REGIONAL VICTORIA LIVE MUSIC CENSUS AND AUDIT 2021

PREPARED BY DOBE NEWTON & ROSA COYLE-HAYWARD
ON BEHALF OF MUSIC VICTORIA

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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FOREWORD

When I was approached by Music Victoria to deliver a project focussing on live music in Regional Victoria, I was grateful for the opportunity to update the work I had undertaken in 2014 to produce the Regional Victoria Live Music Census and Audit, and gladly accepted.

While that earlier project was a fairly straightforward quantification of the revenue generated by live music activity across the whole regional area, the brief for this project required a detailed examination of activity in each of the state's 11 designated Regional Tourism Areas. It also required data gathering, analysis and reporting that captured live music's role as a driver of regional visitation and its contribution to regional communities hosting venue performances and concert and festival events.

This would involve calculating on and offsite spending associated with events in the host and neighbouring communities, employment opportunities and jobs created for an often large event workforce and the documenting of the creative practice of industry professionals whose performers propel the sector's activities. In essence the value to the regions accruing from music tourism.

It might seem strange to say so, but I was particularly pleased with the timing of the project.

Although it would take place while the live performance events sector was still in the deep shadow cast by the pandemic, it would provide a unique opportunity to underline the value of live performance by contrasting results from 2019 – the last full year of 'normal' operations, with the 'lost years' of 2020 and 2021 when businesses, workers and practitioners were so impacted by lockdowns/shutdowns and endless gig/event cancellations, postponements and re-scheduling.

By providing what was sure to be a stark contrast, the report would hopefully help a variety of government and private sector decision-makers and investors to create more targeted and nuanced policies and support programs to restore the fortunes of the sector's businesses, workers and practitioners and provide fans once again with the joy that was taken away so quickly and completely.

My greatest delight however, was that I managed to persuade Rosa Coyle-Hayward, my Project Coordinator and report co-author from the Melbourne Live Music Census 2017 project, to join me for this one. Her understanding of the 'census' process we employ, intimate knowledge of the industry and the events sector in particular, are demonstrated throughout this report. Her attention to detail, ability to analyse and crystalise data from a wide range of sources, design skills and endless patience (with me), were absolutely central to the project's success and the findings reported in this document.

We were both delighted to have Collarts students enrolled in the Music Industry Degree course involved again as our research team. The skills, energy and professionalism they displayed foreshadow their important role in our industry's future.

The Melbourne Live Music Census 2022 is currently underway to cover the same period as this study and provide an update to the 2017 Melbourne Live Music Census. The two will then be combined to provide a first ever whole-of-state live music 'Big Picture'.

So we put the band back together, and here's our new release. Enjoy the read.

Dobe Newton
Project Manager for Music Victoria

Image courtesy of Port Fairy Folk Festival

EXECUTIVE SUMMARY

Key Numbers

In Regional Victoria in 2019

29,339	Live music performances
5,296,089	Attendees
$397 million	in event spending by attendees
$133 million	in community spending by event attendees
4,500	Full Time Equivalent jobs created by live music events
10,000+	songwriters/composers based in Regional Victoria

$97.8 million	Event box office
$299.3 million	Onsite event spending
$68.7 million	Offsite food & beverage
$18.5 million	Offsite retail spending
$5.4 million	Offsite tourism spending
$29.8 million	Accomodation spending
$11.1 million	Other community spending
$530.6 million	**Total event value**

In Regional Victoria in 2020 & 2021

74%	of events were cancelled/postponed/re-scheduled
76%	of visitor/attendee spending lost
90%	of performer’s opportunities lost
62%	of music related income lost by performers
66%	of casual and part-time jobs lost

Image courtesy of Port Fairy Folk Festival

The Project

In July 2021, Music Victoria conducted a study to quantify the economic generation and job creation associated with the presentation of live music performances in Regional Victoria. Music Victoria were also keen to understand current gaps in the infrastructure that underpins the future viability and potential expansion of live music in the regions.

In essence, this audit intended to capture and articulate the benefits of 'music tourism' – the tangible and intangible benefits accruing to communities hosting live music events in the 11 designated Regional Tourism Areas and the 48 Local Government Authorities within their boundaries.
The state's 12th Regional Tourism Area - Greater Melbourne, was not part of this project.

The brief was to focus on the economic benefits generated by regional live music presentations & events in –

- Providing employment for creative practitioners, venue and event staff and contractors
- Stimulating and driving cultural tourism through regional visitation and consumption
- Contributing significantly to Gross Regional Product by generating income for thousands of businesses across Regional Victoria
- Enhancing Victoria's brand and reputation in other states and overseas
- Identifying gaps and challenges to drive investment in event sector infrastructure

It was a unique time to conduct the project in terms of comparing 2019 – the last year of 'normal' operations, with 2020/2021 when the entertainment and hospitality sectors were devastated by a range of public health restrictions imposed in response to the worldwide pandemic. It was an important opportunity to provide comprehensive data to inform future policies and strategies and help restore the live music events sector to its previous health and prominence.

The reporting is based on extensive desk research and shared information and informed by significant survey responses from venue operators, event presenters (concerts and festivals), event attendees and performers (musicians and DJs) involved in the regional music scene.

Regional Live Music Events 2019 - 2021

Financial Impact

With **$530 million** contributed to Tourism Gross Regional Product in 2019, live music presentations are economically significant. This in addition to their social and cultural contribution to host communities and the wellbeing and mental health benefits they generate for participants and attendees.

Festivals

From event music licence lists supplied by the Australasian Performing Right Association (APRA), we identified **89** dedicated contemporary music festivals that took place in Regional Victoria in 2019.
In 2019, those festivals attracted **405,380** patrons, 51% from Regional Victoria. They generated **$176.6 million**, including **$76.4 million** spent in host or neighbouring communities.

Festival Revenue Summary 2019	$ millions
Box Office	52.8
Ancillary Spending Onsite (F&B)	47.4
Ancillary Spending Offsite (F&B + Retail)	35.1
Tourism Attraction	2.2
Accommodation	29.8
Spending in other communities	9.3
TOTAL	**176.6**

Table a

In 2020/2021, although **36%** of festivals were able to proceed, most did so with limitations required by COVIDSafe plans.

This resulted in revenue of **$78.9 million (-56%)**.

Concerts

In 2019, some **550** concerts took place across the 11 Regional Tourism Areas in performing arts centres, theatres, community halls and other venues. The latter included the marquee winery-based concert series delivered under the *Day On The Green* banner.

These concerts were attended by **328,000** patrons who generated **$63.3 million** in revenue, **$18.5 million** of which was spent in host and neighbouring communities.

Concerts 2019	$ millions
Box Office	32.1
Onsite Spending	12.7
Offsite Spending	18.5
TOTAL	**63.3**

Table b

As was the case across the hospitality and event sectors, some **74%** of concert performances were cancelled/postponed in 2020/2021 due to COVID-related shutdowns, lockdowns, travel restrictions etc.

The exception were the *Day On The Green* concerts which, in the main, were able to proceed as scheduled mainly because of their January/February window. This allowed **95,000** patrons to attend these concerts across the two COVID-19 years.

Small Venues

Again from APRA music licences, we identified **535** small venues (hotels, bars, cafes) across the Regional Tourism Areas offering live music performances.

From that list, we identified **308** venues that offered a minimum of one live gig per week.

	Venue Number
Daylesford and Macedon Ranges	8
Geelong & The Bellarine	44
Gippsland	42
Goldfields	49
Grampians	29
Great Ocean Road	23
Mornington Peninsula	21
Murray	40
Phillip Island	10
Victorian High Country	21
Yarra and Dandenong Ranges	21
TOTAL	**308**

Table c

The **16,000+** gigs presented in 2019 were attended by **2.66 million** patrons who generated revenue of **$207.5 million** of which **$29.4 million** was spent offsite in host communities.

65% of patrons resided within 25kms of the venue.

As was the case with concert performances, some **75%** of gigs in small regional venues were cancelled/postponed across 2020/2021, with the consequent loss of revenue.

Live Music Events 2019 - 2021

Employment Impact

The cancellations/postponement of events and the shutdown of small venues during 2020/2021 had a 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 effects were not evenly spread.
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 and thus lost their jobs.

Festivals retained a greater percentage of their workers. However, as the 2021 Legislative Council inquiry[1] into the impact of COVID-19 on the events and tourism sectors heard from numerous responders, the uncertainly of ongoing employment certainty 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.

[1] Parliament of Victoria (Legislative Council Economy and Infrastructure Committee). *Inquiry into the impact of the COVID-19 pandemic on the tourism and events sectors*, Legislative Council of the Victorian Parliament, August 2021

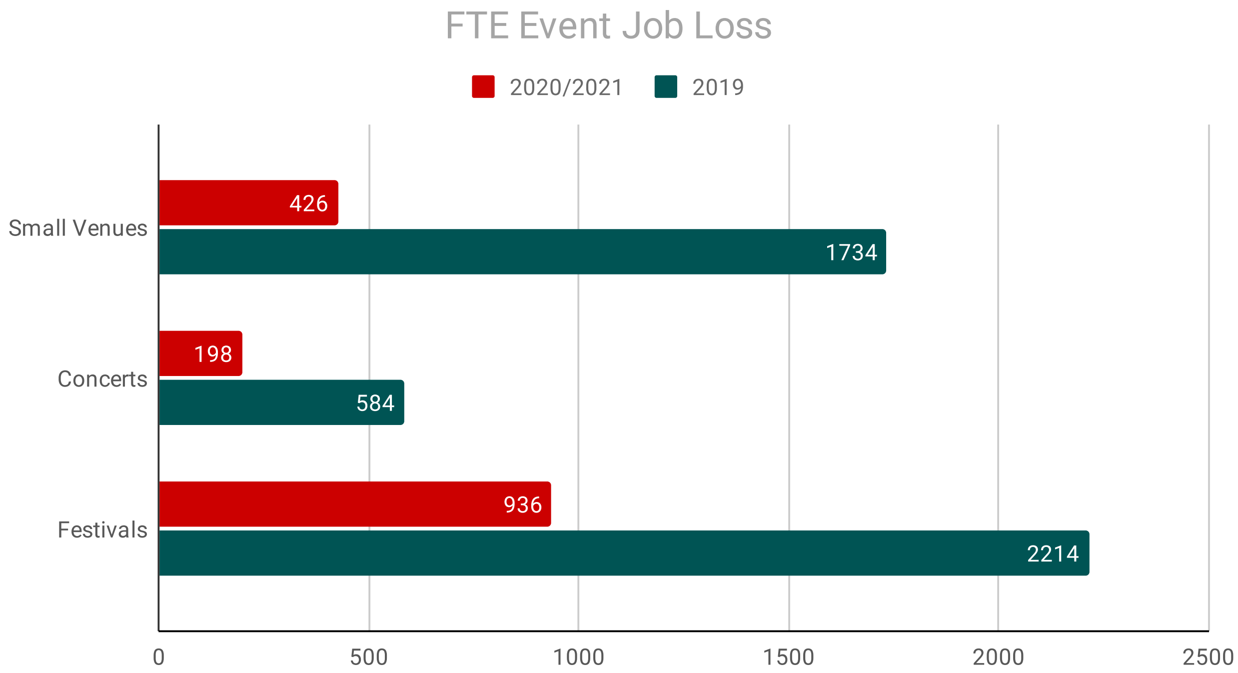


Chart a

Regional Event Snapshots

Queenscliff Music Festival

The town of Queenscliff on the Bellarine Peninsula near the entrance to Port Phillip has hosted the Queenscliff Music Festival for twenty three years.
Unfortunately, the 2020 and 2021 events - usually hosted in late November, had to be cancelled due to COVID outbreaks and restrictions.

In 2019, the festival sold out for the fourth year in a row (**11,400** tickets), and attracted **28,000** patrons across the three days, generating approximately **$1.9 million** in ticket revenue, **$3.7 million** in onsite spending and **$2.9 million** offsite. It is estimated that **83%** of revenue/spending was generated by visitors from outside the region.

- **41%** of patrons travelled from metropolitan Melbourne while **54%** of patrons attended from regional Victoria (**45%** of those 'locals' from within 25 kilometres).
- **44%** of patrons spent two nights in the community and **35%** spent three.
- The event attracts a predominantly female audience **(66%)**, with 50% between the ages of 35-55 years.
- **38%** of the 2019 attendees were returnees.

The organisers have worked diligently to create a sustainable event, diverting an impressive **95%** of waste from landfill.
Some years ago, the event created a Community Benefit Scheme from box office revenue. In 2019, **$144,000** was distributed in cash donations and physical resources to 50 local organisations and charities.

Port Fairy Folk Festival

One of the state's oldest festivals was established in 1977 by the Geelong Folk Club in the picturesque town of Port Fairy at the mouth of the Moyne River in Western Victoria. The first modest gathering (400), enjoyed a celtic-based music and dance program, delivered from the back of a truck, reflecting the significant Irish/Scots heritage of the region.

Since then, the event has established itself as one of the world's leading folk festivals, annually attracting the world's leading performers and winning numerous tourism and international music awards including induction into the Australian Tourism Awards Hall of Fame.

The 45th festival in early March 2020 was one of the last major music events to take place before the State of Emergency was declared on 20th March that year.

The event typifies the significant impact large regional music festivals have on the social and cultural life and the economy of the host and surrounding communities.

The four-day event has an enviable history of being sold out (**14,500** tickets) well in advance of the event, mainly due to the fact that **66%** of patrons attend annually and **15%** regularly. The official program featuring 700+ performers is held in a dedicated event arena adjacent to the town centre and augmented by variety of free music events and activities (parades, street performances, craft fair, workshops, awards) in venues around the town, attracting an estimated **60,000** over the four days.
40% of attendees are from Metropolitan Melbourne and **50%** from Regional Victoria (20% from the local area), with 70% of the audience in the 45-65 years age group.

In 2019 and 2020, it is estimated that the event generated **$2.9 million** in ticket sales and **$4.6 million** in onsite spending. A 2015 report estimated that **$20 million** was injected into the local economy (accommodation, retail, food & beverage etc) by event visitors.

The local economy is not the only beneficiary with event visitors accounting for **78,000** bed nights and rental accommodation in Warrnambool, Portland and Hamilton fully booked for the weekend.The town of Lismore, halfway on the road trip from Melbourne, reports the festival weekend as its busiest of the year.

Run by a management committee of local business people and community leaders and is delivered by many hundreds of contractors and a volunteer workforce of **3,000+**. Many of the latter drawn from the local community.

Like many other large regional music festivals, it has a long history of donating significant amounts of ticket revenue to support community service organisations, schools and charitable causes. Moyne Health is the major recipient of an annual distribution of **$120,000** and numerous organisations benefit from an annual **$200,000** scholarship program.

A Day On The Green (ADOTG)

This annual winery-hosted concert series was founded by Roundhouse Music (Mushroom Group) at Mount Eliza in 2001. Since then, over 490 concert events, featuring a range international headliners have sold **4 million** tickets significantly impacting the economies in the host regions. In recent times, they have been held at the Mount Duneed Estate (Geelong and The Bellarine Regional Tourism Area), All Saints Winery (Victorian High Country) and Rochford Estate (Yarra Valley and Dandenong Ranges).

In terms of their value as music tourism generators, they assumed added significance in 2020/2021 as their annual January/February window allowed the events to fortuitously take place between periods of lockdown and travel restriction.

In 2019, seven concerts were presented under the banner, attracting **87,000 patrons**. These events generated **$10.7 million** from ticket sales, **$6.8 million** in onsite spending (food & beverage) and **$10.9 million** in offsite spending (F&B, general retail, accommodation).

In 2020/2021, although border closures impacted the ability to present international artists, several Elton John concerts and five concerts featuring Australia's foremost artists attracted **95,000 patrons**. These events generated **$12.7 million** in ticket revenue, **$7.9 million** in onsite spending and **$13.6 million** in offsite spending.

24% of ticket sales include an accommodation package and an additional **20%** of visitors are identified as staying for a minimum of one night, thus generating **38,000** bed nights in 2019 and **42,000** in 2020/2021.

[1] KPMG *Port Fairy Folk Festival Economic Impact Study*, 2016.

Conclusion

There is a wealth of evidence which has established the importance of music in the lives of Australians. Live music presentations create opportunities for Regional (and Metropolitan) Victorians to gather together to celebrate creativity and mark individual and community milestones and achievements. Additionally, these performances underpin a range of social goals in other sectors (education, health etc) as well as contributing to social cohesion and individual wellbeing and mental health.

The importance of this report is to highlight the fact that in 2019, live music presentations in Regional Victoria accounted for **8%** of the state's Tourism Gross Regional Product across the Regional Tourism Areas and **5%** of regional tourism employment (based on DJPR published statistics for 2021). Restoring the sector to it's previous health is therefore a priority in terms of reinvigorating regional economies.

The only other detailed work on live music in Regional Victoria is reported in the *Regional Victorian Live Music Census* conducted by Music Victoria in 2014. Although that earlier project was narrower in scope, the categories in which direct comparison can be made clearly demonstrate the significance of the sector in 2019 and the importance of implementing strategies to restore activity to those levels in a post-pandemic environment.

	2014	2019	Growth	2020/2021	Variation
Number Annual Gigs	22,750	29,339	29%	7628	-74%
Event Audience	3,854,500	5,205,460	35%	535584	-71%
Event Box Office	$60.5 million	$97.8 million	60%	$25.4 million	-75%
Onsite Event Spend	$215.3 million	$299.3 million	39%	$71.8 million	-76%
Employment (FTE jobs)	3285	4532	38%	1560	-66%

Table d

The report is also significant in demonstrating that **20% ($133 million)** of the total **$530 million** event revenue in 2019 was offsite, that is injected into local businesses in the host and neighbouring communities.

As the findings in this report demonstrate, the COVID-19 impact on the event and hospitality sectors was devastating and disproportionately so compared to other sectors of the economy.

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, 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.

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 and presenters, the regional live music sector will be restored to previous levels of activity.

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

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

Dobe Newton & Rosa Coyle Hayward
Music Victoria

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 11 Regional Tourism Areas; 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 authors' own 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

- That in view of the significant impact of COVID-19 on the event sector workforce, 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, and in consultation with the events sector to identify priority needs.

Infrastructure

- That the state government consider establishing a specific funding program to create fully-equipped (audio, lighting) 'plug and play', all-weather outdoor performance facilities, particularly in towns and cities where outdoor presentations currently require the repeated, one-off erection of staging, transport of equipment and repeated permit applications. Likewise, assist venue operators to expand and/or adapt outdoor spaces for music presentation.
- That local and state government and agencies work with major festival presenters – particularly in remote locations, to address challenges in accommodating and providing amenities for event and technical staff and performers.
- That local and state government and agencies work with major event presenters to create permanent storage facilities so that equipment can be readily accessed by local organisations seeking to potentially expand the range of live music activations in regional locations.

Collaboration/Industry Development

- That funding be allocated to create and convene a Regional Live Music Taskforce comprised of LGA representatives, Regional Tourism Board members, live music presenters and appropriate agencies and organisations (eg. VMDO, Creative Victoria, Regional Arts Victoria, VAPAC, Music Victoria, Arts Industry Council, Festivals Association etc). Among other things the body would be tasked with –
    I. Working with local councils and Regional Tourism Boards to create a specific live music action plan (where none exists) for the 11 RTAs to highlight the important role of live music in their communities and ensuring it is incorporated in each region's Destination Planning.
    II. Working with Visit Victoria to include music offerings in future intrastate, interstate and overseas marketing campaigns specific to each Regional Tourism Area.
    III. Working with councils and RTBs to develop a more formalised and extensive interaction with venue operators and event presenters in each region. Particularly with regard to assisting current and potential presenters to navigate the permit/regulatory process – eg. POPE (Places of Public Entertainment).
    IV. Liaising with all major festival and event presenters to compile a comprehensive database of infrastructure requirements. This to include the individual challenges faced by unique, region-based events – eg. toilets and amenities, portable accommodation for staff and crew, public transport, onsite equipment storage facilities, pressure on (or lack of) visitor accommodation, road maintenance/upgrades etc.
- That Music Victoria and VAPAC expand their cooperative relationship to include a detailed assessment of the needs of regional Performing Arts Centres to address the replacement/upgrade of aging infrastructure – spaces, staging, audio, lighting etc (eg. Portland, East Gippsland, Great Ocean Road) and the need for new facilities (eg. Mornington Peninsula).

