


**MUSIC
VICTORIA**

22

MELBOURNE LIVE MUSIC CENSUS 2022 EXECUTIVE SUMMARY





This report has been developed on the unceded land of the Wurundjeri People of the Kulin nation.

We pay our respects to their Elders past and present, as well as to all Aboriginal and Torres Strait Islander people in metropolitan Melbourne and regional Victoria, acknowledging their contribution as our first musicians, performers and storytellers.

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COVID-related Impact on Live Music Activity in Greater Melbourne 2020–2021

Live Music Impact in Greater Melbourne 2019–2021

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KEY FINDINGS



Live Music Activity in Greater Melbourne 2019



505
regular live music venues



141,000
live music gigs



20,723,989
audience attendees



\$536 million
event box office/entry



\$1.18 billion
in onsite event spending



\$111.1 million
in offsite spending by event/venue attendees



4,271
full time equivalent jobs created by live music events



21,948
songwriters/composers based in Greater Melbourne





1 live venue per 8,785 inhabitants
world's leading live music city


\$1.84 Billion
Total Event Value





COVID-related Impact on Live Music Activity in Greater Melbourne 2020–2021


 **75%**
of events cancelled/
postponed/re-scheduled

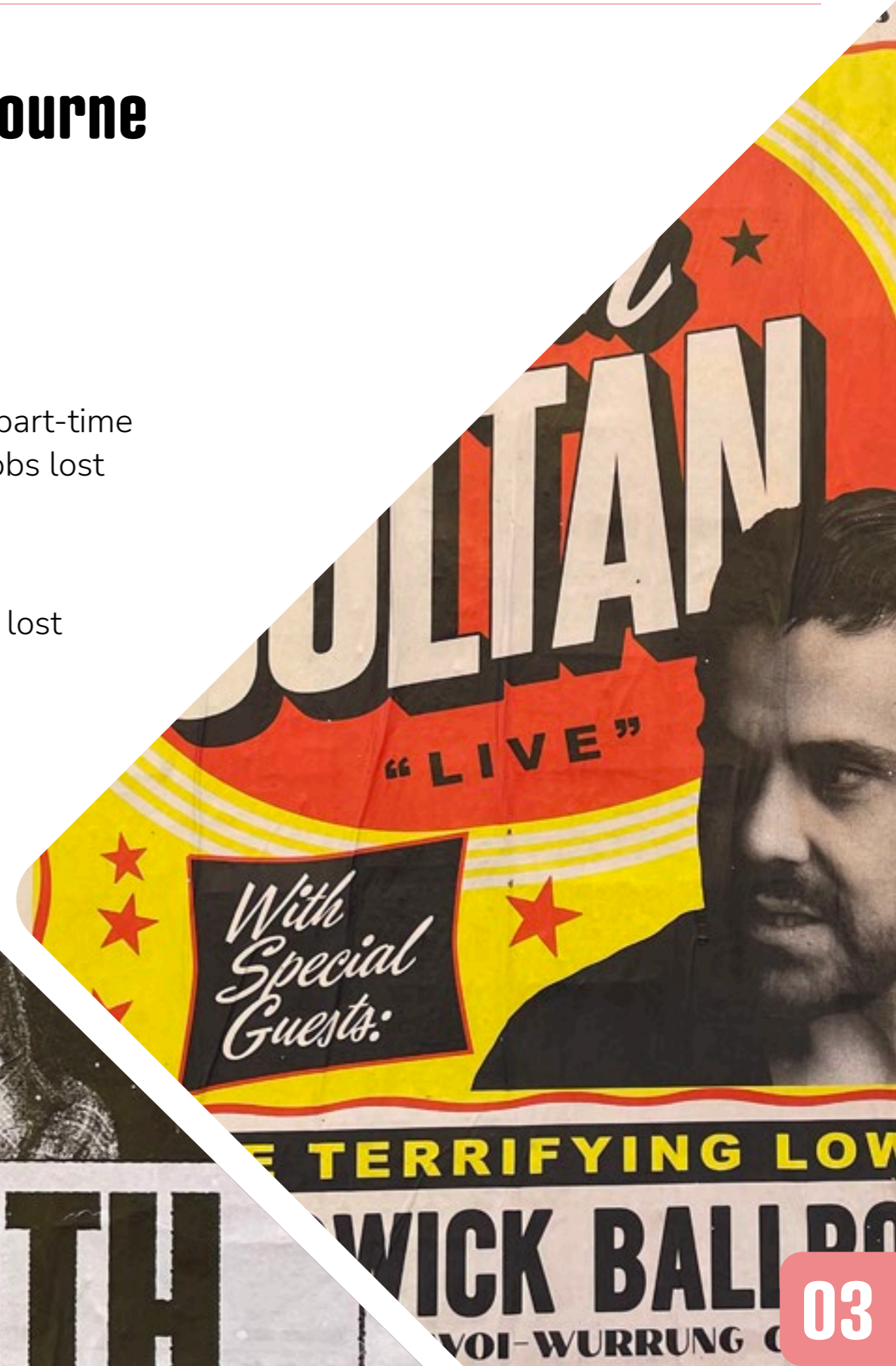
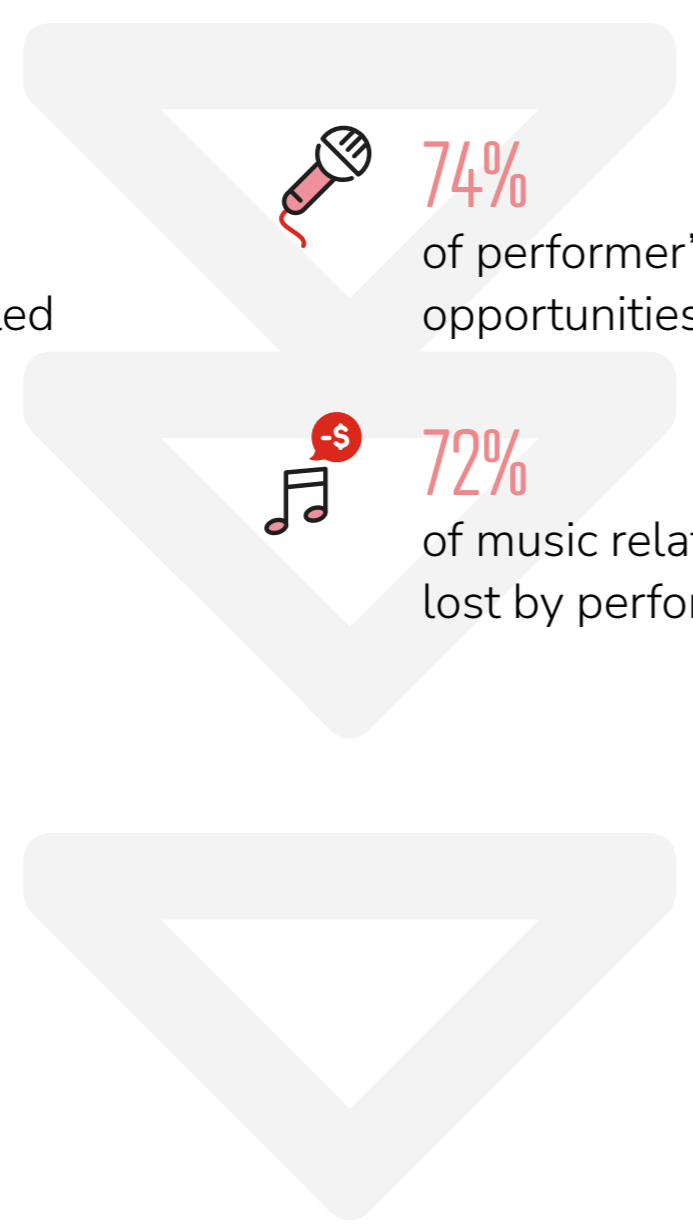
 **71%**
of visitor/attendee
spending lost

