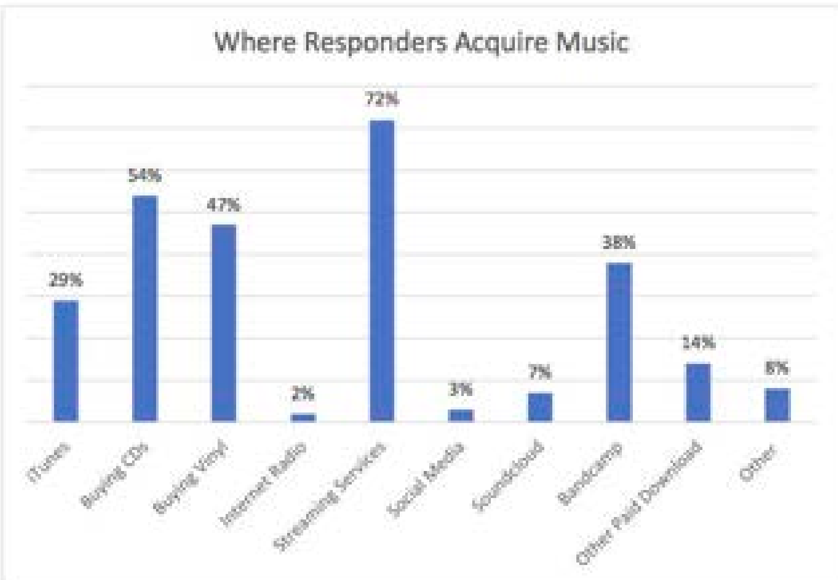
Question 10
What device do you predominantly use the internet on?
N=514

Computer - 54%
Phone - 72%
Tablet - 10%

Question 11
How much of your internet use would you say is music related?
N=514
The average percentage was 53%.

Question 12
How do you acquire new music? (Select all relevant options)
N=515
The majority of respondants found and accessed music on streaming services. However it seems that many still seek out physical with CD and vinyl purchases being made by a lot of respondents.

Figure 6.5

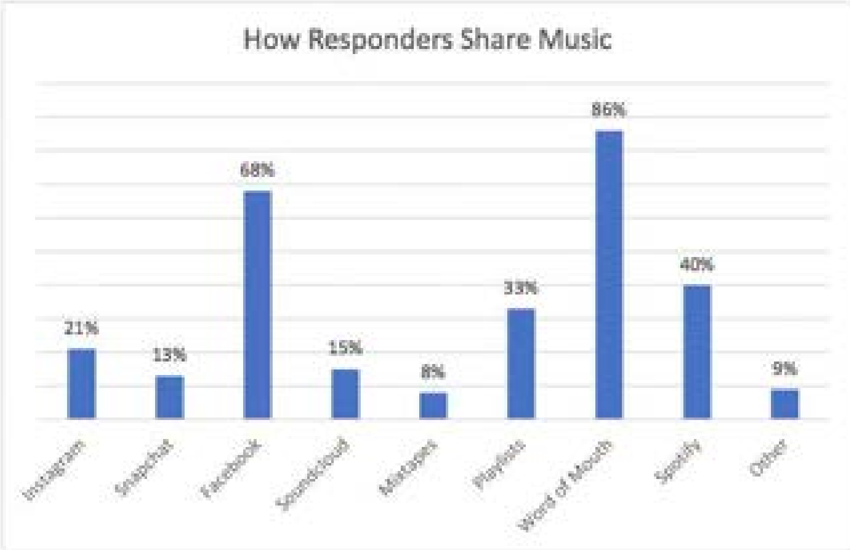


Question 13
If you ticked, streaming in the previous questions, do you pay for your subscription?
N=420

Yes - 71%
No - 29%

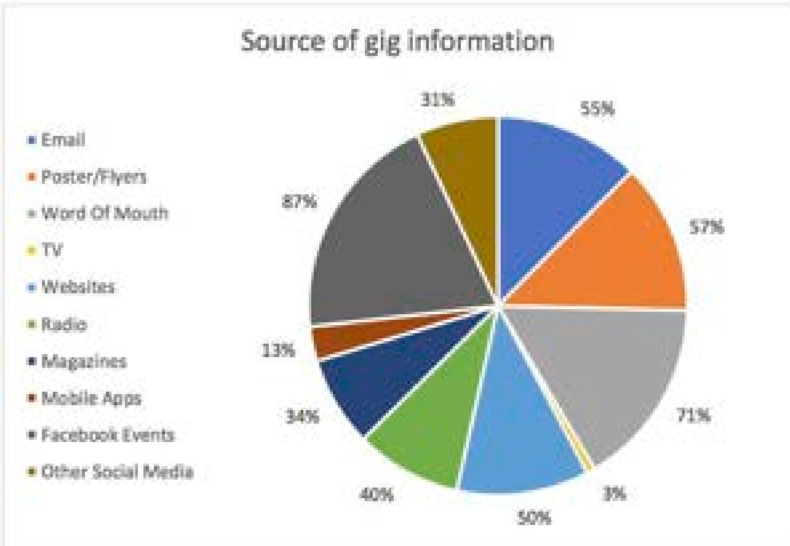
Question 14
How do you usually share music with your friends? (Select all relevant options)
N=508

Figure 6.6



Question 15
Where do you predominantly find gig and show information from? (Select all relevant options)
N=514

Figure 6.7



Question 16
Did you attend a gig/concert on Census Night? (25 Nov 2017)
N=510

Yes: 19%
No: 40%
Unsure: 41%

Note:
The online surveys were live for four months after census night, so many respondents who answered months after were unable to say whether they had attended music that night.

Question 17

If yes, please specify what artist / event you saw and at what venue:

N=162

Many of the respondents who remembered the events attended Melbourne Music Week, Queenscliff Music Festival or specific events at large venues which they would have to had paid in advance.

Interestingly, many responders remembered the music venue they visited (eg The Tote and Thornbury Local) even if they did not remember the specific bands which were playing.

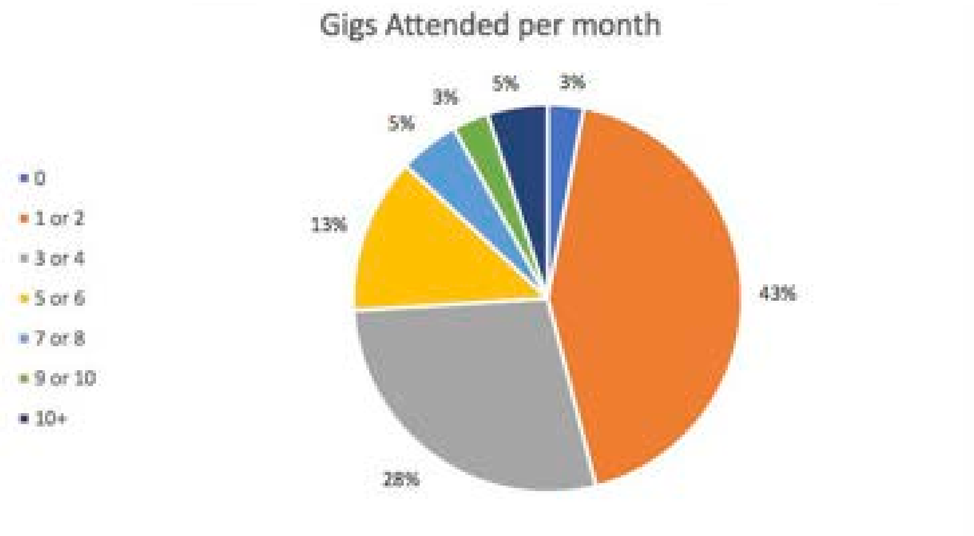
Question 18

On average, how many gigs/concerts do you attend per month? (excluding festivals)

N=513

The large majority group of respondents advised that they went to either 1-2 or 3-4 live music events per month. Encouragingly there was a small group who said they went to 10+ events a month!

Figure 6.8



Question 19

Which of the following best describes the type of venue you have attended live music events at in the last 12 months? (Select all relevant options)

N=515

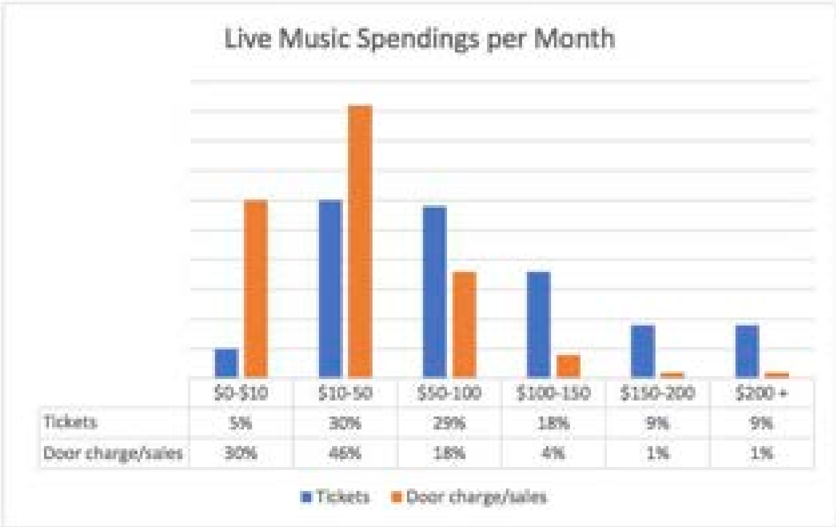
These findings show that small music venues and bars with live music are the most attended of Melbourne's venues, showing that small grassroots music performances are truly the backbone of live music culture in the city. However, around half the responders also said they have seen larger performances at Concert Halls, Arts Centres and/or Large venues, showing that they willingly also invest in those higher cost events.

Table 6b

Bar, pub with music (20-100)	77.67%
Small music venue (<350)	73.59%
Medium music venue (351-650)	59.42%
Outdoor e.g. parks used for festivals	51.84%
Concert hall (200-3,000)	50.29%
Large music venue (651-5,000)	49.32%
Arts centre(200-2,000) – multi-arts, multi-purpose venue	47.38%
Arena (5,000-20,000)	38.25%
Stadium (5,000-100,000) – large, usually uncovered	26.02%
Restaurant/café with music	24.27%
Small nightclub (<500)	23.88%
Theatre/opera house (500-2,500)	22.14%
Outdoor (urban)	21.17%
Hotel or other function room	15.15%
Large nightclub (>500)	14.95%
Student union/university building	8.93%
Church/place of worship – which hosts live music events	8.16%

Question 20
On average, how much do you spend per month on concert/festival tickets?
N=513
Over half the respondents, spent between $10-50 and $50-100 on concert/Festival tickets every month.

Question 21
On average, how much do you spend per month on bar/pub/club entry?
N=507
Figure 6.9



Question 22
On average, how many music festivals do you attend per year?
N=513
Table 6c

0	1 or 2	3 or 4	5or 6	7 or 8	9 or 10	10+
19%	47%	22%	7%	1%	2%	2%

Question 23
What type of transport do you usually use to get to and from gigs?
N=514
Table 6d

Public Transport	76%
Car	54%
Bike	9%
Walk	21%
Taxi	8%
Uber	42%

These numbers seem fairly consistent with the 2012 findings except the dramatic decrease in those using taxis and a larger proportion of responders saying they now used the new ridesharing service uber.

Question 24
Estimate your travel distance to most gigs you attend (kms)?
N=514
Table 6e

1-5kms	19%
5-10kms	35%
10-20kms	25%
20-35kms	15%
35kms+	23%

In this census, we broke down the categories of distance to be smaller than in the 2012 Census but comparing the data shows that more people appear to be attending gigs within a 20km radius of their home while there has been a decrease in attendees travelling from further than 20kms.

Question 25

On average, how much do you spend per month on transport to and from gigs?

N=508

Table 6f

$0-10	5%
$10-50	56%
$50-100	25%
$100-150	8%
$150-200	3%
$200+	3%

Question 26 & Question 27

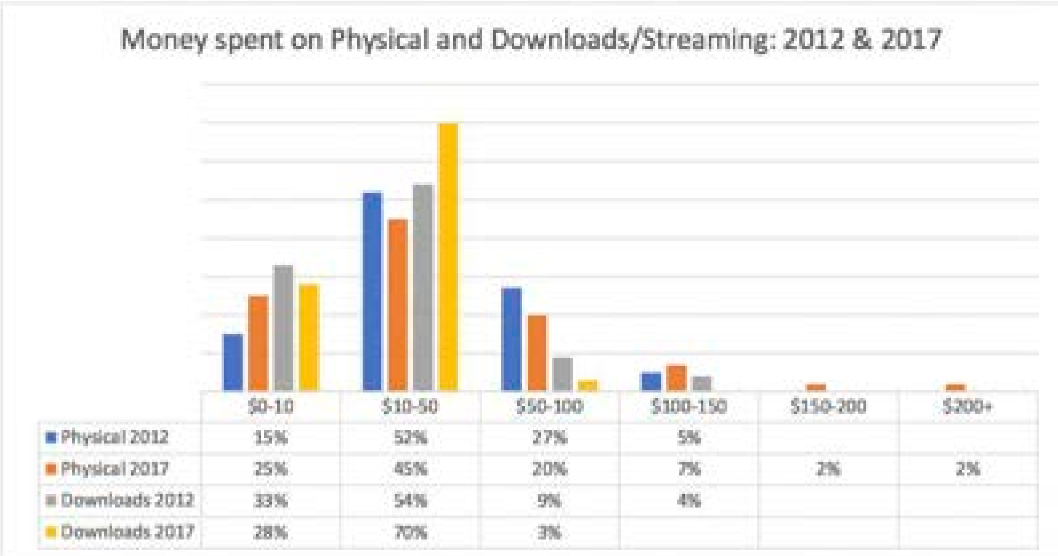
On average, how much do you spend per month on CDs/Vinyls?

N=511

On average, how much do you spend per month on downloads/streaming?

N=509

Figure 6.10

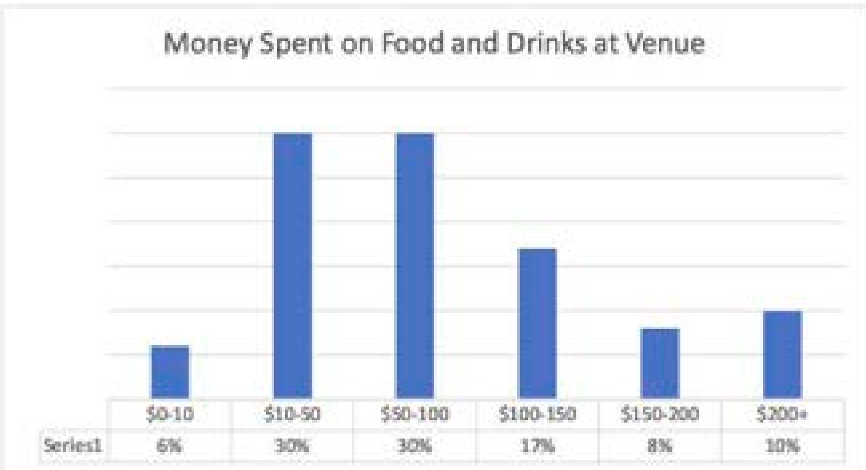


Question 28

On average, how much do you spend per month on food and alcohol at gigs?

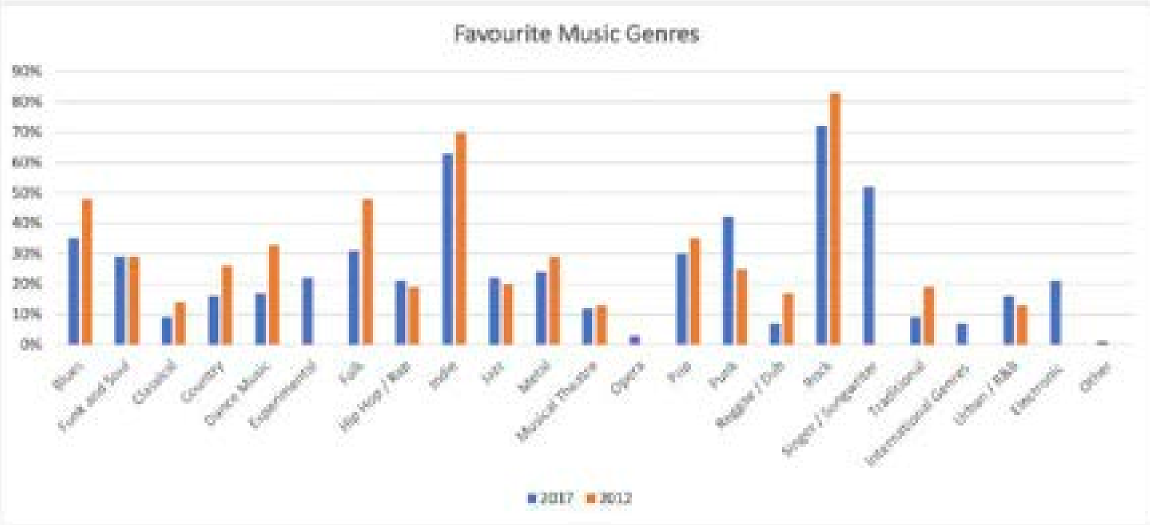
N=511

Figure 6.11



The exact same number of responders chose that they spent between $10-50 and $50-100 which shows a marked increased than the average of $30-50 found in the 2012 census results.

Question 29
Which best describes the type of music you usually go and see? (Select all relevant options)
N=511
Figure 6.12



The graph above shows the comparison between responses from the 2012 and 2017 census. In 2017, we have expanded the options for genres to accomodate changes in genres and distinction between scenes i.e. Blues and Folk were previously combined and are now separate as well as Dance styles (Techno/house etc) being differentiated from other electronic music. This means that genres like blues may show a decrease due to its distinction from folk, rather than a decrease in fanbase.

Question 30
Name your 5 favourite live music venues
N=481
The top five venues are:
1. The Corner Hotel (195)
2. The Forum (195)
3. The Tote (136)
4. Northcote Social Club (99)
5. Howler (94)

Special Mentions: The Gasometer Hotel (84), The Old Bar (76) and Festival Hall (72)

The 2012 census showed that The Corner was the most popular small venue with Northcote Social Club and The Tote maintaining their popularity. However The Toff In Town only receives 22 mentions while the Esplanade sees a fall to 16 mentions, due to its closure. It is worth noting that its iconic status leads to it still being listed by people despite this.
Billboard (now 170 Russell) was listed in 2012 as on of the most popular large venues yet only received 57 responses (by either name) while the The Forum previously second favourite is now the only large venue to make the top five list in 2017.

Question 31
What percentage of the music you listen to is Australian?
N=512
The average percentage was 51%.

Question 32
Do you believe most Victorian venues provides a safe and inclusive environment?
N=513
Yes - 80%
No - 8%
Have no opinion - 12%

Question 33

If no, please list any venue you have felt unsafe at:
N=126

While only 42 respondents replied no to the last question, many more responses were recorded in this question indicating that although the majority find most live music venues safe, there had been incidents that were remembered at certain venues by many respondents.
Many mentioned security and other punters being the main problem rather than the venues themselves, also night clubs in general were called out for being the site of issues over pubs and bars.
The largest proportion of venues that were mentioned were larger venues, like Festival Hall but also The Corner was mentioned by multiple respondents. There were a range of smaller venues who also mentioned but not usually more than once or twice.