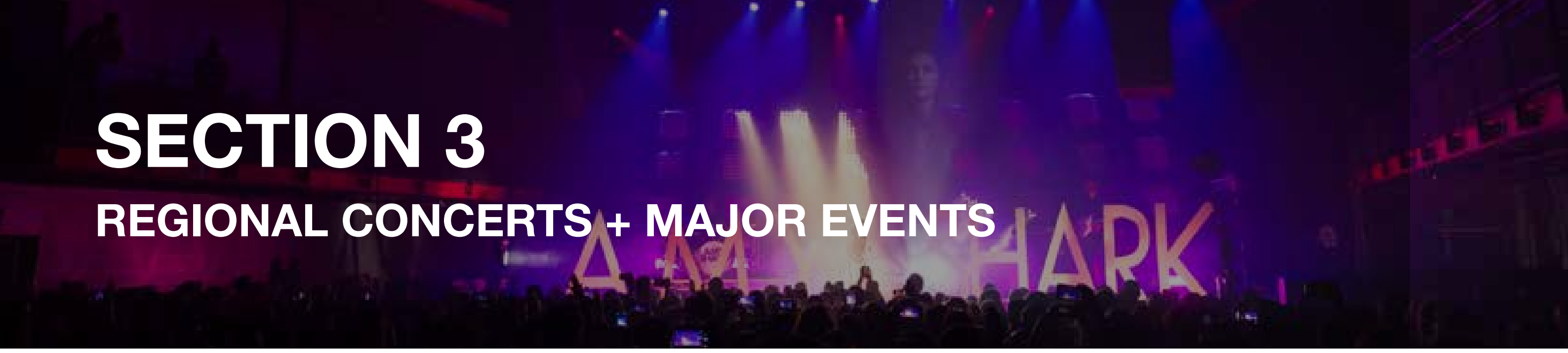
- That Music Victoria and other agencies work with the Municipal Association of Victoria's arts and cultural office network to ensure that live music presentation value and requirements are fully appreciated by councils and a more holistic approach to regulation and support is instituted across departmental lines in order to reduce 'red tape'. Additionally, that local councils be encouraged to ensure that live music performances are a feature of all their event activations and a focus on local practitioners be encouraged.

Creative Practitioner Support

- That the Victorian state government (DJPR), through its arts funding agencies, consider an urgent and substantial increase of the funding allocation to individuals and groups through its Arts Grants (11% of total arts budget in 2019/2020 and 8.4% in 2020/2021) and specifically the Music Works program (3.3% of total arts in 2019/2020 and 3.9% in 2020/2021).

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.



SECTION 3

REGIONAL CONCERTS + MAJOR EVENTS

Introduction

Measuring and valuing live music performance across regional Victoria is an aggregation of gigs in dedicated small venues (pubs, clubs, bars), concert performances in theatres and performing arts centres as well as other large venues and dedicated music festivals which predominantly take place annually at temporary, specially-constructed event sites.

For many years, the music industry has relied on data published by Live Performance Australia's annual Ticket and Revenue Survey which is focused on major events across the performing arts.

The data is provided by ticketing agencies, venues and event companies or organisations supported by Australia Council for the Arts funding. For artforms where performances are mainly delivered by a small number of readily identifiable companies/organisations – classical music, opera, music theatre, ballet etc, the LPA data captures most of the generated revenue and attendance.

Contemporary music is an exception, with LPA's consultants (Ernst & Young) identifying a 'limitation' based on the fact that a number of events and venues self-ticket, resulting in what they refer to as a 'conservative' estimate for that category.

Having been published for more than a decade, the data provides useful state-by-state and year-on-year comparisons across the various performing arts categories. Although the reports are useful in 'setting the scene', it was not until the last report (combining 2019 and 2020) published in late 2021, that regional activity was reported. Unfortunately, there is no artform/genre breakdown. (See comments below).

In order to accurately report concert performances in regional Victoria, this report has therefore relied on information provided to us directly by venues, event presenters and ticketing agencies which enables us to identify and quantify regional performance data. This has been combined this with a range of demographic information (from providers) and feedback from detailed surveys completed by those attending and presenting concerts in the regions.

3.1 Live Performance National Landscape 2019 – 2020 (Live Performance Australia)

Contemporary Music reporting covers dedicated festivals and ticketed concert performances. It is by far the most significant of the performing arts, regularly accounting for more than 40% of ticket sales and revenue.

As the LPA's consultants annually note, the concert sector is primarily based on touring by prominent international artists and year-on-year results are subject to significant variation based on the profile of artists in any particular year.

In 2019, the Contemporary Music category (major concerts and touring) recorded an 18% decline in revenue driven by a decline in attendance and ticket prices. Although there were significant tours in 2019 including U2, Eminem and Fleetwood Mac, they could not compete with 2018 tours by P!nk and Ed Sheeran, two of the most popular artists ever to tour Australia, plus Taylor Swift, Katy Perry and Bruno Mars.

Even with this drop in revenue the contemporary music category still accounted for 42.5% of the total revenue and attendance for all the performing arts.

Image credit: Richard Iskov

The 2019 Year – Victoria

In terms of the whole performing arts sector, Victoria recorded revenue of $627 million. A market share of 31.9%, the second highest national figure just behind NSW. This was a 4.5% increase on the 2018 figure. Despite reporting a small decline in attendance (1.5%), the 7.4 million ticket sales reported was the highest in the nation, accounting for 31% of national attendance.

Victorians spent $94 per capita on the performing arts. This was by far the biggest spend, substantially ahead of the $81 per head spent by NSW residents.

3.2 Live Music Performances - Victorian Results 2019

The genres that contribute to live music performance measured by LPA are – Classical music, Opera, Contemporary Music Festivals, Music Theatre and Contemporary Music (concerts and tours).

Note: As a matter of interest, the results from the 2014 LPA report have been included – the year that the first Regional Victorian Live Music Census was conducted.

The LPA results for 2019 were

	2019			2014	
	Tickets	**$ millions**	**National Share**	**Tickets**	**$ millions**
Opera	101,000	7.8	23%	96,000	9.1
Music Theatre	1,500,000	118.0	34%	1,200,000	120.0
Classical	425,000	27.5	32%	330,000	19.0
Contemporary Music	2,400,000	254.0	31%	1,800,000	182.0
Contemporary Festivals	240,000	27.7	16%	N/A	N/A

Table 3a

Note: The Contemporary Music Festivals category is the one where Victoria has the most significant 'gap' compared to the leading states.

In 2019, NSW recorded $74 million in revenue from 556,000 tickets and Queensland (which Victoria 'beats' in every other category) recorded $36 million from 295,000 tickets.

The 2014 results were not included as this table as the category has changed significantly in terms of LPA's classification - from 'Multi-artform festivals' including contemporary music to a dedicated category in recent years.

3.3 The 2020 Year – National

The pandemic restrictions, lockdowns and closures had a significant impact on major performing arts activities with revenue declining from $2 billion to $600,000 and attendance from 24 million to 7.8 million. While pandemic restrictions did not come into place until March in most places across Australia with the Victorian state of emergency being announced on 16 March 2020, it is worth noting that before this time contemporary music events large and small were beginning to cancel or postpone as an industry managed public health response.

None of the live music genres was spared.
Opera revenue declined by 72% and attendance by 66%.
Music Theatre revenue declined by 80% and attendance by 72%.
Contemporary Music Festival revenue and attendance both declined by 70%.
Classical Music revenue declined by 79% and attendance by 78%.
Contemporary Music revenue declined by 63% and attendance by 66%.

Ironically, Contemporary Music suffered less decline than other categories mainly due the lower number of performers required in presentations in comparison to performances in other ‘company’ based presentations like ballet, orchestra and theatre.

They have thus been more flexible and able to adapt even in restricted circumstances. Prior to restrictions which closed down events in Victoria in March 2020, there were national tours by Elton John, Queen with Adam Lambert and Michael Buble.

Despite its overall losses, Contemporary Music was the only category to increase its overall revenue and attendance market share.
Revenue from 42.5% in 2019 to 51% in 2020.
Attendance from 34% in 2019 to 37% in 2020.

3.4 Victorian Live Music 2020

No state escaped the effects of the pandemic but Victoria experienced the longest and hardest restrictions across the country.

Victoria maintained its leadership position in terms of national market share, with the second highest share of national revenue (26.1%) and the highest attendance share (20%) across all categories.

But those figures bely the reality – the second highest year-on-year decline in revenue – from $627 million in 2019 down to $158 million (- 75%) and the highest year-on-year decline in attendance – from 7.5 million down to 1.5 million (-79%).

The extent of the COVID-related impact is emphasised by the decline in Victorian per capita spending on the performing arts from an all-time high $94 in 2019 to $24 in 2020. This relegated it from the number 1 position it had clearly held for many years to 3rd behind South Australia ($33) and Western Australia ($27).

Victoria’s 2020 results were

	2020		
	Tickets	**$ millions**	**National Share**
Opera	7,030	0.4	4%
Music Theatre	237,000	25.0	35%
Classical	96,000	6.4	34%
Contemporary Music	96,600	81.7	29%
Contemporary Festivals	78,000	9.7	18%

Table 3b

The ‘gap’ noted above in 2019 in terms of attendance and revenue in the Contemporary Festivals category, still existed in 2020, although NSW lost far more major festivals.

In 2020, NSW recorded $12 million in revenue from 111,000 tickets and Queensland recorded $10.5 million from 84,000 tickets.

	2019/2020 Variation			
	Tickets	**Variation**	**$ millions**	**Variation**
Opera	7,030	-92.5%	0.4	-94.6%
Music Theatre	237,000	-81.0%	25.0	-73.0%
Classical	96,000	-70.0%	6.4	-77.0%
Contemporary Music	96,600	-96.0%	81.7	-69.0%
Contemporary Festivals	78,000	-67.5%	9.7	-65.0%

Table 3c

3.5 The 2019 Year – National Regional

Performances across regional Australia generated $25.5 million from 503,00 paid tickets. There were an additional 50,000 complimentary tickets.

NSW and Victoria account for a significant share of revenue and attendance – NSW 32% of revenue and 37% of attendance and Victoria 32% and 30% respectively.

For reasons not detailed, both states recorded significant declines on their 2018 performance.
Victoria’s regional revenue of $7.9 million represented a 17.4% decline and the 159,000 tickets an 18% decline. NSW revenue declined 7.5% and attendance 32%

3.6 Regional Victoria - LPA Reporting

For the first time, LPA’s Revenue and Ticket Survey report contained data specific to regional performing arts activities in 2019 and 2020.

While useful, unfortunately the data does not contain a state breakdown by artform category. This will need to be calculated using reported national market share – rather than from directly reported data.

It should also be noted that although there are a number of regional Performing Arts Centres that report their data – Bendigo, Frankston, Geelong, Gippsland and Mildura, there are another 15 centres across regional Victoria that do not directly report.

3.7 Victorian Regional Live Music Categories in 2019 & 2020

The figures quoted below are calculated from percentage shares as reported in the main report. For that reason – and others specified below, they should not be regarded as accurate or definitive. They are provided merely as indicative, and will not form part of the final reporting on attendance and revenue for regional live music performances.

	2019			2020		
	Tickets	$ millions	National Share	Tickets	$ millions	National Share
Opera	4,700	0.25	1%	2,700	0.17	2.1%
Music Theatre	98,000	5.0	19%	26,000	1.5	19%
Classical	16,000	0.85	3.5%	2,900	0.15	1.8%
Contemporary Music	136,000	8.0	29%	33,000	1.8	23.5%
Contemporary Festivals	10,300	0.44	2%	11,000	0.51	7.5%

Table 3d

Note: The LPA figures for this category are undoubtedly such a dramatic under-reporting that they are unreliable. It is simply not credible to report a 2019 national total of 10,000 paid tickets when regional festivals in that year included such significantly attended events as The Woodford Folk Festival (120,000) and Gympie Muster (23,000) CMC Rocks (21,000) in Queensland; Bluesfest (105,000) and Splendour In The Grass (42,000) in NSW; Falls Lorne (12,000), Port Fairy (15,000), Meredith (15,000), Golden Plains (12,000) Festivals in Victoria, to name a few.

Even more perplexing is the fact that Bluesfest (100,000 attendance) is identified in the report as one of the reporting events. As is the Tamworth Regional Council, although it should be noted that council-ticketed events represent only a very small part of the attendance (aggregated 300,000 over the 10-day event) and revenue generated by hundreds of self-ticketed events in 50+ venues.

3.8 Major Events & Concerts – Regional Victoria 2019 – 2021

The findings reported in this section are limited to those for which there was reliable and verifiable event data, supplied either directly by event organisers and venue operators and/or ticketing agencies acting on their behalf.

Based on attendance and consumption data available from a range of sources – Australia Council, Tourism Research Australia, Creative Victoria, Visit Victoria, plus survey responses from regional event attendees, the authors are conscious that this may be under-reporting live music concert events and performances in 2019. For instance, the dedicated music fans who completed our attendee survey, reported attending an average of 12 concerts in regional Victoria in 2019 – 7 concerts within 50 kilometres of their residence, 3 within 51-100 kms and 2 more than 100+ kms from their residence.

Nevertheless, the same methodological approach has been applied as in previous live music census projects. Where there is insufficient data or where information cannot be reliably cross-referenced to authenticate, these events have not been included in final calculations.

3.8.1 APRA

The Australasian Performing Rights Association of Australia (APRA) represents 100,000+ Australian and New Zealand songwriters and is responsible for issuing licences to a variety of businesses and individuals wanting to include the performance of works at their events. The licences are predominantly for live performance, but also cover the use of recorded music (ie. in nightclubs, cafes, pubs, clubs).

As has been done in previous census projects, these licences provide a strong foundation on which to base our analysis. However, APRA readily concedes that not all performances are recorded in their database.

The 2019 Year

APRA issued 2,230 event licences (excluding small venues) for live music performances across Victoria. 1,520 of those were located in Metropolitan Melbourne and 730 in regional Victoria.
By excluding licences for regional music festivals (which will be discussed in the Festivals section) and those for a range of events where the music was not a core component of the event – eg. dance and sporting events and various community celebrations, there is a remaining list of 630 licences spread across a variety of events including live performance in various formats.

The performances covered by the licences represent a broad range of genres from classical and choral to EDM and electronica and everything in between. The majority were in the broad category of rock/pop and included a range of current domestic artists – The Waifs, Anthony Callea, Dani Im, Ian Moss, The Wiggles, Amy Shark, Cold Chisel, Alice Skye, John Butler, Paul Kelly, Missy Higgins, Dan Sultan , and a number of international acts usually on side-tours from major festivals (eg. Boogie, Queenscliff, Bluesfest). These latter included Billy Bragg, Belinda Carlisle, Justin Townes Earle and Toni Childs, and were joined by significant stars touring in their own right – Elton John, Red Hot Chilli Peppers, Bryan Ferry, Florence and the Machine and Rob Thomas.

A significant proportion of licences were for 'heritage' shows, predominantly in theatre or performing arts centres featuring veteran performers delivering their own repertoire such as The Proclaimers, Leo Sayer, Foster and Allen, or for 'tribute' shows built on the classic repertoire of artist like Simon and Garfunkel, Sam Cooke, Creedence Clearwater Revival, Whitney Houston, Johnny Cash or Michael Jackson.

It should be noted that there were an additional 70 licences issued for performances across 'various venues'. These were unidentified in the database, but mainly involved classical music tours by Musica Viva, Australian Chamber Orchestra and the Melbourne Symphony Orchestra.

The 2020/2021 Years

In 2020 APRA and the PPCA (Phonographic Performance Company of Australia) decided to simplify the licensing procedure for event presenters and venue owners by creating a single OneMusic licence to cover the live performance or works (songs) and the use of recordings of those works at events and venues.
Unfortunately, the industry-wide crisis associated with lockdowns and shutdowns, has created a huge backlog of licences yet to be transitioned to the OneMusic licence.

Although APRA's licence information provides numerical confirmation of the number of concert performances, and most often the location of these events, other methods have been utilised to quantify their importance as economic generators and job creators. By doing, it is possible to begin the important work of assessing their role in driving music tourism and visitation to regional areas and communities.

Fortunately, significant and arguably, unprecedented access to data was given to this report from a range of providers and presenters, local government agencies and a significant number of regionally based industry practitioners and experts. Their local knowledge and insights informed our data collection and analysis which, when combined with responses to our comprehensive regional venue and attendee surveys form the basis for our reporting.

3.8.2 Performing Arts Centres - VAPAC

The Victorian Association of Performing Arts Centres is a not-for-profit network of regional theatres and performing arts centres spread across the eleven Regional Tourism Areas and the 47 LGAs they contain.

They include major performing spaces in

Ararat	Bairnsdale	Mildura	Plenty Ranges
Benalla	Hamilton	Warrnambool	Shepparton
Colac Otway	Horsham	Echuca	Sale
Geelong	Morwell	Portland	Swan Hill
Wodonga	Bendigo	West Gippsland	Wangaratta
Castlemaine	Wendouree	Wonthaggi	

They were instrumental in supplying data which significantly assisted in the reporting of operations in these venues.

A significant number are council-owned and operated, which had significant consequences for their workforce in addition to the cancellations and postponements which devastated the sector in 2020 and 2021 (see below).

62% of the VAPAC membership responded either to our direct request for data sharing, or completed the online venue survey.

From their combined responses, the following can be reported –

3.8.3 The 2019 Year

The vast majority of venues present their live music performances – throughout the year on Friday (83%) and Saturday night (100%).

21% of the gigs are free.
12% were private functions.
67% were public ticketed events.

Ticket prices vary considerably based on the nature of the gigs and the profile of the performer. But across all venues reporting, the average ticket price on Friday and Saturday nights was $41. This includes allowances for discounted or concession ticketing.

Attendance across the sector, averaged to allow for slightly lower attendance during the winter months, produced a mean average of 227 ticketed patrons per performance.
Based on a 50-week year to allow for the occasional 'dark' week, and to be consistent with previous surveys, the following box office calculation is reported as –

143,010 gigs generating $5,863,410 in ticket sales.

Ancillary Spending

In understanding the economic impact of live music events it is necessary to report the patron spending associated with attendance at a live music performance. This ancillary expenditure covers spending onsite (usually food & beverage) and the visitation value and contribution to the host community which can include food and beverage consumed offsite; other retail spending; spending at tourism facilities and attractions and spending on local area accommodation. Additionally for those travelling over 100 kms to attend a regional concert event, spending in communities on the road to and from the event.

Note: Numerous studies by The Live Music Office (university of Tasmania), UK Music ('Wish You Were Here' reports) and Music Victoria (Melbourne Live Music Census projects), have consistently confirmed that this on and offsite spending by patrons exceeds ticket/entry expenditure.

Although the PAC (Performing Arts Centres) venues will obviously detail their onsite food and beverage results in their annual reports, access to this information was not provided to the project in sufficient quantity for reliable reporting.

However the 450 surveyed attendees have supplied consumption details in their responses.
These audience numbers have been discounted by 10% to reflect those who reported spending $0 at events in PAC venues.

Further, there is a difference between the amount spent on F&B in the relatively narrow window of an evening concert in a PAC compared to the spend at an all-day concert an event like a Day On The Green concert.

So, in the absence of data directly supplied by venue operators, the estimation of onsite ancillary spending by patrons attending PAC performances is based on 50% of gigs across the sector, at a 20% audience discount and an average patron spend of $41. This conservative approach will not overestimate this spending.

The calculation is therefore that 315 performances with an average attendance of 182 and an average patron spend of $41, produced onsite, ancillary F&B spending of $2.35 million.

Tourism and Visitation

As a general rule, PACs do not maintain records of ticket sales by purchaser postcode. Therefore it is not possible to provide the same level of analysis as can be reported for concert and festival events ticketed through major agencies such as Ticketek, Oztix and Moshtix.

However, based on direct reporting and survey responses, which included details of attendee travel patterns, it can be calculated that typically 50-60% of the audience for performances hosted in PAC venues are locals travelling from within a 50 km radius.

Based on the responses from those venues who reported not providing food, utilising information from attendee surveys and adopting the conservative approach to reporting outlined above, the spending generated by event patrons in local offsite hospitality outlets can be estimated at an additional
$1.31 million.

The numbers attending from a distance of 100+kms suggests that visitor spending on overnight accommodation, general retail and attendance at tourism facilities is limited and has thus not been included in calculations.

Recommendation

That whenever possible, PACs record purchaser postcode data in their booking system to facilitate analysis to determine the tourism impact of specific events and to enhance their target marketing.

Employment

The table below outlines the employment created by PAC performances in the 2019 year.