 **74%**
of performer's
opportunities lost

 **72%**
of music related income
lost by performers

 **73%**
of casual and part-time
event/venue jobs lost

 **69%**
event revenue lost



Live Music Impact in Greater Melbourne 2019–2021

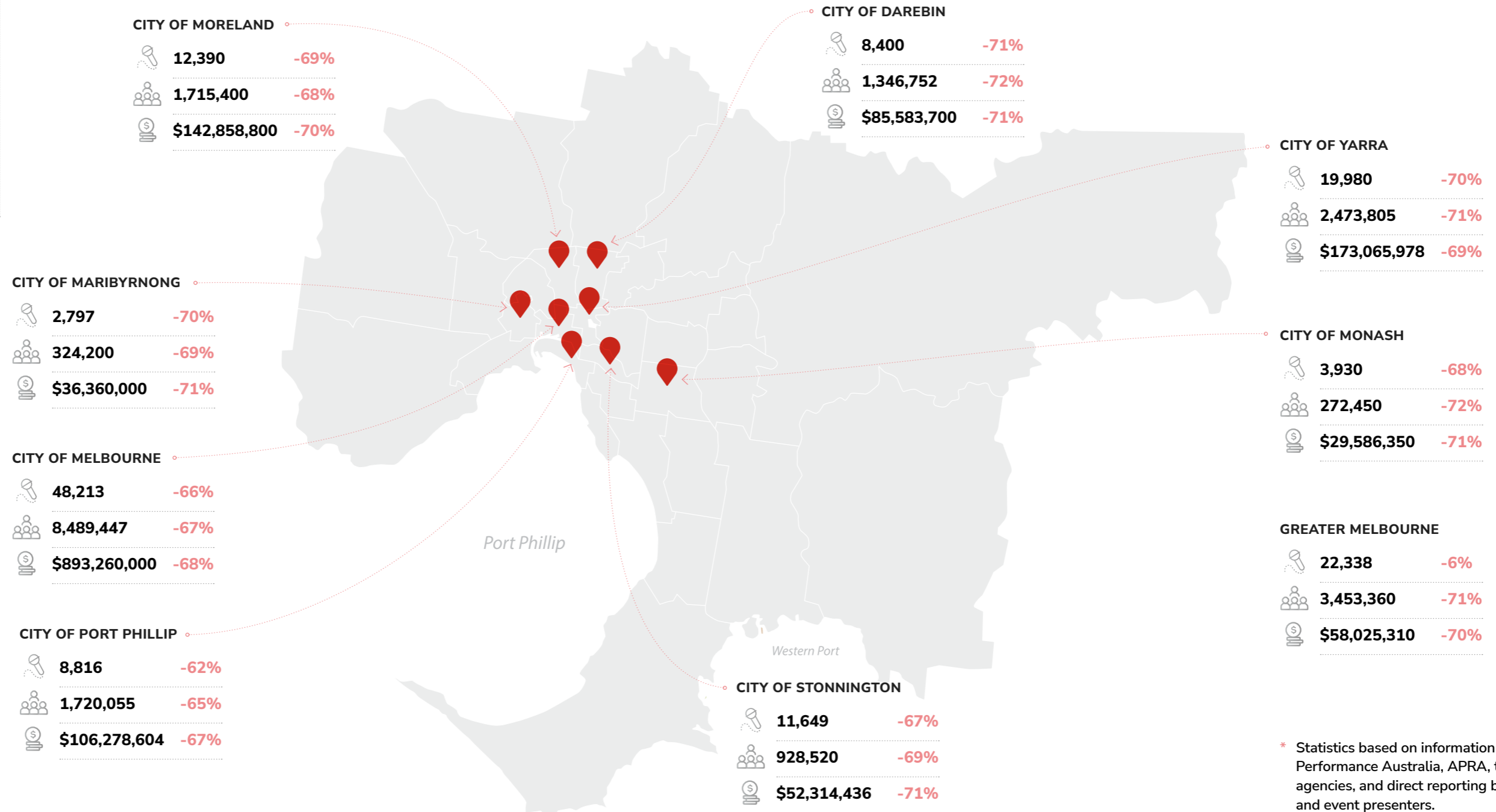


The importance of small venues is underlined by the fact that in the majority of council areas, live music activities in small venues generate an average of 75% of gigs and audiences and 65% of revenue. The exceptions being the cities of Melbourne (majority of large concerts and festivals) and the city of Port Phillip (home of the St Kilda Festival).

- NUMBER OF GIGS
- ATTENDEES
- REVENUE AND SPENDING

FIGURES BASED ON 2019 (THE LAST YEAR OF 'NORMAL' ACTIVITY)

% CHANGE FROM 2019 COMPARED TO 2020/2021



* Statistics based on information from Live Performance Australia, APRA, ticketing agencies, and direct reporting by venues and event presenters.

EXECUTIVE SUMMARY

THE PROJECT

In July 2021, Music Victoria conducted a study to research and quantify the economic generation, job creation and visitation driven by live music events and presentations in Regional Victoria. This presented a perfect opportunity to update the 2017 Melbourne Live Music Census which had provided industry and government with vital information to underpin policy development and investment.

The cities of Melbourne, Darebin, Maribyrnong, Monash, Moreland, Port Phillip, Stonnington and Yarra joined the Australasian Performing Right Association and the Live Music Office as project partners in enabling this important Music Victoria study.



This report is based on extensive desk research, data sets held, reported and shared by key stakeholders across arts, tourism and other government agencies, plus extensive survey responses from venue operators, event presenters, attendees and performers involved in Melbourne’s live music scene.

THE FOCUS WAS ON THE ECONOMIC BENEFITS GENERATED BY LIVE MUSIC PRESENTATIONS IN GREATER MELBOURNE IN



Providing employment for creative practitioners, venue and event staff and contractors



Stimulating and driving music tourism to metro Melbourne



Contributing to Gross State Product by generating income for thousands of businesses in Greater Melbourne



Enhancing Melbourne’s brand as a cultural destination for regional, interstate and overseas visitors



Identifying priorities for targeted policy support and infrastructure investment

It was a unique time to compare the level of activity in 2019 — the last year of ‘normal’ operation, with the 2020/2021 years when the entertainment and hospitality sectors were devastated by public health restrictions in response to the global pandemic.

Providing that comprehensive comparative data to inform future planning and investment, will help restore the live music sector to its former robust health.



The Financial Impact of Greater Melbourne Live Music Events



FESTIVALS

From event licences issue by the Australasian Performing Right Association and information supplied by festival organisers and ticketing agencies, we identified 35 music festivals in metropolitan Melbourne.

They ranged in size from small suburban affairs to large events attracting tens of thousands. Some were one-day affairs, others spread performances across a number of days in multiple venues. Most were ticketed, others offered free entry to fans, some a combination of both. The majority take place in the CBD and inner suburbs.

In 2019, these events attracted 388,000 paying patrons. Another 500,000 attended free festival events.

FESTIVAL REVENUE SUMMARY 2019	\$ MILLIONS
Box Office / Ticket Revenue	49.5
Ancillary Spending @ Ticketed Events	35.6
Ancillary Spending @ Free Events	19.1
TOTAL	104.2

The revenue and spending reported is confined to dedicated live music events and does not include an estimate of value generated by the many Melbourne festivals where live music programming is important, but not the event focus.