Question 34

If no, how often have you had an experience which made you feel unsafe or uncomfortable at a venue?
N =340

Table 6g

Often	2%
Occasionally	25%
Rarely	48%
Once or Twice	25%

Question 35

Do you feel that you have been directly harassed or discriminated against on the basis of: (Check all relevant options)
N=172

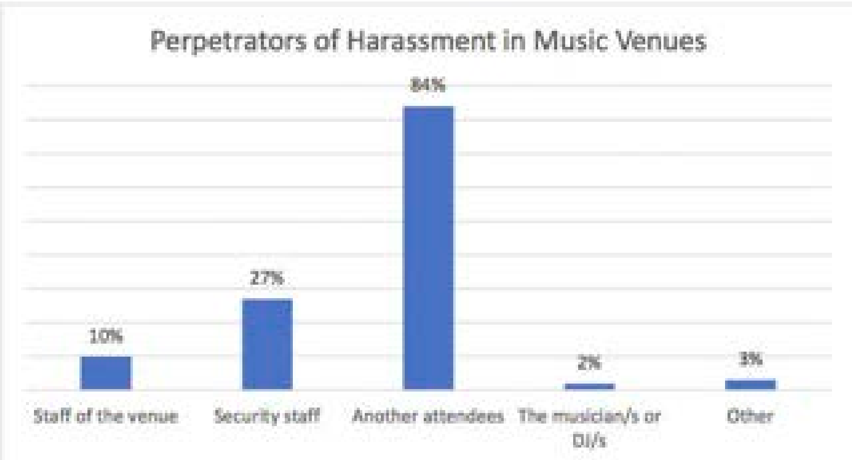
Table 6i

Gender Identity	56%
Sexuality	32%
Race	6%
Age	33%
Ability	8%
Other	10%

Question 36

If you have had experiences which make you feel unsafe or uncomfortable at a venue, who made you feel that way? (Select all relevant options)
N=316

Figure 6.13



Many responders listed that they would leave the venue or confront the perpetrator before communicating with the staff of a venue about harassment. This data is worrying for venues because it may indicate that the attendees do not trust or feel comfortable to approach staff with problems.

Question 38 & 39

Do you bring any form of hearing protection equipment when you attend live music events?
N=512

Yes - 27%
No - 52%
On occasion - 21%

If no, would you use hearing protection equipment if provided by venues?
N=438

Yes, I have before - 259%
Yes, I would in future - 28%
No - 19%
Maybe - 25%

Although not many responders have used hearing protection on a regular basis these responses show that over half of the responders have/would use ear plugs if provided by venues. The question is whether it is up to the venue to provide this or whether the onus should be on the patron to protect themselves.

Question 40

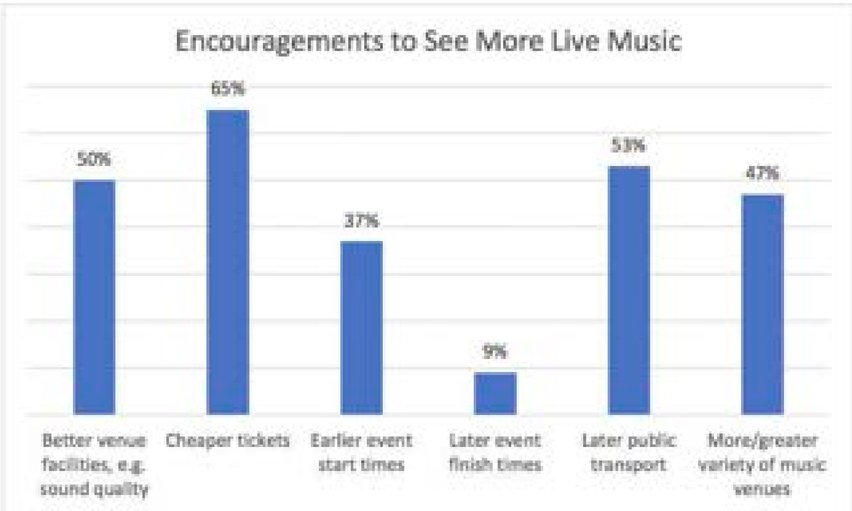
Do you have access requirements that need to be met in order to attend live music events?
N=509

Yes - 8%
No - 91%
Prefer to not say - 1%

Question 41

What of the following would encourage you to see more live music? Tick three options.
N=504

Figure 6.14



From the responses we received the three main things that would encourage people to see more live music were:

1. Cheaper Tickets (65%)
2. Later Public Transport (53%)
3. Better Venue Facilities (50%)

Question 41

What would improve your live music experience overall?
N=345

There was a range of responses to this question, positively many expressed a desire to simply having more time or money at attend live music:
“Nothing really that the venues or bands can improve - I just wish I had more time available to attend gigs.”
“More time and money to see more! Sadly you can’t help me with that.”

However there were common issues that arose frequently in the responses:

<u>Sexual Harassment</u>
"Less random roaming hands from arseholes!"
"I don't the know there is too much, just more security believing when women are harassed would make shows more bearable. Hard when you know it has happened to them but security won't believe them."
"Better gig etiquette (safer mosh pits for women)"
"I think we're making great strides, I feel safer in venues and spaces these days but there's still more to do."
"More inclusive environments - less of the 'dude bros' who think their opinion on music is more important than any woman's opinion. Less sexual harassment."

<u>Issues with alcohol consumption</u>
"Less alcohol and therefore drunken behaviour"
"A more understanding environment from security and police. Less belligerent drunks- drinking is by far the worst problem in Australia in regards to feeling unsafe in venues or at events and encountering conflicts with people."

<u>Problems with the set up of venues and facilities</u>
"Better organisation. Natural People flow. Too many structures and barricades impeding crowd movement."
"Better air conditioning at venues, totally don't like sweating like in a sauna - especially as a manager I'm usually either driving or sober so not getting crazy drunk. Also more seats at particular venues, struggle to stand up for six hours since I usually sit on my laptop running my business for 70hrs per week"

<u>Treatment of musicians and performers</u>
"Pay bands more money"
"Many of the acts I see are 'quieter' and I hate when other 'fans' talk loudly over the performers - a common occurrence."
"People learning to shut up and not talk during show- a culture of respect for the artist and other listeners."

<u>Policy and financial support for live music venues</u>
"Putting money into Victoria's live music scene, whether it be restoring venues or funding for artists/institutions. Stop the government from tearing down iconic venues!"
"Protection for live venues against noise complaints. Protection of venues from redevelopment. Greater support from mainstream media."
"With the loss of he Palace and soon Festival Hall there will be no (affordable) venue providing capacity of 2000-5000 for mid-tier bands. So, a venue for this requirement. SAVE THE PALACE THERE IS STILL TIME!!"
"Stop developers and new neighbours from complaining about the noise. Music venues are part of the fabric of Melbourne."

<u>Environmental issues about venue surroundings</u>
"City infrastructure surrounding venues. Cultural and social support so that other vendors operate in tandem times, so that event attendees aren't the only patrons on the streets. Support from local council and communities. The comfort in knowing sound need not be regulated to cater to neighbours"

<u>Location of venues</u>
"A proper rock oriented venue or two in the Western suburbs of Melbourne would be awesome. Yarraville or Footscray are good candidates."
"I'm still waiting for Preston's music venue to rival the tote. one day, right?"
"Melb has an abundance of exceptional artists nearly every night of the week Sadly southside has all but killed live music and that means a trip over to the north most times I want to see a performance"

<u>Volume levels in venues</u>
"Lower volume levels in live performance. Significantly lower volume levels. There is no need - at all - for the volume levels we deal with."
"Better sound. The volume is often too high, with the bass frequencies mixed to dominate. Very harmful to hearing."

<u>Times of performances</u>
"Early gig start and finish times. So hard to see gifs when u work full-time and then have to travel home when it finishes at midnight or later and then get up for work. That is not inclusive of the work force!!"

Issues with inclusivity

"Having staff that are not 'ageist' towards a particular demographic of gig patrons. I have noticed at a few particular venues, bar staff in particular to be quite rude and condescending towards us older patrons. This attitude doesn't affect me attending but it certainly affects my reluctance to spend over the bar."
"more gender diversity in festivals/ gig lineups. More women going to gigs. Safer spaces policies. Changing male dominant spaces to be more inclusive."
"Less douchebags but I guess that's hard to police. Gender neutral bathrooms should be the norm."
"respect and safety promoted over mic at the event, when the event is promoted, visuals/posters in the venue and toilets, through increasing accessibility for others with disabilities"

Access issues

"Easier access and seating to accommodate disability and others with a disability. Designated area for someone with a disability. Quite often I am stuck behind a crowd of people and cannot see the stage."

Public Transport

"Easier access to venues with public transport, particularly Thursday and Sunday nights"
"if vline had later trains back to towns like Seymour (rural Victoria) so that I could go out and see live music throughout the week without the hassle of organising a way home since there are no trains past 9pm"
"More 24-hour public transport! The north west of the city is ignored (both 57 & 59 trams aren't 24 hour)"

Indigenous recognition

"recognition of the traditional custodians of the land the event is being held on"

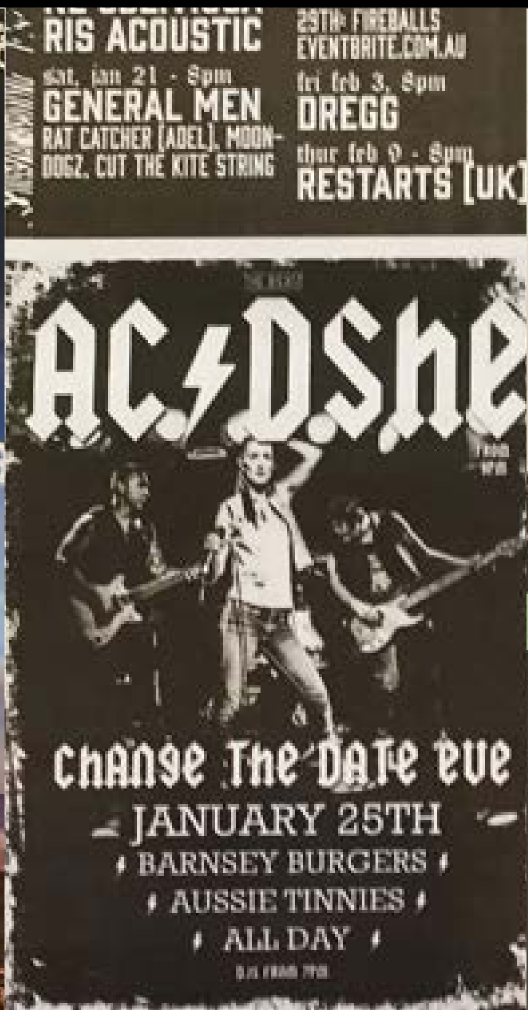
One last thing:

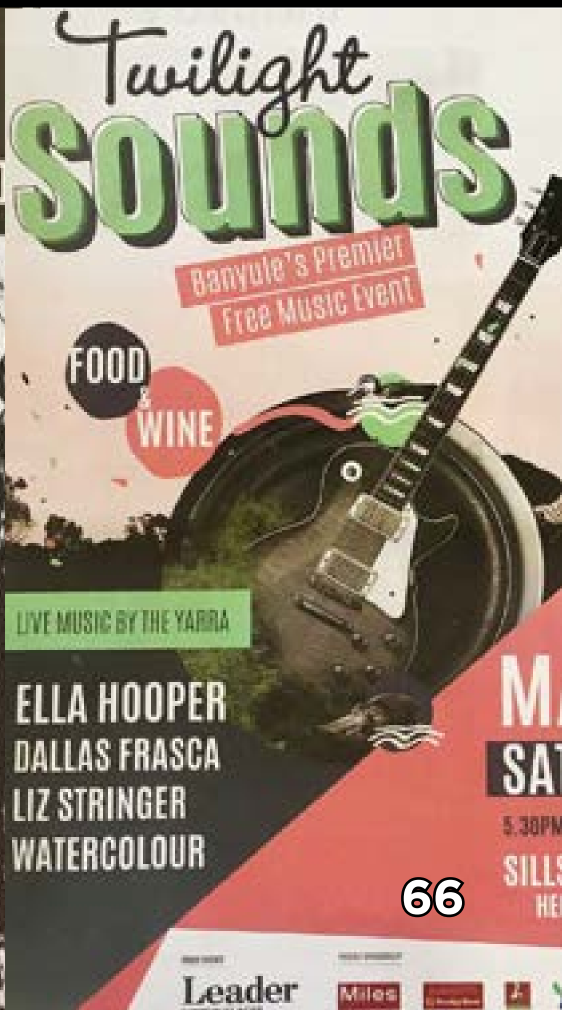
"Being taller :)"

Rosa Coyle-Hayward
April 2018

Audience Survey Findings title page image courtesy of the Performing Arts Collection, Arts Centre Melbourne

7 Musician/DJ Survey Findings





7 Musician/DJ Survey Findings

The 495 responses we received to our online Musician/DJ Survey provide a comprehensive insight into the activities of practitioners involved in Melbourne's live music scene.
Where appropriate/possible we have compared our findings to those reported in the 2012 Census.

Portrait of a Live Performer

~ Is a male (60%) or female (40%) spread across age ranges 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 predominantly in the inner suburbs (60%) within 8-10 kilometres of the city centre, but is increasingly considering more affordable options – eg. the outer northern and western suburbs.

~ Is a local (60%) but may well be one of the 40% whom have relocated from regional Victoria (32%) or interstate (53%) to take advantage of increased industry opportunities in Melbourne.

~ Earns, on average, 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 had formal music training/tuition (80%), but is much less likely to have had formal industry training (6%). The tuition/training is likely to be provided by a privately (music lessons) or degree course (industry), with TAFE attendance markedly declining since 2012.

~ Has experienced physical and/or mental health issues (40%) associated with their music practice, but usually self-manages the issue/s.

~ Is very likely to be an APRA AMCOS member (70%+), less likely to be a Music Victoria member (24%), but certainly not a member of the Musicians Union.

~ Is more likely in 2017 to have applied for a grant (43%) than in 2012 (37%), but is much more likely to have been successful last year (42%) than they were in 2012 (20%).

~ Has a number of issues that impact on their music practice with financial viability (47%) the dominant concern.

Question Responses:

Question 1

What Is Your Gender Identity?
Number of Responses=491

Male - 59%,
Female - 38%
Other (Unspecified) - 3%

Question 2

How Old Are You?
N=492

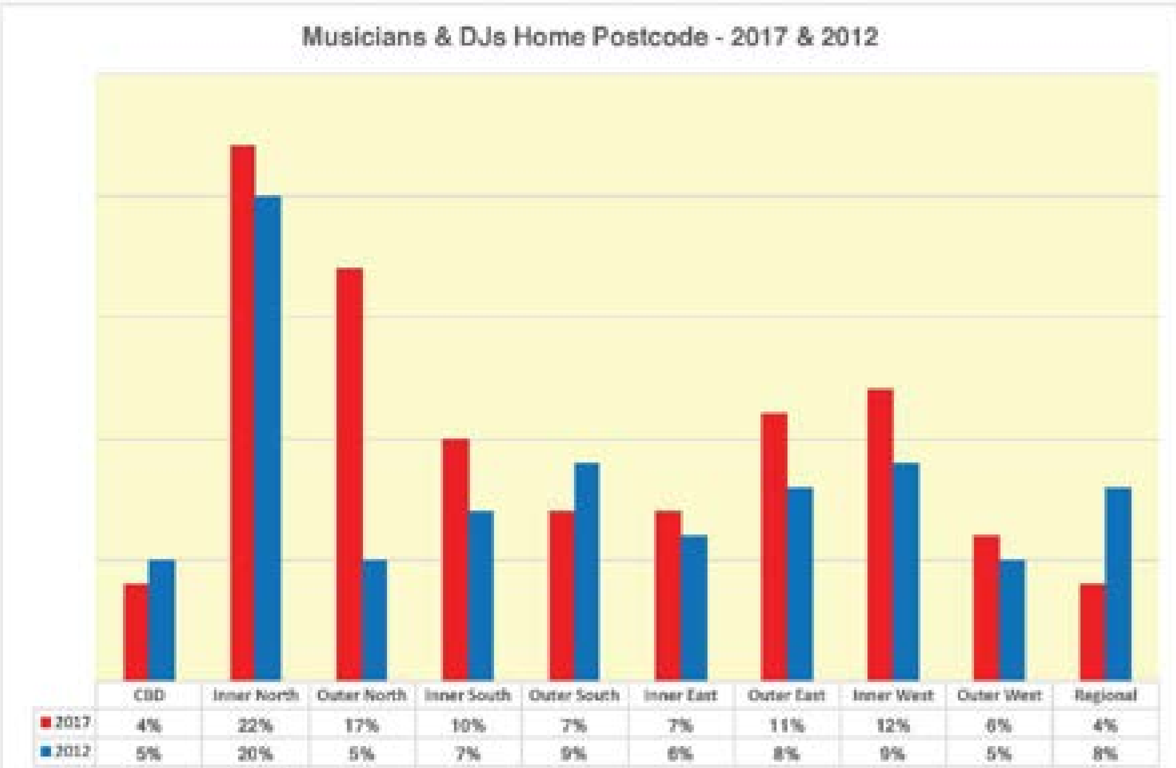
Table 7a

18-24	25-29	30-35	36-40	41-49	50-59	60-69
15%	16%	17%	16%	18%	13%	5%

Question 3

What is Your Home Postcode?
N=492
Musicians and DJs are still attracted to the inner suburbs close to the majority of live performance venues in the CBD and music precincts. This attraction has not reduced, but anecdotal opinion suggesting an increasing move to outer, more affordable suburbs is confirmed by respondents to this year's survey.

Figure 7.1



Question 4 & 5

Are You an Australian Citizen?
N=490

95% of respondents were Australian citizens.

If not, please state your country of origin.
N=191

The 5% who were not were evenly split between New Zealand, the United Kingdom and the United States.

Question 6

Have you relocated from any of the following for more industry opportunities?
N=476

Since the 2012 Victorian Live Music Census, we have had definitive evidence that Melbourne's live music scene has been a significant magnet for performers from regional Victoria and interstate.
This is confirmed by this year's study which showed that 40% (198) of respondents have relocated for enhanced industry opportunities.

Table 7b

Relocated?	Yes	No	
2017	40%	60%	
2012	30%	70%	
From ?	Regional Vic	Interstate	Overseas
2017	32%	53%	14%
2012	45%	55%	Not Asked

Question 7

Do you identify as Aboriginal or Torres Strait Islander?
N=490

Only 2% of respondents identified as having Aboriginal and/or Torres Strait Islander heritage.

Question 8 & 9

Do you perform in a language other than English?
N=490

7% of respondents perform in a language other than English.

If yes, which language/s?
N=150

Languages identified were – Italian, French, Indigenous dialects, Greek, Arabic, German, Polish and Spanish.

Question 10

Do you identify as visually impaired, deaf or hard of hearing?
N=485

Only 2% of respondents identified as having visual or aural impairment. This does not correspond to answers given to question 41 which recorded a 46% response re hearing issues.

Question 11

Do you identify as having a disability or accessibility requirements?
N=487

Only 2% of respondents identified as having these issues.