MIDWEEK	Casual	Part-Time	Full -Time
Non- Management Event Staff	54	30	20
F&B Staff	48	20	40
Management	20	30	20
Security	35	0	0
FRIDAY			
Non- Management Event Staff	78	30	21
F&B Staff	52	21	21
Management	21	21	21
Security	45	0	0
SATURDAY			
Non- Management Event Staff	68	30	21
F&B Staff	60	21	21
Management	49	21	21
Security	57	0	0
SUNDAY			
Non- Management Event Staff	50	30	21
F&B Staff	48	21	21
Management	42	21	21
Security	24	0	0

Table 3e

A calculation based on an industry standard 6-hour shift for casual staff [1] (8 hours for security) leads to the following number of casual and part-time employment hours generated –

	Venue	F&B Staff	Management	Security
Casual Hours	57,000	47,880	30,096	31,920
Part Time Hours	91,200	60,800	91,200	0
TOTALS	148,200	108,680	121,296	31,920

Table 3f

[1] This figure was used in the Melbourne Live Music Census 2017 as based on information previously provided by venue operators.

Based on the current formula[1] used to calculate Full Time Equivalent jobs (35 hrs per week x 46 weeks = 1610 hours), it is possible to report that -

Performances in PAC venues in 2019 created 248 FTE jobs for casual and part-time staff.
This is in addition to any full time management positions.

Also it is calculated that PAC gigs in PAC venues in 2019 created 3,465 performance opportunities for musicians and/or DJs and 10,000 + hours for production staff.

3.8.4 The 2020/21 Years

Many live music providers have described the 16 March 2020 as "the day the music died". Although most PAC venues went 'dark' for much of 2020 and 2021, half the reporting venues were able to present performances in limited windows across the 24 months.

Even when performances were able to be staged, restrictions and density limits reduced audience numbers to 55% of pre-COVID audience number cumulatively.

Across the sector, 94% of scheduled live music performances were cancelled or postponed.
The Cube (Wodonga) for instance reported that it was able to present none of its planned 35 live music performances.

Employment

Casual and part-time employees in PAC venues were significantly impacted by shutdowns, restrictions and cancellations.

Some 25% of the venues are council owned and operated and were therefore ineligible to apply for JobKeeper (especially) to maintain staff, nor qualified for state-based business support.
The venues reported that across 2020 and 2021, 75% of casual event and F&B staff lost their work as did 70% of part-time F&B staff.

In smaller regional communities with limited alternatives available, this loss of employment obviously had serious economic, social and mental health impacts.

3.9 A Day On The Green (ADOTG)

Although numerically a small component of the overall regional concert scene, these major concerts featuring high-profile domestic and international artists, have significant economic and tourism impacts in regional Victoria.

A Day On The Green's first concert was presented in Mount Eliza in 2001. Since then, Roundhouse Music (part of the Mushroom Group) has sold 4 million tickets to the 490 concerts it has presented.
It is hard to overestimate their significance in the regional live music performance sector as economic generators, job creators and visitation drivers.

Between 2019 and 2021, ADOTG was able to present 13 major events at three venues – Mt Duneed Estate (Waurn Ponds), All Saints Winery (Rutherglen) and Rochford Estate (Coldstream).
Surprisingly only 4 of their scheduled show were cancelled over this period – Cold Chisel, Birds of Tokyo, Magic Dirt at All Saints (due to bushfires in 2019), Rod Stewart at Mt Duneed (COVID) and James Blunt/ Jason Mraz and Simply Minds at Rochford (COVID). One other show, Midnight Oil and Dan Sultan at Mt Duneed proceeded with reduced COVID capacity limits.

[1] *Benchmarking Data & Research*, 'How to calculate FTE (Full Time Equivalent)', The Benchmarking Group Pty Ltd, 2021 https://benchmarking.com.au/definitions/full-time-equivalent-benchmark-calculation/

Roundhouse provided unprecedented access to customer purchase data for this reporting as well as comprehensive demographic data from 27,000 customer surveys conducted by Tiketmaster.
In accordance with the confidentiality agreement, this report only includes aggregated information.

3.9.1 A Day On The Green 2019 – 2021

In 2019, Rochford and All Saints presented two concerts and Mt Duneed presented three.
These concerts attracted 87,675 patrons.

In 2020 and 2021, due to restrictions and border closures, the emphasis turned to domestic artists. Rochford presented three concerts, All Saints presented one and Mt Duneed hosted two. These concerts attracted 95,017 patrons.

Year	Artist	Location	Total Tickets
2019	Florence & The Machine Red Hot Chilli Peppers Elton John Bryan Ferry Rob Thomas John Butler	Mt. Duneed Mt. Duneed Mt. Duneed Rochford Rochford All Saints	22,000 20,000 20,000 5,000 6,300 8,300
2020	Cold Chisel Cold Chisel Elton John Elton John Rod Stewart James Blunt Simple Minds	Mt. Duneed Rochford Rochford All Saints Mt. Duneed Rochford Rochford	23,000 12,000 24,000 11,000 Cancelled Cancelled Cancelled
2021	Midnight Oil	Mt. Duneed	12,500

Table 3g

The 2020 concerts were all fortuitously scheduled for January and February and were able to proceed. Concerts scheduled for later in the 2020 year were initially postponed, but later cancelled.

Box Office

Based on the information supplied, these performances **generated a combined box office of $23.36 million.**

Ancillary Spending – Onsite

Analysis of the attendee survey responses indicates that patrons attending major concerts in regional Victoria spent an average of $92 onsite (food & beverage and merchandise). This corresponds closely to the $80 average onsite spend recorded in the Melbourne Live Music Census 2017.

Although only an average of 6% reported spending $0 onsite, the audience total is discounted to 10% as a conservative calculation.

It can therefore confidently be reported that ancillary onsite spending from 2019 to 2021 totalled an additional $7.12 million.

Note: As noted previously, not only does this figure correspond closely with the *Melbourne Live Music Census 2017* report, but also closely aligns with the onsite spending identified in a number of annual *Wish You We Here: Music Tourism Contribution to the UK Economy* (UK Music 2016, 2017, 2018).
It is also worth noting that the wine consumed onsite is produced by the wineries hosting the events and the patron spending is a direct injection into that local business and the local economy.

Employment

The ADOTG concerts across the period provided 1,560 performance opportunities for performers and artist crew.

Across all events employment was created for over 3,000 casual and part-time staff. Importantly, the majority of these opportunities involved workers from the local and/or surrounding areas.

ADOTG Employment Summary	Hours
Casual & Part-Time Event Staff	39,500
Casual & Part-Time F&B Staff	38,300
Casual Production/Staging Staff	26,000
Casual Security Staff	9,750
TOTAL	**113,550**

Table 3h

Utilising the Fairwork/ABS formula, **ADOTG concerts in 2019-2021 created 70.5 Full Time Equivalent jobs.**

3.9.2 ADOTG Tourism Impact

An analysis of the purchase postcode and patron demographic data supplied to us reveals the following attendance profile for the three venues based on place of residence.

Attendance Profile	Metro Melb	Regional	Interstate
Rochford (60 Kms from Melbourne)	51%	42%	7%
Mt Duneed (98 Kms)	40%	53%	7%
All Saints (300 Kms)	17%	49%	34%

Table 3i

Note: Given that the All Saints venue is situated 300 kms from the Melbourne CBD, it is unsurprising that the Metro attendance is significantly lower.
It is also the case, for the same venue, that the 34% recorded as 'Interstate' is a distortion based on the venue's proximity to the Victorian and New South Wales border.
Stripping out the 'locals' attending from regional NSW restores true interstate visitation to a similar level to the other venues (8.5%).
In determining the tourism benefit in the host communities and those travelled through on the way to or from events , the postcode data has been combined with attendee survey responses.

Ancillary Spending – Offsite

Data from attendee surveys shows that a proportion of patrons attending these events will remain in the community and/or surrounding areas for longer than the one-day event window. However the following calculations are based on the average reported daily spend.

Food and Beverage outside the event site –
Average per patron $84 with 25% reporting no spending.
Local business injection - **$4.8 million.**

General Retail outside the event site (excluding F&B) –
Average per patron $105 with 45% reporting no spending.
Local business injection - **$3.9 million.**

Visits to Local Tourism Facilities/Attractions –
Average per patron $31 with 62% reporting no spending.
Local business injection - **$825,000.**

Accommodation

Local business injection - $2.54 million
The data supplied by the ADOTG ticketing agency confirmed that 24% of ticket purchasers booked accommodation as part of their package. By analysing the audience using the size of the booking group associated with each purchase (supplied), it is possible to estimate the number of single-night stays.
Analysis from attendee responses also shows that a further 20% (minimum) can be added to reflect the significant number who stayed in local accommodation for a minimum one-night stay.
As previously noted, the below is a conservative estimation based on the fact that many attendees reported multi-night stays associated with event attendance.

Spending in Other Communities

Attendees who travelled 100+ Kms to attend these events reported spending an average of $69 in communities travelled through on the way to or from the concerts (17% reported no spending.
Business injection in other communities - **$1.84 million**

In summary –

Onsite	$ Millions
Box Office	$23.36
Food & Beverage	$7.12
Offsite	**$ Millions**
Food & Beverage	$4.80
General Retail	$3.96
Tourist Attractions	$0.83
Accommodation	$2.54
Travel Expenses	$1.84
TOTAL	**$44.45**

Table 3j

Of the total of $44.45 million in spending associated with these major concerts, $13.97 million was directly injected into local and area businesses and facilities external to the concert site

3.10 Other Concerts

This report also received input, including postcode data, from ticketing agencies Moshtix and Oztix concerning their regional event activities. Although smaller in scale (than the ADOTG concerts), the 60+ events they reported for 2019 involved some 98,000 ticket sales.

From the data, a conclusion can be made that approximately one third (30,500) of these tickets were sold for performances in small venues (clubs/hotels/community halls) and therefore will be included in that section of the report. The calculations below are therefore based on 35 regional concerts held mainly in the Goldfields and Geelong and the Bellarine Regional Tourism Areas.

Limits to reporting

One third of patrons (24,000) did not provide a postcode when purchasing tickets. Rather than allocate metro Melbourne/regional/interstate purchases on the basis of the ratios for the remaining two thirds (and other concerts reported above), this cohort of patrons will be excluded from the below calculations.

The demographic information provided shows that a larger proportion of this audience (30%) was under 25 years than the ADOTG audience (15%). According to the attendee survey responses, it appears that this cohort spends less on and offsite. For the purposes of calculation, the attendance numbers have therefore been discounted by 20% to account for this reduced consumption. Further, the average ticket price ($78) is significantly less than reported for ADOTG concerts, primarily because only 2 of the 180+ performers involved were high-profile internationals.

A figure for accommodation spending has not been included due to the limitations of supplied data (see below).

Box Office/Audience

The postcode data provided reveals that 39% of patrons attended from Metropolitan Melbourne, 56% attended from regional Victoria and 5% from interstate.

Utilising the discounted audience figure 35,600, the estimated ticket sales generated **$2.77 million**.

Ancillary Spending – Onsite

The consumption of food, beverage and merchandise onsite generated **$3.27 million**.

Tourism Impact

Ancillary Spending – Offsite

The following calculations are based on the analytical tools previously developed and, in the case of these events, applied in light of the fact that 33% of regional attendees were identified as locals (within 50 kms of their residence), while 42% travelled 100+ kms to attend.

Food and Beverage outside the event site – average per patron $84 with 25% reporting no spending.
Local business injection - **$2.2 million.**

General Retail outside the event site (excluding F&B) – average per patron $105 with 45% reporting no spending.
Local business injection - **$1.68 million.**

Visits to Local Tourism Facilities/Attractions – average per patron $31 with 62% reporting no spending.
Local business injection - **$480,000.**

Spending in Other Communities

Attendees who travelled 100+ kms to attend these events reported spending an average of $69 in communities travelled through on the way to or from the concerts (17% reported no spending.
Business injection in other communities - **$1.14 million.**

Accommodation

The ticketing agencies reporting for this series of events, did not have access to any data on patron accommodation booking or spending.

Data From our attendee surveys shows that 40% of those travelling from a distance of 100+ Kms stay in a hotel, motel or rented private residence for a minimum of one night. Based on that average length of stay, it is estimated that approximately **$2.2 million** was generated for local providers.
Conservatively only 50% of this figure is included in the summary.

Employment

In 2019, 195 performance opportunities were created for musicians and/or DJs.
These concerts provided employment opportunities for 1,200 casual and part-time workers – event staff, food & beverage staff and a range of production and staging crew.
They were employed for a total of 17,850 hours – the equivalent of **11 FTE jobs**.

The 2020 and 2021 Years

The vast majority – over 95%, of scheduled/planned performances were either cancelled or postponed due to various restrictions, lockdowns and border closures.

3.10.1 Regional Concert Sector Summary

Employment

Regional concerts in the years 2019-2021, provided a total of 4,220 Performance opportunities for artists.
In 2019, the concert's operations created full-time jobs for 38 event management staff and contributed significantly to the full-time employment of another 35.

Shifts by casual and part-time workers across event or venue, food and beverage, production and security totalled 529,446 hours equating to 328.25 FTE jobs.

In 2020 and2021, it was only A Day On The Green events that were able to operate mainly as planned. They were responsible for 21% of the casual and part-time work hours.

Performing Arts Centre casual and part-time staff lost 75% of work and those in the 'Other' concert category lost 90%.

Total Concert and Major Income Summary

Box Office	$ Millions
VAPAC	5.86
ADOTG	23.36
Other Concerts	2.77
Travel Expenses	$1.84
Ancillary Onsite (F&B etc)	**$ Millions**
VAPAC	2.35
ADOTG	7.12
Other Concerts	3.27
Tourism Impact	**$ Millions**
F&B Offsite	
VAPAC	1.31
ADOTG	4.80
Other Concerts	2.24
Retail	
VAPAC	1.31
ADOTG	4.80
Other Concerts	2.24
Tourist Attractions	
VAPAC	0.00
ADOTG	0.82
Other Concerts	0.48
Accomodation	
VAPAC	0.00
ADOTG	2.54
Other Concerts	1.05
Non-host Communities	
VAPAC	0.00
ADOTG	1.84
Other Concerts	1.14
TOTAL	**66.59**

Table 3k

Note: In order to be entirely confident in the accuracy of reporting, a figure of $0 has been recorded in the VAPAC sector where verifiable data was unavailable and informed calculations were not possible.

3.11 Conclusion

The largest revenue share by far was generated for concert event presenters and promoters.
However, given that one of the core aims of the project was to identify the tourism value associated with music event visitation, it is pleasing to report that nearly one-third of all revenue generated benefited businesses based in communities hosting the events or located on routes travelled by patrons on the way to or from events.

Concert Snapshot 2019/2020	$ Millions	
Box Office	31.99	48%
Onsite Spending (F&B, Merch)	12.74	19%
Offsite Spending (Local Business - Event Impact)	18.88	28%
Spending in non-host Communities	2.98	4.5%

Table 3l

It is of course distressing to report that most of that revenue, and the employment generated, was lost during 2020 and 2021 due to the pandemic impact.

2019 v 2013

When the '2013 Regional Victoria Live Music Census' was conducted, data collection, analysis and reporting were in their 'infancy'. The report team certainly did not have the direct involvement of event organisers and ticketing agencies which have so significantly aided the analysis on this occasion.

In that report, concert performances were included in the category which quantified live music presentations in 'small venues'. Festivals were analysed in a separate category. The combined total of revenue generated across the two categories was reported at $60.9 million.

While it is almost certain that the 2013 census under-reported due to the lack of robust data available at the time, there can be little doubt that the $66.59 million in revenue for concert performances alone in 2019 is indicative of significant growth in the live performance sector in Regional Victoria.

SECTION 4
FESTIVALS

Introduction

As is discussed above, the importance, breadth and economic impact of music festivals has been significantly under-reported. When it has been reported, often it has been combined in reports about multi-artform festival activity and the role of dedicated music festivals, has therefore not been able to be clearly quantified.

Anecdotally it is clear to see the cultural, economic and tourism impact of the vibrant regional music festival sector to Melburians and Regional Victorians alike. In the attendee survey, music fans from across Victoria reported attending on average 2 regionally located festivals per year pre-COVID.

Some of the state's largest and best loved festivals, Queenscliff Music Festival, Beyond The Valley, Wangaratta Jazz & Blues and National Celtic Folk Festival (just to name a few) are all located regionally. These events not only supply their local areas with vibrant music culture but also encourage tens of thousands from Melbourne to travel to these regional communities every year.

While the following reporting was greatly aided by the generous sharing of ticketing demographics by a group of festival organisers, this report was not immune from the difficulties in reporting on the true representative data about this industry. The efforts of this report team were also thwarted by the almost simultaneous dissemination of the survey with the unexpected but welcome announcement by the Victorian State Government that live music capacities and density limits lifted were going to be lifted just before the beginning of festival season (November - March), leading to many operators having to frantically organise their festivals with very late notice.

Therefore, to strike the balance between a methodological approach while trying to adequately report the size of the industry sector - attendance figures from festival operators and ticketing agencies have been combined with festival reported attendance figures available via their website and strategic plans. As well as this, some attendance numbers are based on reported attendance by reputable news outlets, but have been discounted by 25% to mitigate over reporting.

Other elements of the festival's operations including ticketing prices, lineups and other information have been researched via festival websites and social media for other parts of this reporting.

It is lastly, important to note that in the following section we are only reporting on festivals where music either is the main focus of the festival i.e. Meredith Music Festival or if it is a major component of the festival's offering i.e. Bruthen Blues & Arts Festival. By our definition, the offering of the festival must be at least 50% musical acts or performers.

4.1 APRA

In 2019, APRA issued a total of 2,229 event licences for Victoria.

519 of those were for major concerts or festivals in Regional Victoria. 60 of these were for music-oriented festivals. While this provides a starting list for the numbers of festivals in Regional Festivals, there are more than this number suggests.

Image courtesy of Volta Ballarat

4.2 Music Festivals in Regional Victoria

A list of festivals was built by consulting industry connections, local government contacts and industry research as well as from open responses to the attendee survey. That produced a list of 89 festivals in Regional Victoria that run regularly .

Apart from occurring in Regional Victoria and being largely music oriented these festivals varied widely in size, duration and style of festival.

The following graphs will give some sense of the spread of these festivals across the year:

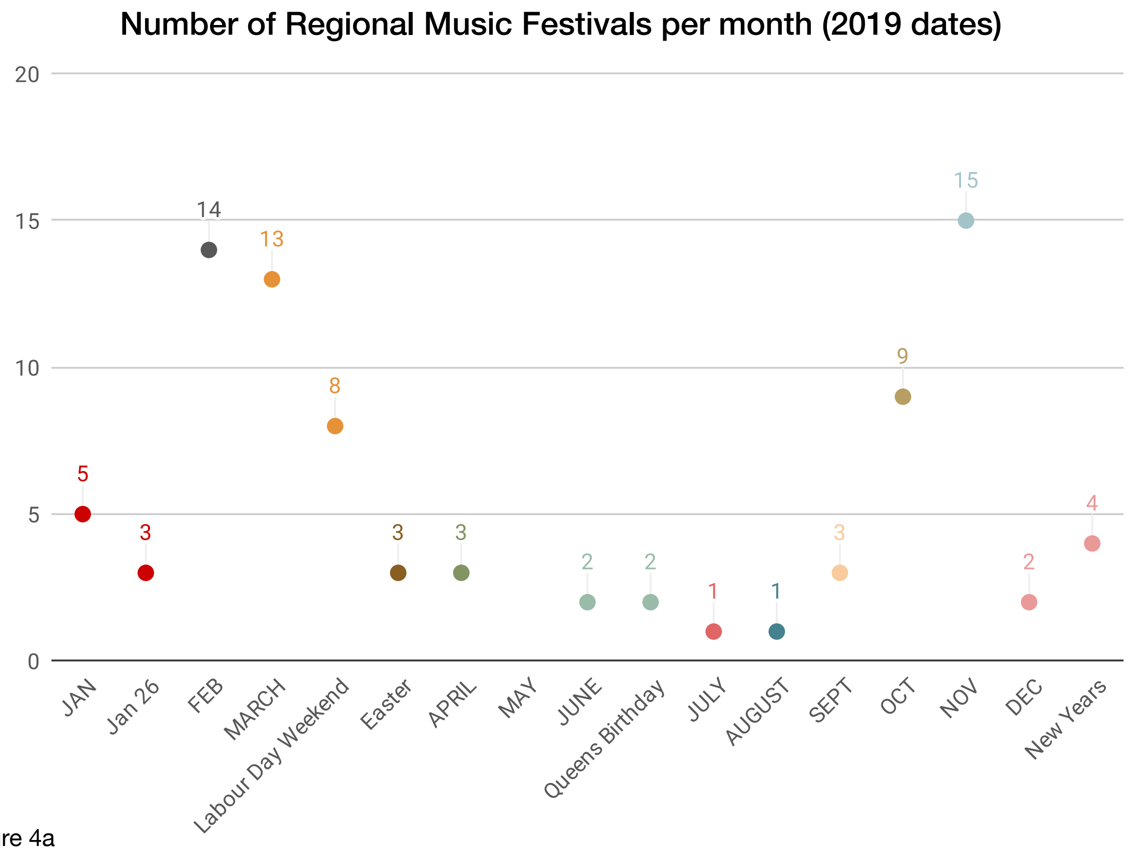


Figure 4a

There is a high concentration of festivals in late spring and early summer with the highest months being March (21) and November (15).