During the pandemic years of 2020 and 2021, many major festivals were cancelled or postponed. Of the 35% that were able to proceed, 80% did so at reduced capacity due to public health restrictions, resulting in a 75% reduction in revenue and 76% job loss for performers and event staff.

CONCERTS

In 2019, APRA issued 2,230 special event licences for in Victoria, 1,620 of those for concerts in Greater Melbourne. Many of these are annual licences cover multiple presentations and programs by single presenters. The majority were held in suburban performing arts venues and the large theatres, arena and stadiums situated in, or adjacent to, the Melbourne CBD. A number also took place in large clubs and bandrooms situated in the inner-suburban music 'precincts'. Audiences ranged in size from the intimate Salon at the Melbourne Recital Centre (140 capacity), to the multi-thousand seat Marvel Stadium, Sidney Myer Music Bowl, Rod Laver Arena etc.

Based on ticket and revenue reporting to Live Performance Australia and information supplied by ticketing agencies and presenters, ticketed concerts in Greater Melbourne attracted 3.6 million patrons in 2019.

CONCERT REVENUE SUMMARY 2019	\$ MILLIONS
Box Office / Ticket Revenue	363
Ancillary Spending Onsite	323
Ancillary Spending Offsite	102
TOTAL	788

The effect of lockdowns and restrictions is dramatically underlined, by the COVID-related operations of The Arts Centre Melbourne, one of our most prolific concerts presenters. In 2019, there were 2,022 performance events in their five venues, attracting an audience of 2.1 million patrons. In 2020, there were 244 events (-81%) with an audience of 325,000 (-78%). Even though the number of events doubled in 2021 (548), density limits meant that the audience (403,000) did not increase proportionately (24%).

SMALL VENUES

Using APRA licencing information, responses from venue operators and our detailed research, we identified 777 small venues (pubs, bars, clubs, restaurants/cafes) licensed to present live music in 2019.

This list was then refined to identify 'regular' providers — a minimum of one live music gig per week, every week. The 505 we identified, represented a 9% increase on the 464 recorded in the 2017 Census project. 167 were in the City of Melbourne, 201 in the inner-suburban music 'precincts' and 137 in the outer suburbs.

The 97,000 gigs they hosted in 2019 attracted an audience of 12.5 million, 49% of whom paid a door/entry fee.

SMALL VENUE REVENUE SUMMARY 2019	\$ MILLIONS
Box Office / Ticket Revenue	123.5
Ancillary Spending in Small Venues	823.9
TOTAL	947.4

Small venues were particularly hard-hit by lockdowns and restrictions. Various sources estimate that in 2020 the small venues sector was operating at approximately 8% of 2019 capacity with the majority of the 2,670 Full Time Equivalent workers losing their employment.

Things improved somewhat in 2021, but we note that only 47% of the venues licensed for live music in 2019, have so far renewed their licenses for 2021/2022.

