

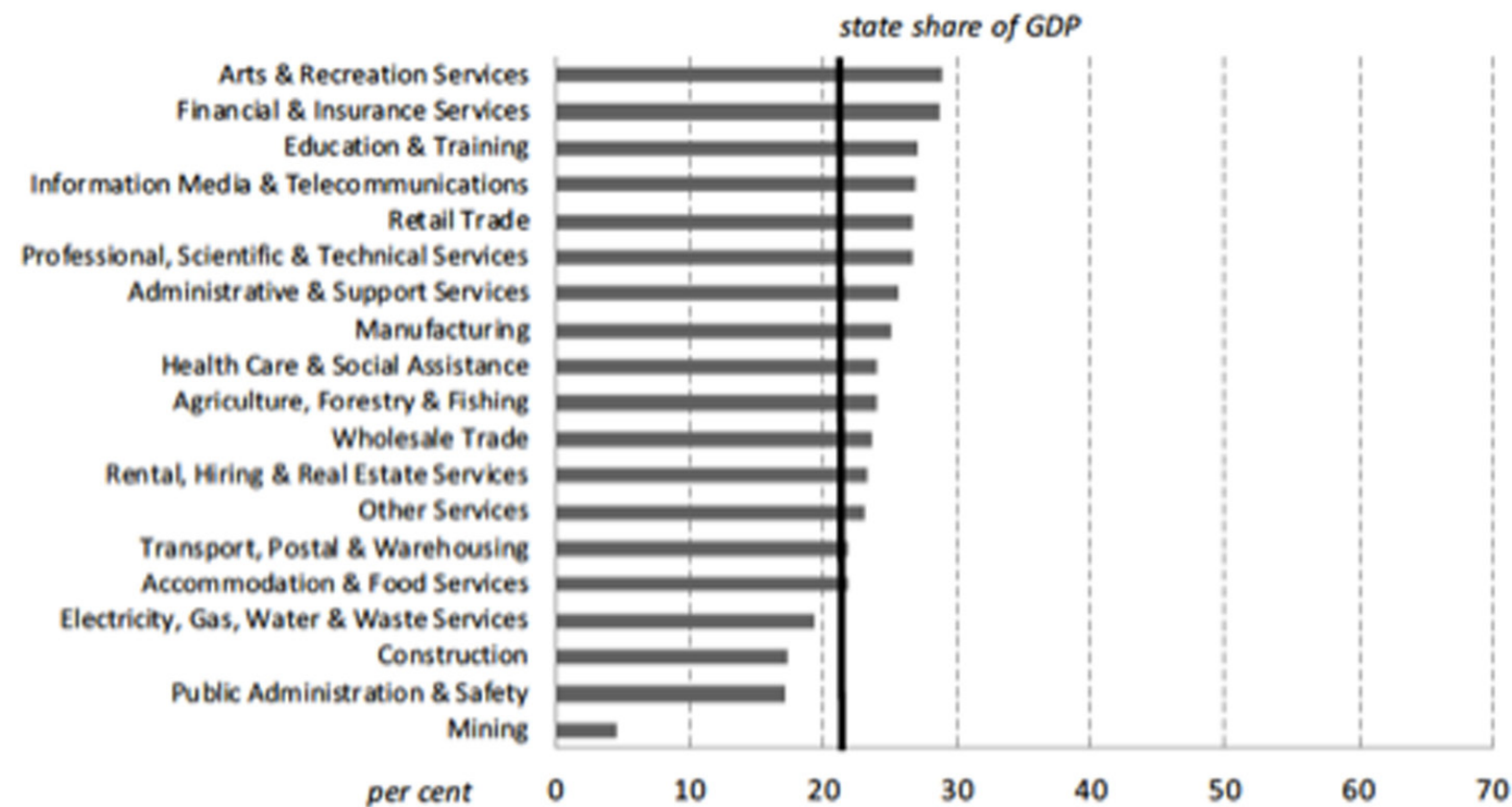
# **THE ROLE OF MUSIC IN CONTEMPORARY VICTORIA**

# **THE ARTS AND CULTURE SECTOR CONTRIBUTES \$11.4 BILLION TO GROSS STATE PRODUCT**

Source: KPMG Economic impact of the Victorian Arts and Cultural Sector (2013)

# STATE INDUSTRY SHARE AS A PERCENTAGE OF AUSTRALIAN TOTAL INDUSTRY 2011-12

Reference: Victorian state budget paper no.2 2012-13



# **THE MUSIC SECTOR IN VICTORIA IS A BILLION DOLLAR BUSINESS**

**LOCAL LIVE MUSIC VENUES – \$301M DIRECT ECONOMIC CONTRIBUTION TO GSP  
PLUS: CONCERTS, FESTIVALS, RECORDING, PUBLISHING**

Reference: Deloitte Access Economics – The economic, social and cultural contribution of venue-based live music in Victoria  
Music Victoria – Regional Victoria Live Music Census 2013

# **VICTORIA'S MUSIC SCENE**

**MELBOURNE IS THE PREMIER MUSIC CITY IN AUSTRALIA**

**62,000 GIGS ACROSS 470 VENUES**

**14.4 MILLION PATRONS**

**COMBINED PATRONAGE OF AFL, NRL, A-LEAGUE AND SPRING RACING CARNIVAL: 5.9 MILLION**

Victorians love their sport but they really love their music

# **GOVERNMENT/SECTOR RELATIONSHIP**

**THE MUSIC SCENE IS A COMMUNITY AND AN INDUSTRY**

**THE SCENE IS LARGELY SELF SUSTAINING IN THE FREE MARKET**

**ROLE OF GOVERNMENT - TO ENCOURAGE, PLAN AND REDUCE IMPACT OF PRESSURES**

# **ADVANCING VICTORIA'S MUSIC SECTOR HAS THE POTENTIAL TO DELIVER ECONOMIC, SOCIAL AND CULTURAL BENEFITS**

**FOSTER INCOME GENERATION**

**JOB CREATION**

**EXPORT EARNINGS**

**INCREASE TOURISM**

**CONTRIBUTE TO LIVEABILITY**

**PROMOTE SOCIAL INCLUSION, INCLUDING FOR YOUTH**

**SKILLS AND KNOWLEDGE TRANSFERS**

**DRIVE INNOVATION**

# GOVERNMENT/SECTOR RELATIONSHIP

GOVERNMENT INVESTMENT

**CREATE THE RIGHT CONDITIONS**

**ENGAGEMENT AND PARTNERSHIP**

**ADVOCACY AND COORDINATION**

**REGULATORY REFORM**

**DIRECT FINANCIAL INVESTMENT**

MUSIC SECTOR DELIVERY

**CREATE MUSIC, THE MUSIC EXPERIENCE AND LIVABILITY**

**DELIVER ECONOMIC AND SOCIAL DIVIDEND**



# **MUSIC VICTORIA POSITION AND PRIORITIES**

**CELEBRATE AND PROMOTE MELBOURNE AS A MUSIC CITY**

**SUPPORT DEVELOPMENT OF VICTORIA'S REGIONAL MUSIC SCENE**

**SUPPORT DEVELOPMENT OF VICTORIA'S MUSIC SECTOR**

**TARGETED FINANCIAL ASSISTANCE**

**REGULATORY REFORM**

# REGULATORY REFORM

**PLANNING SYSTEM**

**NOISE REGULATIONS**

**BUILDING CODE**

**LIQUOR REGULATION**

**LOADING ZONES**

Reforms mostly delivered, but important next step  
is to implement and educate.