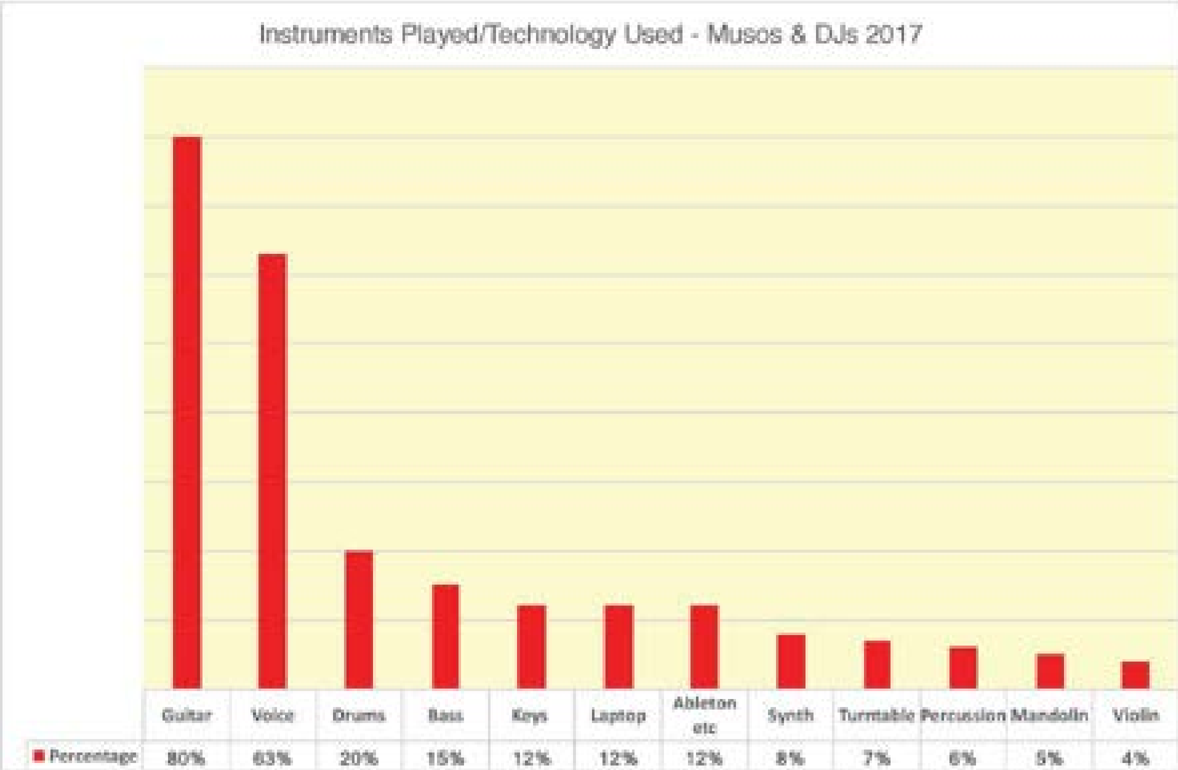
Question 12

Do you identify as having a disability or accessibility requirements?
N=492

Question 12

Which are the main instruments you perform with? DJs list technologies.
N=492

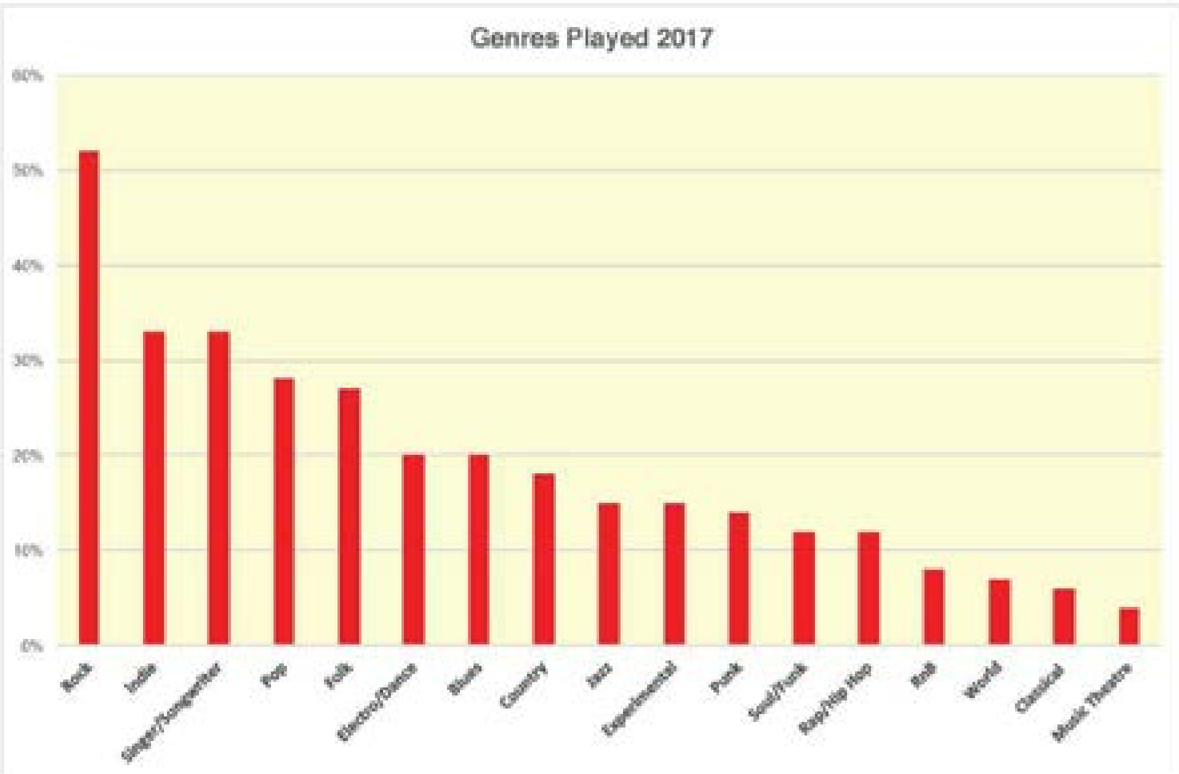
Figure 7.2



Question 13

Which best describes the genre of music you currently perform regularly? (Select all relevant options)
N=481

Figure 7.3

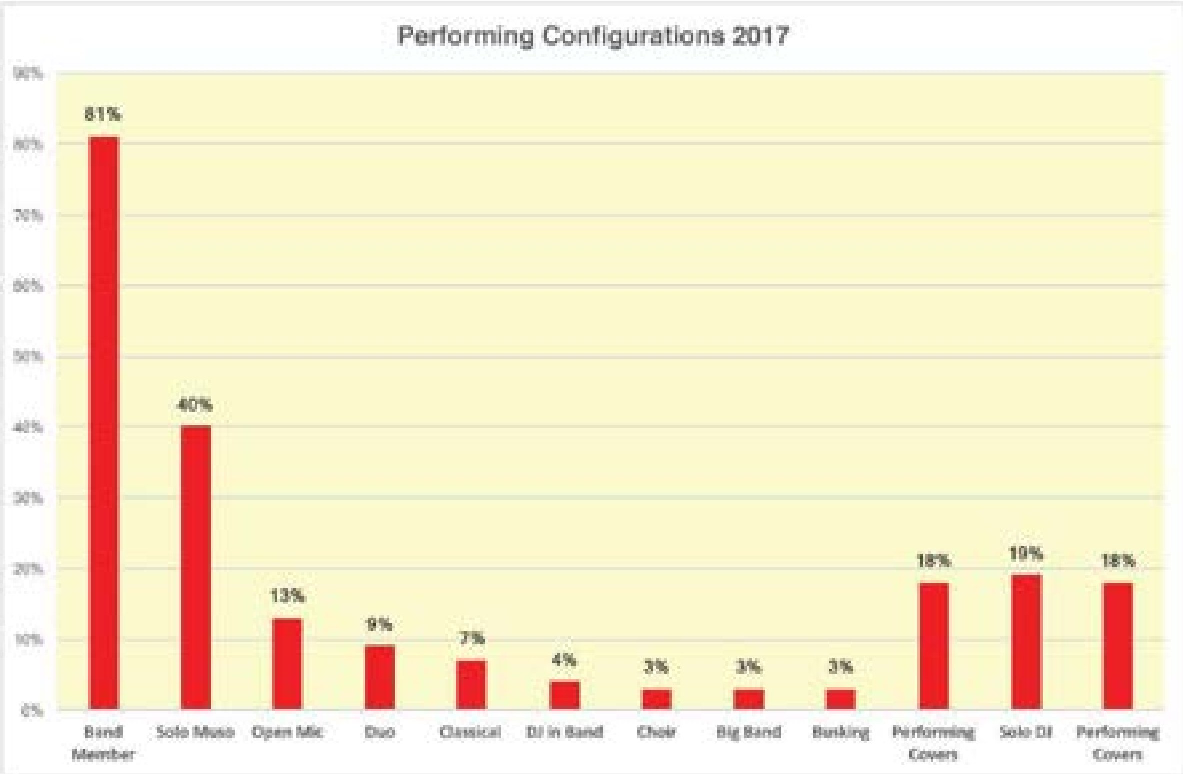


Question 14

As a performing artist, do you regularly perform in/as? (Select all relevant options)

N=491

Figure 7.4



Question 15

What proportion of your live music repertoire is your original music?

N=486

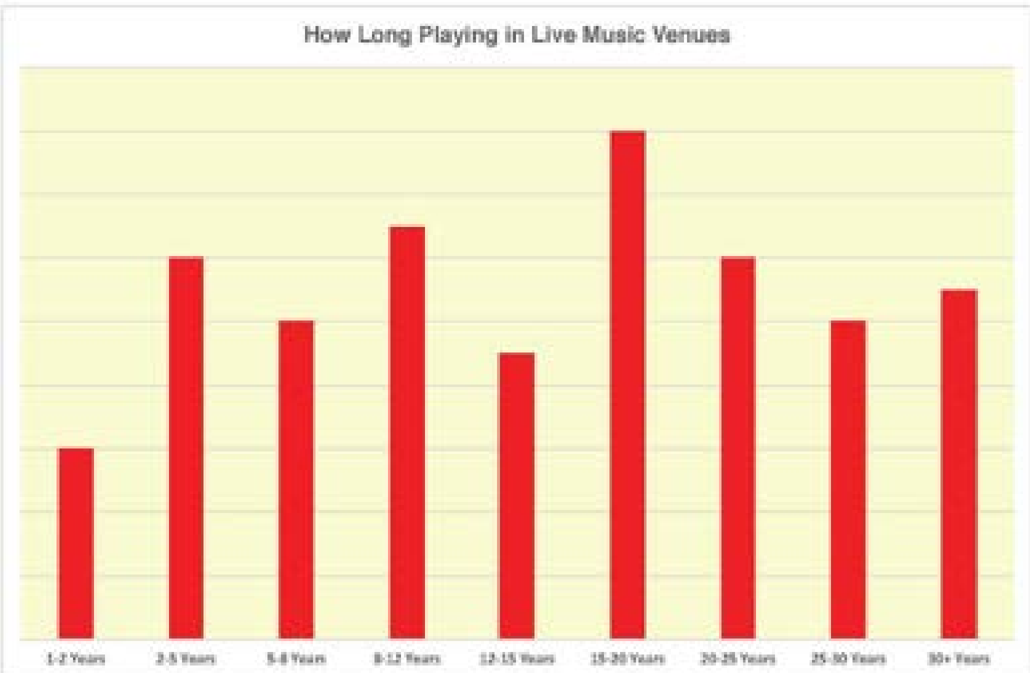
Respondents reported their repertoire included 35% original material.

Question 16

How long have you been performing music in some public capacity (ie. In live music venues)?

N=492

Figure 7.5



Question 17

As a Musician/DJ, have you had formal training?
N=481

As was the case in 2012, private lessons have been the most important instructional component in practitioner training.

Table 7b

	Private Lessons	School/AMEB	TAFE Music	Degree Music
2017	39%	20%	16%	16%
2012	33%	16%	31%	18%

Question 18

On average, what percentage of your week is spent working as a musician/DJ on musical activities?
N=491

The average for all respondents was 47%.

Question 19 & 20

On average, what percentage of your week is spent working as a musician/DJ on musical activities?
N=491

64% of responders answered 'Yes',

If yes, what percentage of your income comes from being a musician/DJ?
N=384
The average response was 39%,

Question 21

Where does your remaining income come from?
N=480

Table 7c

Other Work	Music Industry Work	Govt Benefit	Family Support
66%	23%	8%	5%

Question 22

If you have employment other than music, what is your current occupation or status? (Select all relevant options)
N=459

Table 7d

Full Time Worker	Self Employed	Casual Worker	Part Time Worker	Student	Unemployed	Unable to Work	Retired
30%	28%	23%	22%	11%	3%	2%	2%

Question 23

If being a musician does not contribute to your income, on average does the earnings from being a musician cover the cost associated with your music practise? (eg instrument maintenance, recording costs or any costs associated with performing live)
N=312

69% of respondants said that their music earning does not cover the costs of their music practise.

Question 24

Please specify what percentage of your music-related income comes from the following sources. (Enter number only)
N=447

Given that the majority of our musician/DJ respondents are the 'road warriors' that APRA AMCOS speaks of, it is not surprising that live performance fees are their major income component.

Table 7e

Live Performance	Royalties	Record Sales	Merchandise	Digital Sales	Streaming
63%	16%	9%	4%	6%	2%

Question 25

If you have released commercial recordings, how many of the following?
N=416

The table below shows the average amount of each type of release by each artist who responded.
Table 7f

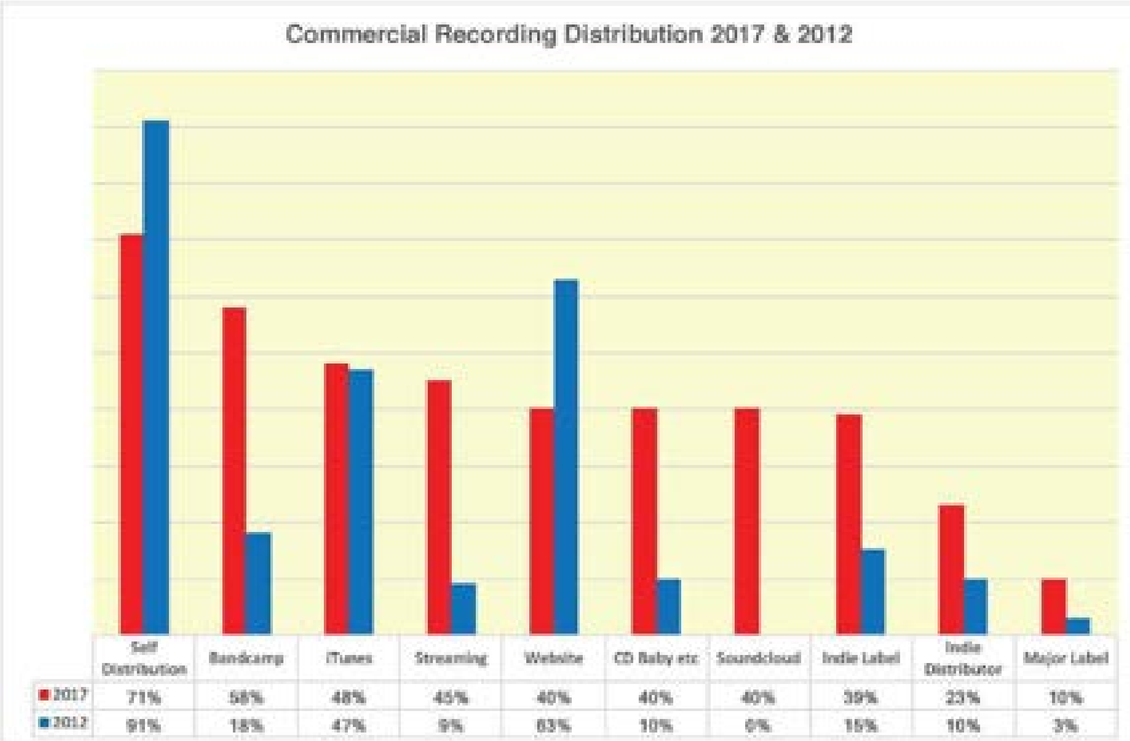
Singles	EP	Albums	MixTape
5	2	5	1

Question 26

If you have released commercial recordings, how did you distribute them? (Select all relevant options).
N=414

Digital distribution has obviously become a much more prominent distribution method since the 2012 Census, with increases across all styles of online distribution but it is also worth noting that Indie labels and distributors have increased as well as a small increase in major labels.

Figure 7.6



Question 27

Did you perform on Census Night (25th November 2017)? If so, please specify what type of venue you performed at.
N=301
Table 7g

Yes	55%				
Bar	Hotel	Music Club	Nightclub	Café/Restaurant	Other
35%	30%	14%	8%	8%	5%

Question 28

Estimate your travel distance to most gigs you play.
N=487

Table 7f

1-5Kms	5-10kms	10-20Kms	20-35Kms	35Kms+
18%	31%	23%	12%	16%

Question 29

What type of transport do you usually use to get to and from gigs you are playing?

N=491

As was the case in 2012, private lessons have been the most important instructional component in practitioner training.

Table 7h

Private Vehicle	Public Transport	Uber	Taxi	Bike	Walk
88%	22%	18%	5%	4%	4%

Question 30

Do you regularly employ any of the following industry practitioners?

N=415

In contrast, 85% of respondents in 2012 were totally self-managed, with no 'team' in place.

Table 7i

Manager	Booking Agent	Publicist	None
30%	37%	28%	52%

Question 31 & 32

On average, how many live gigs do you play per month (in summer & winter)?

N=485

In contrast, 85% of respondents in 2012 were totally self-managed, with no 'team' in place.

Table 7j

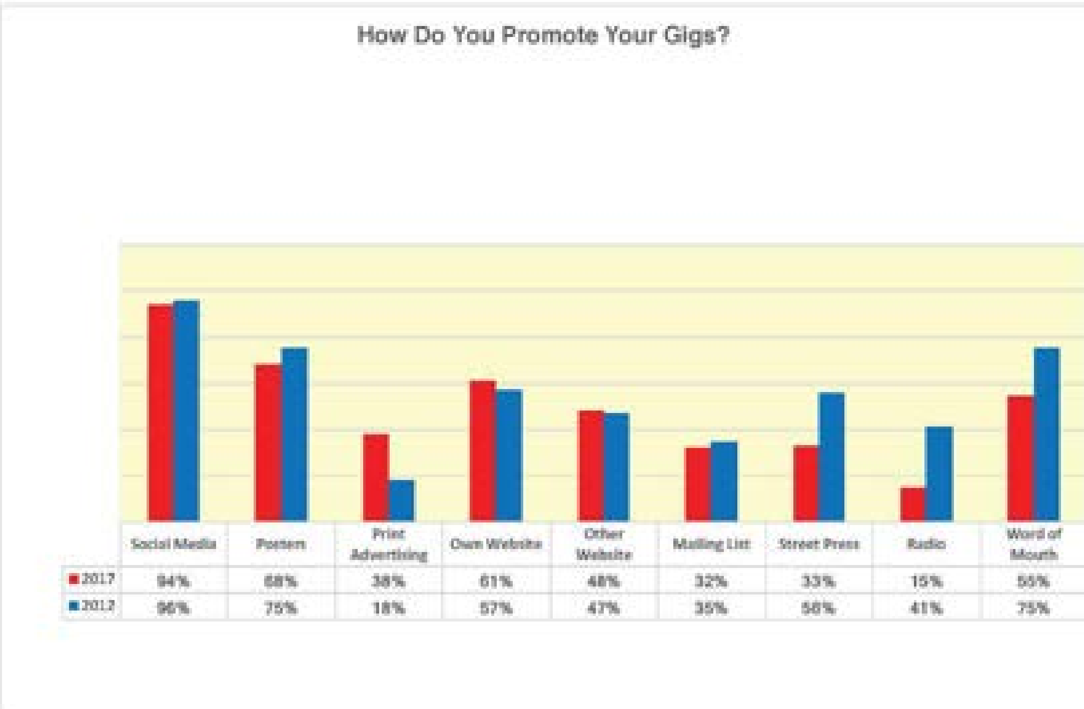
	Summer	Winter
2017	5	3.9
2012	3.5	3

Question 33

How do you promote gigs? (select all that apply)

N=443

Figure 7.7



Question 34
Which promotion method do you find the most successful?
N=443

Table 7k

Social Media	Posters	Mailing List	Other Websites	Own Website
89%	25%	20%	11%	10%

Word of Mouth	Street Press	Print Adverts	Radio
9%	9%	6%	6%

Question 35
Have you ever applied for a grant to contribute to costs associated with being a musician/DJ?
N=487

Although there has only been a modest increase in the number of funding applicants since the last Census, there has been a doubling of the success rate.
This would seem to reflect the facts that the popular music community – traditionally not strongly represented in arts funding rounds, has identified enhanced opportunities in recent years. Also that funding bodies have made concerted, and apparently successful, efforts to provide more information and advice to prospective applicants about grant writing.
Table 7l

	Applied	Not Applied
2017	43%	57%
2012	37%	63%

	Successful	Unsuccessful
2017	42%	58%
2012	20%	80%

Question 36
Are you a member of any of the following?
N=490
Table 7m

	APRA AMCOS	PPCA	Music Victoria	All	None
2017	75%	11%	24%	8%	14%
2012	71%		20%		21%

Question 37 & 38
Do you have an Australian Business Number?
N=481

Are you registered for GST?
N=480
Table 7n

	Have ABN	No ABN
2017	79%	21%
2012	71%	29%

Table 7o

	Registered	Not Registered
2017	24%	76%
2012	29%	71%

Question 39
If you write music with others, have you made an agreement regarding royalties?
N=490
Table 7p

Yes - Verbal	Yes - Written	No	Not Applicable
35%	27%	18%	20%

Question 40

Do you regularly wear hearing protection in any of the following situations?