The Employment Impact of Live Music Performances in Greater Melbourne

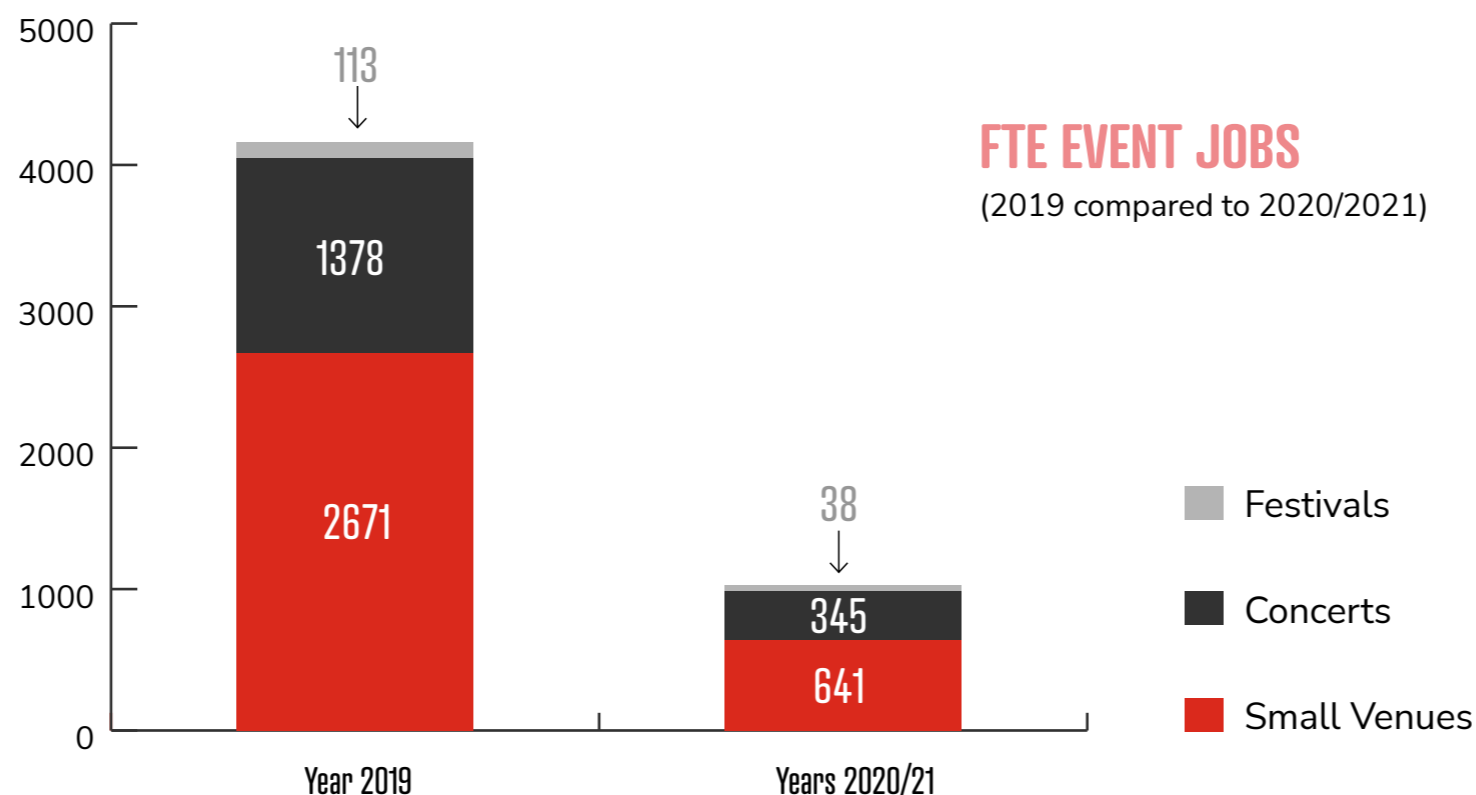


In 2019, live music performances in Greater Melbourne created 4,162 Full Time Equivalent (FTE) jobs in pubs, clubs, bars, concert venues and at festival sites.

These are hours associated with the window of presentation, and do not include management hours outside that window, nor the significant work by the event team in the lead-up to festivals and the hours generated for a range of external contractors.

However, the COVID-related cancellations and/or postponement of events and the shutdown of small venues during 2020/2021 had a massive and disproportionate employment impact (compared to other industry sectors), due to the significant casualised workforce, many of whom were not eligible for federal and/or state government support payments and programs.

The average job loss across the sector was 66%, but the impact was not evenly spread across the sector. Performing Arts Centres which are predominantly council owned/operated were ineligible to apply for JobKeeper. As a result, they reported that 75% of their casual/part-time staff lost their work.



While 95% of small venues reported that JobKeeper (especially) allowed them to maintain some staff, they also reported that many did not meet eligibility criteria.

Festivals retained a greater percentage of their workers. However, as the 2021 Legislative Council inquiry into the impact of COVID-19 on the events and tourism sectors heard from numerous responders, the uncertainty of ongoing employment saw a significant number of qualified staff exit the sectors during 2020/2021.

Widespread concern was expressed that they will not return, creating a significant skills deficit.

These figures represent the loss of Full Time Equivalent Jobs (1,610 hrs annually) by casual and part time staff. They do not include full time management.

* Parliament of Victoria (Legislative Council Economy and Infrastructure Committee), Inquiry Into The Impact Of The COVID-19 Pandemic On The Tourism And Events Sectors — submissions from Crew Care, Arts Industry Council of Victoria, Save Victorian Events, Australian Festival Association, Gig Power etc. (August, 2021)



Growth and Decline of Melbourne Live Music 2017–2021



	2019	GROWTH SINCE 2017	2020/2021	VARIATION
ANNUAL GIGS	141,000	17%	26,518	-72%
EVENT/VENUE ATTENDEES	47,459,528	16%	5,431,120	-84%
EVENT/VENUE BOX OFFICE	\$505,000,000	21%	\$126,250,000	-75%
ONSITE ANCILLARY SPENDING	\$1,250,900,000	11%	\$300,216,000	-76%

CONCLUSION

Live music presentations create opportunities for Melburnians (and visitors) of all ages, backgrounds and gender identities to gather in diverse venues and at all manner of events to celebrate creativity and mark individual and community milestones and achievements. Additionally, these performances contribute to social cohesion and individual wellbeing and mental health.

Restoring the sector to its previous health is therefore a priority in terms of reinvigorating a vital contributor to the city and state economy.

This project updates the Melbourne Live Music Census 2017, which followed the first such project in 2012.

Although mindful of the fact that the scope of reporting and thus the quality of data available for analysis has varied significantly since those earlier reports, where credible comparisons are possible and appropriate, there is no doubting the significance of the live music sector in 2019, nor the importance for all stakeholders of developing and implementing strategies to restore activity to previous levels in a post-pandemic environment.



The road to recovery for the live music sector will be long and challenging and it is clear, from responses and feedback provided by the range of presenters and practitioners that there will need to be a much more collaborative approach between the events sector, all levels of government and associated agencies, in order to restore the fortunes of this vitally important economic and social generator.

The key findings — more live gigs, more performers, increased audiences, revenue and employment across small venues, concerts and festivals demonstrate the health of the live music scene in 2019.