# **REGIONAL DEVELOPMENT**

**197 VENUES**

**450 GIGS PER WEEK**

**AVERAGE 150 PATRONS PER GIG**

**WEEKLY AUDIENCE OF APPROXIMATELY 60,000**

# **REGIONAL DEVELOPMENT**

**THE REGIONAL LIVE MUSIC SCENE IS IN GOOD SHAPE, BUT IT CAN BE BETTER**

**UNEVEN SPREAD AND INCONSISTENT QUALITY**

**NO REGIONAL TOUR CIRCUIT LIKE WA OR NSW**

**A REGIONAL ACTION PLAN SHOULD BE IMPLEMENTED:**

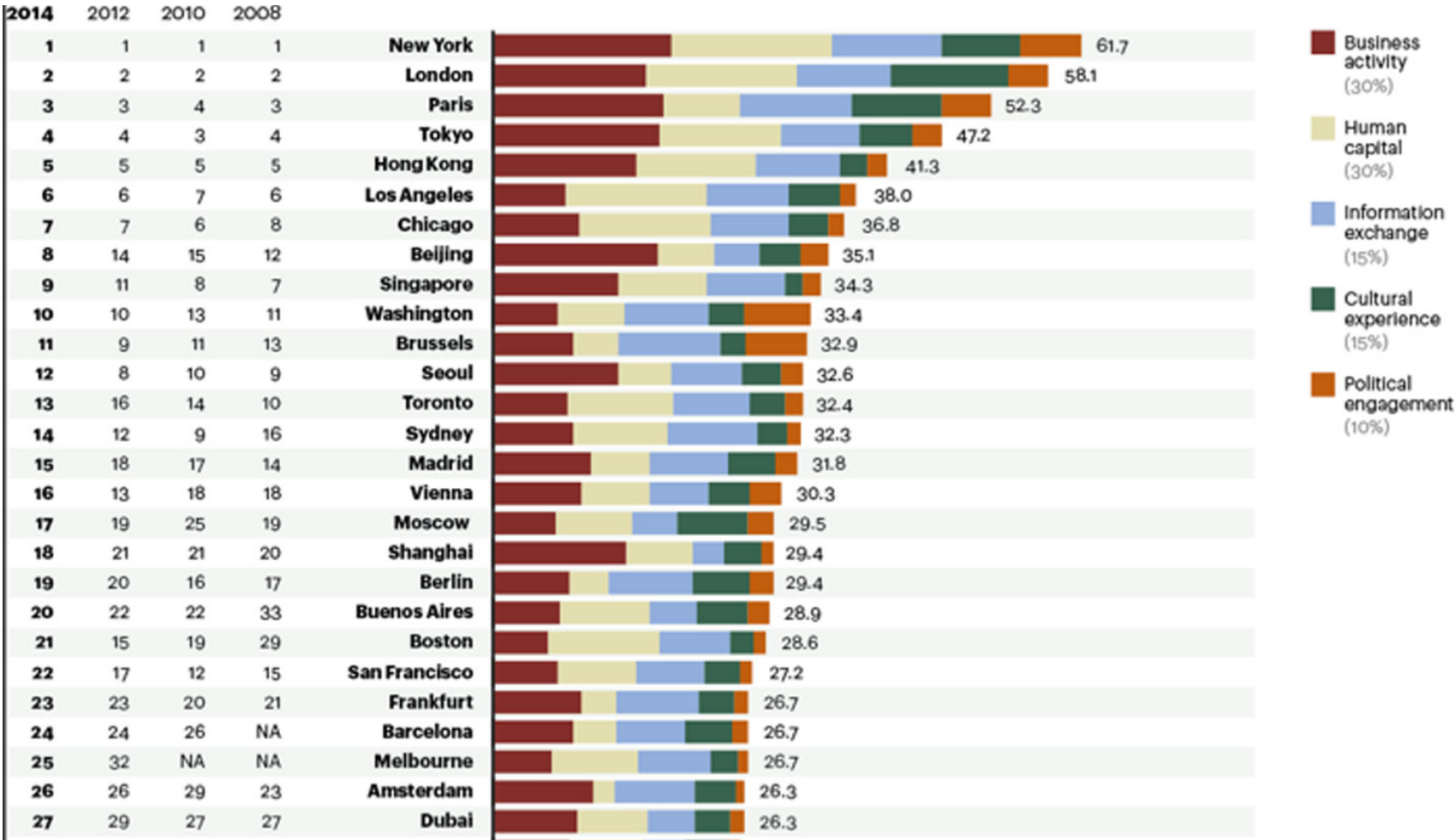
- FULL TIME REGIONAL OFFICER**
- STIMULATE REGIONAL TOUR CIRCUIT**
- PROFESSIONAL DEVELOPMENT PROGRAM**
- LOCAL GOVERNMENT MUSIC STRATEGIES**

# **REGIONAL DEVELOPMENT**

**NEXT STEP: MUSIC VICTORIA TO COORDINATE WITH VICTORIAN GOVERNMENT  
AND LOCAL GOVERNMENTS ON A REGIONAL ACTION PLAN**

# GLOBAL CITIES INDEX

Refeence: A. T Kearney Global Cities Index 2014



# **MELBOURNE: MUSIC CITY**

**CELEBRATE MELBOURNE'S MUSIC HERITAGE**

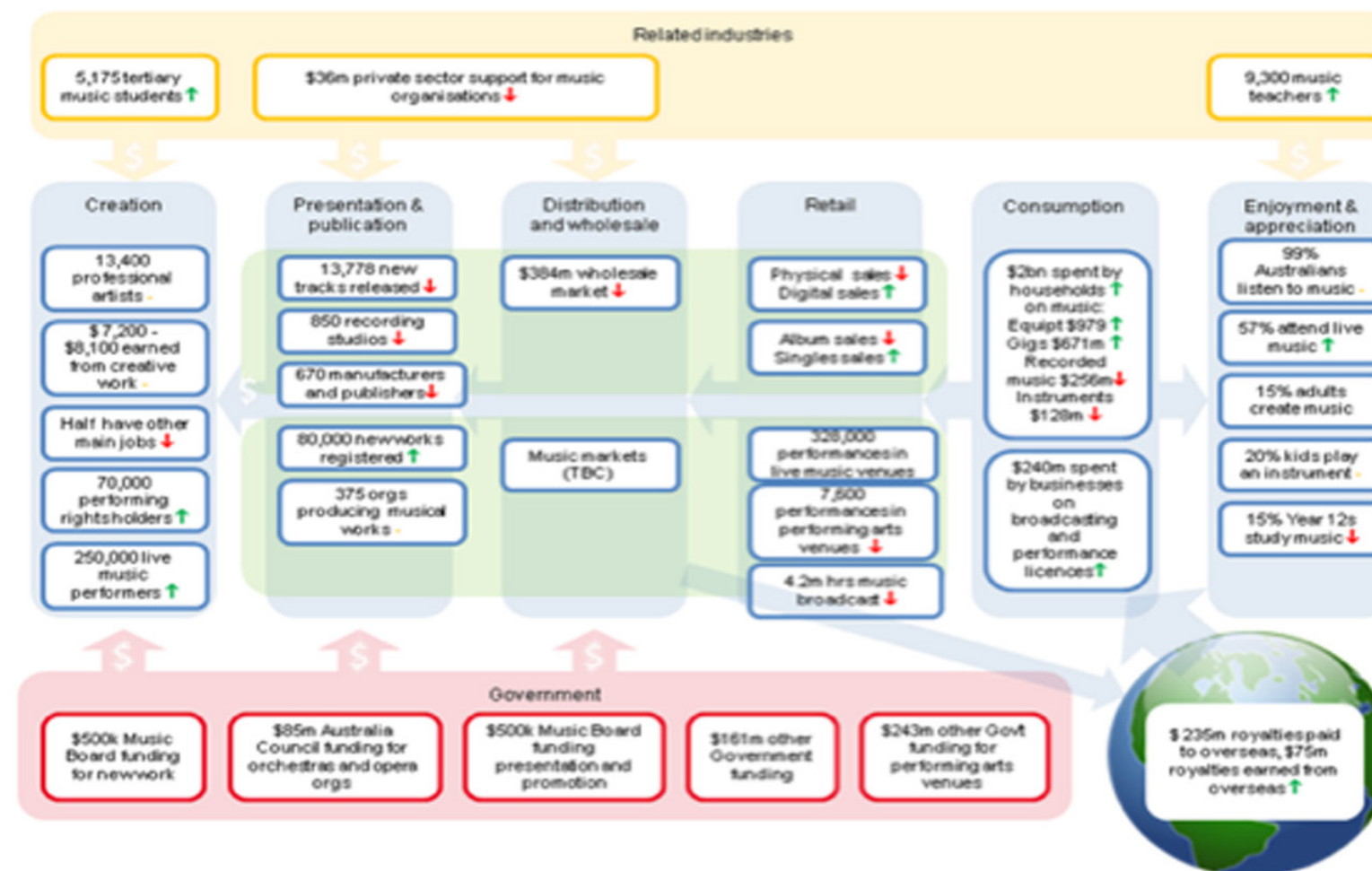
**MELBOURNE MUSIC CITY – MUSIC WEEK ON THE EVENTS CALENDAR**

**UNESCO CITY OF MUSIC (OR SOME OTHER FORMAL RECOGNITION)  
TO PROVIDE GLOBAL RECOGNITION**

**NEXT STEP: VICTORIAN GOVERNMENT, CITY OF MELBOURNE AND INDUSTRY  
TO BETTER COLLABORATE TO CELEBRATE MELBOURNE MUSIC CITY**