N=489

Table 7q

Rehearsal	Performing Live	Recording	Do Not Use
32%	26%	5%	48%

Question 41

Has your hearing been affected by music industry participation?

N=489

Considering 46% of respondents reported their hearing as 'affected', it is surprising that 48% in the previous question reported not using any protection in their practice.

Yes - 46%,
No - 22%
Unsure - 32%

Question 42 & 43

Has your physical health been affected by music industry participation?

N=491

Yes - 36%,
No - 42%
Unsure - 22%

If you answered yes, which of the following steps have you taken.

N=304

Table 7r

Self-Managed	Medical Practitioner	No Action
50%	30%	20%

Question 44 & 45

Has your mental health been affected by music industry participation?

N=487

Yes - 42%,
No - 36%
Unsure - 22%

If you answered yes, which of the following steps have you taken.

N=304

Table 7s

Self-Managed	Medical Practitioner	No Action
50%	30%	20%

Question 46

Have you ever felt unsafe or uncomfortable at a music venue where you were performing?

N=488

Table 7t

Yes Often	Yes Occasionally	Yes Rarely	No Never
6%	23%	35%	36%

Question 47

If, so, who made you feel that way?

N=331

Table 7u

Venue Staff	Other Event Staff	Security	Audience Member	Other Performer
13%	5%	17%	62%	3%

As shown in the Audience Survey Findings, the main perpetrators appear to be overwhelmingly the patrons of the live music events.

Question 48

Have these experiences ever caused you to take the following action?
N=251

Table 7w

Leave Early	Report to Venue Staff	Report to Security	Report to Police	Confront Perpetrator
50%	10%	8%	3%	29%

This mirrors the responses of performance attendees as musicians/DJs choose to find their own solutions to issues at venues either by leaving or confronting the perpetrator themselves. Half respondants say that they choose to leave, potentially having effects on their performances or networking opportunties after performances.

Question 49

Which of the following do you believe would help encourage people to attend live music events?
N=477

Table 7x

Better Venue Facilities	Greater Variety Venues	Cheaper Tickets
58%	65%	49%

Later Public Transport	Earlier Event Times	Later Finish Times
55%	46%	9%

Again musicians appear to have similiar concerns to punters with Later Public Transport (53% of attendees) and Better Venue Facilities (50%) being major sources of encouragement. Interestingly Attendees did not appear to be as interested in a greater variety of venues with only a very small group of responders referring to this as an issue in their written responses.

Question 50

What would improve the viability of your live music practice?
N=366

Table 7y

Better Pay	Valuing Music	Better Venue Promo
47%	12%	9%

More Diverse Venues	Financial Support Grants	Support New Artists
9%	12%	12%

Career Assistancve	Parking/Loading	More Aussie Music on Radio
18%	13%	22%

Better Venue Facilities/Backline	Bigger Audiences
8%	10%

Have Your Say
As reflected in the table above, many of the respondents to this question focused on the financial viability (or lack of!) their practice –

"Higher pay for performing musicians. $100 base rate for a 3-hour gig...the same in 2017 as it was in 1977. SERIOUSLY! :-("

However, number of issues elicited a response. Here's a selection –

"I think the key term is ENGAGEMENT and also feeling connected.. I think we need aps that alert people to their favourite style of music and whose playing in that style with like 1-2 days advance.. I also think people need to support original music more.. have fb groups that specifically aim to attend at least 1 gig a month and engage more people in society on the joys of live music. There needs to be a MINIMUM wage for all music performances with focus on ATTENDANCE to be the job of the venue manager and the general community in supporting local live music.. perhaps more live music not pub orientated for the non drinkers.. also venues need proper basic sound systems.. more respect for the work of musicians generally.. take the onus solely off us to BRING AUDIENCES.. most of my time is in self managing and promotion and not focussed enough on writing and producing new material.. need more support from society government and music venues."

"PARKING PERMITS FOR PARKING/LOADING GEAR INTO AND OUT OF VENUES!! Giving parking permits to venues so that they can then pass them onto the musicians who are playing that night, to park and load in and out close to the venue. Many times I've come home poorer than when I left to play at a gig because of parking fines :("

"Living in an alternate universe where the social function of music wasn't annihilated by digitally over-saturated millenials who selfishly recluse from the joys of group dynamics in a physical space"

"The cost of crew takes up most, if not all, of the performance fee for entry level support slots (touring bands pay about $300 to an opener which just covers sound and lighting crew). Self-run shows are generally more profitable for bands as we take a high cut of the ticket sales. Bands need a balance of both (the former for exposure, the latter for injecting profits into the business). If touring bands can pay supports better (or cover crew costs), that would be beneficial."

"Cultural integration of live and original music. Celebration of our present and past artists. Monitoring of grant recipients' performance via surveying of artists that they employ or collaborate with. ie. "what were the working conditions like for you when working with the artist we funded?"

"Cheaper international visas".

"1) Clear venue goals and policies regarding harassment, safety, audio safety etc. 2) Clear hierachies on how to deal with incidents, and venues not relying on promoters to enact policies 3) Greater accessibility of venues including disabled access+bathrooms. "

"Rehearsal rooms cost too much. Practice is to hard to do at home because of complaining neighbours. Also I'm sick of people who live near venues complaining about noise levels & forcing venues to close or pay for expensive treatments."

"More parking closer to venues for performers as carrying lots of gear to and from the car is difficult, and can often be risky if there is lots of gear so multiple trips have to be made and the car is left unattended."

"Educating the greater community to value music and recognise the costs involved."

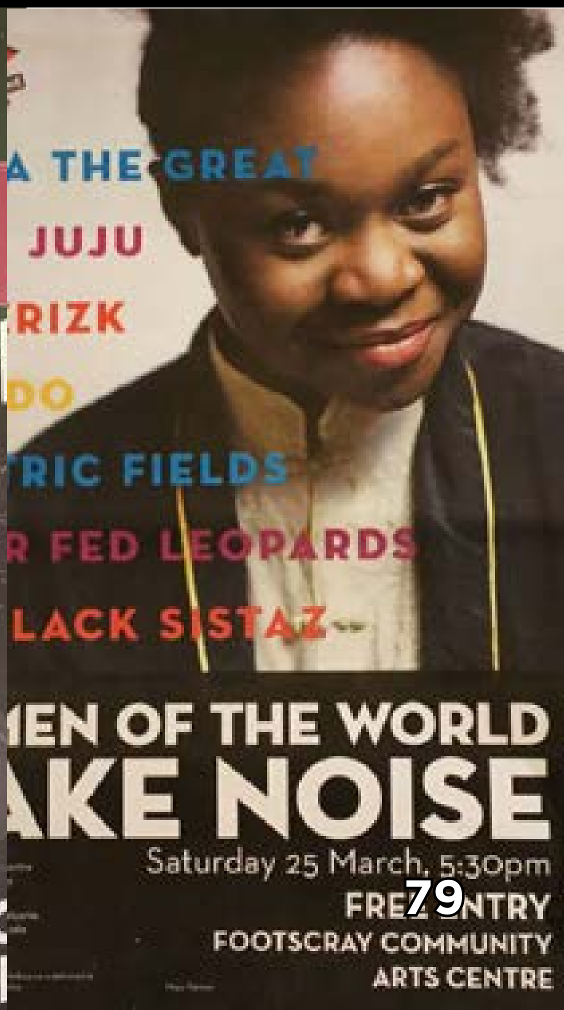
"Funding family friendly venues that allow under 18s. Being a mother this is very restrictive professionally and socially my daughters love a lot of local bands (Kaiit, Adrian Eagle, Sampa, The Harpoons etc etc) and often we cannot attend as a family."

"More group meetings with strong women figures in the music industry to help up and comers. We are stronger

Dobe Newton
April 2018

Musician/DJ Survey Findings title page image courtesy of the Performing Arts Collection, Arts Centre Melbourne

8 Venue Operator Survey Findings



8 Venue Operator Survey Findings

The results presented here primarily represent detailed information from **75** venues who responded to the detailed online survey. However, it has been possible in many instances to combine the findings with those from **200+** observations on Census Night 2017.
Where appropriate/possible, we have compared our findings with data reported in the 2012 Census.
N=285

Question Responses:

Question 1
Answers to question one have been omitted as they identify the venues who had completed the survey.

Question 2
Type of venue?
The sample covered the range of live music venues in Greater Melbourne, but particularly those in the active CBD and music precinct areas.

Table 8a

Hotel/Pub	Bar/Lounge	Nightclub	Café/Rest	Concert Venue	Other
28%	38%	12%	9%	10%	3%

Question 3 & 4
Location of venue.

Table 8b

CBD	Inner Melb	Outer Melb	Regional
21%	61%	15%	3%

Table 8c

Municipality Melbourne	Fitzroy/Collingwood	Brunswick/Coburg	Northcote/Thornbury
26%	24%	13%	9%

Richmond/Hawthorn	St Kilda/Elsternwick Etc	Prahran/South Yarra	Other
7%	11%	8%	2%

Question 5
Number of years operating as a live music venue.
25% of venues that responded have been 'born' (or re-purposed) since the 2012 Census.

Table 8d

Less Than a Year	1-3 Years	4-6 Years	7-10 Years	10+ Years
0%	19%	12%	13%	56%

Question 6
How many spaces/rooms do you have for live performances?

Table 8e

1 Space	2 Spaces	3 Spaces
56%	26%	18%

Question 7
How many patrons were present in these live spaces/rooms on Census Night (Saturday 25th November)?
The average reported patron numbers across the range of respondents for the night was –

Table 8f

Space 1	Space 2	Space 3
194	268	75

Question 8, 9, 10 & 11

Estimate the number of patrons in each live music space/room on each of –
The average number of patrons across the range was:

A weeknight (Mon-Thur)

Table 8g

Space 1	Space 2	Space 3
120	127	57
11% - None	65% - None	75% - None

Friday

Table 8h

Space 1	Space 2	Space 3
175	128	73
4% - None	48% - None	70% - None

Saturday

Table 8i

Space 1	Space 2	Space 3
207	132	74
4% - None	43% - None	62% - None

Sunday

Table 8j

Space 1	Space 2	Space 3
128	68	58
18% - None	70% - None	80% - None

Question 12

What percentage of your live performances are – free, paid entry, private function.
94% of venues have free shows, 80% have paid shows and 10% host private functions.
Across all respondents the average was –

Free - 45%
Paid - 48%
Private Functions 7%

Question 13

When your venue has live music does it effect the revenue from food and beverage sales?

Table 8k

Increase Significantly	Increase Marginally	Same	Decrease Significantly	Decrease Marginally
42%	31%	21%	0%	6%

Question 14

Does your venue have a dedicated booking agent/s? If yes, how many?

Table 8l

No	Yes - 1	Yes - 2-3	Yes 4-6
20%	53%	25%	2%

Question 15

How many employees were working on Saturday 25th November? (including door, sound, security, Food & Beverage staff).
As Census Night was a Saturday, see chart below (Questions 17 & 18)

Question 16

What kind of staff does your venue employ? (select all that apply)

Table 8m

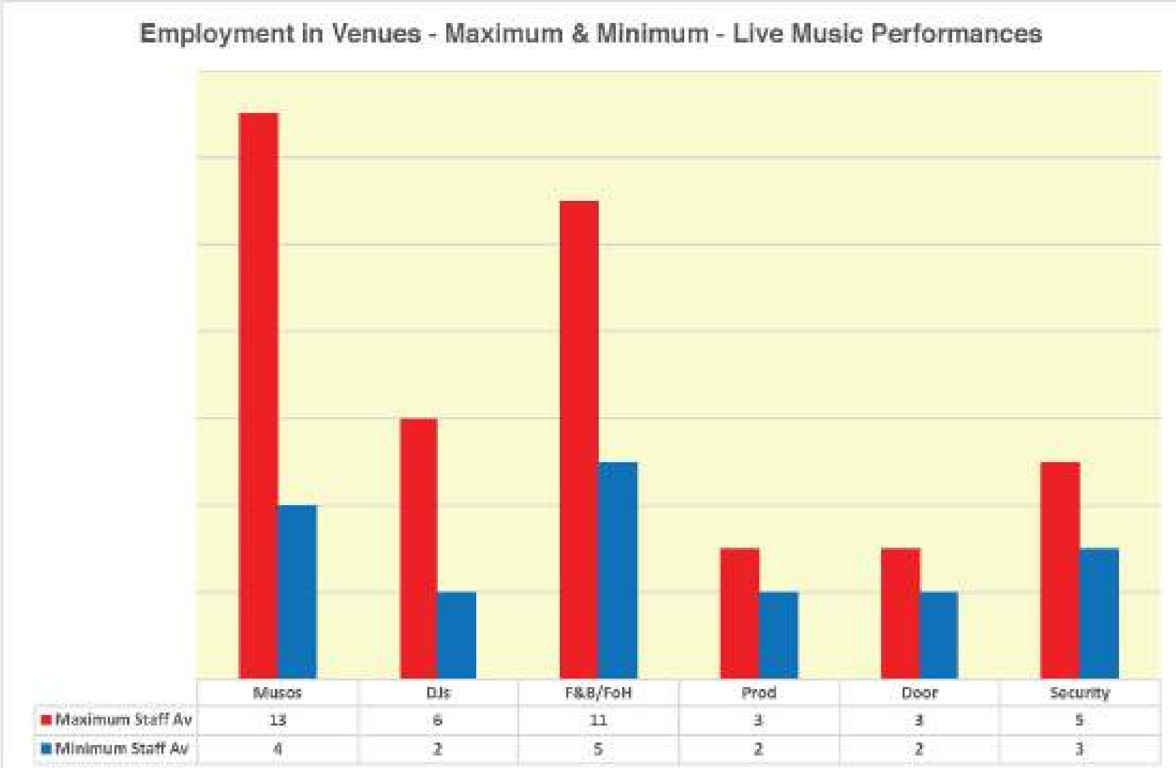
Full Time	Part Time	Casual	Short Contract
65%	51%	92%	23%

Question 17 & 18

What is the MINIMUM number of staff you might employ per live music event?
What is the MAXIMUM number of staff you might employ per live music event?

The averages across all respondents were –

Figure 8.1



In terms of the percentage of venues who employ the various categories of workers on minimum and maximum for live music events –

Table 8n

	Musos	DJs	F&B/FoH	Production	Door	Security
Minimum Event - No. Venues	70%	67%	98%	45%	44%	56%
Maximum Event - No. Venues	78%	73%	98%	83%	80%	88%

Question 19

Does your venue have an in-house sound system suitable for your live music needs?

Yes - 92%
No - 8%

Question 20

Does your venue do any of the following?

Table 8o

	Employ in-house Sound Engineer	Employ Freelance Sound Eng	Musos/DJs supply PA
Yes	55%	81%	14%
No	45%	19%	86%

Question 21

If your venue employs sound engineers on an ongoing basis, how many do you have on your roster?

Across all respondents, the average number of sound engineers on the roster was 3.

Question 22
How many nights per week do you offer live music?

Table 8p

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
31%	37%	49%	63%	89%	93%	68%

7 Days	6 Days	5 Days	4 Days	3 Days	2 Days
7%	10%	12%	16%	24%	32%

Question 23
What percentage of gigs have a door/ticket charge?

On average, across all respondents, 51% of gigs had a door/entry charge.

Question 24
If your venue does have a door charge for gigs, please list the average price for the following.

Monday-Thursday - $10
Friday - $19
Saturday - $19
Sunday - $13

Question 25
What sort of live music does the venue USUALLY offer? (select all that apply)

Table 8r

Rock	Funk/Soul	Blues	Jazz
55%	47%	47%	46%

Folk/Roots	Pop	RnB	Elec - Non Dance
45%	42%	41%	41%

Rap/Hip Hop	Dance/Elec	Country	Punk/Hardcore
37%	34%	35%	34%

World	Reggae/Ska	Metal	Indigenous Aust	Classical
34%	31%	23%	8%	8%

Question 26
Can you estimate what percentage of live music in your venue is presented by –

Table 8s

Solo/Duo - Originals	Solo/Duo - Covers	Bands - Original
17%	16%	54%

Bands - Covers	DJs - Featured	DJs - Background
15%	30%	17%

Question 27
What percentage of the live music is played by bands/musicians or DJs?

Table 8t

Solo/Duo - Originals	Solo/Duo - Covers	Bands - Original
17%	16%	54%

Bands - Covers	DJs - Featured	DJs - Background
15%	30%	17%

Question 28
If your live music events have a door charge, does the venue take a percentage of the door?

Yes - 36%
No - 40%
Sometimes - 24%

Question 29
Does your venue offer a fixed fee (guarantee) for musicians/DJs to perform?

Yes - 57%
No - 20%
Sometimes - 23%

Question 30
How does your venue promote live music events?

Table 8u

Social Media	Posters	Print Advertising	Own Website
99%	93%	48%	89%
Mailing List	Radio	Street Press Gig Guide	External Website
61%	18%	40%	63%

Question 31
Which promotion method do you find most successful?

Table 8v

Social Media	Posters	Print Advertising	Own Website
89%	35%	6%	26%
Mailing List	Radio	Gig Guide	External Website
24%	17%	25%	7%

Question 32
Are you aware of the Good Neighbours grant program to assist venues with sound amelioration?

Aware & have applied - 28%
Aware but have not applied - 37%
Sometimes - 35%

Question 33
Which of the following does your venue have?