Just as dramatically, the report demonstrates the impact on the hospitality and entertainment sectors of two years of COVID-related venue and event shutdowns and cancellations, travel restrictions and audience limits following the State of Emergency declared in March 2020.

Given the consistent and significant growth in revenue and attendance between 2014 and 2019, there is every reason to suggest that with appropriate, targeted investment and support for

practitioners, presenters and workers, Melbourne's live music sector will be restored to previous levels of activity.

Hopefully, the findings in this report will inspire action to that end!

The research team gratefully acknowledges the assistance of all who have shared their advice, information and data directly or through surveys responses.

Dobe Newton

Author and Project Manager
Music Victoria



LIVE MUSIC – MELBOURNE'S REAL PASSION



Still #1 MUSIC V SPORT

In the Melbourne Live Music Census 2017 report, we noted that Australians — and Melburnians in particular, are often referred to as being 'obsessed' with sport, and Melbourne often referenced as the nation's 'sporting capital'.

However, that report demonstrated that annual attendance at major sporting events was dwarfed by attendance at live music performances across this city.

In that year, live music venue and event attendance (festivals, concerts and small venues)

tripled the reported 7.6 million attendees for major sporting codes/events including AFL, A-League, NRL, Cricket, Basketball, Netball, Australian Grand Prix, Spring Racing Carnival and the Australian Tennis Open. (Sources: *Melbourne Live Music Census 2017*, sporting code and event websites, Wikipedia, Austadiums.com.au)

This project confirms that in 2019, documented attendance at live music events in Greater Melbourne totaled 47.5 million.

Again, many times sporting code/event attendances for the year.

We note that because our reporting is focused on revenue, spending and job creation across the metro area, the total does not include attendance at music components of multi-artform events such as the Melbourne International Festival, Moomba nor a number of large and free music celebrations such as the St Kilda Festival with an estimated attendance of 400,000.



The Live Music Capital

In 2018, Melbourne hosted the first Music Cities Convention held in a southern hemisphere location. It was the perfect setting in which to launch the *Melbourne Live Music Census 2017* report.

Among all the data, there was one that grabbed the attention of policy makers and media headlines. Namely, that Melbourne — on a live music venue per capita basis, had a legitimate claim to the title of Live Music Capital of the World.

Identifying live music as a core cultural offering by a city/region arguably dates back to 1991, when The City of Austin decided to identify itself as the 'live music capital of the world'.

This was a trademark registration as part of a marketing campaign, rather than a claim backed by quantifiable data. It undoubtedly succeeded!

In 1994, the music industry 'bible', *Billboard Magazine*, published a comprehensive feature on Melbourne's music scene which concluded that it could rightly claim to be "the Austin of the Southern Hemisphere".

The following decades saw increasing focus and growth in international interest in 'music cities' and particularly the value of music tourism — the contribution to local economies of visitor spending associated with attendance at live music events and venues. In addition, of course to the significant social and health benefits that have been often highlighted and well-documented. This was one of the factors that inspired our research team to the detailed analysis which produced the first Melbourne Live Music Census report in 2012.

To coincide with the London Olympics in 2012, then Mayor Boris Johnson, commissioned BOP Consulting to produce the first 'World Cities Cultural Report'. It detailed a range of cultural data for 12 major cities.

Neither Melbourne nor Austin — both especially proud of their live music scenes, were on that initial list.

A second 'World Cities Cultural Report' was issued in 2015, including both Melbourne and Austin.

That report inspired the creation of a World Cities Cultural Forum aimed at sharing information and best practice.

It was an analysis of the data contained in that report and verification undertaken by the Music Victoria census research team, that led to the identification in our 2017 report of Melbourne as the world's 'live music capital', with one live music venue per 8,087 inhabitants (Austin one per 11,050, Sydney one per 11,126, New York one per 18,500 ... etc).

The third 'World Cities Cultural Report' (2018) has allowed us to update the data based on 'greater city' municipal boundaries and populations rather than smaller CBD areas.

We can therefore confidently report that in 2019, Melbourne with a total of 570+, retained its 'title' with one live venue per 8,785 inhabitants. Well ahead of London (one per 10,500), Sydney (one per 11,200), San Francisco (one per 14,400), Austin (one per 16,600) ... etc.

Note: It also presented significantly more live gigs with greater attendances than any other reporting city.



'Counting The *Beat*'

For many years, fans, performers and venue operators have relied on the free listings in the weekly '*Beat Magazine*' to source and promote gig information. The spreadsheet data generously shared by the magazine provides a valuable insight into small venue operation in Melbourne in 2019.

The free listings for the year promoted 16,765 shows in small venues which created 45,266 gigs for performers — 65% for bands (29,423) and 35% for solo/duo artists and DJs (15,843). DJs accounting for 70% of that latter total.

Although only 49% of venues regularly have a door/entry fee, they accounted for the presentation of 77% of shows and gigs for performers.

The average door/entry charge across the sector was advertised as \$25.

(Note: This aligns precisely with the \$ figure we determined from the hundreds of Attendee survey responses we received).