# AUSTRALIAN MUSIC SECTOR ECOSYSTEM

A statistical snapshot of annual activity

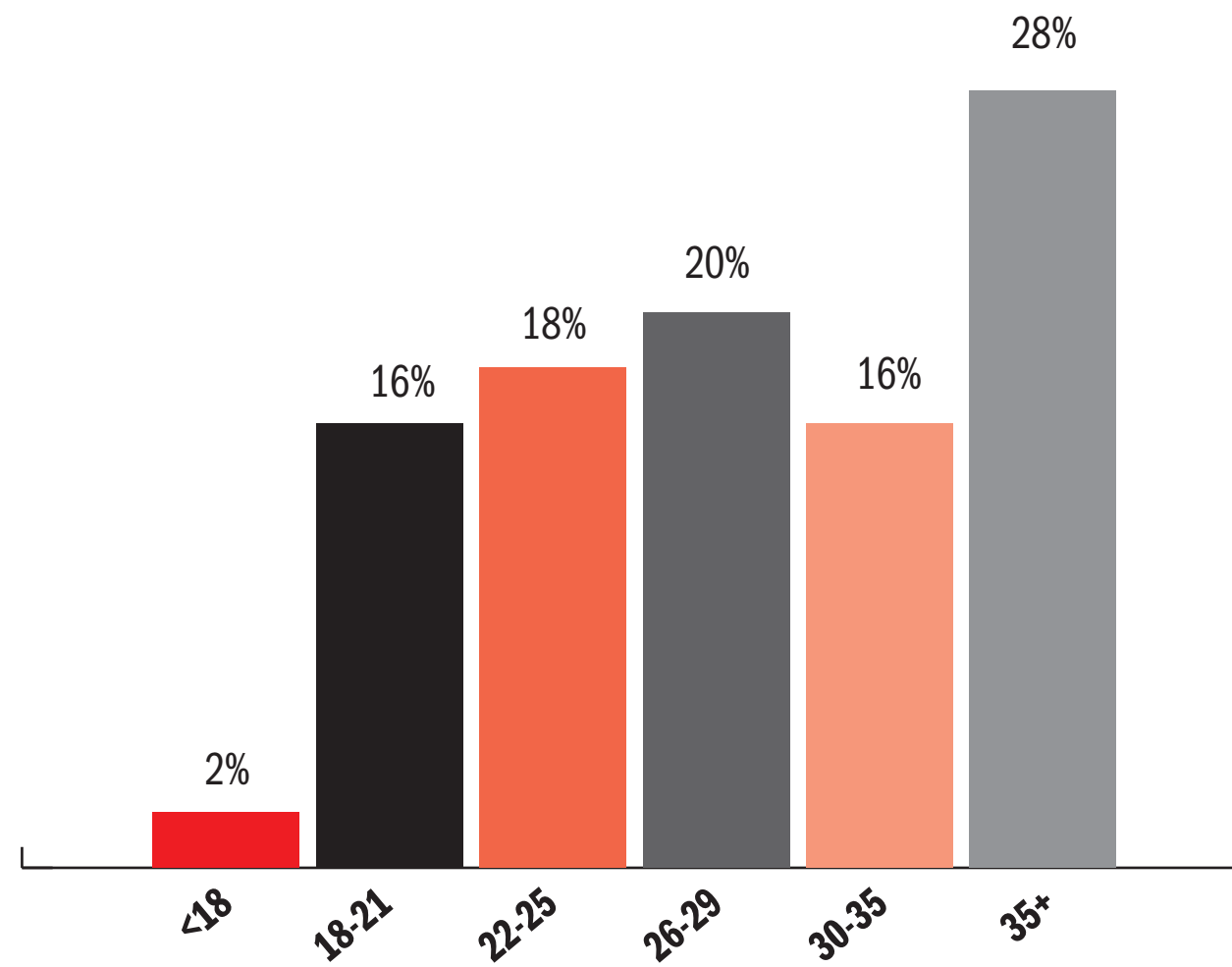




# PORTRAIT OF THE TYPICAL LIVE MUSIC CONSUMER

## AGE

Source: Live Music Census 2012



# PORTRAIT OF THE TYPICAL LIVE MUSIC CONSUMER

## GENDER

Source: Live Music Census 2012

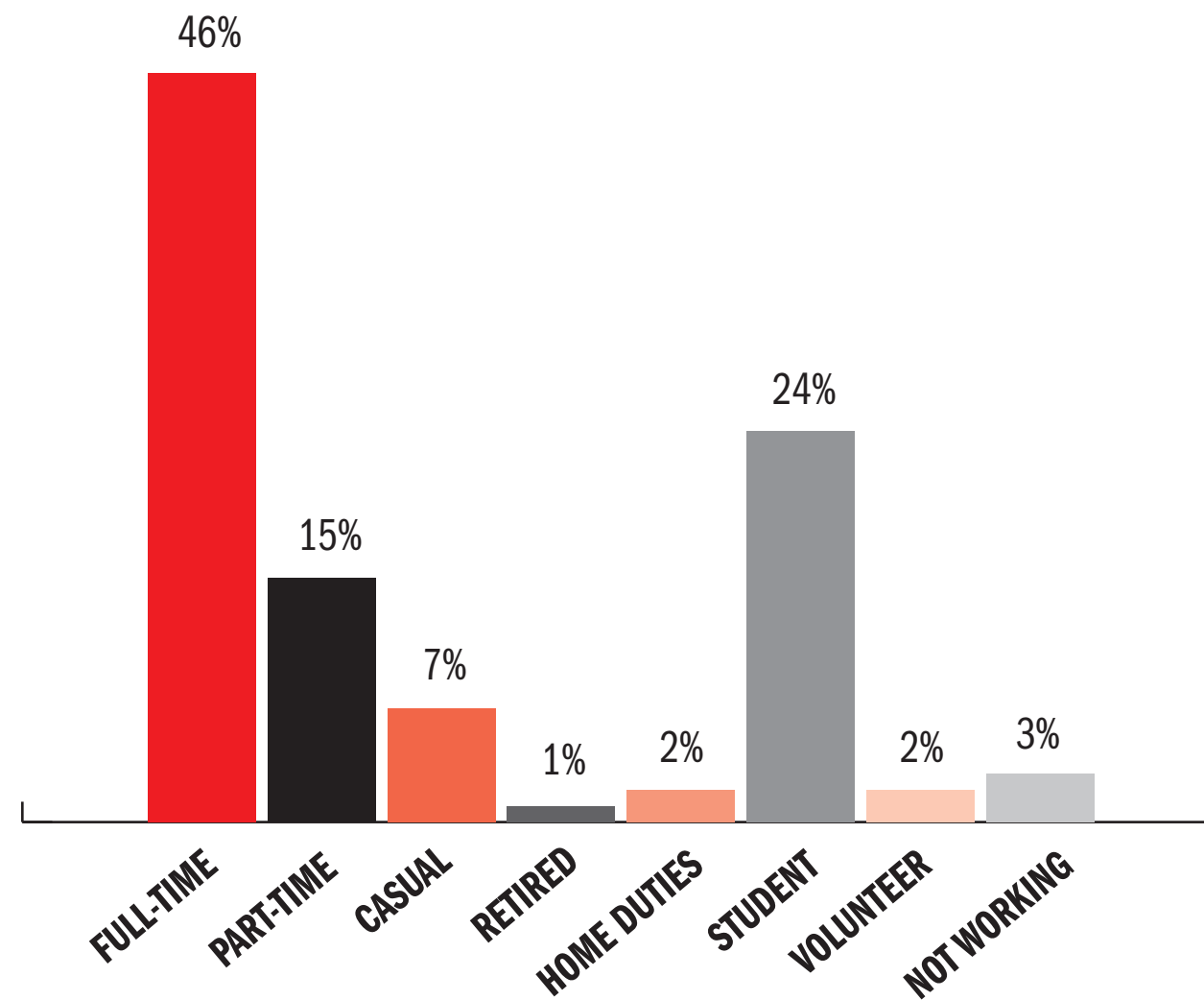


■ FEMALE 52%  