Note: When dates have changed across the year, 2019 dates were used as a reference, however the small number of festivals that ran from 2020/2021 have been added in.

Figure 4b

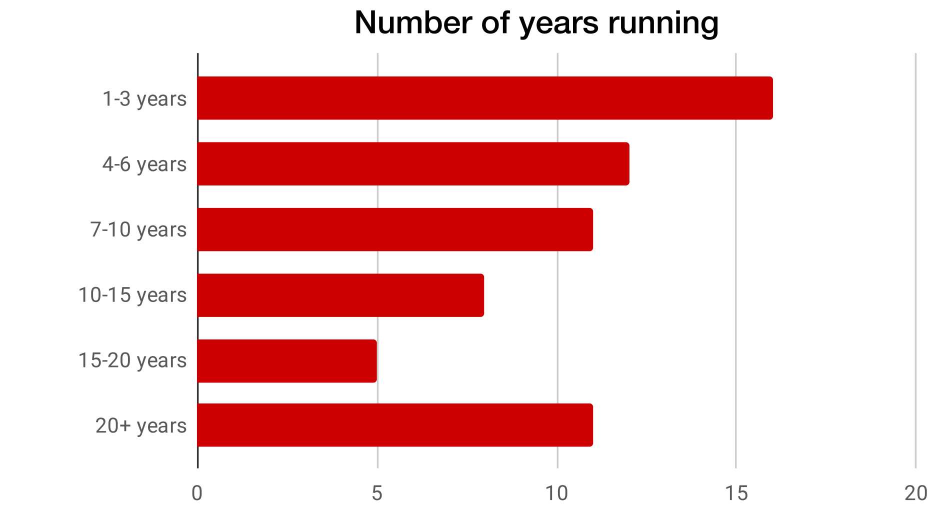


Figure 4c

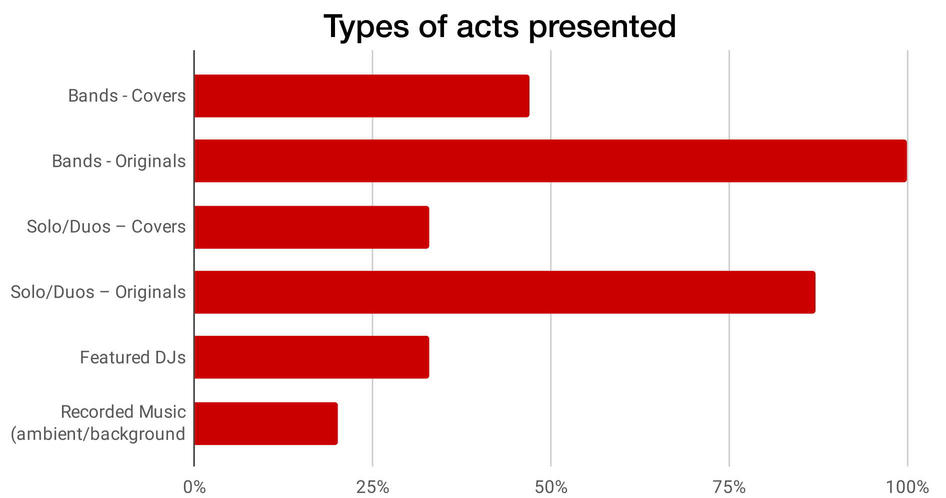


Figure 4d

A number of the festivals selected the genres which they present at their festivals, to get a sense of the diversity of styles across the sector, but is in no way demonstrative of the entire sector.

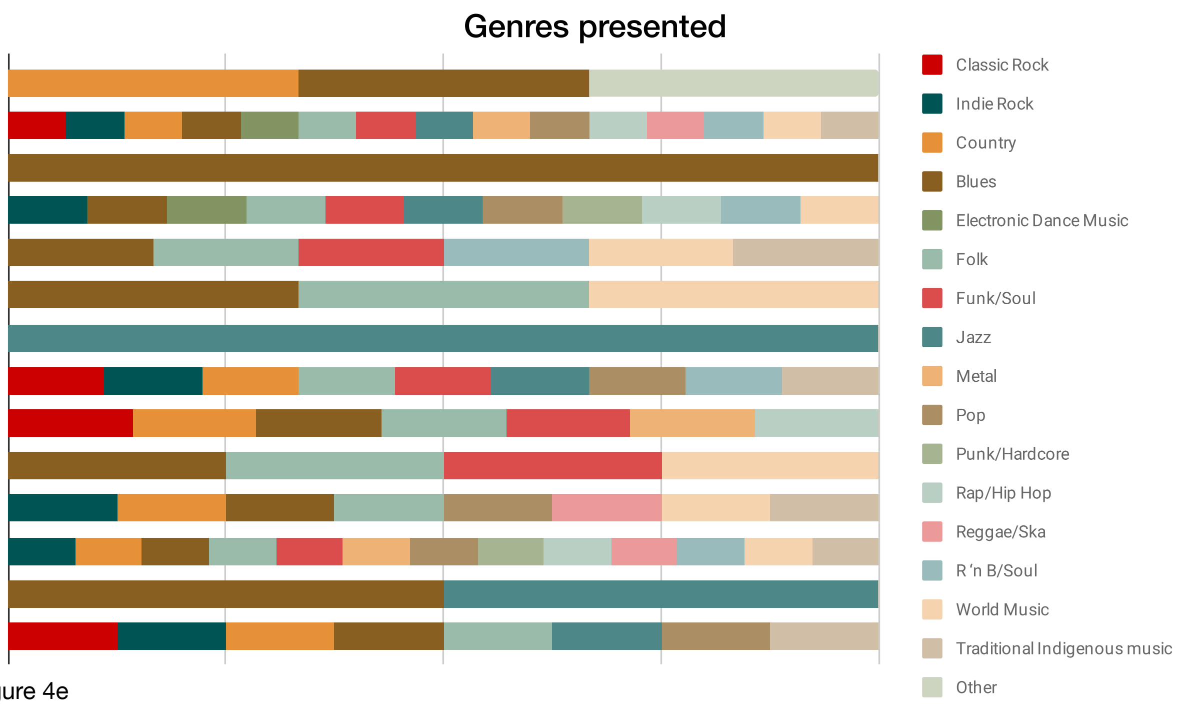


Figure 4e

Blues, indie rock, folk and country are very well represented in these profiles and more accurate for the popularity at regional festivals in general. However the lack of electronic, metal and hip hop appears under-represented for its popularity across the industry.

Regional Festivals reported offering this split of tickets.

Free	30%
Single whole-event ticket price	25%
Different ticket prices for the separate days or events	30%
Concession/Youth/Family tickets	35%

Table 4a

Blues, indie rock, folk and country are very well represented in these profiles and more accurate for the popularity at regional festivals in general. However the lack of electronic, metal and hip hop appears under-represented for its popularity across the industry.

4.3 The 2019 Year

In Section 3, there was the reporting on the LPA data about Victorian arts events which included a section for "Contemporary Music" and "Contemporary Festivals". While it is a great move for the data about these festivals to be broken up in this way, the results reported by LPA seem to indicate that there is a severe lack of information about festivals across the state.

The information below aims to give a more realistic picture of the scale of the Regional Live Music Economy as well as Victoria's more broadly.

4.3.1 Attendance Numbers and Demographics

By combining data from the festival surveys as well as cross referenced research, the combined attendee number across regional music festivals is: **405,380**

This number can either represent one multi day festival ticket for onsite camping festivals or single tickets to events that make up a festival with multiple days and events.

As discussed earlier, the festival operator survey was not completed by the majority of festival organisers and the capacities and attendances of many festivals cannot be verified so best diligence has been maintained to get a more accurate picture of the industry while not over-reporting. The number is based on numbers from only 55 out of 76 festivals on our list but in order to be conservative this number will be used to calculate revenue calculations further on.

Residence of Attendees:

Festival Operators were asked to estimate the percentage of their audience from Regional Victoria.
The average was - **52%**

Age of Attendees:

When asked to estimate the ages of their attendees, the festival organisers reported the below average percentages:

Under 18	6%
18 – 25	11%
26 – 35	15%
36 – 45	16%
46 - 55	19%
56 – 70	22%
71+	11%

Table 4b

These figures give a very different picture from the breakdown from the major festivals who supplied their ticket data:

Under 18	0%
18 – 25	46%
26 – 35	24%
36 – 45	19%
46 - 55	7%
55+	5%

Table 4c

4.3.2 Box office

In order to calculate the average ticket price, single ticket festival prices were averaged with an average ticket price for multi-price festivals.

By this calculation, the average ticket price was: **$167**
The average amount of events with free tickets in multi-concert festivals was 22% so assuming that 22% of the combined ticket sale number listed above this leaves as box office revenue of:
$52,804798.80 (52.8 million)

4.3.3 Ancillary Spending – Onsite

The responders of the attendee survey reported having spent a daily average of **$132** on onsite food & beverage.

This is a considerably more than the average patron's reported spending at major concerts ($94).
As with the major concerts calculations, although only an average of 7% reported spending $0 onsite at the festivals they attended, the attendee number has been decreased by 10% to be conservative.

Therefore we can confidently report that festival attendees in Regional Victoria spent **$47.4 million** on onsite food and beverage.

This above calculation is treating 405,380 ticket numbers as a daily ticket despite the fact that many festivals (ie Beyond The Valley) are more than one day and therefore worth more in daily spread. The reason for this is to counteract the fact that this box office figure also includes festivals made up of multiple tickets, some of which could be on the same day (ie Bendigo Blues and Roots).

4.3.4 Employment

Artists

The average number of performance opportunities for bands, musicians and/or DJs per festival was 32.
This number is the average across one day as well as multi day festivals.

If we times this per the number of festivals in 2019 the number of total performance opportunities is **2848**.

This number only represents the number of acts which performed at festivals so the number of performers and artist crew is likely to be much higher than this.

The following table report on the proportion of underrepresented groups in artist lineups:

Female (at least one member for a group)	38%
Gender diverse (Trans/Non-binary)	3%
First Nations	4%
Ethnically/linguistically diverse	8%

Table 4d

Note: These numbers are based on self reporting by festival operators as well as research of lineups, therefore the identification therefore relies on the public information about these artists rather than how they self identify.

The graph below shows the place of residence of the artists who perform at festivals in Regional Victoria. According to this information we can calculate that festivals create 712 performance opportunities for Regional Victorian Acts per year.

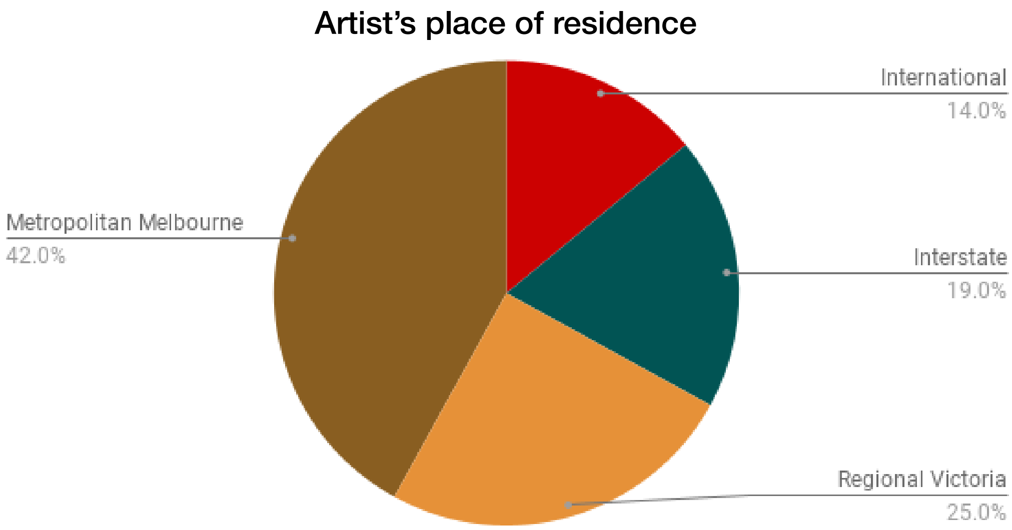


Figure 4f

Festival Staff

For employment information we had to rely on the information which was given to us by the festival operators, from the numbers that have been supplied. However it appears that the employee numbers look closer to the operation of smaller festivals rather than the large scale job generation of major festivals.

In the non-festival period, a conservative calculation shows the below Full Time Equivalent jobs:

Full time - year-round	141
Part time - year-round	136
Casual/Contract - year-round	65
Full time - in festival lead up period	15
Part time - in festival lead up period	35
Casual/Contract - in festival lead up period	51

Table 4e

Over the festival period (on average 3.4 days) the following additional staff are engaged, by estimating the hours done by the total staff over this period, it is possible to calculate the FTE jobs created as the below:

Full time	8.5
Part time	516
Casual	522
Contractors - ie security etc	725

Table 4f

From these numbers we can see that the sector creates **2214 FTE positions**.

These numbers only represent the staff that are employed by the festivals and so do not include ancillary staff such as cleaners, food truck staff or site staff if the festival takes place in established venues etc.

Of the festivals, which responded to our operator survey, it is reported that **58%** of festival staff live within 30 minutes drive of the site. While the response doesn't include some major festivals which hire large staff numbers, it does indicate significant job creation in regional communities)..

4.3.5 Tourism Impact

In the festival operators survey we asked operators to estimate the percentage of their audience who attend from Regional Victoria vs Metropolitan Melbourne, Interstate or from Overseas.
The average percentage of Regional Victoria reported was **55%**.

However the data provided to us from 9 major festivals gave a different average:

Metropolitan Melbourne	44.1%
Regional Victoria	36.8%
Interstate	11.3%
International	0.4%
Unknown	7.4%

Table 4g

By getting the average from the ticketing data and the survey results the average percentage of Regional Victoria attendees is **51%**.

Ancillary Spending – Offsite

While it is likely that attendees who travel for music festivals may stay in the community for longer than the exact festival period. The attendee number will be used as the daily amount for the same reason as with the onsite spending calculation.

<u>Food and Beverage outside the festival site –</u>
Average per patron $74 with 18% reporting no spending.
Local business injection - **$24.5 million.**

<u>General Retail outside the event site (excluding F&B) –</u>
Average per patron $48 with 46% reporting no spending.
Local business injection - **$10.5 million.**

<u>Visits to Local Tourism Facilities/Attractions –</u>
Average per patron $23 with 76% reporting no spending.
Local business injection - **$2.2 million.**

Accommodation

As is seen above, the festivals across Regional Victoria are diverse in their artistic offering, the audience they attract as well as duration and their accommodation offering as part of the ticket.

A large number of multi-day festivals in Victoria include camping as part of the ticket or as a small add on.

From the information reported in the festival surveys as well as the data provided by some major operators, we are able to ascertain a number of patrons who attended a multi day festival which did not provide camping.

This number was added to the number of patrons from other festivals who reported staying offsite.

From demographic patron data identifying attendance from the local area we calculate that, it can be calculated **49%** of attendees come from outside of the local area of a festival. This number is based on the percentage of attendees from Metropolitan Melbourne, Interstate & International. Although there may be a proportion of Regional Victorians who would also need to be accommodated at these festivals, this percentage is used to remain conservative. This number was multiplied by the average spend reported in the attendee survey, average of $375 per attendee tour party.

Based on the above, the local accommodation business injection is **$26.6 million** from multi-day festival attendees.

Analysis from attendee responses, shows that in addition to this figure and extra 20% of the one day non-local event attendees should be included in the accommodation calculations to reflect those who may choose to stay in the local area of a one day event.
This accounts for an extra - **$3.2 million**.

Spending in Other Communities

Attendees who travelled 100+ Kms to attend these events reported spending an average of $57 in communities travelled through on the way to or from the festivals with 17% reporting no spending.
Business injection in other communities - **$9.3 million.**

4.3.6 Local Government Engagement

Questions in the survey were designed to assess the relationship between festivals and local government and local tourism boards.

Local Council

100% of operators reported that they had a working relationship with their local council.
They reported that they received support in the following areas:

Assists in application of event permits	69%
Provides business/operational advice	25%
Provides a networking opportunity	63%
Promotes the festival	63%
Provides direct financial support	69%
Provides advice on grant/funding opportunities	50%

Table 4h

While many festival operators reported that they had no recommendations of extra ways local council could assist, others listed the following:

- More funding opportunities - more ongoing funding systems
- More Local Marketing Opportunities
- Council Resources such as bins, skips etc.
- assistance with volunteers networks
- Having more knowledge about live music strategies

Regional Tourism Boards

By contrast, only 44% reported that they had a working relationship with their Regional Tourism Board. They reported that they received support in the following areas:

Assists in application of event permits	0%
Provides business/operational advice	6%
Provides a networking opportunity	19%
Promotes the festival	31%
Provides direct financial support	0%
Provides advice on grant/funding opportunities	25%

Table 4i

It appears particularly counterproductive that Regional Tourism Boards appear (from this data) to not have as much engagement with festivals as a tourism driver, particularly in the promotion of the festivals who responded to this survey.

Note: Due to the low answer rate of this question, we can only take this as an indication of engagement rather than a wholly accurate number.

4.3.7 2019 Funding

Festival operators report the following information regarding funding in 2019.

The following percentages show the festival operators who reported applying for the following types of grants and who were successful in 2019:

	Applied	Successful
I did not apply for any grants/assistance	33%	
Local Government	60%	53%
State Government	40%	7%
Federal Government	0%	
Other	7%	7%

Table 4j

From researching publicly available information about festivals, the number who also received funding in 2019 were:

Local Government	42%
State Government	14%
Federal Government	0%

Table 4k

4.3.8 Health of the sector in 2019

Pre-pandemic there were still considerable barriers to successfully putting on live music festivals.

The first of which is that the 2019/2020 festival season was heavily affected by the Black Summer bushfires which burned more than 1.5 million hectares of land in Victoria with the shires of East Gippsland, Mansfield, Wellington, Wangaratta, Towong, and Alpine all affected amongst others.
Also there are the more operational challenges that affect festival operators, in 2019 including impact from the following issues.

	Not applicable	Slight impact	Moderate impact	Strong impact
Noise restrictions/complaints	73%	27%		
Issues with permits	73%	20%		7%
Issues with the festival site	53%	33%	7%	7%
Health & Safety Issues	67%	33%		
Lack of support from local authorities	80%	13%	7%	

Table 4l

In good news, 89% of operators were able to resolve these issues.

In comparison to previous years, 50% of operators reported that their attendance was increasing in 2019, 43% reported a similar attendance and only 7% reported a decrease.

In terms of income from the festivals in 2019, the operators reported that they:

Run at a profit	21%
Balance the budget from ticket sales	14%
Balance the budget from ticket sales plus funding support	36%
Ran at a deficit	29%

Table 4m

4.3.9 Total figures

The below table shows the full economic contribution of music festivals in 2019:

Onsite	$ Millions
Box Office	$52.8
Food & Beverage	$47.4
Offsite	**$ Millions**
Food & Beverage	$24.5
General Retail	$10.5
Tourist Attractions	$2.2
Accommodation	$29.8
Travel Expenses	$9.3
TOTAL	**$176.5**

Table 4n

4.4 2020/2021 Years

As cannot be understated, from March 2020, Regional Victorian Festivals have experienced unprecedented effects from the pandemic.

In 2020 - only 36 Festivals went ahead.
26 occurred before the State of Emergency was announced on 16 March 2020.
6 occurred in an online or streamed format rather than in front of a live audience.

Of those that cancelled, 2 were cancelled due the bushfire season, 3 did not go ahead due to non-COVID reasons.

In 2021 - 39 Festivals went ahead.
7 occurred in an online or streamed format.

In other words in 2020 only 34% of festivals ran in a live format and 36% in 2021.

4.4.1 Operational Impact

Festival operators have often discussed the pressures and operational impacts of COVID even when they did go ahead.