Table 8w

Website	Facebook Page	Instagram	Twitter
93%	97%	91%	45%

Question 34
Does your venue have an environmental sustainability plan?

Yes - 49%
No - 51%

Question 35
Are any of your live music rooms/spaces fully accessible to patrons with decreased mobility?

Yes - 64%
No - 36%

Question 36
Does your venue supply hearing protection to any of the following?

Patrons - 19%
Staff - 44%
Do Not Supply - 37%

Question 36
What is the average age range of your venue attendees? (select all that apply)

Table 8x

18 to 24	25 to 35	35 to 45	45 to 55	55 to 65	65+
47%	81%	52%	33%	22%	11%

Question 37
What is the average age range of your venue attendees? (select all that apply)

Table 8y

18 to 24	25 to 35	35 to 45	45 to 55	55 to 65	65+
47%	81%	52%	33%	22%	11%

Question 38
Does your venue hold events that are specifically LGBTIQA+ friendly?

Table 8z

Yes Often	Yes Occasionally	Yes Rarely	No
32%	31%	11%	27%

Question 39
Does your venue have all-gender bathrooms?

Yes - 44%
No - 29%
Can be designated as such for special events - 27%

Question 40
Does your venue hold all-ages events?

Table 8aa

Yes Often	Yes Occasionally	Yes Rarely	No
22%	12%	23%	43%

Question 41
Do you have a formal policy/strategy based on providing a safe and respectful environment for workers and patrons?

Yes - 77%
No - 23%

Question 42
Are all your staff trained in dealing with sexual harassment or assaults?

Table 8ab

Yes All Staff in houseTrained	No Only Security Trained by Us	No
49%	4%	15%

No only staff employed by us	No Only security trained by agency	Unsure
15%	7%	15%

Question 43
Overall, in the last 12 months, have the number of live music events you present –

Table 8ab

Increased	Decreased	The Same
47%	12%	41%

Question 44
Overall, in the last 12 months, has your audience for live music events –

Table 8ac

Increased	Decreased	The Same
55%	16%	29%

Question 45
Has your venue been negatively affected by any of the following? (Select all that apply)

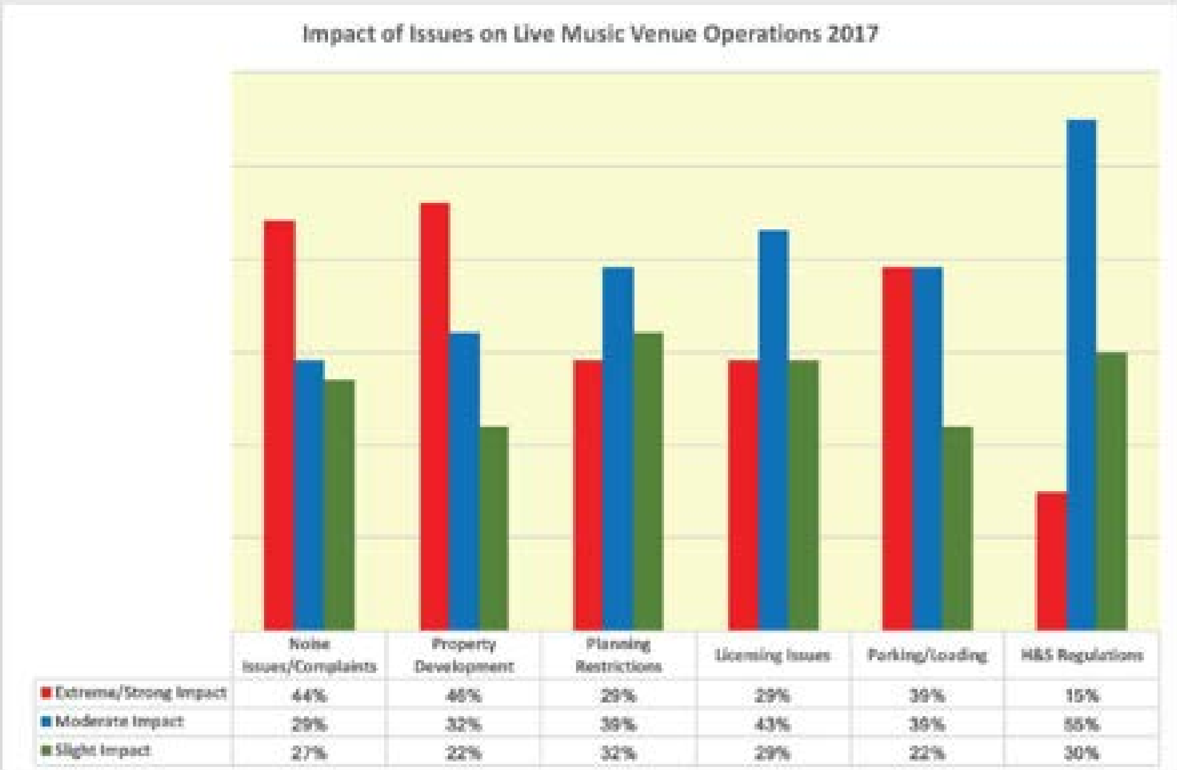
Table 8ad

Noise Restrictions	Planning Restrictions	Health & Safety Requirements
67%	34%	21%

Licensing Issues	Parking/Loading	Property Development
33%	41%	47%

Question 46
Has your venue been negatively affected by any of the following? (Select all that apply)

Figure 8.1



Question 47
Can you suggest any solutions/steps to address issues that impact negatively on your ability/willingness to host more live music events?

"Adherance to Clause 52.43. At the moment this law is untested - we are under threat from property developers. Council seem unwilling to enforce the law and keep referring to VCAT. Our legal fees to try to enforce the law are HUGE and are threatening our commercial viability and live music in general."

"We have no loading zone and local council has refused to allow artists to use the loading bay unless vehicles are marked as courier."

"Less proscriptive rules and a shift to management plans. Example latest rules around smoking outside has just resulted effectively in a food ban."

"We don't have a licence to sell alcohol, we sometimes supply alcohol at no charge to patrons. If we could get an easy and inexpensive licence we could sell the alcohol and make back some of the cost of running the show."

"Stop developers from owning all inner city councils! Create zones that allow live music till 1am automatically and late night trading."

"Some regulations enforced by bodies such as local council and the VCGLR (Victorian Commission for Gambling & Liquor Regulation) are unreasonable for our space. The prohibitively excessive fees and lack of assistive engagement from such parties make the pursuit of compliance focused improvements unviable. An assigned application manager for the duration of any one application for example would be a real improvement, rather than continual engagement with a new employees with no knowledge of the history of any application. Given the rates/fees/fines which gouge venues it seems like we should receive better services and support from regulating bodies."

"Having a good working relationship with neighbours. We do a 6 monthly letter box drop to let neighbours know our policies and to reach out if they have any concerns or issues."

"Better understanding for compliance offers of the positive benefits that nightclubs and live music venues make to the community. Better planning oversight for developments that have an effect on the local businesses. More even playing field for commercial premises in relation to encroaching residential uses."

"We are currently in the process of trying to vary our liquor license to better reflect what we would like to do with live music. If this license is approved it will greatly help lift some pretty heavy restrictions. We need legal help to deal with a complaining neighbour who is negatively impacting the health & livelihood of the business, patrons & staff alike. This is easily the most stressful issue we've ever dealt with."

"Unreasonable demands to have traffic management at a venue that regularly hosts larger non-music events other than ours. Because we are labelled as a music festival we are automatically told to engage expensive traffic plans. Lack of support all round - from sponsorship to small business advice (boy would it help to have book keepers /accountants who specialise in events - rather than explaining to your book keeper who Brian Cadd is and that yes he is GST registered! Lastly - misogynists and egos."

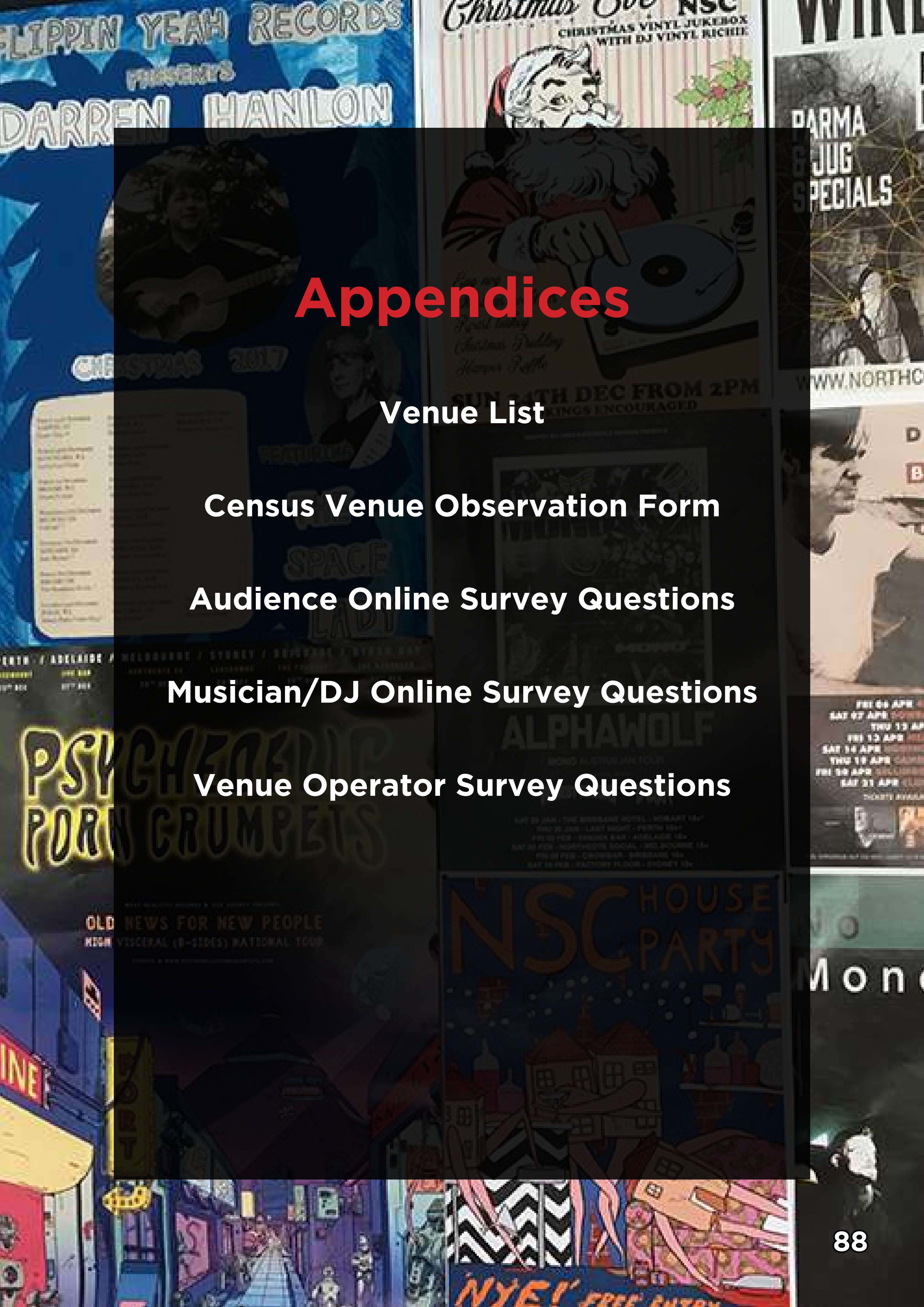
Conclusion

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.



Appendices

Venue List

Census Venue Observation Form

Audience Online Survey Questions

Musician/DJ Online Survey Questions

Venue Operator Survey Questions

CBD & Melbourne Municipality Venues

170 Russell St/Billboard	170 Russell Street	Melbourne
401 The Order	401 Swanston Street	Melbourne
420 Bar	420 Lonsdale Street	Melbourne
Amber Lounge	388 Lonsdale Street	Melbourne
Asian Bier Café	Lvl 3 211 LaTrobe St	Melbourne
Bambu Bar & Lounge	10 Flinders Lane	Melbourne
Bang! (Royal Melb Hotel)	621-629 Bourke Street	Melbourne
Baroq House	9-13 Drewery Lane	Melbourne
Bass Lounge	91-103 Little Bourke Street	Melbourne
Bear Brass	Shop 3GA Southgate	Southbank
Belleville	Globe Alley	Melbourne
Bennetts Lane	25 Bennetts Lane	Melbourne
Bird's Basement	11 Singers Lane	Melbourne
Black Rabbit	85 Queen Street	Melbourne
Blue Diamond	15/123 Queen St	Melbourne
Bond Lounge	24 Bond Street	Melbourne
Boney	68 Little Collins Street	Melbourne
Boss Karaoke Bar	195 Lt Bourke Streert	Melbourne
Bottom End	579 Lt Collins Street	Melbourne
Brown Alley	cnr King & Lonsdale Streets	Melbourne
Butterfly Club	Carson Place	Melbourne
Carlton Club	193 Bourke Street	Melbourne
Central Lion Hotel	3/211 LaTrobe Street	Melbourne
Chaise Lounge	105 Queen Street	Melbourne
Charlies Bar	Basement 71 Hardware Lane	Melbourne
Cherry Bar	AC/DC Lane	Melbourne
Clique	26 King Street	Melbourne
Club Retro @ Niagara	383 Lonsdale Street	Melbourne
Colonial Hotel (Next)	585 Lonsdale Street	Melbourne
Comedy Theatre	240 Exhibition Street	Melbourne
Cookie	252 Swanston St	Melbourne
Coopers Inn	282 Exhibition Street	Melbourne
CQ Bar	113 Queen Street	Melbourne
Crafty Squire	115/127 Russel Street	Melbourne
Croft Institute	21 Croft Alley	Melbourne
Curtin House Rooftop Bar	7/252 Swanston St	Melbourne
Ding Dong Lounge	18 Market Lane	Melbourne
Eden Bar	163 Russell Street	Melbourne
El Coco	120 King Street	Melbourne
Element Lounge	85 Queen Street	Melbourne
Elephant & Wheelbarrow	94-96 Bourke Street	Melbourne
Emerald Peacock	233 Lonsdale Street	Melbourne
Equinox	Cnr Lt Lonsdale & Elizabeth Sts	Melbourne
European Bier Café	120 Exhibition Street	Melbourne
Exford Hotel	199 Russell Street	Melbourne
Fabrique Bar	272 City Road	Melbourne
Fad Gallery	14 Corrs Lane	Melbourne
Fathers Office	249 Lt Lonsdale Street	Melbourne
Ferdydurke	Lvl1, 239 Lonsdale Street	Melbourne

Fiftyfive	55 Elizabeth Street	Melbourne
Fortyfive Downstairs	45 Flinders Lane	Melbourne
Galley Room	Lvl 1, 510 Flinders Street	Melbourne
Geddes Lounge	Geddes Lane	Melbourne
Gin Palace	10 Russell Street	Melbourne
GoGo Bar	256 Flinders Lane	Melbourne
Golden Monkey	389 Lonsdale Street	Melbourne
Hidden Forest	229 Queensberry St	Melbourne
Highlander Bar	11A Highlander Lane	Melbourne
Horse Bazaar	397 Little Lonsdale St	Melbourne
House of Maximom	16 Corrs Lane	Melbourne
Hugs and Kisses	22 Sutherland Street	Melbourne
Hush Bar	Lvl 3 Melbourne Central	Melbourne
Inflation	60 King Street	Melbourne
Irish Times	427 Little Collins St	Melbourne
K Bar -Khokolat Bar	43 Hardware Lane	Melbourne
Key Club	117 Lonsdale Street	Melbourne
Korova Milk Bar	12 Bourke Street	Melbourne
La Di Da	577 Little Bourke Street	Melbourne
Little Red Pocket	422 Little Collins Street	Melbourne
Loop Bar	23 Meyers Place	Melbourne
Lounge Upstairs	243 Swanston Street	Melbourne
Lui Bar	55/525 Collins Street	Melbourne
Lustre Bar	1/252 Flinders Lane	Melbourne
Marrakech	25 Bank Place	Melbourne
Max Bar	54-58 Hardware Lane	Melbourne
Max Watts (Previously 'The Hi-Fi')	125 Swanston Street	Melbourne
Melbourne Central Lion Hotel	Level 3, 211 La Trobe Street	Melbourne
Ms Collins	425 Collins Street	Melbourne
Murmur	1/17 Warburton Lane	Melbourne
New Guernica	318-322 Lt Collins Street	Melbourne
Nomads All Nations Bar	2 Spencer Street	Melbourne
Ormond Hall	557 St Kilda Road	Melbourne
Paris Cat Jazz Club	6 Goldie Place	Melbourne
Penthouse 15	123 Queen Street	Melbourne
Platform One	7 & 8 Banana Alley	Melbourne
Pole Pole Bar	1/267 Little Collins Street	Melbourne
Pulp	18 Corrs Lane	Melbourne
Randy Dragon	313 Flinders Lane	Melbourne
Redlove	401 Swanston Street	Melbourne
Royal Melbourne Hotel (Bang)	629 Bourke Street	Melbourne
Section 8 Bar	27-29 Tattersalls Lane	Melbourne
Speakeasy HQ	522 Flinders Street	Melbourne
Spice Market	Beaney Lane	Melbourne
Sub Club	Flinders Court	Melbourne
Sweatshop Bar (Seamstress)	113 Lonsdale Street	Melbourne
The Apartment	401 Little Bourke Street	Melbourne
The Bottom End (Anyway)	579 Little Collins St	Melbourne
The Carlton	193 Bourke St	Melbourne
The Commune (Mr. Tod Cafe)	2 Parliament Pl	Melbourne

The Toff in Town	2nd Floor, 252 Swanston Street	Melbourne
The Workshop Bar	1/413 Elizabeth Street	Melbourne
Tramp	20 King Street	Melbourne
Transit Roof Top Bar	Lvl 2, Federation Square	Melbourne
Transport Hotel	Ground Floor, Flinders St & Swanston St	Melbourne
Trapt	377 Lonsdale Street	Melbourne
Trill	25 Bank Place	Melbourne
Troika Bar	85 Little Collins Street	Melbourne
Troika Bar	106 Little Lonsdale St	Melbourne
Turf Sports Bar	131 Queen St	Melbourne
Tuxedo Cat	293 LaTrobe Street	Melbourne
Two Floors Up	189 Lonsdale St	Melbourne
U Bar	2 Spencer Street	Melbourne
Union Electric	13 Hefferman Lane	Melbourne
Vamos	37 Little Bourke St	Melbourne
Velvet Underground	167 Franklin St	Melbourne
Victoria Hotel	215 Little Collins Street	Melbourne
Waterside Hotel	508 Flinders Street	Melbourne
Wharf Hotel	18-38 Siddeley Street	Docklands
Whitehart Bar	22 Whitehart Lane, Melbourne	Melbourne
Young & Jackson	1 Flinders St, Melbourne	Melbourne

DOCKLANDS

Alumbra	Shed 9, Central Pier, 161 Harbour Esplanade	Docklands
Watermark	9/800 Bourke Street	Docklands
Woolshed Pub	North Wharf Road	Docklands