■ MALE 48%

# PORTRAIT OF THE TYPICAL LIVE MUSIC CONSUMER

## EMPLOYMENT STATUS

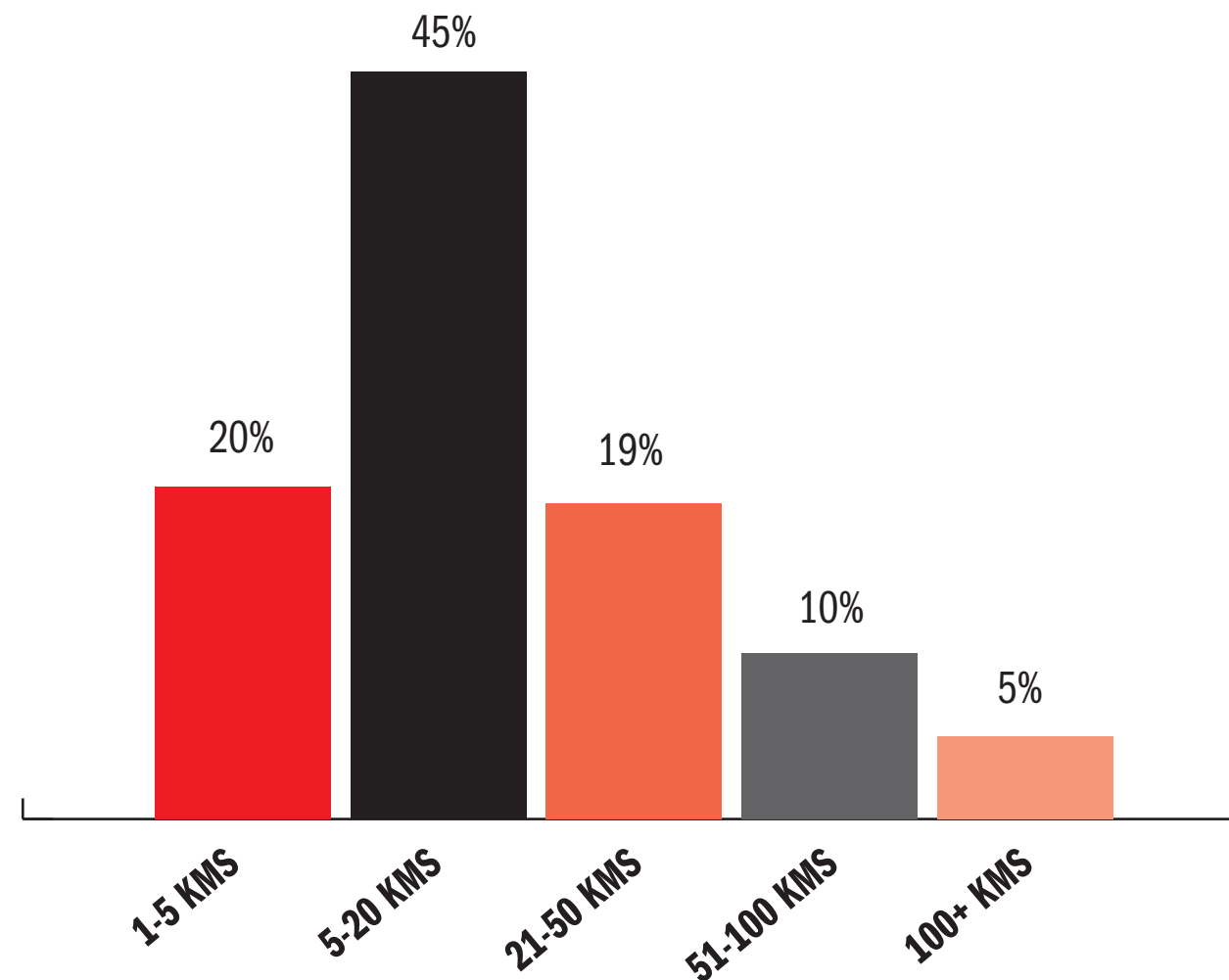
Source: Live Music Census 2012



# PORTRAIT OF THE TYPICAL LIVE MUSIC CONSUMER

## AVERAGE TRAVEL DISTANCE TO GIGS

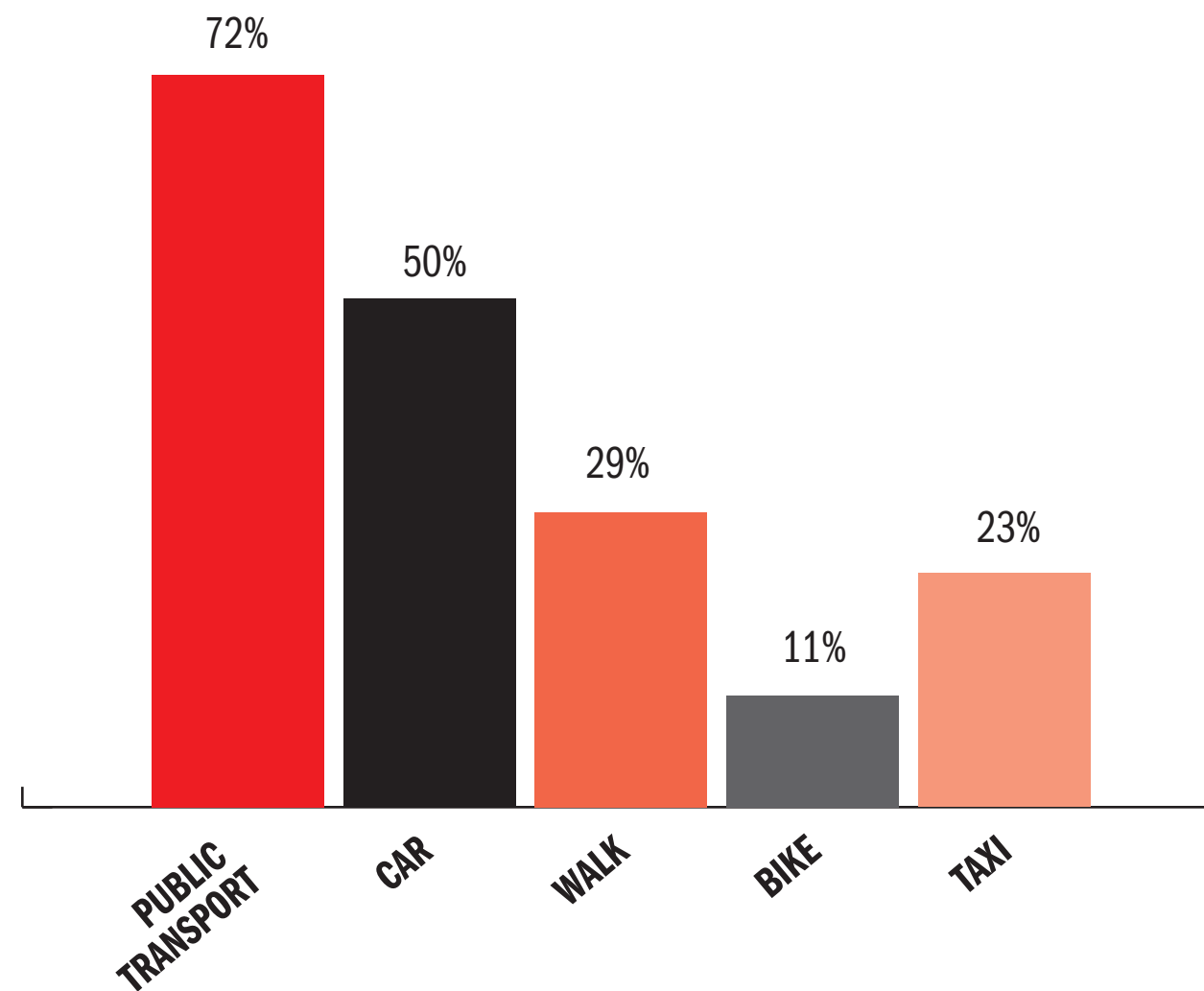
Source: Live Music Census 2012