The below table shows the changes that needed to be made in order for festival to operate:

	2020	2021
Reduced capacity	3%	41%
Change in format ie seated rather than standing	0%	25%
Reduced the music offering in favour of other art forms	3%	13%
Reduced the length of the festival	7%	6%
Reduced the number of performances/events	20%	7%

Table 4o

4.4.2 Financial Impact

	2020 $ millions	decrease from 2019	2021 $ millions	decrease from 2019
Onsite				
Box Office	17.9	34.9	19	33.8
Food & Beverage	16.1	31.3	17	30.3
Offsite				
Food & Beverage	8.3	16.2	8.8	15.7
General Retail	3.7	7	3.7	6.8
Tourist Attractions	0.7	1.4	0.7	3.8
Accommodation	10.1	19.7	10.7	19.1
Travel Expenses	3.1	6.2	3.3	6
TOTAL	**56.6**	**116.7**	**63.2**	**115.5**

Table 4p

This means that the total economic contribution from music festivals in 2020 was **$56.64 million and $59.99 million in** 2021.

These would still be impressive numbers if it wasn't for the **$110.56 million and $109.5 million loss** in 2020 and 2021 respectively.

These figures also don't give a sense of the economic loss of reduced capacities, reduced festival periods and reduced numbers of performances.

Funding

A small positive effect of the pandemic conditions was an increase in State and Government funding to the arts and music. Although it can be argued that it was too little too late, the information given to us by festival operators show that it was sought and awarded in much bigger numbers than 2019 - the Restart Investment to Sustain and Expand (RISE) Fund especially seemed to help a lot of festivals stay afloat.

	Applied	Successful
I did not apply for any grants/assistance	0%	
Local Government	25%	25%
State Government	40%	7%
Federal Government	19%	13%
Other	0%	0%

Table 4q

From research, the percentage of festivals that received funding in 2020/2021 was:

Local Government	45%
State Government	20%
Federal Government	18%

Table 4r

Of the successful applicants 100% reported that the income was an essential or important factor which allowed them to continue to operate.

For 2020/2021, the festivals reported the following income:

Run at a profit	12.5%
Balance the budget from ticket sales	12.5%
Balance the budget from ticket sales plus funding support	50%
Ran at a deficit	25%

Table 4s

Note: The above only represents the festivals that ran in 2020/2021, cancelled or postponed events did not answer the question

4.4.3 Employment Impact

Artists

In 2020 it is estimated at least 1880 performance opportunities for artists were lost and 1823 in 2021. The true number could be higher as some events ran with reduced durations and performances.

Festival Staff

In 2020 it is estimated at least 1880 performance opportunities for artists were lost and 1823 in 2021. The true number could be higher as some events ran with reduced durations and performances.

Unfortunately, not enough information was given by our survey responders in order to give a detailed picture of the exact loss of jobs outside the festival period. Information on exactly how many companies were able to hold onto staff due to JobKeeper is also too difficult to ascertain.

We can assume that a minimum, festivals that did not occur would not have hired their festival staff, so loss would be at least:
- 1087 FTE jobs in 2020
- 1046 FTE jobs in 2021

4.4.4 Mental Health Impact

As is well documented, the emotional toll on workers in the events and music industry has been severe. The figures above only give a sense of the number of postponements and constant uncertainty in the sector.

The following responses were reported by festival operators:

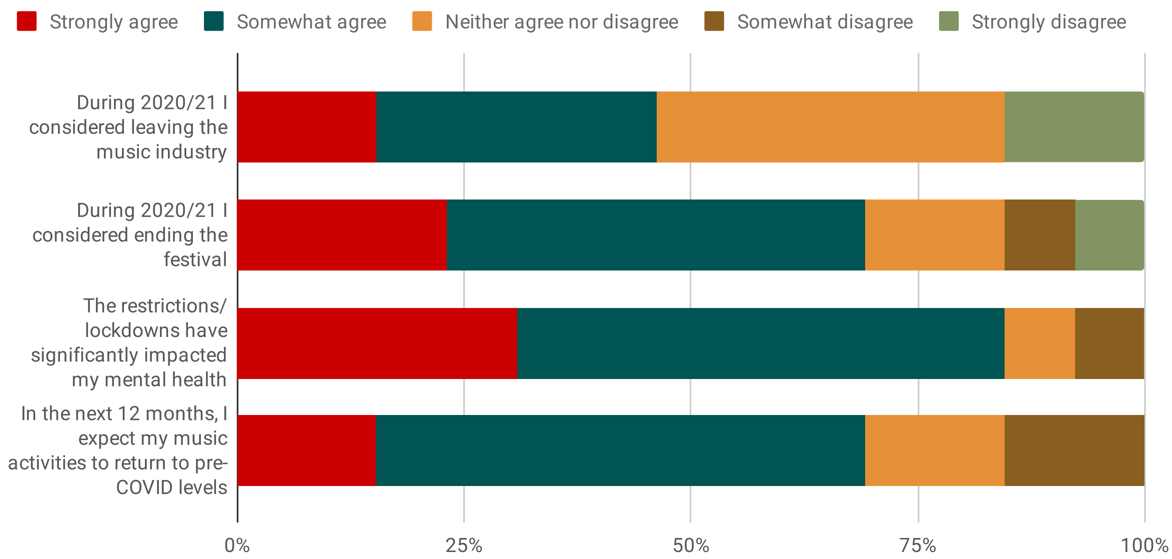


Figure 4g

4.4.5 Conclusion and Community Impact

What is not illustrated by the numbers, tables and graphs above is how important music festivals are to communities and what they mean for the identity or pride of a town or region. Also they are an important vehicle for social cohesion.

One small indication if provided by the number of volunteer positions filled at Regional Victorian festivals in 2019 - 41,280. It would be difficult to find another sector which inspires such a number of people to work together for a common goal and no financial gain.

SECTION 5
SMALL VENUES

Introduction

Live music performances in small venues are at the heart of community involvement. In 2019, **7,296** licences were issued to premises in regional Victoria. Of those, **2,028** were On-Premises, Full Club, General or Late night – typically covering the serving of food and drink and the potential to host entertainment.

In order to determine the number of venues presenting live music performances and, more importantly, those presenting on a ‘regular’ basis – at least one gig per week, we will begin with an analysis of the APRA database information.

As mentioned previously, the Australasian Performing Right Association (APRA) represents over 100,000 songwriters in Australia and New Zealand and issues licences to businesses wishing to present those members’ works (songs) in live performances and recorded music events (nightclubs, bars, cafes etc).

As previous music census projects have revealed, live music presentations in small venues generate significant revenue for operators, create significant employment and income for artists, venue, food and beverage and production staff. The venues also play a significant role in the social life of their communities as a focal point for celebration and interaction.

5.1 APRA Licences

In 2019, APRA issued 1,461 licences to Victorian venues – 662 covered Metropolitan Melbourne venues and 799 for Regional Venues. After removing those not licensed to present live music, we were left with an indicative total of - **522 venues in Regional Victoria.**

It is worth noting that in the 2013 Regional Victoria Live Music Census, we reported a total of 455.

Although the APRA licences provide the legal ability (and probably the intention) to present live music, they do not identify those venues for whom live music presentation is a core component of their operations. Nor, as APRA readily admits, is their licensing database likely to capture all the venues presenting live music. In this way they are just the starting point.

5.2 Refining the APRA lists

In order to create definitive lists identifying small venue live music presenters, the following process was undertaken–

(i) Venues from APRA’s master list were allocated by postcode to their appropriate Regional Tourism Area.

(ii) These lists were then distributed to the 11 Regional Tourism Boards and the 47 Local Government Authorities within their boundaries. They were asked to use their local knowledge to add venues missing from APRA’s list and indicate any that were not presenting live music in 2019 or had ceased to do so in 2020 and 2021.

(iii) The lists were also distributed to the 43 regional FReeZA groups, Music Victoria’s Regional Music Coordinators, 25 venue managers who are members of the Victorian Association of Performing Arts Centres and 60+ industry workers/practitioners who have participated in Music Victoria’s Music Professional Mentor Program.

(iv) After their feedback was incorporated, the amended lists were given to the Collarts research team acting as regional coordinators for each of the Regional Tourism Areas. They verified the lists and, most importantly, identified regular presenters. This investigation involved research via the venue’s websites, social media platforms and gig guides where available.

Note: This process was far easier than in 2013, as 81% of venues now have a website; 96% a Facebook page and 74% an Instagram account.

Image credit: Richard Iskov

5.3 Regional Tourism Area Venues 2019

This process produced the following results –

	Venue Number
Daylesford and Macedon Ranges	25
Geelong & The Bellarine	82
Gippsland	102
Goldfields	120
Grampians	51
Great Ocean Road	67
Mornington Peninsula	64
Murray	83
Phillip Island	19
Victorian High Country	65
Yarra and Dandenong Ranges	40
TOTAL	**718**

Table 5a

Based on research by the RTA coordinators, we immediately removed 125 'venues' on the basis that there music activities were ancillary to core activities (eg. dance schools, education, sporting groups).

We also removed performances in 57 theatres and performing arts centres as their results have been included in the previous Concert section.

This left us with a total of **536 venues** to research and confirm the regularity of their live music presentation.

The remaining 228 venues were identified as presenting 'occasionally' – anywhere from 1 gig per month to a handful per year.

5.4 Quantifying 'Regular' Presenter Revenue/Spending

The **308 venues** identified as delivering a minimum of 1 live gig per week were contacted by their RTA coordinator and encouraged to complete a comprehensive online Regional Small Venue Survey.
96 (31%) did so. Importantly half of those responses came from pubs/hotels.

Note: This is the 4th live music census project conducted by Music Victoria (and partners). To our knowledge they are the only such studies on popular music activity which adopt a 'census' type approach – rather than a weighted sampling one.

For instance, Deloitte Access Economics, Ernst and Young and SGS in previous reporting on venue activity in Victoria have interrogated a small number of live music presenters/venues and extrapolated data from their responses. In the case of small venues, the number was so small as to make the findings questionable.

So the figures and calculations that follow are based on a robust sample of respondents. Where appropriate, the calculations have been cross-referenced and verified based on responses from 450+ attendees at regional live music events.

	Venue Number
Daylesford and Macedon Ranges	8
Geelong & The Bellarine	44
Gippsland	42
Goldfields	49
Grampians	29
Great Ocean Road	23
Mornington Peninsula	21
Murray	40
Phillip Island	10
Victorian High Country	21
Yarra and Dandenong Ranges	21
TOTAL	**308**

Table 5b

The responses provided by regional small venues and patrons attending gigs at those venues, show that 90% of the gigs reported in the 2019 year took place in pubs or hotels. These **278 venues** form the basis for our reporting.

5.5 Profile of Regional Victorian Hotels/Pubs

Visitors to Australia are sometimes confused that what are referred to as pubs or bars in other countries are often called (and named) 'hotels' here. Something that in other countries conjures up the image of a multi-storey building dedicated to guest rooms.

The explanation is historical. In order to obtain a licence to operate as a 'public house' (pub) serving alcohol to patrons, establishments were required to provide accommodation - a hotel. In many rural and remote areas, it was also a practical solution, as the local hotel was often the only source of food and accommodation for travellers.

For many years, drinking areas were segregated by gender with the public bar a men-only area, and a lounge or outdoor area (beer garden) where women were welcome.
Once the gender barriers were removed - by legal challenge in 1965, lounges and/or beer gardens were often converted into restaurant/bistro and entertainment areas.

In recent years, many regional hotels have renovated their accommodation rooms to attract visitors/travellers and many offer a la carte dining options in addition to the more basic traditional 'counter meal'. Often not literally consumed at the counter.

5.5.1 Venue Facilities/Operations

In terms of live music presentation, most of the hotels on our list are well established, with 60% having offered live music for 10 or more years and 30% for 5 years or more.

All hotels on the core list provide food when presenting live music which they predominantly do on Friday and Saturday nights across the year.

The hotels that responded to our small venue survey vary in terms of physical size and the utilisation of spaces for live music presentation.

But across the sample -

- The average capacity of performance spaces was **289**.
- 58% have their own in-house PA and 33% employ their own sound engineer.
- 90% of venues report that their music spaces are accessible by patrons with decreased mobility.
- 41% provide all-gender bathrooms and another 20% have bathrooms that can be adapted as circumstances require.

In terms of their municipal engagement –
61% of small regional venues reported having a 'working relationship' with their local council. 39% reported none.

Those with a relationship identified the following benefits –

Provision of business/operational advice	30%
Facilitating business/networking	25%
Promotion of venue/gigs	30%
Advice on funding/grant opportunities	35%
Direct financial support	5%

Table 5c

48% of venues reported a working relationship with their Regional Tourism Board. 52% reported none.

Those with a relationship identified the following benefits –

Provision of business/operational advice	32%
Facilitating business/networking	27%
Promotion of venue/gigs	42%
Advice on funding/grant opportunities	17%
Direct financial support	2%

Table 5d

Approximately 10% of small venues reported their operations being strongly or moderately affected by a number of issues in 2019.

Of that 10%, the impacting issues were -

Noise attenuation issues/concerns	15% (of total venues)
Zoning/planning issues	10%
Licensing/permit issues	10%
Development/building impact	5%
Health and safety issues	5%
Parking/loading issues	10%

For 71% of those reporting, issues were satisfactorily resolved.

When asked to consider their presentations across 2019,

60% identified their audience as increasing
34% reported it as 'stable/staying the same'
6% as declining.

Asked to comment on the regional live music scene in general,

57%	reported it as 'healthy and growing'
29%	as 'stable/the same'
14%	as in decline.

Of the 14% reporting a decline, the following issues were identified –

Fewer available venues	60%
Fewer performance opportunities	40%
Fewer artists touring	40%
Increasing artist fees	80%
Increasing staff costs	42%
Increasing event production costs	40%

5.5.2 Gigs

In 2019, of the 308 small venues on our core list, 41% presented 2 gigs per week and 94% presented 1 gig per week.
37% presented several gigs per month, but were not 'regular' weekly presenters.

Based on calculations, these venues hosted an estimated 16,353 across the 2019 year, providing 32,200 performance opportunities for musicians and DJs.

The venues on the list reported that 33% of the gigs they presented had a charge for patron entry to their gigs, which averaged $16 across Friday, Saturday and Sunday when the vast majority of gigs took place. 61% of the gigs had no entry/door charge for patrons and 6% were private and/or business functions limited to invited guests.

The average number of patrons attending per gig over the year on the days on which gigs occurred was 163 patrons.

The venues regularly present an eclectic mix of music genres –

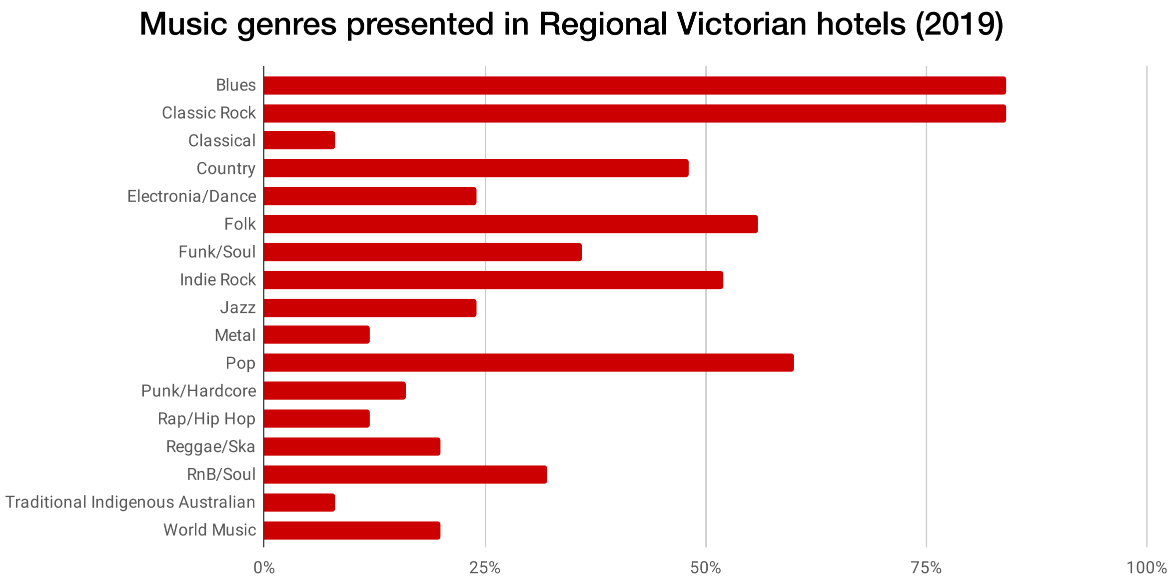


Figure 5a

Across the various music genres,

75%	of venues present bands performing covers material
60%	present bands performing original material
85%	present solo/duo artists performing covers
68%	present solo/duo artists performing original material, and
30%	present featured DJs.

When promoting gigs they rely on a mix of digital and 'traditional' tools –

- 80% have a dedicated venue website
- 95% have a venue Facebook page
- 73% have venue Instagram account
- 73% utilise posters/flyers
- 71% rely on 'word of mouth' (including patrons sharing recommendations on social media)

5.5.3 Audience - Attendees

In 2019, 90% of our survey respondents reported attending events in regional hotels. On average, they attended 3 gigs per month. The average for metro attendees was 7 per month.

Attendees utilise a number of sources to obtain information about gigs –

- 61% regularly visited an artist website
- 58% regularly visited venue website
- 59% regularly visited a venue Facebook page
- 55% obtained information through a venue mailing list

'Word of mouth' remains an important source (63%), as it traditionally has been. But as noted above, this category increasingly includes digital communications and recommendations shared between potential attendees.

The age and gender mix of patrons attending live music events in regional venues varies, depending largely, as it does everywhere, on the nature of the performance. But in general -

Under 25 years	20%
26 - 35 years	23%
36 - 45 years	23%
46 - 55 years	25%
Over 56 years	9%

Table 5e

Unsurprisingly, a larger percentage of regional residents are more likely to attend from within a radius of 25 kms of their residence compared to metro-based attendees.
This is unsurprising, given the far more limited offerings in regional areas and the fact that the nature of the performance and the identity of the performer are the predominant drivers of attendance.

	Regional	Metropolitan
Within 25 kms of residence	65%	43%
100+ kms from residence	44%	28%

Table 5f

When they attend paid events in small venues, they report paying an average $16 per entry. 85% of attendees reported spending on food and beverage at the venue gigs they attended. The average spend was $68 per attendee whether or not it was a free or paid entry event.

The following calculations are based on the survey responses from regional hotel presenters and from patrons attending live music performances in those venues.
The operational detail and value of the small venues that are identified as 'occasional' presenters will be addressed at the end of this section.

5.6 Box Office and Ancillary Spending

In 2019 there were 16,353 gigs in regional Victorian pubs/hotels.
These gigs attracted a total of 2,665,539 at an average attendance of 163 per gig.

The 33% of gigs that had a door/entry charge (average $16), generated revenue of $14,072,768.

85% of patrons reported spending on food and beverage when attending gigs.

Based on an average reported spend of $68 per patron, this spending generated $154,020,000.

5.6.1 Community and Tourism Impact

The vast majority of small venue gig patrons are drawn from the local area (within 50 kms of residence), and certainly attended the venue for a limited timeframe - ie. same-day. Thus their engagement with local tourism-focused businesses and consumption of services and products such as accommodation was limited. Nevertheless, 38% of respondents (frequently) and 25% (sometimes) connected with these businesses and providers.

In terms of those that did engage/consume –

Visit Landmarks	63%
Nature trails/walks	53%
Food outlets	95%
Historical/cultural sites	45%
Wineries	50%
Local produce/retail	50%

52% of attendees at hotel/pub gigs reported $0 spending offsite (in the community/businesses outside the venue). The 48% of attendees who did, reported an average spend of $17 per person.

We estimate this injected $22,338,000 into local offsite businesses.

5.6.2 Summary of 'regular' small venue generation 2019

Small Venue Revenue Summary 2019	millions
Regular venue box office	$14.07
Ancillary spending onsite	$154.02
Ancillary offsite	$22.34
TOTAL	**$190.43**

Table 5g

5.7 2019 Employment

The 16,000+ regional gigs, created significant employment for a range of workers, particularly casual and part-time workers drawn from the local area.

	Venue	F&B	Security	Production
Casual	92,700	231,125	263,500	41,400
Part Time	309,000	618,000	0.00	0.00
Full Time	618,000	618,000	0.00	0.00
TOTAL Hours	1,019,700	1,467,125	263,500	41,400

Table 5h

Using the Fairwork/ABS formula of 1,610 annual hours equating to full-time employment, these gigs created **1,734 Full Time Equivalent regional jobs.**

5.8 'Occasional' Performances

From survey responses, it is estimated that the remaining 227 venues delivering 'occasional' performances, contributed a minimum of 20% of the contribution attributed to 'regular' presenting venues.