SOUTHBANK

Arts Centre - Fairfax Studio	St Kilda Road	Melbourne
Belgian Beer Café (Eureka)	557 St Kilda Road	Melbourne
Club 23 (at Crown)	8 Whiteman Street	Southbank
Electric Dreams at Co. (at Crown)	8 Whiteman Street	Southbank
Gasolina	25 Dukes Walk	Southbank
Groove Live Bar & Terrace (at Crown)	8 Whiteman Street	Southbank
Left Bank	1 Southbank Blvde	Southbank
Melbourne Public	11 Dukes Walk	Southbank
Munich Brauhaus	45 Sth Wharf Promenade	Southbank
Palms At Crown	8 Whiteman Street	Southbank
PJ O'Briens	Southgate Melbourne	Southbank
Soho Restaurant and Bar	2/4 Riverside Quay	Southbank
Studio 3 (Crown)	8 Whiteman Street	Southbank
Testing Grounds	1 City Road	Southbank
Therapy Nightclub (Crown)	8 Whiteman Street	Southbank
Xe54	334/344 City Rd	Southbank

NORTH MELBOURNE

Club Voltaire	14 Raglan Street	North Melbourne
Leveson	46 Leveson Street	North Melbourne
The Drunken Poet	65 Peel Street	West Melbourne
The Last Chance Rock & Roll Bar	238 Victoria Street	North Melbourne
Town Hall Hotel	33 Errol Street	North Melbourne
Victoria Hotel	312 Victoria Street	North Melbourne

CARLTON

Beaufort Hotel	421 Rathdowne Street	Carlton
Bella Union	Cnr Victoria & Lygon Streets	Carlton
Carlton Yacht Club	298 Lygon St	Carlton
Clyde Hotel	385 Cardigan Street	Carlton
Dan O'Connell Hotel	225 Canning Street	Carlton
Shaw Davey Slum	171 Elgin Street	Carlton
Sippers	164 Rathdowne Street	Carlton
The Clyde Hotel	385 Cardigan Street	Carlton
The Curtin	29 Lygon Street	Carlton
Music Precinct Venues **COLLINGWOOD/FITZROY**		
Acoustic Cafe	187 Johnston Street	Collingwood
Alchemist Bar & Cafe	361 Brunswick Street	Fitzroy
Aviary Hotel	271 Victoria Street	Abbotsford
Bar Open	317 Brunswick Street	Fitzroy
Baxters Lot	302 Brunswick Street	Fitzroy
Bendigo Hotel	125 Johnston Street	collingwood
Bimbo Deluxe	376 Brunswick Street	Fitzroy
Black Cat	252 Brunswick Street	Fitzroy
Boite World Music Café	1 Mark Street	fitzroy north
Catfish	30 Gertrude Street	Fitzroy
Copa Cabana	139 Smith Street	Fitzroy
Cruzao Arepa Bar	365 Brunswick Street	Fitzroy
Empress of India Hotel	714 Nicholson Street	Fitzroy North
Evelyn Hotel	351 Brunswick Street	Fitzroy
Fox Hotel	351 Wellington Street	collingwood
Gasometer Hotel	484 Smith Street	Collingwood
Gem Bar	289 Wellington Street	Collingwood
Glamorama	393 Brunswick Street	fitzroy
Grace Darling Hotel	114 Smith Street	Collingwood
Greenwood Loft	Level 1, 247 Gertrude Street	Fitzroy
Grumpy's Green	125 Smith Street	Fitzroy
Horn of Africa	20 Johnston Street	collingwood
Kanela Bar & Rest	56 Johnston Street	Fitzroy
La Niche	67 Smith Street	Fitzroy
Labour In Vain	197A Brunswick Street	Fitzroy
Laundry	50 Johnston Street	fitzroy
Lot 347	347 Smith Street	fitzroy
Mr Boogie Man Bar	160 Hoddle Street	Abbotsford
Mr Scruffs	60 Smith Street	collingwood
Night Cat	141 Johnston Street	fitzroy
Old Bar	74-76 Johnston Street	fitzroy
Peel Hotel	113 Wellington Street	collingwood
Perserverance Hotel	196 Brunswick Street	Fitzroy
Provincial Hotel	299 Brunswick Street	Fitzroy
Railway Hotel	800 Nicholson Street	fitzroy north
Rainbow Hotel	27 St David Street	fitzroy
Rochester Castle Hotel	202 Johnston Street	Fitzroy
Royal Derby Hotel	446 Brunswick Street	Fitzroy
Royal Oak Hotel	442 Nicholson Street	fitzroy north

Some Velvet Morning	123 Queens Parade	Clifton Hill
Standard Hotel	293 Fitzroy Street	Fitzroy
Standard Hotel	293 Fitzroy Street	fitzroy
The Fitzroy Pinnacle	251-255 St Georges Road	Fitzroy North
The Rooks Return	201 Brunswick Street	fitzroy
Tote Hotel	71 Johnson Street	collingwood
Tramway Hotel	165 Rae Street	fitzroy north
Union Club Hotel	164 Gore Street	fitzroy
Uptown Jazz Cafe	1/177 Brunswick Street	Fitzroy
Woody's Bar	64 Smith Street	Collingwood
Workers Club	51 Brunswick Street	fitzroy
Yah Yahs	99 Smith Street	Fitzroy
Yarra Hotel	295 Johnston Street	collingwood
Yarra Hotel Abbotsford	295 Johnston Street	Abbotsford
BRUNSWICK/COBURG		
Bar Oussou	653 Sydney Road	Brunswick
Beach of Brunswick	303 Sydney Rd	Brunswick
Brunswick Green	313 Sydney Road	Brunswick
Brunswick Hotel	140 Sydney Road	Brunswick
Charles Weston Hotel	27 Weston St	Brunswick
Compass Pizza	319 Lygon Street	Brunswick
Cornish Arms	163A Sydney Road	Brunswick
Edinburgh Castle	681 Sydney Road	Brunswick
Howler	4-11 Dawson Street	Brunswick
Lomond Hotel	225 Nicholson St	Brunswick East
My Aeon	791 Sydney Road	Brunswick
Penny Black	420 Sydney Road	Brunswick
Post Office Hotel	229 Sydney Road	Coburg
Railway Hotel Brunswick	291 Albert Street	Brunswick
Retreat Hotel	280 Sydney Road	Brunswick
Rubix Warehouse	36 Pheonix Street	Brunswick
Shim Sham	133 Sydney Road	Brunswick
Spotted Mallard	314 Sydney Road	Brunswick
The B.East	80 Lygon Street	Brunswick East
The Charles Weston Hotel	27 Weston Street	Brunswick
The Moldy Fig	120-122 Lygon St	Brunswick East
Union Hotel	109 Union Street	Brunswick
Victoria Hotel	380 Victoria Street	Brunswick
Victoria Hotel	380 Victoria St	Brunswick
Whole Lotta Love	524 Lygon Street	East Brunswick

NORTHCOTE/THORNBURY

24 Moons	2 Arthurton Road	Northcote
Bar 303	303 High Street	Northcote
Barton Fink	816 High Street	Thornbury
Cramer’s Hotel	1 Cramer Street	Preston
Croxton Hotel	607 High Street	Thornbury
Croxton Hotel (Front Bar)	607 High Street	Thornbury
Farouk’s Olive	711 High Street	Thornbury
Francesca’s Bar	222 High Street	Northcote
Northcote Social Club	301 High Street	Northcote

Open Studio	204 High Street	Northcote
Peacock Inn	210 High Street	Northcote
Purple Emerald	349 High Street	Northcote
Sash Bar	111 High Street	Northcote
Stolberg Beer Cafe	197 Plenty Road	Preston
Tago Mago	744 High Street	Thornbury
The Thornbury Local	635 High Street	Thornbury
Thornbury Local	635 High Street	Northcote
Thornbury Theatre	859 High Street	Thornbury
Wesley Anne	250 High Street	Northcote
RICHMOND/HAWTHORN		
Auburn Hotel	85 Auburn Rd.	Hawthorn
Bar 9T4	94 Swan Street	Richmond
Bridge Hotel	642 Bridge Road	Richmond
Central Club Hotel	293 Swan Street	Richmond
Cheers	660A Glenferrie Rd,	Hawthorn
Corner Hotel	57 Swan Street	Richmond
Dizzy's Jazz Club	368 Bridge Rd,	Richmond
Glenferrie Hotel	324 Burwood Rd.	Hawthorn
Great Britain Hotel	447 Church Street	Richmond
Great Britain Hotel	447 church street	Richmond
Holy Moly	660A Glenferrie Rd	Hawthorn
Lido Jazz Room	675 Glenferrie Road	Hawthorn
Precinct Hotel	60 Swan Street	Richmond
Richmond Club Hotel	100 Swan Street	Richmond
Room 680	Level 1, 680 Glenferrie Road	Hawthorn
Station 59	59 Church Street	Richmond
Swan Hotel	425 Church Street	Richmond
The Hawthorn Hotel	481 Burwood Road	Hawthorn
Untz Untz	660A Glenferrie Rd	Hawthorn
SOUTH YARRA/PRAHRAN		
56 Bricks	56 Chapel Street	Windsor
Bess Bar	427 Chapel Street	South Yarra
Blue Bar	330 Chapel Street	Prahran
Boutique	134 Greville Street	Prahran
Bridie O'Reillys	462 Chapel Street	South Yarra
Chapel Off Chapel	12 Little Chapel Street	Prahran
Chasers	386 Chapel Street	South Yarra
Circus Bar	199 Commercial Road	South Yarra
College Lawn Hotel	36 Greville Street	Prahran
College Lawn Hotel	36 Greville Street	Prahran
Hoo Haa Bar	105 Chapel Street	Prahran
Imperial	522 Chapel Street	South Yarra
Jacksons Lounge Bar	8 Jackson Street	Toorak
Killing Time Garden Bar	11 Chapel Street	Prahran
Less Than Zero	153 Commercial Road	South Yarra
Love Machine	Little Chapel Street	Prahran
Lucky Coq	179 Chapel Street	Prahran
Lux	373 Chapel Street	South Yarra
Marmalade Carpe Diem Bar	194 Commercial Road	Prahran

Mount Erica Hotel	420 High St	Prahran
One Six One	161 High Street	Prahran
Pawn & Co	177 Greville Street	Prahran
Revolver Upstairs	229 Chapel Street	Prahran
Sister of Society	254 Chapel Street	Prahran
Social Bar	116 Chapel Street	Prahran
Somewhere Bar	181 Chapel Street	Prahran
Temperance Hotel	426 Chapel Street	South Yarra
The Emerson	143 Commercial Road	South Yarra
Trak Lounge Bar	445 Toorak Road	Toorak
Union Hotel	90 Chapel Street	Windsor

ST KILDA AREA

29th Apartment	3/29 Fitzroy Street	St Kilda
Antique Bar	218 Glen Huntly Road	Elsternwick
Balaclava Hotel	123 Carlisle Street	St Kilda East
Barney Allens	14 Fitzroy Street	St Kilda
Big Mouth	168 Acland Street	St Kilda
Captain Baxter	10-18 Jacka Bvld	St Kilda
Claypots	213 Barkly Street	St Kilda
Cushion Lounge	99 Fitzroy Street	St Kilda
Dog's Bar	54 Acland Street	St Kilda
Elsternwick Hotel	259 Elsternwick Road	Elsternwick
Elwood Lounge	49/51 Glen Huntly Road	Elwood
George Public Bar	127 Fitzroy Street	St Kilda
Hotel Barkly	109 Barkly Street	St Kilda
Iddy Biddy Bar	35-39 Blessington Street	St Kilda
Inkerman Hotel	375 Inkerman Street	St Kilda East
Khyats Hotel	25 Wilson Street	Brighton
Local Taphouse	184 Carlisle Road	St Kilda East
Lyrebird Lounge	61 Glen Eira Road	Ripponlea
Memo Music Hall	88 Acland St	St Kilda
Milanos Tavern	4 The Esplanade	Brighton
Misery Guts Bar	19 Grey Street	St Kilda
Newmarket Hotel	34 Inkerman Street	St Kilda
Pause Bar	268 Carlisle Street	Balaclava
Prince Bandroom	29 Fitzroy Street	St Kilda
Prince Public Bar	29 Fitzroy St	St Kilda
Republica	Sea Baths - 10-18 Jacka Blvd	St Kilda
Robarta Bar	109 Fitzroy Street	St Kilda
Saint Hotel	54 Fitzroy Street	St Kilda
Saint Martins Place	374 St Kilda Road	St Kilda
Secret Garden Bar	60 Fitzroy Street	St Kilda
St Kilda Branch	204 Barkly Street	St Kilda
The Fifth Province	3/60 Fitzroy Street	St Kilda
The Flying Saucer Club (Caulfield RSL)	4 St Georges Road	Elsternwick
Treehouse Lounge	263 Carlisle Street	Balaclava
Umbrella Lounge Bar	338 Glen Huntly Road	Elsternwick
Veludo Bar & Restaurant	175 Acland Street	St Kilda
Vineyard	71A Acland Street	St Kilda
Windsor Alehouse	42 Punt Road	Windsor

SOUTH MELB/PORT MELB		
Bohemia Cabaret Club	226 Coventry Street	South Melbourne
Claypots Evening Star (Sth Melb Market	101 Cecil St & York Street	South Melbourne
Emerald Hotel	415 Clarendon Street	South Melbourne
Golden Fleece Hotel	120 Montague Street	South Melbourne
Market Hotel	160 Clarendon Street	South Melbourne
Pandora Club	127 Dorcas Street	South Melbourne
Prince Alfred Hotel	355 Bay Street	Port Melbourne
Rising Sun Hotel	2 Raglan Street	South Melbourne
Seven Nightclub	52 Albert Road	South Melbourne
The George	139 Cecil Street	South Melbourne
The Local	22-24 Bay Street	Port Melbourne

Greater Melbourne (Regular Live Music Venues)

2 Brothers Brewery	4 Joyner Street	Moorabbin
Afro Hub	727 Nicholson Street	Carlton
Alfred’s Homestead	420 Warrandyte-Ringwood Rd	Warrandyte South
Ascot Vale Hotel	447 Mount Alexander Road	Ascot Vale
Axedale Tavern	105 High Street	Axedale
Bay Hotel	62 Main Street	Mornington
Beaches of Mornington	55 Barkly Street	Mornington
Brycee's Tavern	30-32 Brice Avenue	Mooroolbark
Burvale Hotel	Springvale Rd & Burwood Highway	Nunawading
Caravan Music Club	95-97 Drummond Steet	Oakleigh
Chelsea Heights Hotel	Springvale Rd & Wells Rd	Aspendale Gardens
Clocktower Centre	750 Mount Alexander Road	Moonee Ponds
Club Kilsyth	Cnr Canterbury & Colchester Rds	Bayswater
Club Ringwood	Cnr Oban Rd & Maroondah H'way	Ringwood
Commercial Hotel	820 Plenty Road	South Morang
Croydon Hotel	47 Maroondah Highway	Croydon
Customs House Hotel	161 Nelson Place	Williamstown
Daisey's Hotel	6 Mt Dandenong Road	Ringwood
Dancing Dog	42A Albert Street	Footscray
Dandenong Club	1579 Heatherton Road	Dandenong
Dandenong Workers Club	52-70 Wedge Street	Dandenong
Deluxe Bar	595 Mount Alexander Road	Moonee Ponds
Dorset Gardens	335 Dorset Road	Croydon
Double G Saloon	8 Octavia Street	Mornington
Doutta Galla Hotel	337 Racecourse Road	Kensington
Eddie's Bandroom	168 Chesterville Road	Moorabbin
EV's Youth Centre	212 Mt Dandenong Road	Croydon
Ferntree Gully Hotel - Middle	1130 Burwood Highway	Ferntree Gully
Fuid Lounge	189 Maroondah Highway	Healesville
Gin Lane	1641 Burwood Hwy, Belgrave VIC	Belgrave
God's Kitchen Mornington	53 Barkly Street	Mornington
Grand Hotel	110 Yarra St	Warrandyte
Grand Hotel Mornington	124 Main Street	Mornington
Gypsy Road Bar	Shop 402a 1 Murnong Street	Point Cook
Hallam Hotel	241 Princes Highway	Hallam
Harp of Erin	636 High St	Kew
Kelly's Bar and Kitchen	1510 Mount Dandenong Tourist Road	Olinda

Kington Club (Mordy HQ)	528 Main Street	Mordialloc
Laurel Hotel	289 Mount Alexander Road	Ascot Vale
Live at London Eleven	11 London Drive	Bayswater
Lou Lou Bar	425 Burwood Highway	Wantirna South
Lucky 13 Garage	8 Cochranes Road	Moorabbin
Mango Lounge	17 Hall Street	Moonee Ponds
Manhattan Hotel	131 Heatherdale Rd	Ringwood
Matthew Flinders Hotel	667 Warrigal Rd	Chadstone
Merchant Lane	58 Main Street	Mornington
Micawber Tavern	61 Monbulk Road	Belgrave
Micawber Tavern	61 Monbulk Rd	Belgrave
Mornington Peninsula Brewery	72 Watt Road	Mornington
Mount Dandenong Hotel	1451 Mount Dandenong Tourist Road	Olinda
Mulgrave Country Club	345 Jells Road	Mulgrave
Musicland Fawkner Music Complex	1359 Sydney Road	Fawkner
Mynt Lounge	185 Watton Street	Werribee
Oakleigh Junction Hotel	1 Portman Street	Oakleigh
On Top In Ormond	483 North Road	Ormond
Orange Whip	115 Maroondah Highway	Ringwood
Pakenham Hotel	153 Main Street	Pakenham
Palace Hotel	893 Burke Road	Camberwell
Panton Hill Hotel	633 Kangaroo Ground, St Andrews Road	Panton Hill
Park Hotel		Werribee
Pascoe Vale Hotel	12 Railway Parade	Pascoe Vale
Pascoe Vale RSL	40 Cumberland Road	Pascoe Vale
Pier Hotel - Bandroom	508 Nepean Highway	Frankston
Pier Hotel - Flannagans	508 Nepean Highway	Frankston
Pier Hotel - Pelly Bar	508 Nepean Highway	Frankston
Pirates Tavern	82 Nelson Place	Williamstown
Prosciutto Bros Craft Bar	31 Peel Street	Eltham
Quiet Man	271 Racecourse Road	Flemington
Reverence Hotel	28 Napier Street	Footscray
Rifle Club Hotel	121 Victoria Street	Williamstown
Rosstown Hotel	1084 Dandenong Road	Carnegie
Royal Essendon Hotel	873 Mount Alexander Road	Essendon
Royal FTG Hotel	1208 Burwood Highway	Ferntree Gully
Sandown Park Hotel	Cnr Corrigan Rd & Princes Highway	Noble Park
Seamus O'Tooles Irish Pub	425 Burwood Highway	Wantirna South
Sin City Nightclub	31 Langhorne Street	Dandenong
Skinny Dog Hotel	155 High Street	Kew
Skylark Room	351 Glenfern Road	Upwey
Somerville Hotel	84 Station Street	Somerville
Sooki Lounge	1648 Burwood Highway	Belgrave
Southside Social	433 Nepean Highway	Frankston
St Andrews Hotel	79 Burns Street	St Andrews
Stags Head Hotel	39 Cecil Street	Williamstown
Terminus Hotel	23 Harker Street	Healesville
The Barn Live	9/24 Longstaff Road	Bayswater
The Bay Mordialloc	Cnr Centreway & Beach Rds	Mordialloc
The Bazoo Bar	shop4, 130 Main Street	Croydon

The Deck	2-4 Davey Street	Frankston
The Substation	1 Market Street	Newport
Upper Yarra Arts Centre	3409 Warburton Highway	Warburton
Village Green	Springvale & Ferntree Gully Rds	Mulgrave
Wantirna Club	350 Stud Road	Wantirna
Westend Market Hotel	47 McIntyre Road	Sunshine
Wheelers Hill Hotel	Ferntree GullyRoad	Wheelers Hill
Whitehorse Centre	397 Whitehorse Road	Nunawading
Yarra Valley Grand Hotel	19 Bell Street	Yarra Glen