# PORTRAIT OF THE TYPICAL LIVE MUSIC CONSUMER

## TRANSPORT METHOD TO GIGS

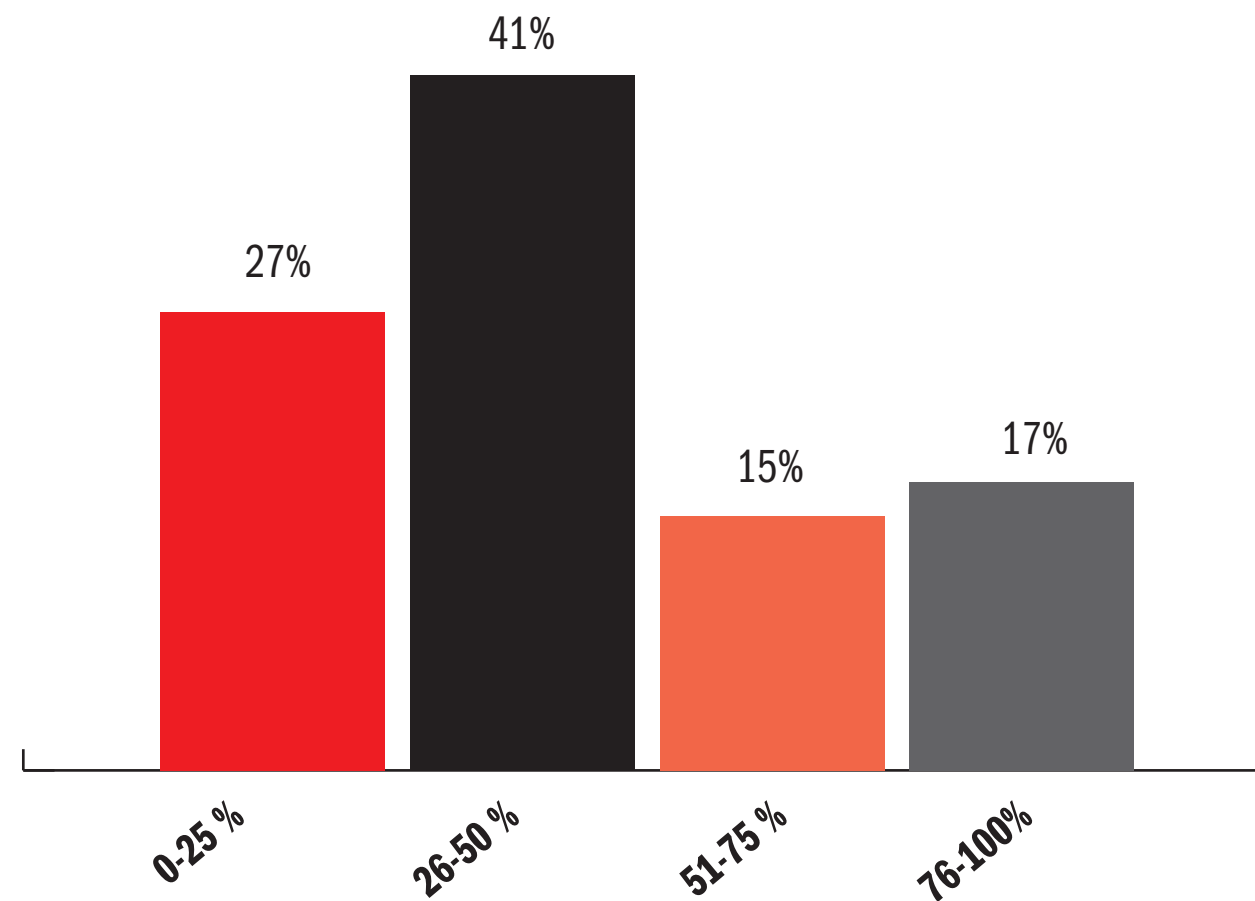
Source: Live Music Census 2012



# PORTRAIT OF THE TYPICAL LIVE MUSIC CONSUMER

## % OF MUSIC OWNED – AUSTRALIAN

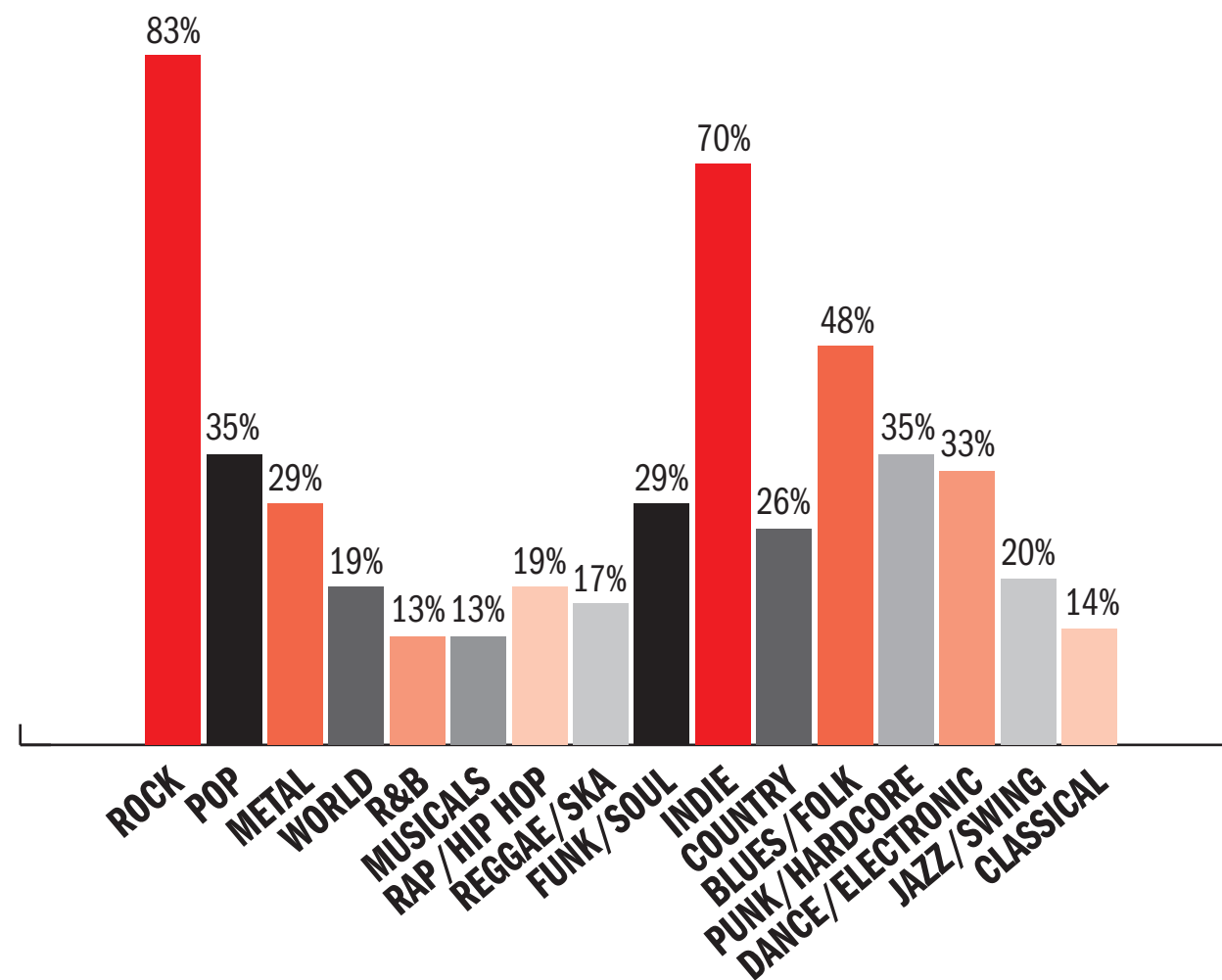
Source: Live Music Census 2012



# PORTRAIT OF THE TYPICAL LIVE MUSIC CONSUMER

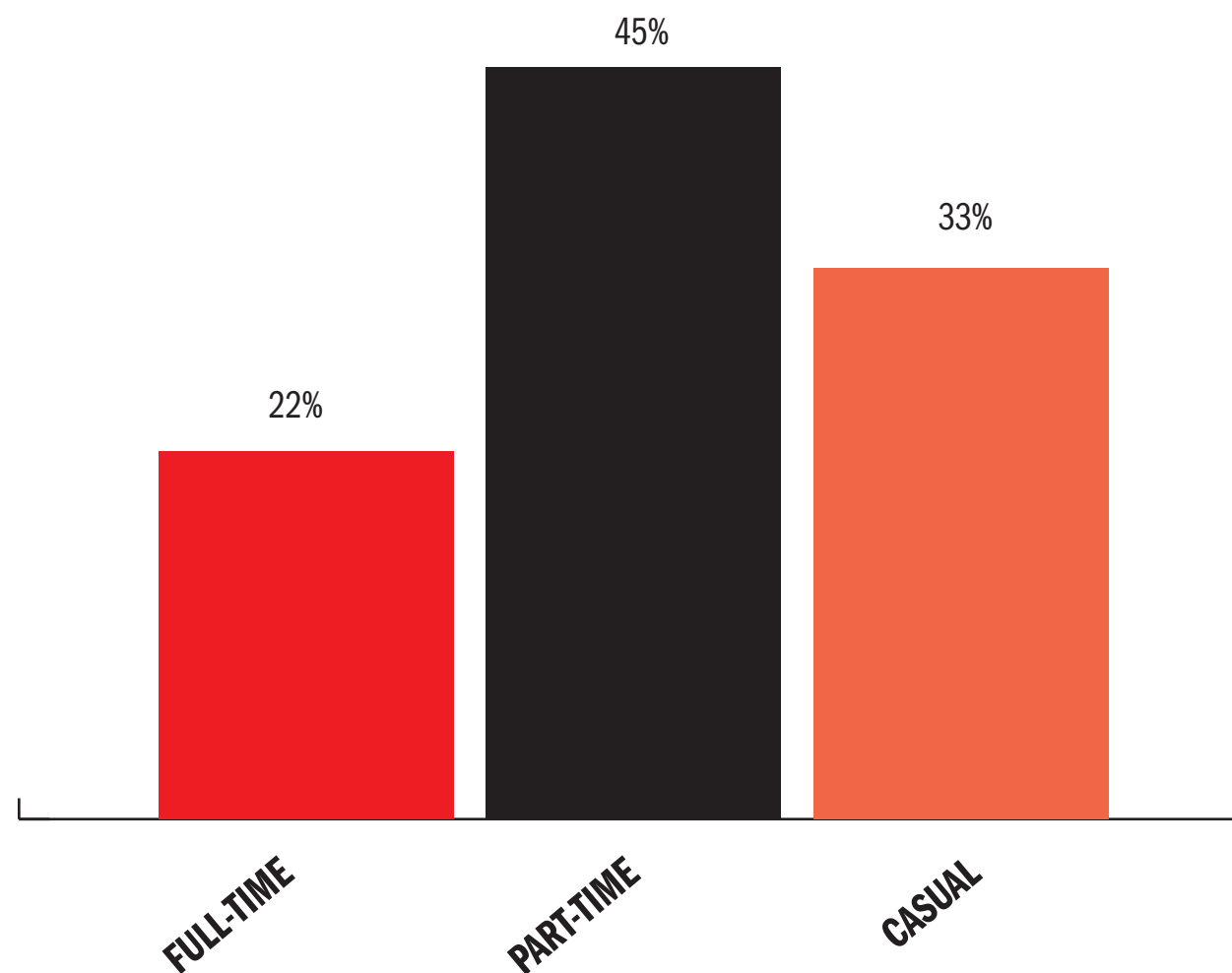