$3,518,192 Door/Entry
$5,850, 050 Ancillary Spending (onsite)
$5,584,500 Community Impact

5.9 Additional Performances - FreeZa

FReeZA is a state-funded youth development program which provides cultural and entertainment programs for Victorians aged 12-25 years in a variety of alcohol, drug and smoke-free venues.
In 2019, it conducted 281 events in regional Victoria involving 41 of the 48 regional LGA areas, attended by 99,000 attendees. 200 of those events involved a live music component and 125 were dedicated live music events.
Excluding those that are counted elsewhere – eg. FReeZA component of regional festivals, or could not be classified with certainty, there is an estimated attendance of approx. 55,000.

Utilising responses provided to our online attendee survey by people in this age-group, we estimate that **these events generated an additional $620,000 in ticketed revenue and additional onsite spending of $1,458,965.**

Small Venue Revenue Summary 2019	$ millions
Regular Venue Presenters	
Regular Venue Box Office	14.07
Ancillary Spending Onsite	154.02
Ancillary Offsite	22.34
Occasional Venue Presenters	
Venue Box Office	3.51
Ancillary Spending Onsite	5.85
Ancillary Offsite	5.58
Additional' Venue Presentations	
Venue Box Office	0.62
Ancillary spending Onsite	1.46
TOTAL	**207.45**

Table 5i

5.10 The 2020 and 2021 Years

As has been thoroughly documented, late in 2021 Melbourne claimed the unenviable title of the world's most lock-downed city.

Regional Victoria was also impacted by considerable personal movement restrictions including stay-at-home orders.

Although small venues in the regions do not rely on metro Melbourne attendees to the same extent as larger concert and festival events, those located within daytrip reach of Melbourne, were particularly impacted by a four-month ‘ring of steel’[1] preventing travel between the capital and regions.

During these periods of restricted internal movements, state border closures were also in operation. These restrictions combined to affect the range of artists available for gigs, thus impacting attendance even when patrons were free to travel to gigs.

During these years, venue operators reported that 74% of all planned and scheduled gigs were cancelled or postponed.

Although 77% of venues reported being able to present some live music performances, they did so for only an average of 12 weeks and then at significantly reduced capacity – the crowd attendance on Friday and Saturday nights was reported to be an average of 36% of ‘normal’ crowd numbers..

JobKeeper assisted 95% of venues in the retention of staff but 65% of casual venue and food & beverage staff lost their employment and 51% of part-time staff lost theirs.

Venues over this period were able to make applications for local and state-based business assistance grants and programs to sustain operations and compensate for cancelled and postponed performances. In these applications, 50% of venues were successful, 12% were unsuccessful and 38% didn’t apply.

During these undoubtedly stressful times, 62% of venue managers reported their mental health as impacted by the various challenges to live music presentation. While only 20% considered leaving the industry during this period, 60% of operators considered ceasing live music presentations.
In a remarkable show of resilience and optimism, 60% anticipate that in the next 12 months, gigs will return to pre-COVID levels.

5.11 Conclusion

There is no doubt that live music presentations in regional small venues [predominantly hotels] in 2019 generated important revenue for venue operators and local business owners, provided thousands of opportunities for artists and created significant local employment.

In the ‘Regional Victoria Live Music Census 2013’, we reported total revenue for this sector of $195 million, but it is important to note that that total included pub/club/bar revenue AND that generated by concert activity.

Adding those results provides a final total of $274 million – a sector increase of 41% on 2014.
(See table 5j below)

These 2019 live music gigs provided some 40,000 performance opportunities and created a minimum **2,000 FTE positions**, including over 2 million hours for casual employees.

We know from our own investigations, a range of workforce data and detailed entertainment industry-focused inquiries (I Lost My Gig, Save Victorian Events etc) that during 2020 and 2021 in excess of 75% gigs were cancelled or postponed resulting in the loss of the associated revenue and work opportunities.

At the time of writing, although lockdowns are no longer on the political agenda, the sector is impacted by density restrictions and a ‘shadow’ lockdown associated with the increased transmissibility of the Omicron variant, which is impacting workforces in all industries and producing obvious reluctance among potential event attendees.

1 Following a record number of cases in early July, 2020, the Victoria government implemented a strict lockdown. It included significant restrictions on personal movement, including the so-called ‘ring of steel’ which prevented Melburnians from travelling to regional Victoria, and vice versa. Initially intended to operate for six weeks, the travel restrictions lasted for 112 days until lifted in late October.

Oztix CEO Brian Chladil said there have been six major disruptions to the live music industry over the three waves of COVID-19, each one putting venues and bands and their teams back to square one in planning and scheduling shows. Not only has 90 percent of touring income gone in the past year alone, many businesses have lost more money having to refund tickets and then rebook shows.

“Ticket sales have now plummeted to an all-time low with Omicron, worse than when COVID-19 was first a thing and worse than the Delta second wave,” he said. “It’s a very bad time to be in a band, own a venue or be an event producer. I can smell the fear.”

The high rate of no-shows has a roll-on effect for venues; fans who don’t show up, don’t buy food or drinks. “Often the ticket price covers the cost of hosting the show and the money is made on food and beverage,” he said.

“In early 2021 we were all shocked we were starting to get 10 to 15 per cent no-shows. In December we started seeing 30 percent and in January 2022 we are now seeing 50 to 60 per cent at some events.[1]

Our attendee survey confirmed the current reticence, with 36% of patrons reporting they will only feel ‘comfortable’ about attending gigs in small venues when all audience members, performers and staff are fully vaccinated. The figure for concerts and festivals was 30%.

We can only hope that the optimism of operators and fans is justified and that targeted support for and investment in the sector will revive the fortunes of all those whose livelihoods have been so significantly impacted.

Small Venue Revenue Summary 2019	$ millions
Regular Venue Presenters	
Regular Venue Box Office	14.07
Ancillary Spending Onsite	154.02
Ancillary Offsite	22.34
Occasional Venue Presenters	
Venue Box Office	3.51
Ancillary Spending Onsite	5.85
Ancillary Offsite	5.58
Additional' Venue Presentations	
Venue Box Office	0.62
Ancillary spending Onsite	1.46
Concert/Theatre/PAC	
Venue Box Office	31.99
Ancillary Spending Onsite	12.74
Ancillary Offsite	21.86
TOTAL	**274.04**

Table 5j

[1] Kathy McCabe writing for News Corps Network online - 22nd January, 2022

SECTION 6

LIVE PERFORMERS - MUSICIANS + DJS

Introduction

We surveyed a range of musicians and DJs who performed in 2019 and potentially in 2020/2021.

Before proceeding, we would like to express our gratitude to all those who took the time to participate and respond in such detail, supplying data that must have been painful to recall after the significant challenges of operating as a live music creative across the period of pandemic lockdowns, shutdowns and restrictions.

Where appropriate, interesting or illuminating, we have included comparative data from the Melbourne Live Music Census 2017

Excluding those who performed exclusively in Metropolitan Melbourne, we report the findings in this section from the 273 who responded to our online survey.
Our responder sample was 57% male and 40% female and covered a wide range of ages –

18 - 24 years	7%
25 - 34 years	24%
35 - 44 years	27%
45 - 54 years	21%
55 - 64 years	10%
65+ years	2%

Table 6a

6.1 Portrait of a Live Performer

Considering that 87% of our survey responders are songwriter members of the Australasian Performing Right Association (APRA), the organisation's database provides an insight into Regional Victoria and Metropolitan Melbourne's creative activity.

In 2022, APRA represented 95,900 Australian writers (70,000 in 2017), **18,700** of them based in Victoria.
Of that total, 60% are based in Metro Melbourne and 40% in Regional Victoria.
The Regional Tourism Areas with the greatest concentration were The Goldfields, Yarra Valley and the Dandenong Ranges, Geelong and The Bellarine, Great Ocean Road and Mornington Peninsula.

The typical performer:

- Lived in Metropolitan Melbourne (77% of responders) in 2019 – mainly in the inner-northern suburbs (cities of Yarra, Moreland, Darebin) or Regional Victoria (22%).
- Changed their place of residence by 2021 (57%), with 25% of those moving from Metropolitan Melbourne to Regional Victoria and the remaining 75% moving within the Metro area.
- Has been in the industry for an average of 18 years,
- Is largely self-taught (35%) augmented by private tuition (45%), is self-managed (88%) and increasingly (12%) from a Culturally and Linguistically Diverse background (7% in 2017).
- Is most likely to be self-employed (45%), spending approximately 50% of their time (22 hours) per week on musical activities and deriving an average 35% of their income from those efforts.
- The balance of their income is derived from full time, part time or casual work in the music industry (23%) or outside the music industry (66%).

Note: 22% of responders derive 85% of their income from their music activities.

Image credit: Paul Armour

- Plays many genres of music in many configurations (eg. choirs, music ensembles, music theatre, orchestras, big bands etc), but is most likely (75%) to be in a contemporary band performing original material (59% - 35% in 2017) and often (49%) performs solo or as a member of a duo.
- Played regularly in 2019 in both Metro Melbourne (59% of gigs) and Regional Victoria (41% of gigs).

In 2020/2021, the typical performer:

- Was significantly impacted, financially and health-wise, by COVID-19.
- Had 90+% of all performances cancelled and/or postponed.
- lost an average of 67% of their music income compared to 2019.
- Experienced mental health issues associated with lockdowns/restrictions – 76%, compared to the 42% who experienced similar issues arising from their music practice.
- Was only marginally (52%) supported by any of the payments available for individuals and businesses from the commonwealth and state.

As a result of their experiences over the last two years, **52% of surveyed practitioners considered leaving the music industry**.

6.2 Survey Results - 2019 activity

6.2.1 Business Affairs

The table below shows the details of the business side of performer's music industry practise - where possible, the numbers from the 2019 survey are compared with numbers reported in the *Melbourne Live Music Census 2017*.

	Yes	2017
Do you have an ABN?	83%	79%
Are you registered for GST?	16%	24%
In 2019 did you employ a manager?	21%	30%
In 2019 did you employ a booking agent?	31%	37%
In 2019 did you employ a publicist?	21%	27%
Are you an APRA member?	87%	75%
Are you an AMCOS member?	45%	
Are you a PPCA member?	24%	11%
Are you a Music Victoria member	68%	24%
Other Memberships		
Australian Independent Recording Association	10%	
Country Music Assoc of Australia	4%	
Media & Entertainment Arts Alliance	3%	

Table 6b

It was surprising to find that significantly fewer performers are registered for GST (Goods and Services Tax) than was the case with those we surveyed in the 2017 Census.

The ramifications were significant – as we shall see from those who received support, because the majority of COVID-related individual and business assistance programs required GST registration as one of the key eligibility criteria.

6.2.2 Performances 2019

The graph below shows the average number of each type of performance across Metropolitan and Regional Victoria in 2019.

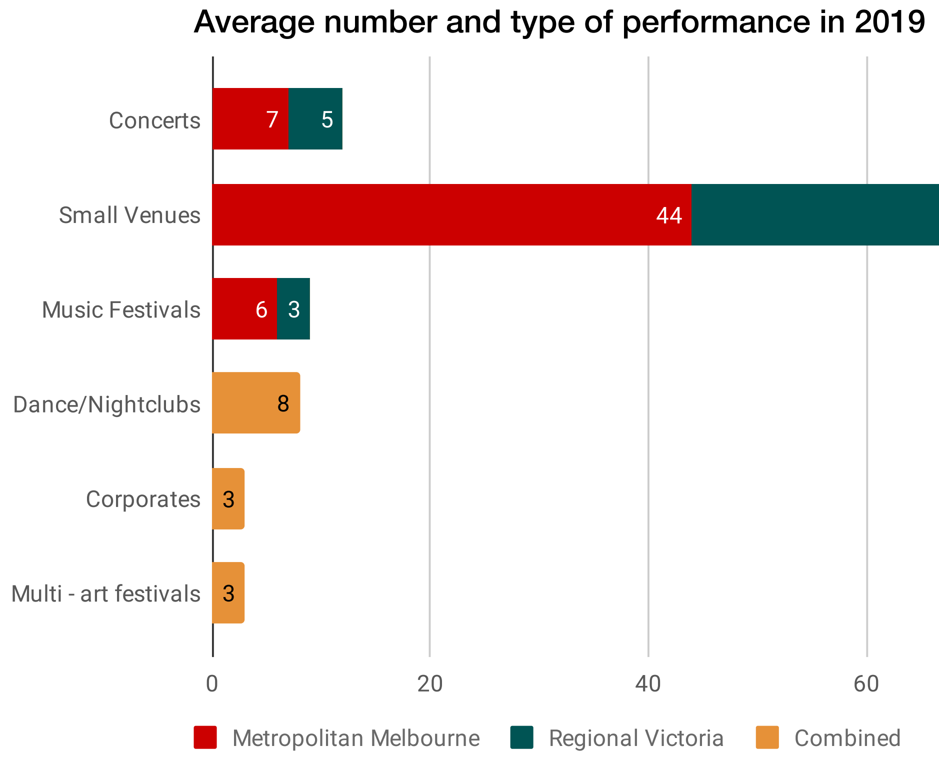


Figure 6a

The average earnings from each type of gig are shown below:

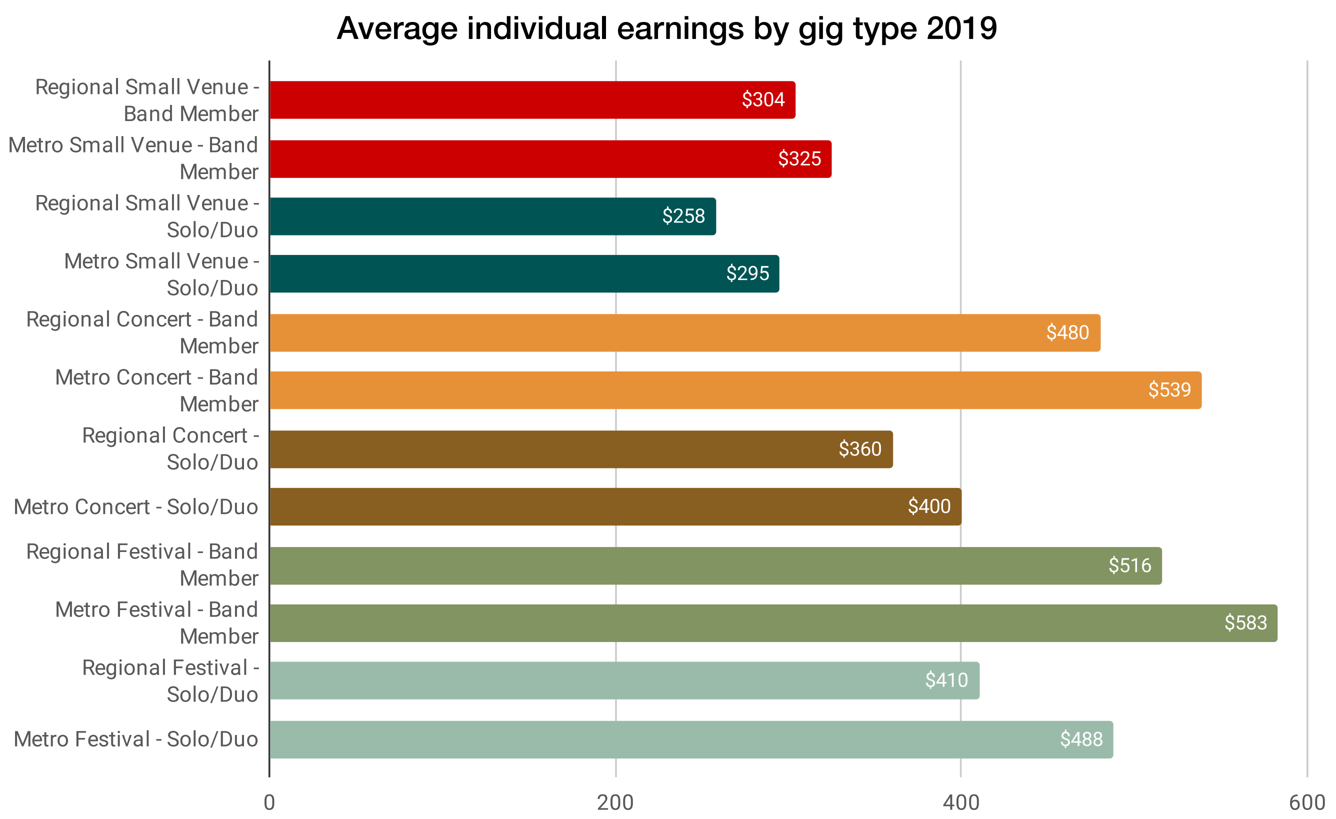


Figure 6b

Distance travelled from place of residence for performances:

Within 50 kms of residence	28%
Between 50 & 100 kms of residence	24%
Between 101 & 200 kms of residence	27%
Between 201 & 300 kms of residence	21%
Over 301 kms from residence	10%

Table 6c

6.3 Survey Results - The COVID-19 Impact 2020/2021

	Regional	Metropolitan
Festival	93%	90%
Concert	94%	94%
Small Venue	92%	95%
Corporate/Function	90%	89%
AVERAGE	92%	92%

Table 6d

It is important to note that although Regional Victoria often had lesser restrictions than Metropolitan Melbourne, on average performers found they had the same percentage of gigs cancelled. Of course this could also be a result of the restrictions between the two areas.

6.3.1 Economic Consequences

Performers estimated that they **lost an average 67% of their music income.**

While they advised that they only lost 33% of the non-music income.

6.3.2 Income Support

During 2020 and 2021, the Commonwealth and Victorian state governments developed a range of programs to support workers and businesses across industry.

At least in their early iterations, they were broadly targeted at those individuals in 'normal' jobs and businesses operating from a 'recognised' premises. That is, they were not designed with a casualised workforce in mind, and therefore excluded many operating in the 'gig economy', especially in the arts and hospitality sectors.

Sole traders, for instance, were not included in the early iterations of JobKeeper, nor were those who had multiple jobs. Even when the eligibility criteria were adjusted, being registered for GST was required by most programs. As we noted in the table above, 84% of our responders are not registered.

Therefore the responses summarised below come as no surprise.

The following table represents the percentage of responders who were able to access the following assistance programs.

JobKeeper	32%
JobSeeker	14%
Personal Lockdown Emergency Payment	8%
Business Support Payments	11%
Gig Cancellation Payment	14%
Creative Worker Emergency	9%
None of These	**49%**

Table 6e

6.3.3 Skills Acquisition

Performers, like most of the workforce, had their personal movements severely curtailed during Victoria's protracted lockdowns. For many, the requirement to 'work from home', meant little change in routine, but the inability to perform saw many (67%) reporting that they had used their time to acquire new skills related to their music practice.

Music Production/Recording - hardware & software	57%
Video Production/Editing	39%
Performance Live Streaming	35%
Enhanced Social Media Presentation	31%
Enhanced Business Skills	30%
Online Lessons/Rehearsals/Collaboration	32%
Learned a New Instrument	22%
Enhanced Graphic Design/Presentation Skills	21%

Table 6f

Unsurprisingly, like workers in many other industries, performers increasingly turned to online engagement with fans and/or potential customers which is reported to have increased 43% during 2020/2021 compared to 2019.

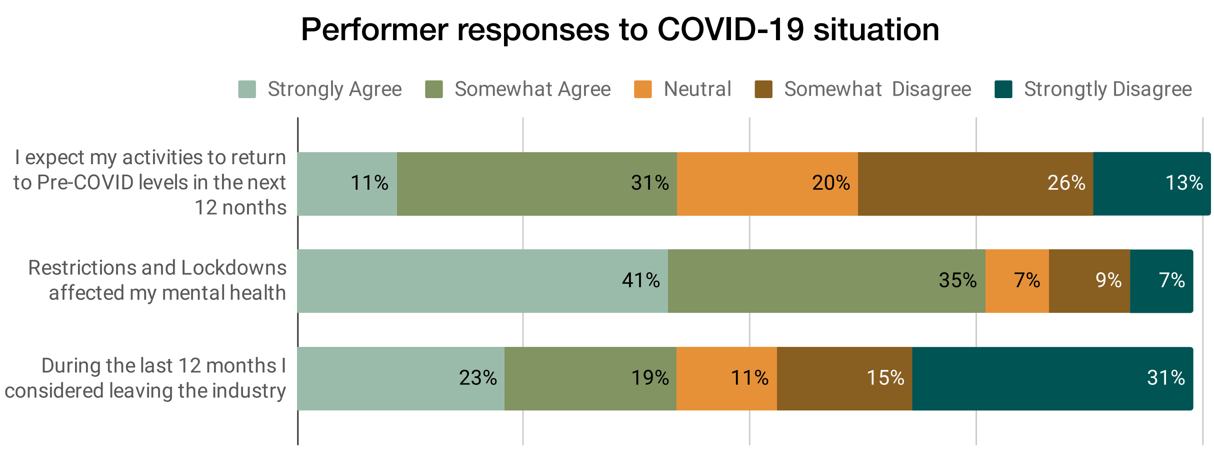


Figure 6c

6.3.4 Local Government Engagement

Q: How could councils and regional tourism boards better support performers?