Occasional Live Music Venues

Anglers Tavern		Maribyrnong
Backyard Bar Mornington		Mornington
Beach 162		Frankston
Bell Tavern		Belgrave
Berwick Inn Hotel (Saturday)		Berwick
Burrinja Cultural Centre		Upwey
Café Cirino		Williamstown
Cardinia Cultural Centre		Pakenham
Casa d'Abruzzo		Epping
Chelsea Heights Hotel		Chelsea Heights
Circolo Italiani Di Kensington		Kensington
Clayton RSL		Clayton
Clocktower Centre		Moonee Ponds
Club Italia		Sunshine
Commercial Hotel		Werribee
Commercial Hotel		Yarraville
Cube 37 Frankston Arts Centre		Frankston
Dingley International Hotel		Dingley
Drum Theatre		Dandenong
Dudley's		Olinda
Eltham Hotel		Eltham
Essendon Wine Bar		Essendon
Floridia Club		Flemington
Frankston RSL		Frankston
g.m sound studios		Campbellfield
Grand Hotel		Frankston
Hangar 8		Tullamarine
Healesville RSL		Healesville
Hickinbotham Winery		Dromana
Hush Bar Knox		Wantirna
Italian Sports Club		Werribee
Kingston Arts Centre		Moorabbin
Knox Club		Wantirna
Knox Community Arts Centre		Bayswater
Lincolnshire Arms Hotel		Essendon
Lonbeach RSL		Chelsea
Longbeach Hotel		Chelsea
Melbourne Showgrounds		Ascot Vale
Melbourne Zoo		Parkville
Merchant Lane		Mornington

Militello Club		Newport
Mitcham Hotel		Mitcham
Monash Hotel		Clayton
Moonee Valley Legends		Moonee Ponds
Mooroolbark Community Centre		Mooroolbark
Mordialloc Supper Club		Mordialloc
Morni9ngton On Tanti Hotel		Mornington
Mountain View Hotel		Glen Waverly
Notting Hill Hotel		Notting Hill
Oscar's Alehouse		Belgrave
Paddy's Tavern		Ferntree Gully
Peninsula Community Theatre		Mornington
Perry Como Bar		Parkdale
Pier Hotel (Flannagan's Bar)		Frankston
Q Room		Thomastown
Risk Bar		Oakleigh
Robert Blackwood Hall		Clayton
Sanctuary Lakes Hotel		Point Cook
Sandown Park Hotel		Noble Park
Satellite Lounge		Wheelers Hill
Shadowfax Wines		Werribee
Shoppingtown Hotel		Doncaster
Sir Johns Bar		Clayton
Skinny Dog Hotel		Kew
Son of Run (Firday)		Belgrave
Spottiswoode Hotel		Spotswood
St Kilda Sporting Club		St Kilda
Steam Packet Hotel		Williamstown
Strike Bayside		Frankston
Sunshine RSL		Sunshine
The Arts Centre		Warburton
The Brooks on Sneydes		Point Cook
The Memo		Healesville
The Phoenix Hotel		Point Cook
The Rocks		Mornington
The Substation		Newport
Titanic Entyertainments		Williamstown
Tudor Inn		Cheltenham
Waterstone Café		Sanctuary Lakes
Werribee Bowling Club		Werribee
Werribee RSL		Werribee
Werribee Zoo		Werribee
Westend Market Hotel		Sunshine
Whitehorse Centre		Nunawading
Wild Oak Bar		Olinda
Wyndham Cultural Centre		Werribee
Yarraville Club		Yarraville
Yarrawood Estate		Yarra Glen
York On Lilydale		Mount Evelyn
Zu Bar		Ringwood

Function Music Venues

Albion Charles		Northcote
Ashley Hotel		Braybrook
Bayswater Hotel		Bayswater
Beleura		Mornington
Bentleigh Club		Bentleigh
Bentleigh RSL		Bentleigh
Boundary Hotel		Bentleigh
Box Hill Town Hall		Box Hill
Brighton Town Hall		Brighton
Brunswick Bowling Club		Brunswick
Brunswick Town Hall		Brunswick
Bundoora Hotel		Bundoora
Camberwell Town Hall		Camberwell
Cardinia Centre		Pakenham
Cardinia Park Hotel		Beaconsfield
Casa D'Abruzzo		Epping
Century City Tavern		Glen Wavberley
Cerry Hill Tavern		Doncaster
Chelsea RSL		Chelsea
Clayton Bowling Club		Clayton
Coburg Town Hall		Coburg
Collingwood Town Hall		Collingwood
Coolaroo Hotel		Coolaroo
Courthouse Hotel		Footscray
Dandenong RSL		Dandenong
Dandenong Town Hall		Dandenong
Davey's Hotel (Cheeky Squire)		Frankston
Deer Park Hotel		Deer Park
Doncaster Bowling Club		Doncaster
Doutta Galla Hotel		Flemington
Doyles Bridge Hotel		Mordialloc
Elevation at Emerald		Emerald
Eltham Hotel		Eltham
Epping RSL		Epping
Essendon Football Centre		Essendon
Excelsior Hotel		Thomastown
Fawkner RSL		Fawkner
Fitzroy Victoria Bowling Club		Fitzroy North
Fitzrtoy Town Hall		Fitzroy
Flem-Ken Bowling Club		Flemington
Footscray Town Hall		Footscray
Fountain Gate Hotel		Narre Warren
Glen Eira Town Hall		Caulfield
Glengala Hotel		Sunshine
Hawthorn Town Hall		Hawthorn
Heildelberg Town Hall		Ivanhoe
Helesville Cub		Healesville
Highpoint Hotel		Maribyrnong
Hotel Bruce County		Mount Waverley

Hotel Kew		Kew
Keilor RSL		Essendon
Kew Golf		Kew East
Lakeside Mill		Pakenham
Lincolnshire Arms Hotel		Essendon
Macs Hotel		Melton
Manningham Hotel		Bulleen
Meadow Inn		Fawkner
Millers Inn		Altona North
Mister Fox		Ringwood
Mitcham Hotel		Mitcham
Montsalvat		Eltham
Moorabbin Bowling Club		Moorabbin
Moorabbin Town Hall		Moorabbin
Mooroolbark Bowling Club		Mooroolbark
Moreland Hotel		Brunswick
Naked Racer		Cheltenham
Noble Park RSL		Noble Park
North Melbourne Town Hall		North Melbourne
Northcote Town Hall		Northcote
Oakleigh Town Hall		Oakleigh
Olinda Creek Hotel		Lilydale
Packing Shed		Emerald
Plough Hotel		Mill Park
Port Melbourne Town Hall		Port Melbourne
Potters Pool Hall		Dandenong
Preston Hotel		Preston
Preston Town Hall		Preston
Prince Mark Hotel		Doveton
Rendevous Restaurant		Point Cook
Richmond Town Hall		Richmond
Royal Hotel		Mornington
Sandbelt Club Hotel		Moorabbin
Seaford Hotel		Seaford
Skaterz		Eltham
Somerville Hotel		Somerville
South Melbourne Town Hall		South Melbourne
St Kilda Town Hall		St Kilda
Stanford Hotel		Rowville
Stillwater at Crittenden		Mornington
Stonnington City Centre		Malvern
Sylvania Hotel		Campbellfield
The Boathouse		Moonee Ponds
The Budgie Smuggler		Ringwood
The Castle		Dandenong
The Cuckoo		Olinda
The Drum Theatre		Dandenong
The Refectory		Werribee
Thyme on the Yarra		Warrandyte
Upwey RSL		Upwey

Vale Hotel		Mulgrave
Villa Adrianna Centre		Dandenong
Waltzing Matilda Hotel		Springvale
Westside Hotel		Laverton
Williamstown Town Hall		Williamstown
Wyreena Arts Centre		Croydon

MUSIC VICTORIA MELBOURNE LIVE MUSIC CENSUS 2017
Venue Observation Survey

1. **Name of Venue:** .... **Address**: ....

2. **Time of Visit to the Venue** ....

3. **Type of Venue** Hotel ☐ Bar ☐ Nightclub ☐ Cafe/Rest ☐ Music Club ☐

   Theatre ☐ Concert/Recital Hall ☐ Other ....

4. **Hours of Operation - Sat. 28th October** Venue Open .... Venue Close ....

   (If Appropriate) Show Time Start .... Show Time Finish ....

5. **What is the TOTAL licensed Capacity of the Venue?** ....

6. **Door Charge on Census NIght?** Yes ☐ No ☐ If Yes, $ ....

   What % of Shows have a Door Charge ? .... %

7. **What type of performance is taking place (or will) on the night?**

   Concert/Recital (audience mainly seated) ☐ Gig (audience mainly standing) ☐

   Club/Party (audience mainly dancing) ☐

8. **Who's in the Venue? (Tick ALL that apply)** Under 18 ☐ 18 - 30 ☐ 31 - 50 ☐

   51 + ☐ **Approx % - Male .... % Female .... %**

9. **Estimate the number of patrons in Live Music Areas/Rooms <u>at the time of your visit</u>** -

   Area/Room 1 .... Area/Room 2 .... Area/Room 3 ....

10. **What is the maximum number of patrons <u>expected</u> in these Areas/Rooms on this night?**

   Area/Room 1 .... Area/Room 2 .... Area/Room 3 ....

11. **How many people are/will be employed in the live music areas on this night?**

   Musos .... DJs .... Bar/Food Staff .... Prod Staff .... Door ....

   Security .... Management ....

12. **Does the venue have In-House PA?** Yes ☐ No ☐

13. What sort of Live Music does the venue USUALLY offer? (Tick All Appropriate)

Dance/Electronic ☐ Rock ☐ R n B ☐ Rap/Hip Hop ☐ Funk/Soul ☐ Metal ☐

Reggae/Ska ☐ Punk/Hardcore ☐ Country ☐ Blues/Folk ☐ Pop ☐ Jazz ☐

Other: ....

14. How many nights per week does the venue offer Live Music?

Spring/Summer (Please Circle)								**Autumn/Winter** (Please Circle)							
Musos	M	TU	W	TH	F	SA	SU	Musos	M	TU	W	TH	F	SA	SU
DJs	M	TU	W	TH	F	SA	SU	DJs	M	TU	W	TH	F	SA	SU

15. Is the venue wheelchair/Disability Accessible (Ramp/Lift)? Yes ☐ No ☐

16. Does the venue have an Accessible (Disability) Toliet? Yes ☐ No ☐

17. Is the venue affected by Noise/Planning/Development issues? Yes ☐ No ☐

If 'Yes' - details (if available) ....

....

....

18. How does the average Friday audience compare with the average Saturday?

Larger .... Approx % Smaller .... Approx % Approx The Same ☐

Name of Volunteer Completing This Survey Sheet ....

Music Victoria would like to thank all live music venues for their cooperation. The cities of Melbourne, Yarra and Port Phillip for their support, and the students and staff of Collarts, RMIT, JMC & SAE who made this survey possible.

Dear Live music fan/patron,

Your responses to this survey will help Music Victoria and it's partners - Cities of Melbourne, Yarra & Port Phillip, update the landmark Live Music Census of 2012/13, and continue to lobby to preserve and promote the livelihood of live music sector practitioners, the viability of the venues that provide the creative spaces and generate thousands of jobs annually, and ensure you have gigs to attend and enjoy.
If you choose to answer anonymously, that's fine.

BUT if you do choose to provide your email contact so that you can enter the prize pool draw for major event tickets, Music Victoria GUARANTEES that the information you provide WILL NOT be used for any purpose other than to help create the Live Music Census Report which will be released in April, 2018 in time for Melbourne's hosting of the International Music Cities Convention.

You WILL NOT be identified individually to any third party nor your contacts shared.

Thank you in advance for taking the time to complete the survey

Content Warning: this survey contains questions which broadly ask about safety and harassment in venues.

Please note that no question requires an answer so you may skip any question you would not like to respond to.

1. What is your gender identity?

- ◯ Female
- ◯ Male
- ◯ Other

2. How old are you?

- ◯ under 18
- ◯ 18-24
- ◯ 25-29
- ◯ 30-35
- ◯ 36-40
- ◯ 41-49
- ◯ 50-59
- ◯ 60-69
- ◯ 70 +
- ◯ Prefer not to say

3. What is your postcode?

4. Are you an Australian citizen?

- Yes
- No

5. If no, please state you country of origin:

6. What is your current occupation or status? (Select all relevant options)

- Full-time worker
- Part-time worker
- Casual worker
- Self employed/Freelance
- Student
- Retired
- Unemployed
- Unable to work

7. Select the radio stations that you listen to regularly. (Select all relevant options)

- ABC Radio National (RN)
- RRR
- MMM
- PBS
- SYN
- MIX
- Gold 104
- KISS
- Triple J
- Nova
- Double J
- Other (please specify)

8. What are the music publications you read regularly?

9. Which music websites or blogs do you regularly visit?

10. What device do you predominantly use the internet on?

- [ ] Computer
- [ ] Phone
- [ ] Tablet

11. How much of your internet use would you say is music related? (percentage of usage time)

0 100

12. How do you acquire new music? (Select all relevant options)

- [ ] iTunes
- [ ] Buying CD's
- [ ] Buying vinyl
- [ ] Streaming service ie Spotify
- [ ] Soundcloud
- [ ] Bandcamp
- [ ] Paid downloads from other source
- [ ] Other (please specify)

13. If you ticked streaming in the previous questions, do you pay for your subscription?

- ( ) Yes
- ( ) No

14. How do you usually share music with others? (Select all relevant options)

- ☐ Instagram
- ☐ Snapchat
- ☐ Facebook
- ☐ Soundcloud
- ☐ Mixtapes
- ☐ Playlists
- ☐ Word of Mouth
- ☐ Spotify
- ☐ Other (please specify)

15. Where do you predominantly find gig and show information from? (Select all relevant options)

- ☐ Email
- ☐ Posters/Flyers
- ☐ Word Of Mouth
- ☐ TV
- ☐ Websites
- ☐ Radio
- ☐ Magazines
- ☐ Mobile Apps
- ☐ Facebook Events
- ☐ Other social media

16. Did you attend a gig/concert on Census Night? (25 Nov 2017)

- ○ Yes
- ○ No
- ○ Unsure

17. If yes, please specify what artist / event you saw and at what venue:

18. On average, how many gigs/concerts do you attend per month? (excluding festivals)

- ○ 0
- ○ 1-2
- ○ 3-4
- ○ 5-6
- ○ 7-8
- ○ 9-10
- ○ 10+

19. Which of the following best describes the type of venue you have attended live music events at in the last 12 months? (Select all relevant options)

- ☐ Arena (5,000-20,000) – large, covered, multi-purpose arena or conference centre
- ☐ Stadium (5,000-100,000) – large, usually uncovered, main purpose usually for sports
- ☐ Arts centre (200-2,000) – multi-arts, multi-purpose venue
- ☐ Bar, pub with music (20-100) – main focus is alcohol sales with occasional music
- ☐ Church/place of worship – place of worship which hosts live music events beyond its regular services
- ☐ Concert hall (200-3,000) – dedicated music venue, mainly seated gigs
- ☐ Hotel or other function room
- ☐ Large music venue (651-5,000) – dedicated music venue, mainly standing gigs
- ☐ Medium music venue (351-650) – dedicated music venue, mainly standing gigs
- ☐ Small music venue (<350) – dedicated music venue, mainly standing gig
- ☐ Large nightclub (>500) – dedicated nightclub, mainly for dancing
- ☐ Small nightclub (<500) – dedicated nightclub, mainly for dancing
- ☐ Outdoor (greenspace), e.g. parks used for festivals
- ☐ Outdoor (urban), e.g. particular sites used regularly by buskers
- ☐ Restaurant/café with music (20-100) – main focus is food with occasional music
- ☐ Student union/university building
- ☐ Theatre/opera house (500-2,500) – mainly theatre with some live music/opera

20. On average, how much do you spend per month on concert/festival tickets?

- ○ $0
- ○ $10-50
- ○ $50-100
- ○ $100-150
- ○ $150-200
- ○ $200+

21. On average, how much do you spend per month on bar/pub/club entry?

- ○ $0
- ○ $10-50
- ○ $50-100
- ○ $100-150
- ○ $150-200
- ○ $200+

22. On average, how many music festivals do you attend per year?

- ○ 0
- ○ 1-2
- ○ 3-4
- ○ 5-6
- ○ 7-8
- ○ 9-10
- ○ 10+

23. What type of transport do you usually use to get to and from gigs?

- ☐ Public Transport
- ☐ Car
- ☐ Bike
- ☐ Walk
- ☐ Taxi
- ☐ Uber

24. Estimate your travel distance to most gigs you attend (Kms):

- ☐ 1-5 kms
- ☐ 5-10 kms
- ☐ 10-20kms
- ☐ 20-35 kms
- ☐ 35 kms +

25. On average, how much do you spend per month on transport to and from gigs?

- ○ $0
- ○ $10-50
- ○ $50-100
- ○ $100-150
- ○ $150-200
- ○ $200 +

26. On average, how much do you spend per month on CDs/Vinyls?

- $0
- $10-50
- $50-100
- $100-150
- $150-200
- $200+

27. On average, how much do you spend per month on downloads/streaming?

- $0
- $10-50
- $50-100
- $100-150
- $150-200

28. On average, how much do you spend per month on food and alcohol at gigs?

- $0
- $10-50
- $50-100
- $100-150
- $150-200
- $200 +

29. Which best describes the type of music you usually go and see? (Select all relevant options)

- [ ] Blues
- [ ] Funk and Soul
- [ ] Classical
- [ ] Country
- [ ] Dance Music (ie Techno/House/Drum & Bass)
- [ ] Experimental
- [ ] Folk
- [ ] Hip Hop / Rap
- [ ] Indie
- [ ] Jazz
- [ ] Metal
- [ ] Other (please specify)
- [ ] Musical Theatre
- [ ] Opera
- [ ] Pop
- [ ] Punk
- [ ] Reggae / Dub
- [ ] Rock
- [ ] Singer / Songwriter
- [ ] Traditional (Indigenous Music)
- [ ] Traditional International Genres
- [ ] Urban / R&B
- [ ] Electronic (other than dance genres)

30. Name your 5 favourite live music venues

31. What % of the music you listen to is Australian?

0 100

32. Do you believe most Victorian venues provides a safe and inclusive environment?

- Yes
- No
- Have no opinion

33. If no, please list any venue you have felt unsafe at:

34. If no, how often have you had an experience which made you feel unsafe or uncomfortable at a venue?

- Often
- Occasionally
- Rarely
- Once or twice

35. Do you feel that you have been directly harassed or discriminated against on the basis of: (Check all relevant options)

- [ ] Gender identity
- [ ] Sexuality
- [ ] Race
- [ ] Age
- [ ] Ability
- [ ] Other (please specify)

36. If you have had experiences which make you feel unsafe or uncomfortable at a venue, who made you feel that way? (Select all relevant options)

- [ ] Staff of the venue
- [ ] Security staff
- [ ] Another attendee/s
- [ ] The musician/s or DJ/s
- [ ] Other (please specify)

37. Have these experiences ever caused you to take the following action? (Select all relevant options)

- [ ] Leave venue (before you would have chosen otherwise)
- [ ] Report incident to venue staff
- [ ] Report incident to security
- [ ] Report incident to the police
- [ ] Confront the perpetrator

38. Do you bring any form of hearing protection equipment when you attend live music events?

- ○ Yes
- ○ No
- ○ On occasion

39. If no, would you use hearing protection equipment if provided by venues?

- ◯ Yes, I have before
- ◯ Yes, I would in future
- ◯ No
- ◯ Maybe

40. Do you have access requirements that need to be met in order to attend live music events?

- ◯ Yes
- ◯ No
- ◯ Prefer not to say

41. What of the following would encourage you to see more live music? Tick three options.

- ☐ Better venue facilities, e.g. sound quality
- ☐ Cheaper tickets
- ☐ Earlier event start times
- ☐ Later event finish times
- ☐ Later public transport
- ☐ More/greater variety of music venues

42. What would improve your live music experience overall?

43. When survey collection is complete (Jan 2018), Music Victoria will conduct a prize draw for major event tickets.
To be eligible, please provide a name and email contact.
This is optional and please be assured that Music Victoria WILL NOT share your email with any third party.