## FAVOURITE MUSIC GENRE

Source: Live Music Census 2012



# PORTRAIT OF THE TYPICAL LIVE MUSIC PERFORMER INDUSTRY EMPLOYMENT

Source: Live Music Census 2012





# PORTRAIT OF THE TYPICAL LIVE MUSIC PERFORMER

## MUSIC MAJOR SOURCE OF INCOME

Source: Live Music Census 2012

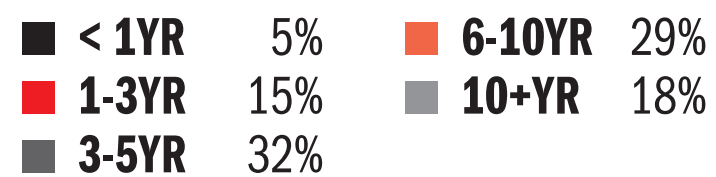
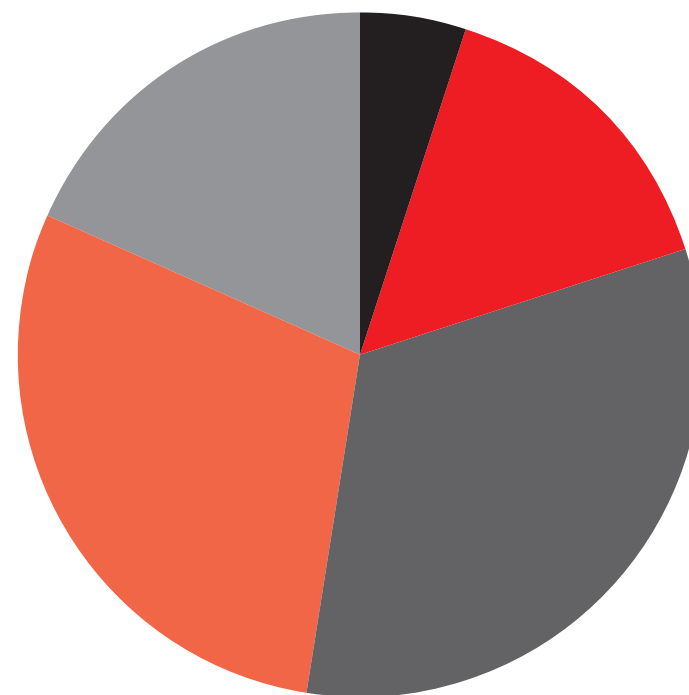