Unsurprisingly, the most frequent response to this question suggested that performers should be better paid when involved in events in general, but particularly those organised by local councils.

To summarise the 200+ responses, there were common trends in responses -

- Local councils should have a more extensive and simplified grants program to support local creatives.
- Fund creatives directly, rather than rely on a 'trickle-down' mechanism by funding venues.
- Creation of more outdoor performance spaces with full amenity – covered stage, lights, PA etc.
- Ensure music is a key component of all council events and that local performers are a featured component.
- Create pop-up venues/performance activations to help revive the industry.
- Reduce bureaucracy and red-tape to encourage new events and presenters.
- Provide infrastructure support for small venues – audio, lighting, soundproofing, ventilation etc.
- Compile a database of local performers and create an online expression of interest facility for local performers to register for future council events.
- Ensure music events/performances are a key element of local tourism promotions and campaigns.
- Care for music as much as they care for sport!

Q: What could councils and Regional Music Boards do to support local venues and event presenters?

Again, there was an emphasis on providing funding to venues to subsidise performances (particularly by locals) to help revive the health of the sector.

Other suggestions included –

- Funding for more outdoor stages - covered, equipped with audio, lighting.
- Reduce bureaucracy re event presentations – assist venues.
- Provide increased support to venues/events to promote and market their gigs.
- Provide financial support to venues to specifically present gigs featuring local performers.

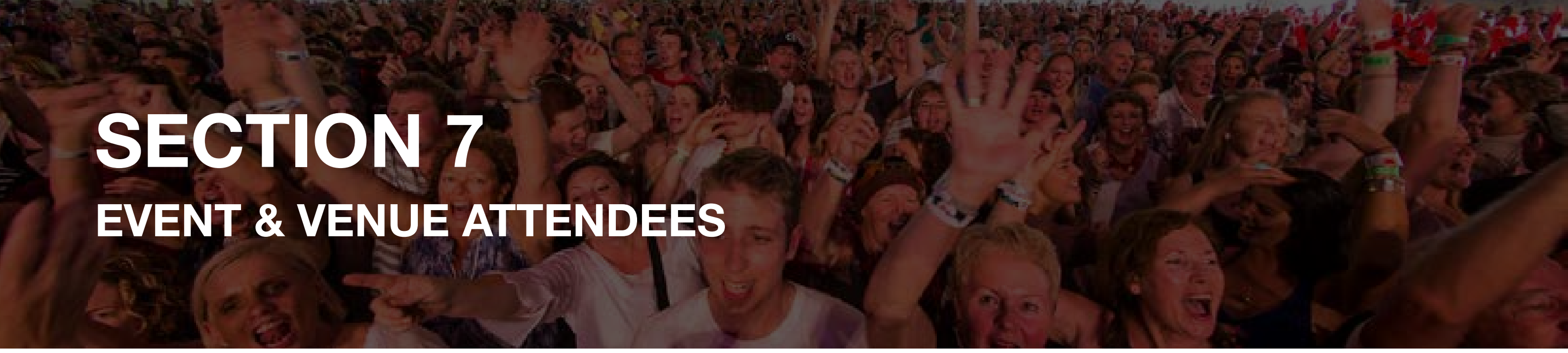
6.3.5 Recommendations

Survey responders were also asked to identify how state government agencies could better support performers and venue/event presenters.
The responses reflected those reported above regarding local councils and Regional Tourism Boards, with an emphasis on increased funding and the provision of funding to create additional, fully-equipped outdoor performance stage in regional communities.

There was reiteration of the 'frustration' that state tourism campaigns failed to adequately promote music as a core element.

Another interesting response highlighted that from the allocated Creative Victoria grants funding a very small percentage actually went to creative practitioners, rather than organisations/businesses.

Note: An analysis of Creative Victoria funding (from DJPR annual reports), reveals that in 2019/2020 individual and group performers were allocated $3.8 million (6% of the arts grant budget), and in 2020/2021 $8.3 million (8% of the arts grant budget).



SECTION 7
EVENT & VENUE ATTENDEES

Introduction

Many industry reports rely on information about live music audience demographics which are provided by music organisations, festivals and venues. While giving some sense of the breakdown of the audiences to specific concerts, festivals or small venues, this does not give us a broad picture of live music attendees in general. This is especially true as ticketing agencies don't always gain much information from these tickets. In the pursuit of getting a full picture of the live music activity of individuals and the community as a whole, this report utilises surveys which were done by Victorian live music attendees or as we like to say live music fans. This was an important process of data gathering that has been used in the Melbourne Live Music Census (MLMC) 2012 and 2017 but not in Regional Victoria Live Music Census 2013.

The Attendee survey was completed by 463 live music fans from across Regional Victoria and Metropolitan Melbourne. The following section will look at these two groups together and separately to create a picture of local engagement with regional live music presentation as well as the tourism that larger events, festivals and destination venues creates between different regional areas as well as the large metropolitan visitation to the regions.

As these surveys were promoted through Music Victoria and similar music focused organisations as well as by various music media and the report authors' industry networks, the following results represent the demographics of a music engagement and industry sympathetic cohort. Yet it still paints an accurate picture of the 'average' live music lover.

This section will focus on reporting the data provided in the survey but we will also compare demographic information provided by the wonderful festivals and major events who shared ticketing information and internal reporting for this report.

7.1 Demographics

(n=453)

Artist's place of residence

Figure 7a

The chart above shows that there is some small evidence that there was a movement in 2020 & 2021 into the regional areas away from metropolitan Melbourne.
The data from the few interstate and international responders has been included to add extra to information about attendance behaviour.

Image: Port Fairy Folk Festival

Gender Breakdown

Female	55.6%
Male	40.9%
Non-Binary	1.5%
Unspecified	1.3%
Other	0.7%

Table 7a

As with the MLMC 2017 Report, a larger percentage of females responded to this survey as well as to the attendee surveys shared by festivals. It was assumed that females were more likely to respond to the surveys, but the data provided about ticketing from a number of major festivals and other agencies shows that the above gender breakdown of responders is fairly indicative of ticket buyers across major festivals as well.

Female	52.1%
Male	41.0%
Other	3.1%
Unspecified	1.3%

Table 7b

This table is based on a number of major regional festivals ticketing and post-event survey data.

Age

Under 18	0.4%
18-24	7.3%
25-34	15.3%
35-44	25.9%
45-54	23.4%
55-64	19.9%
65-74	7.3%
75+	0.4%

Table 7c

As a comparison, the data from the attendee survey is shown on the left while the data provided by festivals and ticketing agencies is on the right.

The discrepancy could be explained by the fact that the major festivals who provided this information have a younger demographic than those who completed the survey and that assuming that the demographics represented by this ticketing information, would have hidden the older demographics who still engage with live music across the state.

Under 18	0.3%
18-24	45.9%
25-34	23.5%
35-44	18.7%
45-54	6.9%
55+	4.7%

Table 7d

Work Status

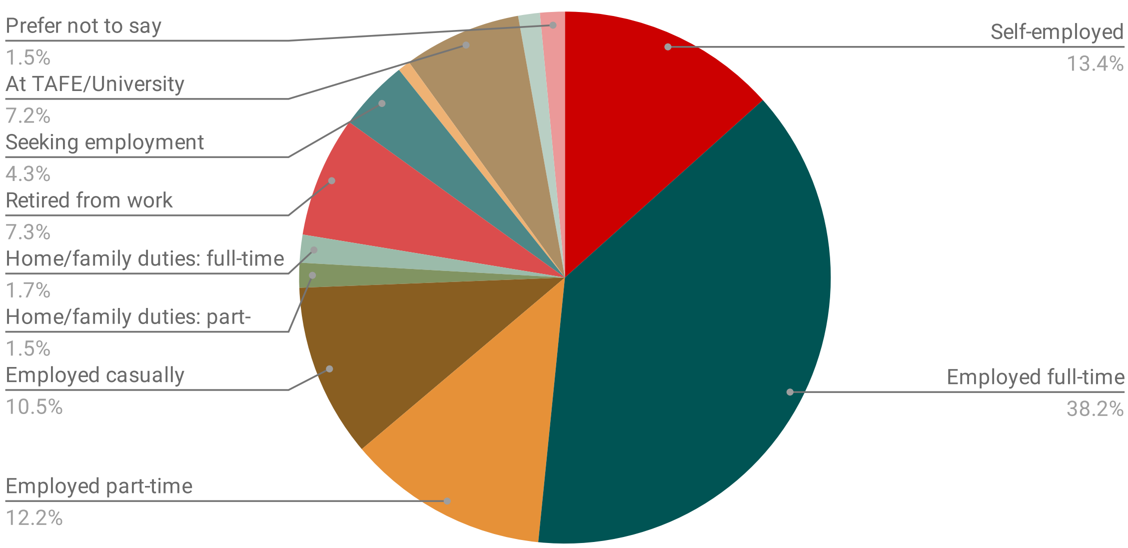


Figure 7b

7.2 2019 Attendance

7.2.1 Live Music Attendance - Major Events

From the 450 responders of this question - **59.33%** of all respondents said they had attended a regional festival or major concert in 2019.

From the 136 responses, there was:
1295 regional concerts attended
342 regional festivals attended

Which means each responder attended an average of **12.04** live Regional Victoria performances per person over the year - that's an average of one gig per month.

For context - in MLMC, we saw that 43% Melbourne responded that they go to 1-2 gigs per month. This indicates that Regional Victorians have a similar level of music activity to those in Metropolitan Melbourne and that for Melburnians, travelling to a regional music event is a regular part of their music activity.

This table shows the breakdown between festivals and large concerts as well as regional Victorians and those in Metropolitan Melbourne.

	Regional Victorians	Metropolitan Melburnians	Combined
Percentage of those who attended a live music event	85%	52%	59%
Total number of regional concerts attended	691	601	1295
Average per person	14.4	6.90	9.5
Total number of regional festivals attended	86	256	342
Average per person	14.4	6.90	9.5

Table 7e

In a free response question about concerts from 2019 - the most common references were to A Day on The Green - especially Elton John and Red Hot Chilli Peppers, Rochford Winery, Ulumbarra theatre (Bendigo) and Theatre Royal (Castlemaine).

Often mentioned festivals include -

Meredith Music Festival (Meredith)
Golden Plains (Meredith)
Bendigo Blues and Roots Music Festival (Bendigo)
Boogie Festival (Tallarook)
Echuca Blues Festival (Echuca)
Falls Festival (Lorne)

Groovin the Moo (Bendigo)
Port Fairy Folk Festival (Port Fairy)
Queenscliff Music Festival (Queenscliffe)
Red Hot Summer (Ballarat & Mornington)
Riverboats Music Festival (Echuca)
Esoteric festival (Donald)

7.2.2 Live Music Attendance - Small Venues

While larger events and festivals drive large numbers into the regions, a large proportion of live music is played regularly in small venues across Regional Victoria.

	Regional Victorians	Metropolitan Melburnians	Combined
Percentage of those who attended a live music event	85%	52%	59%

Table 7f

Responders were then asked to estimate how many shows per month they attend at the following venues: (n=176)

Of that 10%, the impacting issues were -

Small Music Venue shows attended per month	Metropolitan Melburnians (monthly total)	Regional Victorians (monthly total)	Monthly average per person
METRO - Hotel/pub	389	31	2.39
METRO - Café/restaurant	59	1	0.34
METRO - Bar/nightclub	149	6	0.88
METRO - Licensed club	122	2	0.70
REGIONAL- Hotel/pub	54	81	0.77
REGIONAL - Café/restaurant	18	23.5	0.24
REGIONAL - Bar/nightclub	11	11	0.13
REGIONAL - Licensed club	8	4	0.07

Table 7g

The above suggests that on average in 2019, responders attended

51.6 gigs at Metropolitan Melbourne small music venues
27.2 gigs at Regional small music venues

Some of the favourite small venues listed were Archies Creek Hotel (Archies Creek), Bridge Hotel (Castlemaine), The Barwon Club (Geelong), The Torquay Hotel (Torquay), The Cube (Wodonga), The Workers Club (Geelong) and The Sound Doctor Presents (Anglesea).

Note: The authors of this report would like to thank the respondent who listed every one of the 115 gigs they attended in 2019, three quarters of which were at regional venues. Also to the responders who responded 'too many!' when asked to list them.

7.3 Choosing Regional Live Music Events

A selection of questions in the survey were used to see how audiences hear about regional live music events and how far they travel to get to these.

The graph below shows the elements of live music events which are the most influential in driving decisions about attending live music events.

Artist lineup is by far the most important with 78% of responders indicating it was very important. Other important factors include; personal safety as well as event ambience; being with like-minded people and the location of the event site.

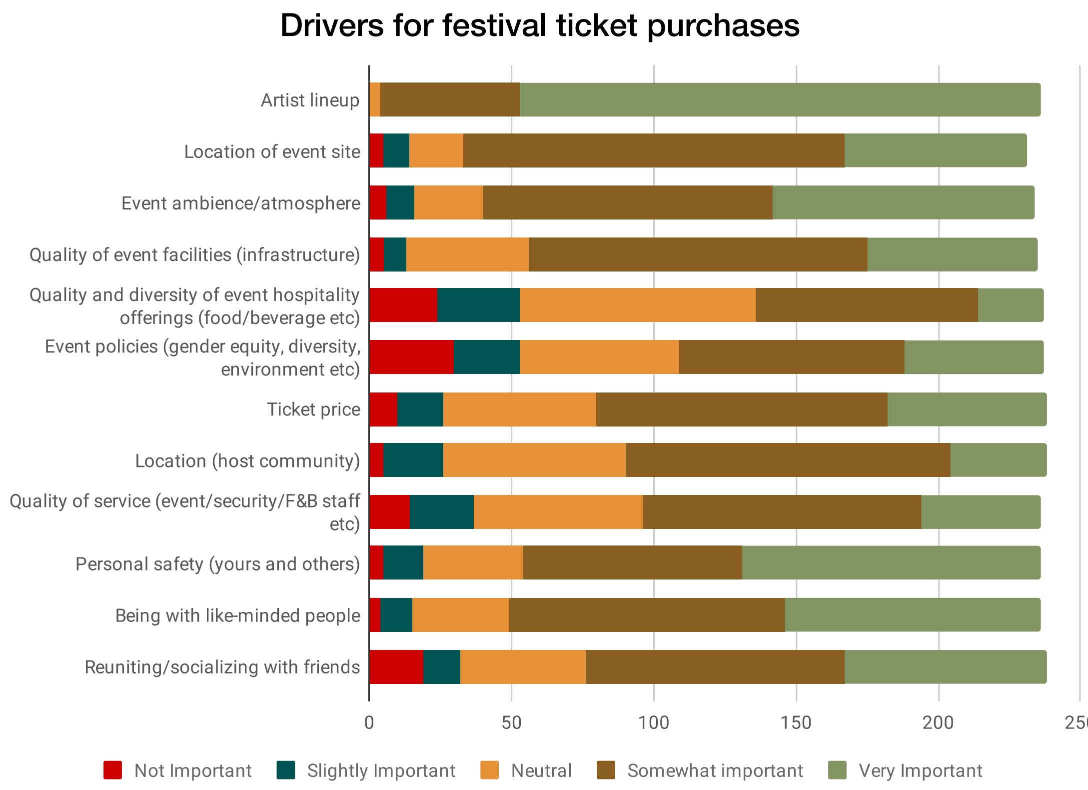


Figure 7c

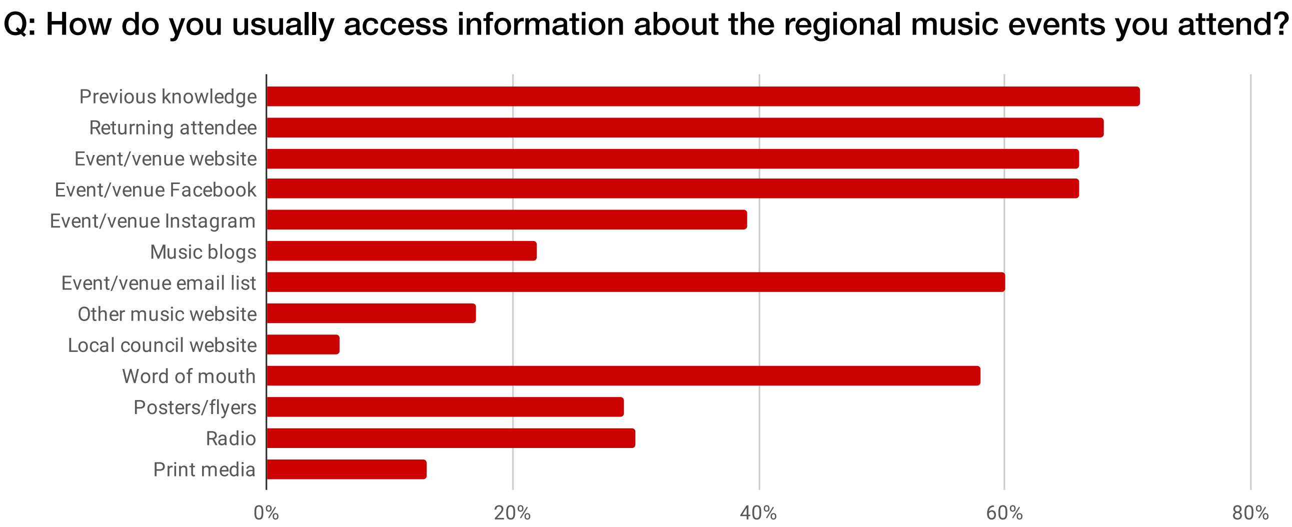


Figure 7d

As has been seen in previous surveys about Victorians live music, the chart above shows that word of mouth and previous attendance are still major drivers of event attendance. Direct marketing from the venues, promoters and festival organisers are also a major avenue for communication with live music lovers.

It is interesting to note, that information supplied by a number of major festivals indicated that on average around 70% of audiences were repeat attendees, showing that major events can form an important cultural tradition for many attendees.

Q: How do you usually access information about the small venues you attend?

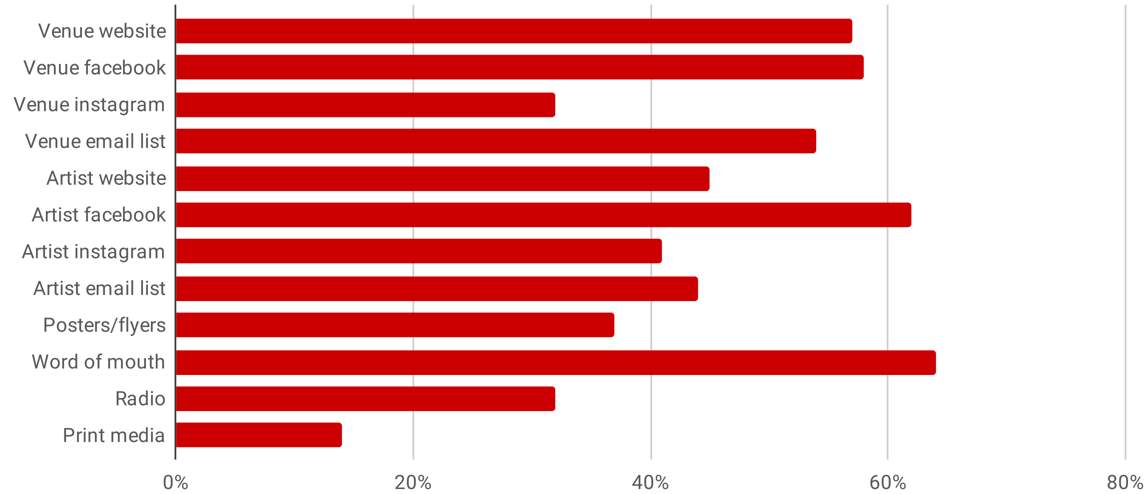


Figure 7e

By contrast, while small music venue attendees also often get information via word of mouth as well as a venue's website and social media, a large percentage are likely to find out about a performance through artist channels. This is unsurprising as attendance of these shows are more likely to be driven by the headline artist rather than the general atmosphere of a festival.

Note: In the free response question asking for a list of concerts attended in 2019, some respondents listed festival names or large venues while small venues were often accompanied by the name of the headline act. Some artists who were mentioned multiple times were Jen Cloher, Laura Imbruglia, Amy Shark and Vera Blue, artists who are all based in capital cities who have played in regional venues across Victoria.