Dear Musician/DJ,

Your responses to this survey will help Music Victoria and it's partners - Cities of Melbourne, Yarra & Port Phillip, update the landmark Live Music Census of 2012/13, and continue to lobby to preserve and promote the livelihood of live music sector practitioners and the viability of the venues that provide the creative spaces and generate thousands of jobs annually.

If you choose to answer anonymously, that's fine.

BUT if you do choose to provide your email contact so that you can enter the prize pool draw for major event tickets, Music Victoria GUARANTEES that the information you provide WILL NOT be used for any purpose other than to help create the Live Music Census Report which will be released in April, 2018 in time for Melbourne's hosting of the International Music Cities Convention.

You WILL NOT be identified individually to any third party nor your contacts shared.

Thank you in advance for taking the time to complete the survey.

1. What is your gender identity?

- ○ Female
- ○ Male
- ○ Other

2. How old are you?

- ○ under 18
- ○ 18-24
- ○ 25-29
- ○ 30-35
- ○ 36-40
- ○ 41-49
- ○ 50-59
- ○ 60-69
- ○ 70 +
- ○ Prefer not to say

3. What is your home address postcode?

[ ]

4. Are you an Australian citizen?

- ○ Yes
- ○ No

5. If no, please state you country of origin:

6. Have you relocated from any of the following for more industry opportunites?

- [ ] Regional Victoria
- [ ] Interstate
- [ ] Overseas
- [ ] Have not relocated

7. Do you identify as Aboriginal or Torres Strait Islander?

- ○ Yes
- ○ No

8. Do you perform in a language other than English?

- ○ Yes
- ○ No

9. If yes, which language/s?

10. Do you identify as visually impaired, deaf or hard of hearing?

- ○ Yes
- ○ No
- ○ Prefer not to say

11. Do you identify as having a disability or accessibility requirements?

- ○ Yes
- ○ No
- ○ Prefer not to say

12. Which are the main instruments you perform with? (DJs may list the technology they use live)

13. Which best describes the genre of music you currently perform regularly? (Select all relevant options)

- [ ] Blues
- [ ] Classical
- [ ] Country
- [ ] Dance Music (ie Techno/House/Drum & Bass)
- [ ] Experimental
- [ ] Folk
- [ ] Hip Hop / Rap
- [ ] Indie
- [ ] Jazz
- [ ] Metal
- [ ] Musical Theatre
- [ ] Opera
- [ ] Pop
- [ ] Punk
- [ ] Reggae / Dub
- [ ] Rock
- [ ] Singer / Songwriter
- [ ] Traditional (Indigenous Music)
- [ ] Traditional International Genres
- [ ] Urban / R&B
- [ ] Electronic (other than dance genres)

Other (please specify)

14. As a performing artist, do you regularly perform in/as? (Select all relevant options)

- [ ] Orchestras
- [ ] Chamber music ensembles
- [ ] Choirs
- [ ] Opera
- [ ] Performing covers as a band or solo
- [ ] Solo artist
- [ ] Solo DJ
- [ ] Duo
- [ ] DJ in duo or group
- [ ] Band
- [ ] Open performance session (open mics/jams/traditional sessions)
- [ ] Big Band
- [ ] Other (please specify)

15. What proportion of your live music repertoire is your original music?

All original Music — All preexisting music

16. How long have you been a performing music in some public capacity (ie in live music venues)?

- 1-2 years
- 2-5 years
- 5-8 years
- 8-12 years
- 12-15 years
- 15-20 years
- 20-25 years
- 25-30 years
- 30 + years

17. As a musician/DJ, have you had formal training?

- [ ] No formal training
- [ ] AMEB
- [ ] Private Lessons
- [ ] TAFE music course
- [ ] TAFE Music Business Course
- [ ] Bachelor Degree - Music Course
- [ ] Bachelor Degree - Music Industry Cours
- [ ] Post Graduate study
- [ ] Other training (please specify)

18. On average, roughly what percentage of your week is spent working as a musician/on musical activites? (percentage)

0 — 100

19. Does being a musician/DJ contribute to your overall income?

- Yes
- No

20. If yes, what percentage of your income comes from being a musician/DJ?

0 100

21. Where does your remaining income come from?

- Work within the music industry
- Work outside the music industry
- Government Benefits
- Family/Spouse support
- Other (please specify)

22. If you have other employment other than music, what is your current occupation or status? (Select all relevant options)

- Full-time worker
- Part-time worker
- Casual worker
- Self employed/Freelance
- Student
- Retired
- Unemployed
- Unable to work

23. If being a musician does not contribute to your income, on average does the earnings from being a musician cover the cost associated with your music practise? (eg instrument maintenance, recording costs or any costs associated with performing live)

- Yes
- No

24. Please specify what percentage of your music related income comes from the following sources. (Enter number only)

Live performance

Collection agencies (eg APRA/AMCOS, PPCA)

Merchandise sales

Recording sales (physical)

Digital sales (eg mp3s)

Streaming

Label royalties

Publishing royalties

25. If you have released commercial recordings, how many of the following?

Single/s

EP/s

Album/s

Mixtape/s

26. If you have released commercial recordings, How did you distribute the recordings? (Check all relevant options)

- [ ] Major Label
- [ ] Independent Label
- [ ] Independant distributor
- [ ] Self-distributed
- [ ] CD Baby or other digital distribution service
- [ ] Website
- [ ] iTunes
- [ ] Bandcamp
- [ ] Streaming services
- [ ] Soundcloud
- [ ] Not applicable
- [ ] Other (please specify)

27. Did you perform on Census night? (25 Nov 2017) If so please specify what style of venue you performed at.

28. Estimate your travel distance to most gigs you play:

- [ ] 1-5 kms
- [ ] 5-10 kms
- [ ] 10-20kms
- [ ] 20-35 kms
- [ ] 35 kms +

29. What type of transport do you usually use to get to and from gigs you are playing at?

- [ ] Public Transport
- [ ] Car
- [ ] Bike
- [ ] Walk
- [ ] Taxi
- [ ] Uber

30. Do you regularly employ any of the following industry practitioners?

- [ ] Manager
- [ ] Booking Agent
- [ ] Publicist
- [ ] None of the above

31. On average, how many live music events do you play per month (in summer)

- ○ 1-2
- ○ 2-6
- ○ 6-10
- ○ 10 +

32. On average, how many live music events do you play per month (in winter)

- ○ 1-2
- ○ 2-6
- ○ 6-10
- ○ 10 +

33. How do you promote your live music events? (check all that apply)

- [ ] Social Media
- [ ] Posters
- [ ] Print Advertising (ie street press)
- [ ] Own Website
- [ ] External websites such as gig guides
- [ ] Mailing List
- [ ] Street press
- [ ] Other (please specify)

34. Which promotion method do you find the most successful?

- [ ] Social Media
- [ ] Posters
- [ ] Print Advertising (ie street press)
- [ ] Own Website
- [ ] External websites such as gig guides
- [ ] Mailing List
- [ ] Street press
- [ ] Other (please specify)

35. Have you ever applied for a grant to contribute to costs associated with being a musician/DJ?

- ( ) Yes and I have been successful
- ( ) Yes but I have not been successful
- ( ) No

36. Are you a member of any of the following?

- [ ] APRA AMCOS (Australasian Performing Right Association & Australasian Mechanical Copyright Owners Society)
- [ ] PPCA (Phonographic Performance Company of Australia Limited)
- [ ] Music Victoria
- [ ] Not a member of any music industry support organisation
- [ ] Please list if you are a member of multiple or unlisted organisations that you consider relevant

37. Do you have an ABN (Australian Business Number)?

- ◯ Yes
- ◯ No

38. Are you registered for GST?

- ◯ Yes
- ◯ No

39. If you write music with others, have you made an agreement regarding royalties?

- ◯ Yes, verbally
- ◯ Yes, in writing
- ◯ No
- ◯ Not applicable

40. Do you regularly wear hearing protection in any of the following situations?

- ☐ Rehearsing
- ☐ Performing live
- ☐ Recording
- ☐ I do not use hearing protection
- ☐ Please specify other hearing protection habits

41. Has your hearing been affected by music industry participation?

- ◯ Yes
- ◯ No
- ◯ Unsure

42. Has your physical health been affected by music industry participation?

- ◯ Yes
- ◯ No
- ◯ Unsure

43. If you answered yes, which of the following steps have you taken

- ☐ Self managed the condition/s
- ☐ Sought medical practitioner support
- ☐ Took no action

44. Has your mental health been affected by music industry participation?

- [ ] Yes
- [ ] No
- [ ] Unsure

45. If you answered yes, which of the following steps have you taken

- [ ] Self managed the condition/s
- [ ] Sought medical practitioner support
- [ ] Took no action

46. Have you ever felt unsafe or uncomfortable at a music venue which you were performing at?

- ( ) Yes, often
- ( ) Yes, occasionally
- ( ) Yes, rarely
- ( ) No, never

47. If you have had experiences which make you feel unsafe or uncomfortable at a venue, who made you feel that way?

- [ ] Staff of the venue
- [ ] Other event staff (eg Promoter or event organiser)
- [ ] Security staff
- [ ] Members of the audience
- [ ] Other performers
- [ ] Please list if multiple apply

48. Have these experiences ever caused you to take the following action?

- [ ] Leave venue (before you would have chosen otherwise)
- [ ] Report incident to venue staff
- [ ] Report incident to security
- [ ] Report incident to the police
- [ ] Confront the perpetrator
- [ ] Please list if multiple apply

49. Which of the following do you believe would help encourage people to attend live music events?

- [ ] Better venue facilities, e.g. sound quality
- [ ] Later event finish times
- [ ] Lower venue cuts leading to cheaper tickets
- [ ] Later public transport
- [ ] Earlier event start times
- [ ] More/greater variety of music venues

50. What would improve the viability of your live music practice?

51. When survey collection is complete (Jan 2018), Music Victoria will conduct a prize draw for major event tickets.
To be eligible, please provide a name and email contact.
This is optional and please be assured that Music Victoria WILL NOT share your email with any third party.

Venue Survey Melbourne Live Music Census 2017

Dear Venue Operator/manager,

Your responses to this survey will help Music Victoria and it's partners - Cities of Melbourne, Yarra & Port Phillip, update the landmark Live Music Census of 2012/13, and continue to lobby to preserve and promote the live music sector and the viability of the venues that provide the creative spaces and generate thousands of jobs annually.

The information you provide is anonymous (unless you choose the option for a follow-up interview), and WILL NOT be used for any purpose other than to help create the Live Music Census Report which will be released in April, 2018 in time for Melbourne's hosting of the International Music Cities Convention.

Please note that no question is mandatory so if do not wish to answer a particular question you will still be able to proceed with the survey.

Than you in advance for taking the time to complete the survey

1. Name of Venue: (you may leave blank if you wish to remain anonymous)

2. Type of Venue:

- ☐ Hotel
- ☐ Cafe/Rest
- ☐ Bar/Lounge
- ☐ Pub
- ☐ Nightclub
- ☐ Concert Venue
- ☐ Other (please specify)

3. Location of Venue

- ○ Inner Melbourne
- ○ Regional City
- ○ Outer Melbourne
- ○ Regional Town or village
- ○ Melbourne CBD

4. Venue postcode

5. How long has your venue been continuously offering live music?

- Under 1 year
- 1-3 years
- 4-6 years
- 7-10 years
- 10+

6. How many rooms or spaces have live music performance? (musicians or DJs)

7. What was the number of patrons present in these live spaces on Census night (25th November)

Space/Room [1]

Space/Room [2]

Space/room [3]

8. Estimation of the number of patrons in each live music space/room on a weeknight (Mon-Thurs):

Space/Room [1]

Space/Room [2]

Space/Room [3]

9. Estimation of the number of patrons in each live music space/room on a Friday:

Space/Room [1]

Space/Room [2]

Space/Room [3]

10. Estimation of the number of patrons in each live music space/room on a Saturday:

Space/Room [1]

Space/Room [2]

Space/Room [3]

11. Estimation of the number of patrons in each live music space/room on a Sunday:

Space/Room [1]

Space/Room [2]

Space/Room [3]

12. What % of your live performances have the following entry requirements (please fill in the percentage number for each option)

Free entry

Paid entry

Private functions/not accessible to general public

13. When your venue has live music does it affect the revenue from food and beverage sales?

- Yes, it decreases sales significantly
- Yes, it decreases sales marginally
- No, it is around the same
- Yes, it increases sales mariginally
- Yes, it increases sales significantly

14. Does your venue have a dedicated booking agent/s? if yes how many?

- No
- Yes, one
- 2-3
- 4-6

15. How many employees were working on Saturday 25 November? (including door, security, sound and bar staff)

16. What kind of staff does your venue employ? Tick all that apply

- Full Time
- Part Time
- Casual
- Short contract

17. Approximately what is the MINIMUM number of staff might you employ per live music event?

Musicians (Not DJs)	
DJs	
Bar/Front of House Staff	
Production Staff ie Sound, Lighting or promotors rep	
Door Staff	
Security	

18. Approximately what is the MAXIMUM number of staff might you employ per live music event?

Musicians (Not DJs)	
DJs	
Bar/Front of House Staff	
Production Staff ie Sound, Lighting or promotors rep	
Door Staff	
Security	

19. Does your venue have an in-house sound system suitable for your live music needs?

- Yes
- No

20. Does your venue do any of the following?

	Yes	No
Employ an in-house sound engineer/s	○	○
Employ freelance sound engineer/s as required	○	○
Require musicians/DJs to supply PA	○	○

21. If your venue employs sound engineers on an ongoing basis, how many sound engineering staff do you have on your roster?

22. How many nights per week does the venue offer Live Music?

- [ ] Monday
- [ ] Tuesday
- [ ] Wednesday
- [ ] Thursday
- [ ] Friday
- [ ] Saturday
- [ ] Sunday

23. What percentage of gigs have a door/ticket charge?

0 100

24. If your venue does charge a door charge for gigs, please list the average ticket price/door charge for the following:

Mid week (Mon-Thurs)	
Friday	
Saturday	
Sunday	

25. What sort of Live Music Does the Venue USUALLY offer? (Tick all appropriate)

- [ ] Jazz
- [ ] Pop
- [ ] RnB
- [ ] Country
- [ ] Blues
- [ ] Folk
- [ ] Rap/Hip Hop
- [ ] Dance genres
- [ ] Punk/Hardcore
- [ ] Reggae/Ska
- [ ] Metal
- [ ] Funk/Soul
- [ ] Rock
- [ ] Electronic music (other than dance genres)
- [ ] Funk and Soul
- [ ] Traditional (Indigenous Australian music)
- [ ] Traditional (World Musics)
- [ ] Other (please specify)

26. Can you estimate what percentage of live music in your venue is presented by:

Solo artists or Duos - original material	
Solo artists or Duos - covers	
Bands - original material	
Bands - covers	
DJs - featured performers	
DJs - background/ambience	

27. What percentage of the live music is played by bands/musicians vs DJs?

Bands and solo artists DJs

28. If your live music events have a door charge, does your venue take a percentage of the door sales for live music?

- Yes
- No
- Sometimes

29. Does your venue ever offer a fixed rate (ie guarantee) for musicians/DJs to perform?

- Yes
- No
- Sometimes

30. How does your venue promote live music events? (check all that apply)

- [ ] Social Media
- [ ] Posters
- [ ] Print Advertising (ie street press)
- [ ] Own Website
- [ ] External websites such as gig guides
- [ ] Mailing List
- [ ] Street press
- [ ] Other (please specify)

31. Which promotion method do you find the most successful?

- [ ] Social Media
- [ ] Posters
- [ ] Print Advertising (ie street press)
- [ ] Own Website
- [ ] External websites such as gig guides
- [ ] Mailing List
- [ ] Other (please specify)

32. Are your venue aware of the Good Neighbours program to assist venues with sound amelioration?

- Yes - but not applied
- Yes - and have applied
- Not aware

33. Which of the following does your venue have?

- ☐ Website
- ☐ A Facebook page
- ☐ Instagram account
- ☐ Twitter account

34. Does your venue have an Environmental sustainability plan?

- ○ Yes
- ○ No

35. Are any of your live music spaces fully accessible for patrons with decreased mobility?

- ○ Yes
- ○ No

36. Does you venue supply hearing protection to any of the following?

- ○ Staff
- ○ Patrons
- ○ We do not supply hearing protection

37. What is the average age of your venues attendees? (check all that apply)

- ☐ 18-24
- ☐ 25-35
- ☐ 35-45
- ☐ 45-55
- ☐ 55-65
- ☐ 65+

38. Does your venue hold events that are specifically LGBTIQA+ friendly?

- ○ Yes, often
- ○ Yes, occasionally
- ○ Yes, rarely
- ○ No

39. Does your venue have all-gender bathrooms?

- ○ Yes
- ○ No
- ○ Bathrooms have been/can be marked as all-gender for specific events

40. Does your venue ever hold all ages events?

- ◯ Yes, often
- ◯ Yes, occasionally
- ◯ Yes, rarely
- ◯ No

41. Do you have a formal policy/strategy based on providing a safe and respectful environment for workers and patrons?

- ◯ Yes
- ◯ No

Please provide details if appropriate

42. Are all your staff trained in dealing with sexual harassment or assaults?

- ☐ Yes, we train all our staff in house
- ☐ No, only the security guards by us
- ☐ No, only the security guards by the agency we use to employ them
- ☐ No, we only train staff actually employed by our venue ie bar/door staff
- ☐ No
- ☐ Unsure

43. Overall, in the last 12 months, have the number of live music events you present

- ◯ Increased
- ◯ Decreased
- ◯ Stayed the same

44. Overall, in the last 12 months. Has your audiences for live music events

- ◯ Increased
- ◯ Decreased
- ◯ Stayed the same

45. Has your venue been negatively affected by any of the following: (check all that apply)

- ☐ Noise restrictions/complaints
- ☐ Property development
- ☐ Planning restrictions
- ☐ Licensing Issues
- ☐ Parking Loading
- ☐ Health & Safety requirements

46. If you answered 'yes' to any of the above, how would you assess the impact on your operations

	Extreme/strong Impact	Moderate Impact	Slight Impact
Noise restrictions/complaints	◯	◯	◯
Property development	◯	◯	◯
Planning restrictions	◯	◯	◯
Licensing Issues	◯	◯	◯
Parking Loading	◯	◯	◯
Health & Safety requirements	◯	◯	◯

47. Can you suggest any solutions/steps to address issues that impact negatively on your ability/willingness to host more live music events?

48. Would you be interested in being involved in a follow-up interview in the future?

◯ No

◯ Yes