■ YES 38%  
■ NO 62%

# PORTRAIT OF THE TYPICAL LIVE MUSIC PERFORMER

## LENGTH OF TIME IN INDUSTRY

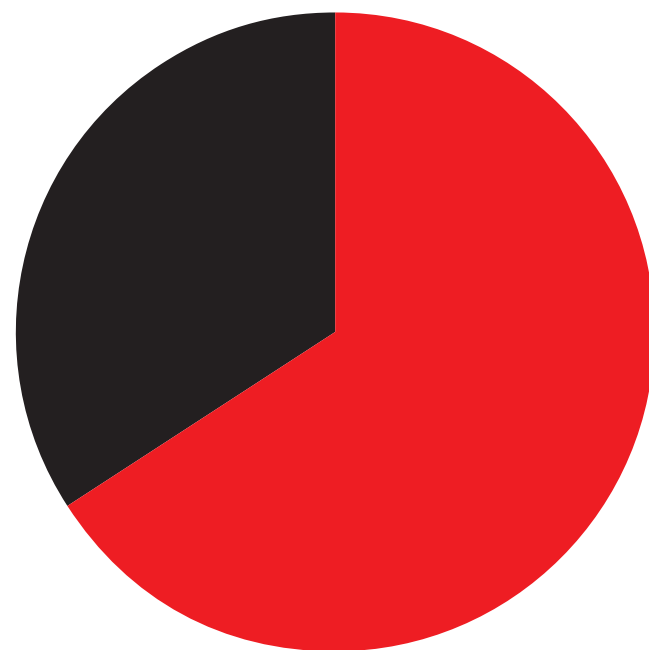
Source: Live Music Census 2012



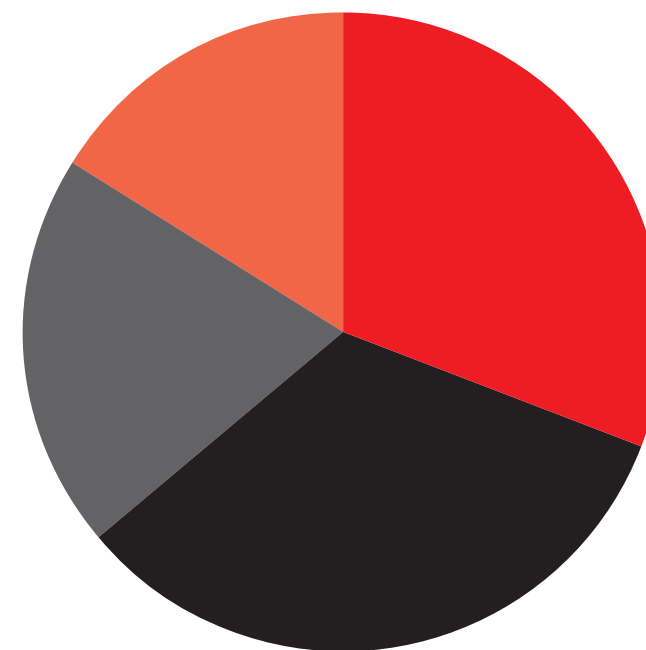
# PORTRAIT OF THE TYPICAL LIVE MUSIC PERFORMER

## FORMAL MUSIC TUITION

Source: Live Music Census 2012



■ YES 66%  
■ NO 34%



■ TAFE 31%  
■ PRIVATE 33%  
■ UNIVERSITY 20%  
■ SCHOOL 16%

# PORTRAIT OF THE TYPICAL LIVE MUSIC PERFORMER

## FORMAL MUSIC BUSINESS TRAINING

Source: Live Music Census 2012



■ YES 36%  
■ NO 64%

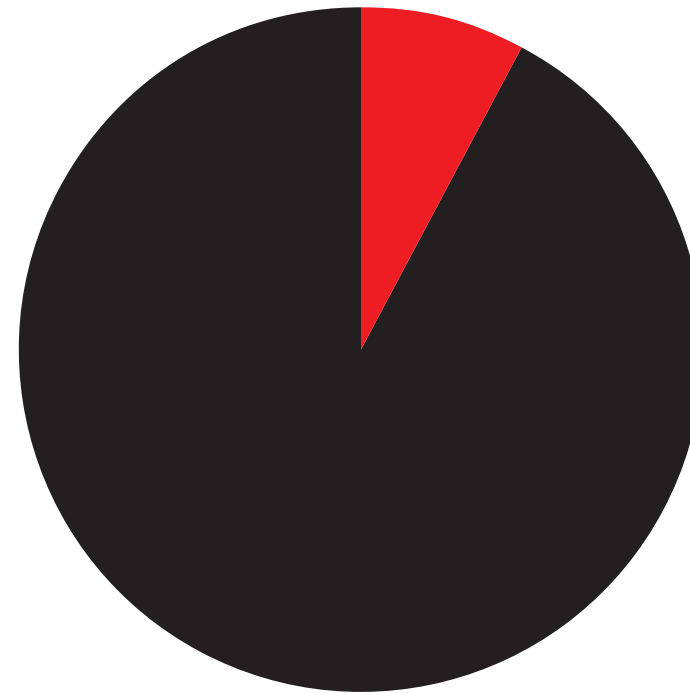
# PORTRAIT OF THE TYPICAL LIVE MUSIC PERFORMER