All of the 60 most regular venues presented live music at least once per week throughout the year. In addition, 33% of them presented shows at least

twice per week, 26% of them presented at least three times per week and 27% of them presented four times a week or more.

In terms of the regular per-month presenters, the Top 10 for the year were — Paris Cat (an average 58 shows per month), The Tote (50), Drunken Poet (42), Wesley Anne (39), Bar Open (38), Workers Club (38), Bar 303 (34), Gasometer (30), Evelyn (39) and Old Bar/Whole Lotta Love (28).

COVID IMPACT

The printing of the physical magazine ceased in March 2020 following the virtual shutdown of music venues, and did not resume until May 2022. The listings upon resumption demonstrate how far the sector recovery has to go.

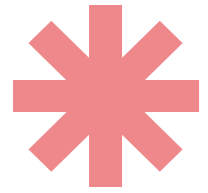
For the week May 9 – May 15, 2019 there were 331 listed small venue shows which featured some 800 performers (bands/solo/DJ).

In the corresponding week in May 2022, there were 82 listed shows (-75%) with 163 listed performers (-80%).



RECOMMENDATIONS





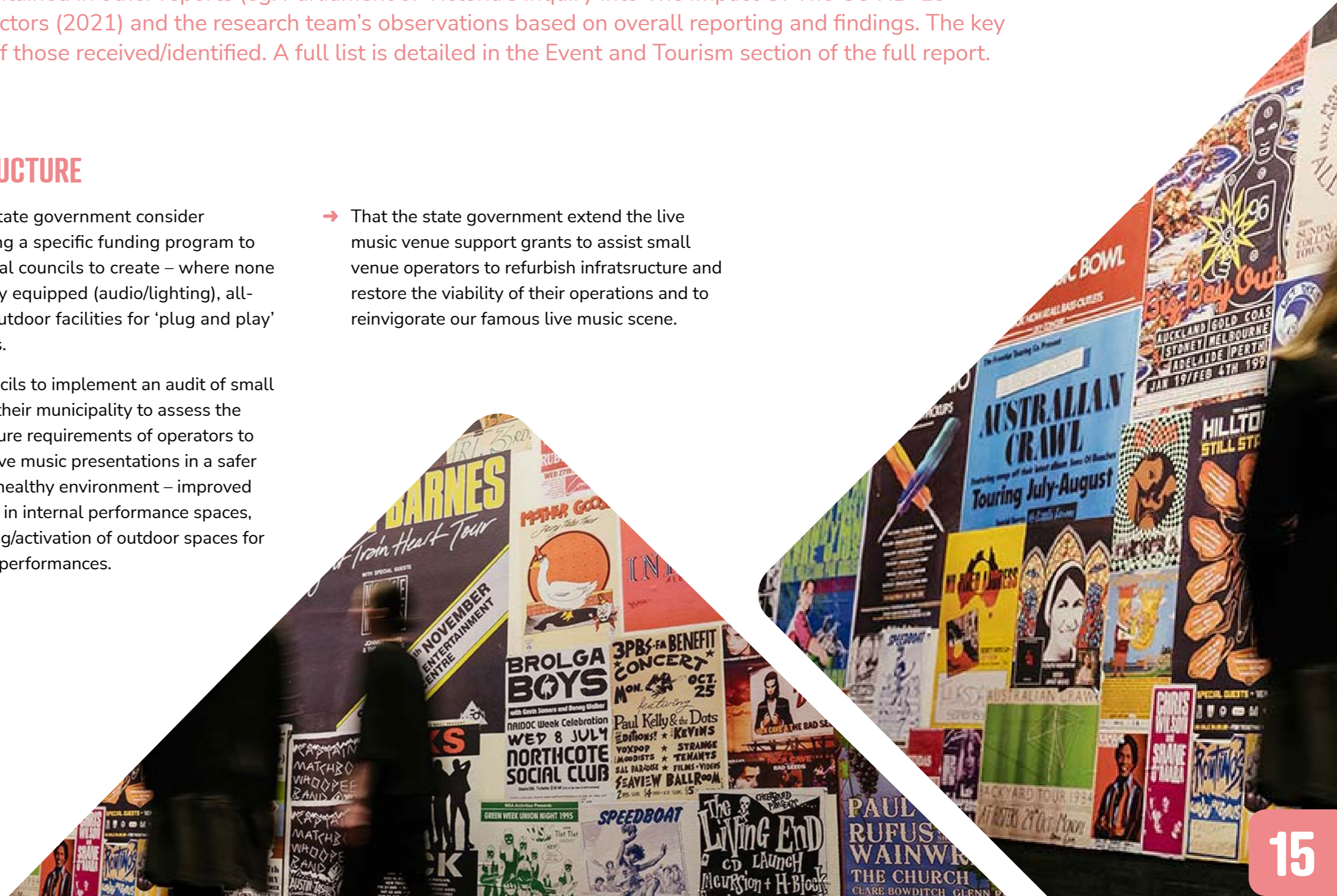
The recommendations contained in this report are drawn from a combination of sources — direct reporting from event presenters, venue operators and local council officers in the Greater Melbourne Tourism Area; hundreds of responses to our online event, venue and practitioner surveys; submissions and suggestions contained in other reports (eg. Parliament of Victoria’s Inquiry Into The Impact Of The COVID-19 Pandemic On The Tourism And Events Sectors (2021) and the research team’s observations based on overall reporting and findings. The key recommendations below are a selection of those received/identified. A full list is detailed in the Event and Tourism section of the full report.