## KNOWLEDGE AND BUSINESS STRUCTURE

Source: Live Music Census 2012



EXCELLENT	11%
ADEQUATE	41%
BELOW AVERAGE	35%
POOR	13%



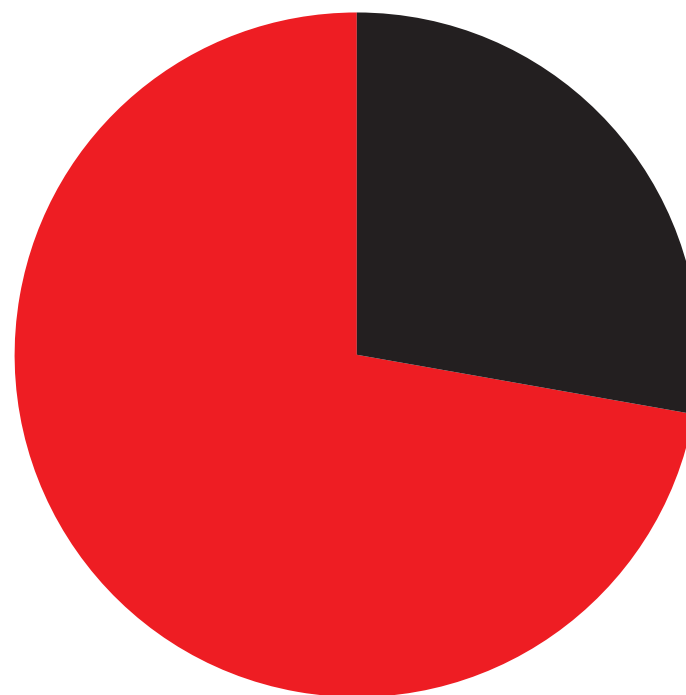
MANAGED	34%
SELF MANAGED	66%



SOLE PROPRIETORSHIP	31%
PARTNERSHIP	33%
COMPANY	20%
DON'T KNOW	16%

# PORTRAIT OF THE TYPICAL LIVE MUSIC PERFORMER HAVE ABN

Source: Live Music Census 2012

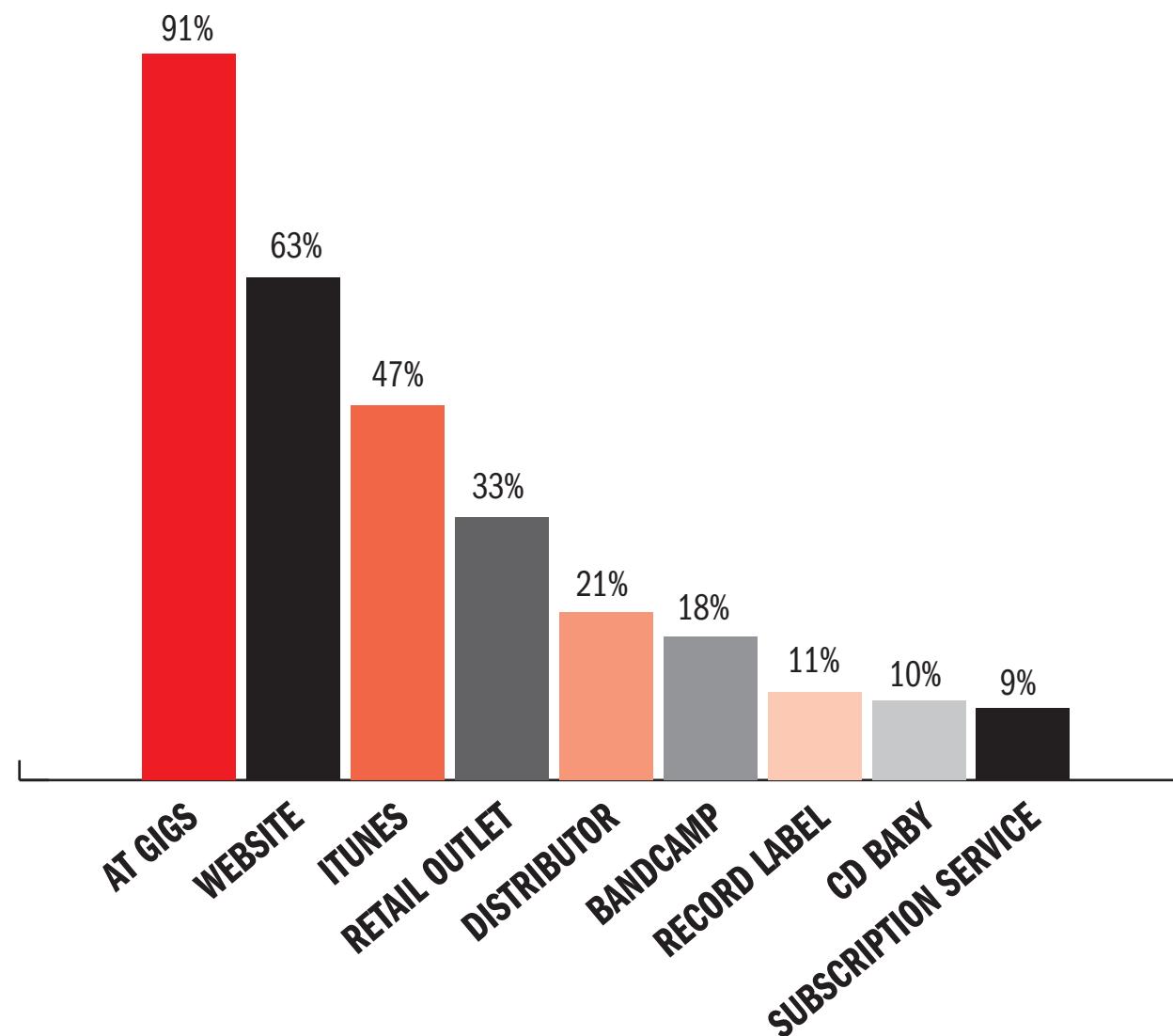


■ YES 72%  
■ NO 28%

# PORTRAIT OF THE TYPICAL LIVE MUSIC PERFORMER

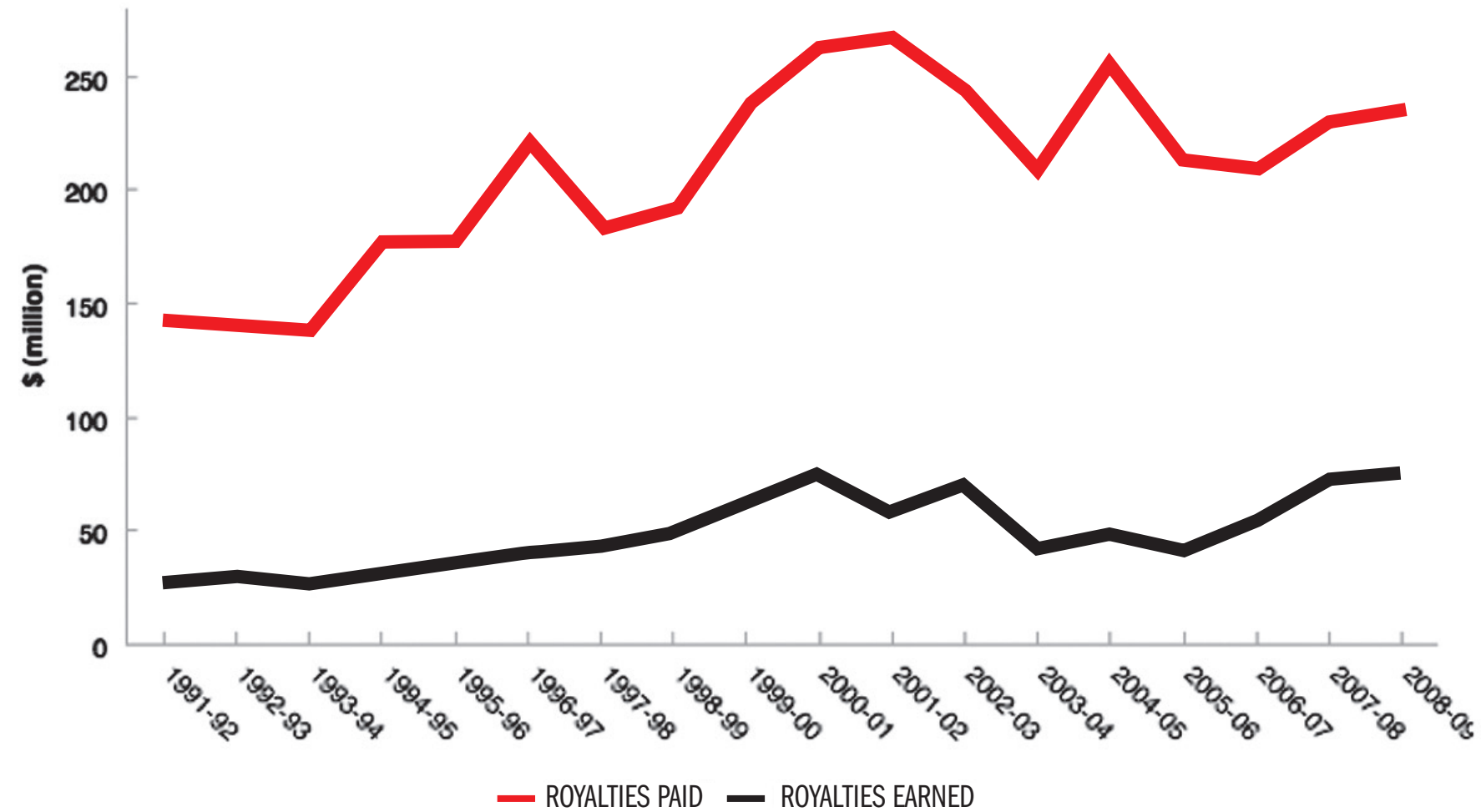
## MUSIC DISTRIBUTION METHOD

Source: Live Music Census 2012



# ROYALTIES: EARNED VS PAID AUSTRALIA WIDE

Source: Australian Government, Australia Council for the Arts





# **OUR MUSIC SECTOR**

**IS A COMMUNITY AND AN INDUSTRY**

**COMPRISES ARTISTS AND BUSINESSES**

**IS A CROSS SECTION OF MOSTLY YOUNGISH PEOPLE**

**NEEDS BETTER PROFESSIONAL AND BUSINESS SUPPORT**

**ACTS LOCAL BUT THINKS GLOBAL**

# **INDUSTRY DEVELOPMENT**

**PROFESSIONAL DEVELOPMENT**

**TRADE AND EXPORT – INCLUDING TRADE MISSIONS**

**ONGOING NATIONAL ADVOCACY**

**PREFERENCE VICTORIAN MUSIC IN GOVERNMENT PURCHASING**

**CONTEMPORARY MUSIC HUB**

**INDUSTRY DEVELOPMENT STRATEGY**

# **ARTS SECTOR FUNDING**

**THE VICTORIAN GOVERNMENT SHOULD:**

**PROVIDE GREATER INVESTMENT RATIONALE AND CLARITY IN ARTS FUNDING**

**REDRESS THE HERITAGE / CONTEMPORARY MUSIC FUNDING DISPARITY**

**ESTABLISH A QUICK RESPONSE GRANT**

# **TEN YEAR INDUSTRY OBJECTIVES**

**A \$2 BILLION INDUSTRY FOR VICTORIA**

**AN INDUSTRY THAT COMMANDS A THIRD OF NATIONAL MARKET SHARE**

**CONTRIBUTES A THIRD OF ONE PERCENT TO GROSS STATE PRODUCT**

**PROVIDES GREATER JOB SECURITY AND RETAINS A GREATER SHARE OF ROYALTIES IN VICTORIA**

**MELBOURNE AS AN INTERNATIONALLY RECOGNISED MUSIC CITY**

**A THRIVING REGIONAL LIVE MUSIC CIRCUIT**

# **NEXT STEPS**

**CONSOLIDATE AND IMPLEMENT THE REGULATORY REFORMS  
VICTORIAN GOVERNMENT TO CONSIDER ITS POLICY POSITION FOR ENGAGEMENT  
WITH THE SECTOR FOR THE NEXT FOUR YEARS  
CONTINUE TO WORK WITH INDUSTRY OVER THE NEXT TERM**