EMPLOYMENT & SKILLING

- In light of the significant impact of COVID-19 on the event sector workforce, this report and our findings lead us to recommend that the Victorian Government investigate options for supporting skills growth in the events sector through targeted apprenticeship programs and/ or subsidised courses. This could be through inclusion of apprenticeship pathway and other courses for the events sector in the Victorian Government’s Free TAFE for priority courses initiative. To be developed in consultation with the events sector to identify priority needs.

INFRASTRUCTURE

- That the state government consider establishing a specific funding program to enable local councils to create – where none exists, fully equipped (audio/lighting), all-weather outdoor facilities for ‘plug and play’ activations.
- Local councils to implement an audit of small venues in their municipality to assess the infrastructure requirements of operators to facilitate live music presentations in a safer and more healthy environment – improved ventilation in internal performance spaces, remodelling/activation of outdoor spaces for live music performances.
- That the state government extend the live music venue support grants to assist small venue operators to refurbish infrastructure and restore the viability of their operations and to reinvigorate our famous live music scene.



COLLABORATION & INDUSTRY DEVELOPMENT

→ That the state government formalise a Live Music Taskforce/Forum to facilitate the sharing of information and the identification of policy priorities across the sector. The body would involve representatives from state government agencies, local government and industry representatives.

THE BODY WOULD BE TASKED WITH

- i. Facilitating the sharing of information between local councils and Tourism Boards to create consistency in the development of live music action plans already developed and/or in planning. Including the potential creation of 'music precincts' in appropriate areas.
- ii. Acting as a conduit for the promotion of recommendations to create a uniform and simplified approach to help venue operators and event presenters to navigate the regulatory requirements (permits/licences) associated with live music presentation.
- iii. Working with Visit Victoria, local councils and Tourism Boards to facilitate the incorporation of live music offerings in marketing campaigns targeting potential consumers — local, regional, interstate and international.
- iv. Creating a 'round table' for the identification of challenges impacting live music sector businesses and workers and the priorities ensure long-term viability.

- That the 'industry' work with the Municipal Association of Victoria to ensure that local councils are aware of the importance of live music in their municipalities and create mechanisms for more formal interaction with local businesses, creative practitioners and event presenters.
- That Music Victoria and Victorian Association of Performing Arts Centres expand their cooperative relationship to include detailed assessment of the needs of 50+ regional and metropolitan venues to address the replacement/upgrade of aging infrastructure.



CREATIVE PRACTITIONER SUPPORT

- That the Victorian state government, through its arts funding agencies, consider an urgent and substantial increase of the funding allocation to individuals and groups through its various funding programs. (These practitioners received 11% of total arts budget in 2019/2020 and 8.4% in 2020/2021). Specifically increase the allocation for contemporary music (Music Works) program (3.3% of total arts budget in 2019/2020 and 3.9% in 2020/2021).
- Create a formal process to investigate the potential implications of creating a 'living wage' for creative practitioners involved in the live music sector.

FUTURE RESEARCH

- That the state government acknowledge the importance of current data to underpin policy development and resource allocation and make a budget allocation to enable Music Victoria to undertake a Victorian music census project (regional and metropolitan) in 2023 to accurately assess the recovery from COVID-19. And that an in-principle commitment be made to repeating the process every three years.
- That state and local governments develop a mechanism to capture comprehensive and reliable data on the value of 'music tourism'. The spending and consumption in the broader economy associated with visitation to live music events and venues.



PHOTO CREDITS

COVER IMAGE

Australian Music Vault, Arts Centre Melbourne
Photo Credit Jason Lau

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Australian Music Vault, Arts Centre Melbourne
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Australian Music Vault, Arts Centre Melbourne
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Festival X Melbourne
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Smith Street Band Poster @ Croxton
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Dan Sultan @ Brunswick Ballroom Poster

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Angus Young Mural, AC/DC Lane
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Nevermind Nirvana Tribute Poster Palais Theatre

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Riff Raiders @ Cherry Bar Poster
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Sooki Lounge Performance
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Goomfest Performance
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Down South Performance
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Music Victoria Awards Performance_2
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Music Victoria Awards Performance_1

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Live Bands Nightly
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SLAM Rally
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Ed Sheeran @ AAMI Park
Courtesy Melbourne Olympic Parks Trust

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Australian Music Vault, Arts Centre Melbourne
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Sidney Myer Music Bowl Crowd
Photo credit Ian Laidlaw, courtesy Arts Centre Melbourne

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Australian Music Vault, Arts Centre Melbourne
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Melbourne Live Music Census Tram

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Australian Music Vault Posters
Photo Credit Dobe Newton — courtesy of Arts Centre Melbourne

BACK COVER

My Aeon Gig Poster
Photo Credit Dobe Newton

TECHNO TIME

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FRIDAY APR 21


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