7.4 Spending at Live Music Events

7.4.1 Tickets and Door Charges

The average amount that the responders reported spending on tickets at regional events in 2019 was:

$105 Large concert ticket
$316 Festival ticket/s
$21 At a hotel/pub
$8 At a cafe/restaurant
$15 At a bar/nightclub
$20 At regional licensed club

For performances in small venues, responders answered that **73%** had a paid entry/door charge while **27%** were free.

7.4.2 Onsite Food & Beverage

The data from the surveys was used to estimate spending on food and beverage at the live music venues, concerts and festival sites that they attend.

The numbers below represent are the average daily spend per person.

$94 At a major concert
$130 At a festival
$59 Hotel/pubs
$37 Cafe/restaurant
$48 Nightclub/bar
$32 Licensed club

For the calculated totals of this spend across the state, see the Small Venue (Section 5), Major Concert (Section 3) and Festivals (Section 4) sections respectively.

7.4.3 Ancillary Offsite Food & Beverage Spending

Responders were asked to estimate the total spend outside of the small venue performance they attended - including food/drink/transport/retail

Average daily offsite spend: $53

For larger events - the spending was separated as to go into greater detail about how live music events drive tourism spend.

The daily average offsite Food & Beverage spend was

$74 Festivals
$65 Major Concerts

7.5 Live Music Related Tourism Activity

7.5.1 Travel

While most regularly music lovers stay within 50 kilometres of their place of residence, the survey data shows that attendees are also willing to travel multiple times a year for regional concerts:

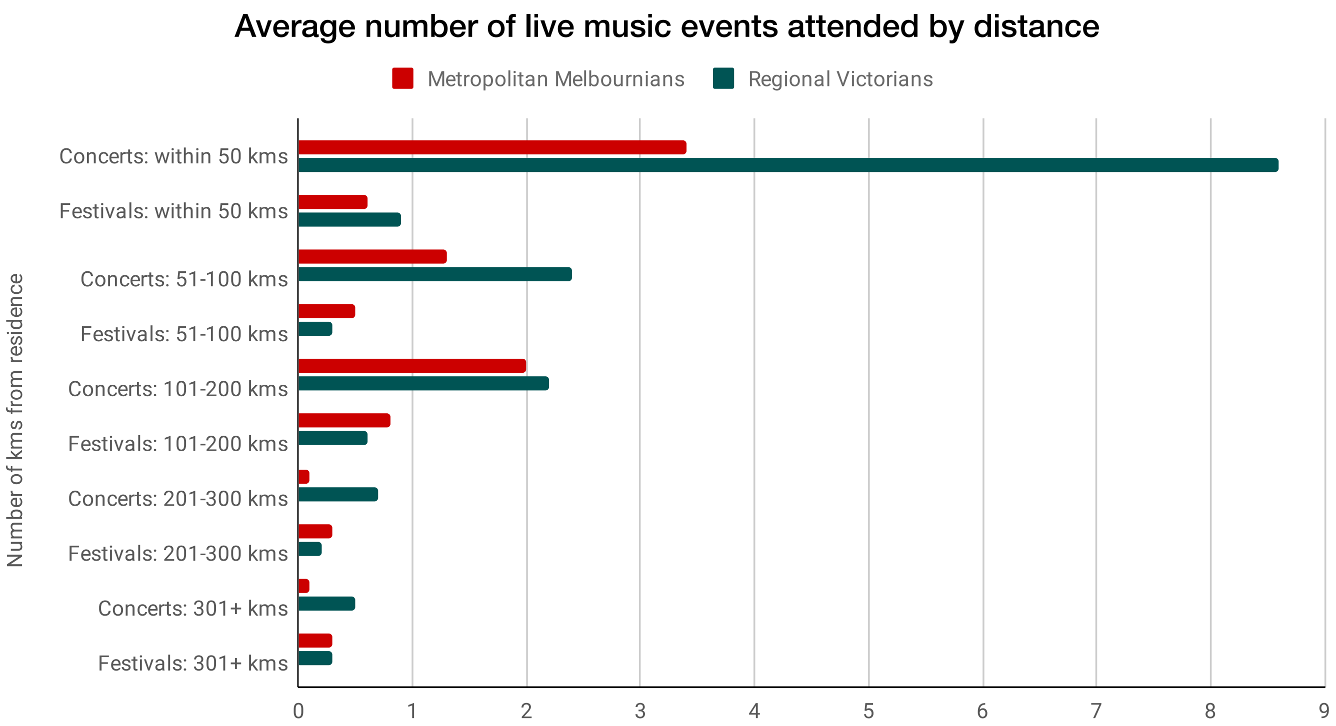


Figure 7f

There is a discrepancy in the willingness between Regional Victorians and Melbournians to travel further into the regions for concerts but it is notable that the difference between these two groups shrinks with festivals with both cohorts willing to travel at a similar rate for a larger event.

For concerts within 50 kms, this discrepancy between Melburnians and Regional Victorians could be due to the fact that within 50 kilometres of their residence for many Melburnians is still within city boundaries and therefore not captured in this question.

72% of live music event responders said that the event was the motivation for travelling to that region or location.

Interestingly this shows a higher percentage than that outlined in the 2014 Tourism Research Australia Report which looked at regional events across Australia which listed that 57% of first time visitors visited a region with the event as the main motivation and 69% for repeat visitors.

The average amount spent on travel to major concerts and festivals including fares, car hire, fuel for the total of their trip was -

$86	Major Concerts
$133	Festivals

7.5.2 Accommodation

The percentage of each length of trip responders made when attending a regional concert or festival:

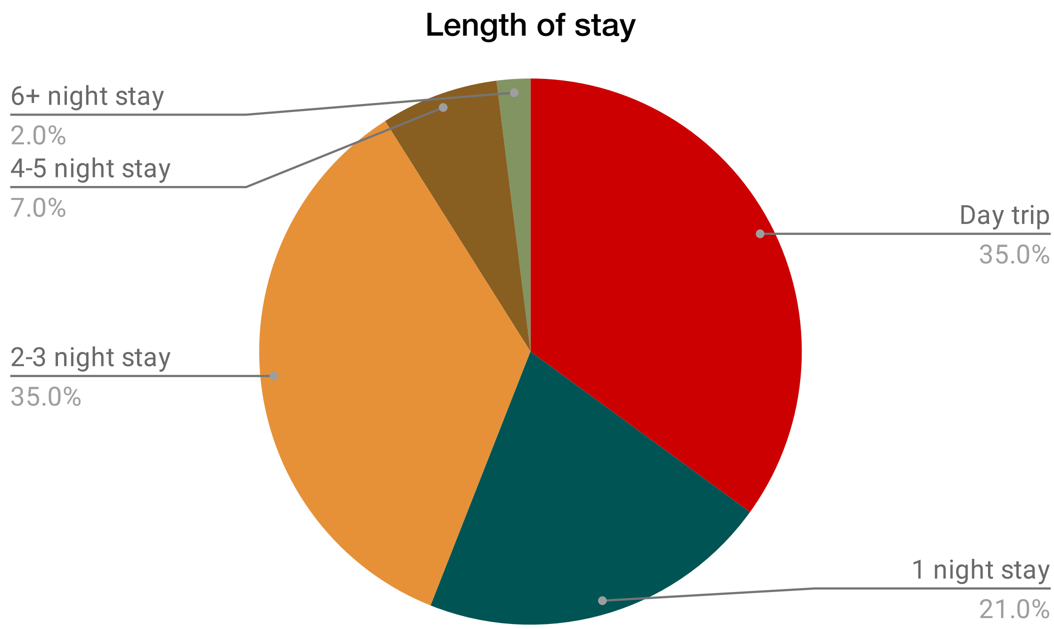


Figure 7g

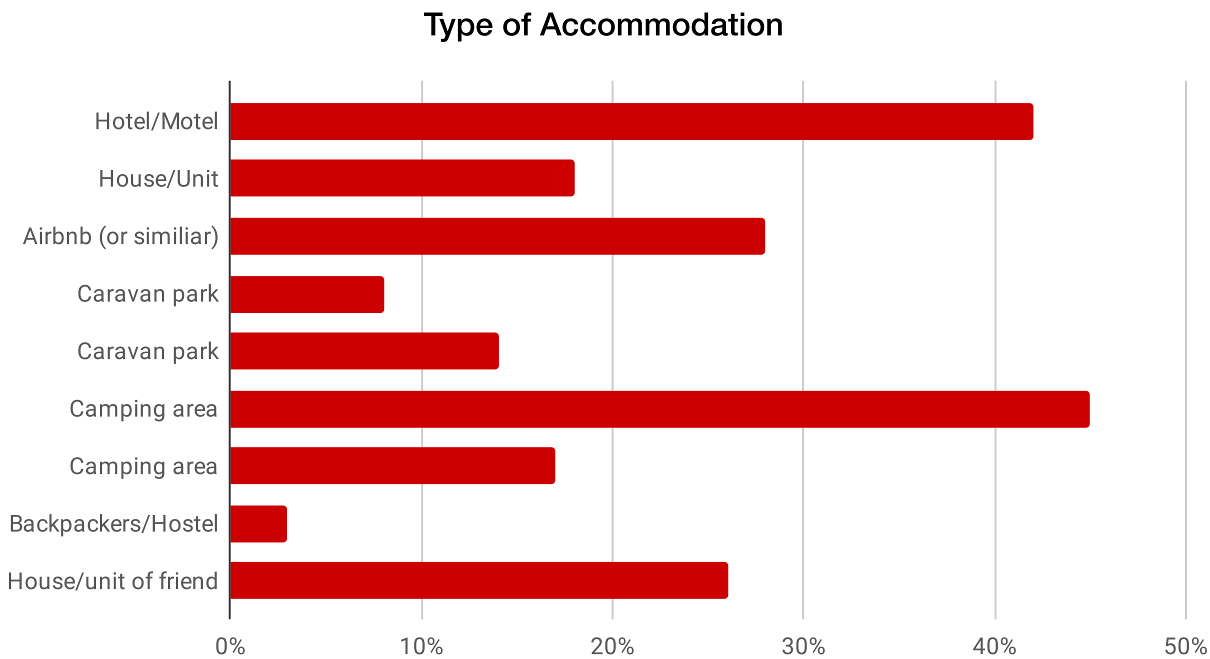


Figure 7h

The average total spend on accommodation for each responders and their travelling party were -

$159 Major Concerts
$375 Festivals

7.5.3 Retail

The average general retail spending per day in the community around a festival or major event were as -

$49 Major Concerts
$48 Festivals

7.5.4 Spending en route

Those respondents travelling 100+ kms to regional events, spent an average of $57 per day in communities on the way to of from the destination on food, beverage and retail etc.

7.5.5 Local attractions and tourism facilities

Attendees were asked whether they visited other local offerings and attractions around the live music events that they attended.

When you travel outside your region to music events, do you visit other local attractions and offering

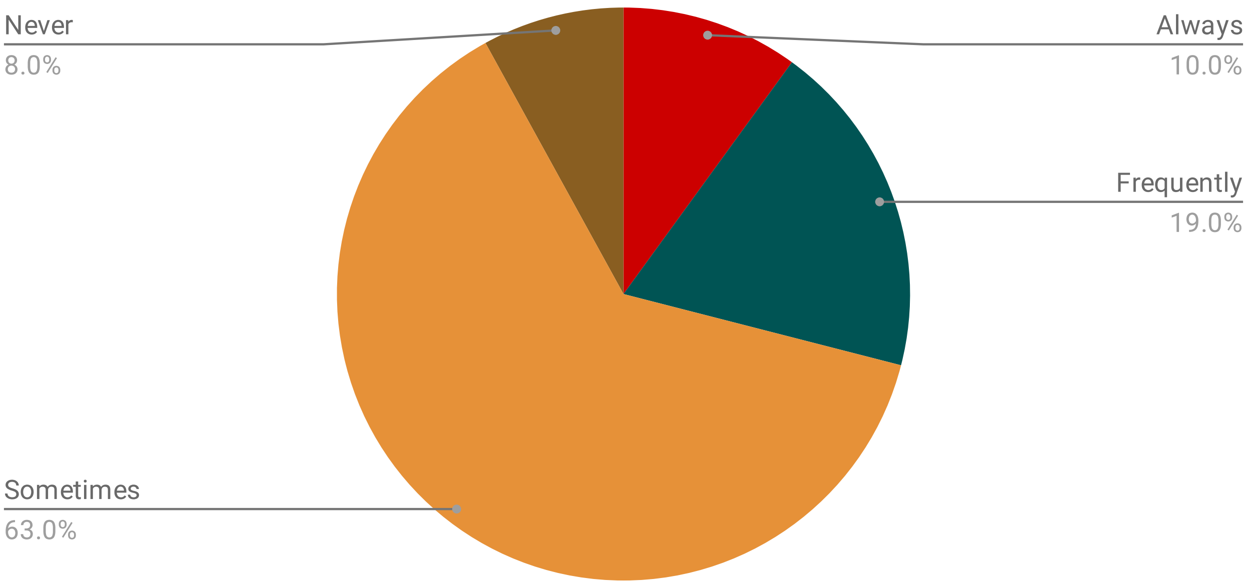


Figure 7i

The average general spending at tourism spending per day in the community around a festival or major event were as -

$22 Major Concerts
$23 Festivals

The following graph shows the local attractions and businesses visited by live music attendees:

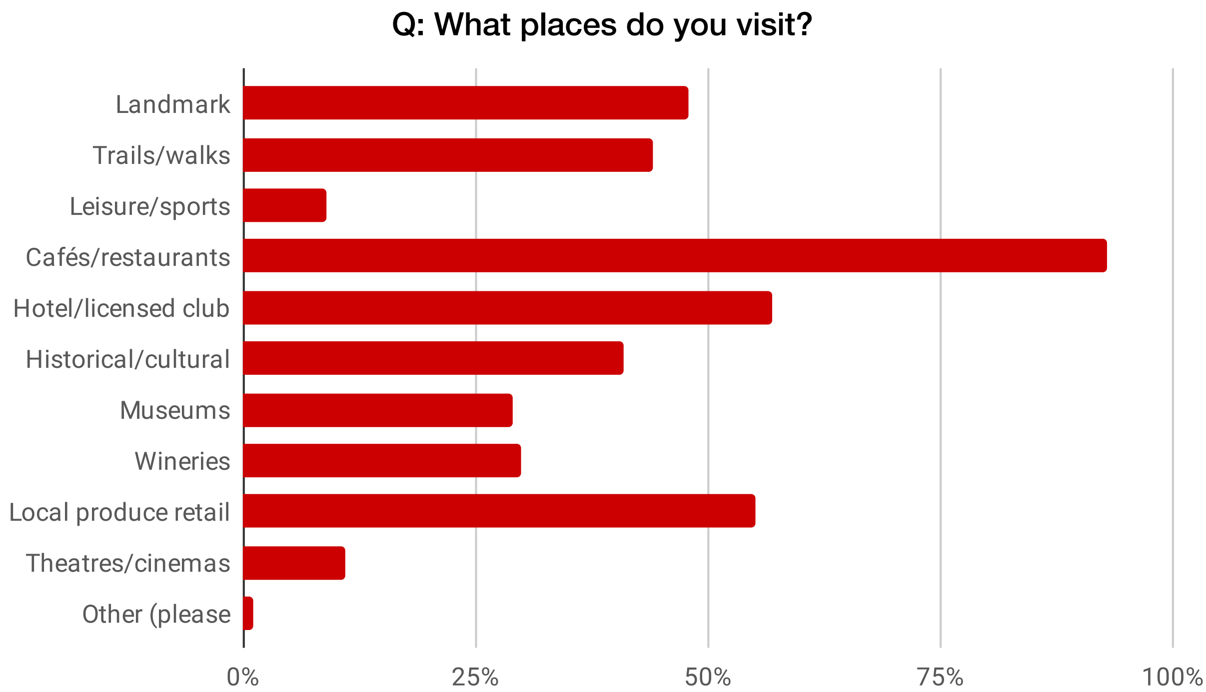


Figure 7j

Local Shire/Council information

46% of responders said that sometimes they visit the council website of the area they are visiting and 4% said always.

20% said that the information provided was very useful, while 65% responded that it was somewhat useful.

7.6 2020 + 2021 Attendance

To compare with a 'normal' year - we also asked whether responders attended any live music events in 2020 /2021, even taking into account that the first 2.5 months were at pre-pandemic levels and also formed part of the heavy summer season the responses are shocking.

It is worth noting as well that certain festivals were not able to go ahead at the beginning of 2020 due to the bushfires, so this may have had some impact on the numbers as well.

It is important to compare the difference between regional and metropolitan responders as during much of 2020, the Victorian Government's strategy for COVID-19 was keeping Melbourne and Regional Victoria separate so that Regional Victoria could lift restrictions more quickly. That meant that regional live musicians were able to perform in Regional Victoria more than their metropolitan counterparts.

	Regional Victorians		Metropolitan Melbournians	
	2020 + 2021	2019	2020 + 2021	2019
Percentage of those who attended regional concert/festival	47%	85%	25%	52%
Percentage of those who attended metropolitan concert/festival	30%	58%	74%	90%

Table 7g

Interestingly, there is a similar percentage drop in both Regional and Metropolitan responders, what this number doesn't show is how many less music events were attended over this time. With this in mind a 20%+ decline in any attendance across two years becomes more significant when you consider that responders on average went to multiple music events per year.

Also notable is that the decline in attendance of a regional concert/festival by Regional Victorians was 38% which is significantly greater than the 27% of metro responders. This can be explained by the fact that despite restrictions in Regional Victoria often being less strict than those in Metropolitan Melbourne, many regional festivals and major concerts were still not able to go ahead due to these restrictions or the 'ring of steel' preventing personnel, artists and attendees being able to travel to the country location.
Also this number also shows how important these events are to regional audiences for their cultural life and the effect it has when they don't go ahead.

When responders were asked to list the events they attended - many of those listed went ahead before March 2020 - Golden Plains (March 2020), Port Fairy Folk Festival (March 2020), Riverboats (Feb 2020) and Red Hot Summer (Jan 2020).

7.6.1 Cancellations and Postponements

59% of responders were intending to go to a festival or concert that was postponed, deferred or cancelled in 2020/2021 due to COVID restrictions.

Responders were asked to estimate how many live gigs in regional small venues that they intended to go to, were postponed, deferred or cancelled and from this number we can estimate that it was
4 shows per person.

7.7 Looking to the future

At the time of writing, Victoria has just seen the restrictions on live music events being lifted again after some restrictions being reinstated in early 2022 with the wave of Omicron. This period also saw dramatic drop offs in attendance numbers and hesitancy in ticket sales which showed that even without serious restrictions, the industry is still not operating at full capacity.

However, the responses from live music fans show that there is reason to be optimistic -

Q: When will you personally feel comfortable and attending regional or metropolitan festivals or concerts again?

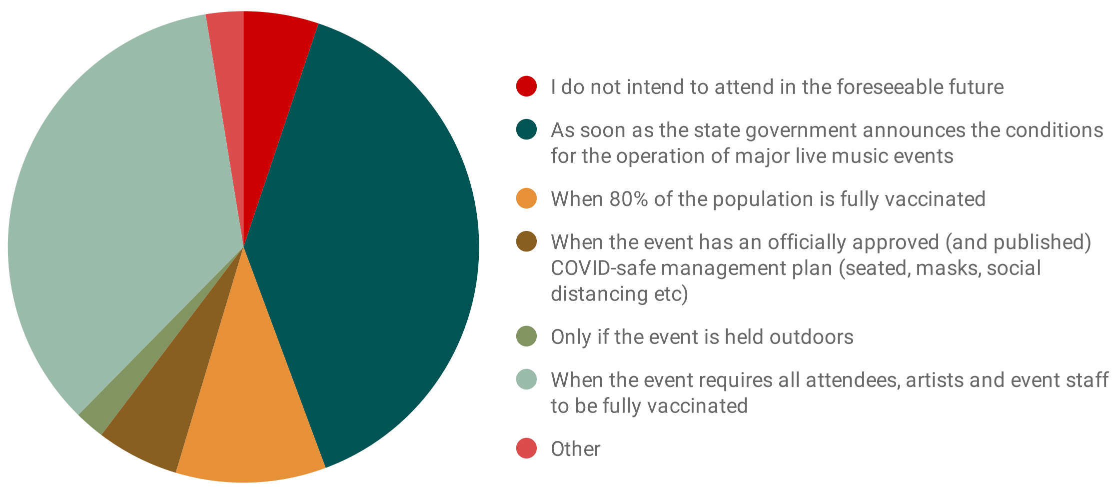


Figure 7k

Q: When will you personally feel comfortable and attending regional or metropolitan small venues again?

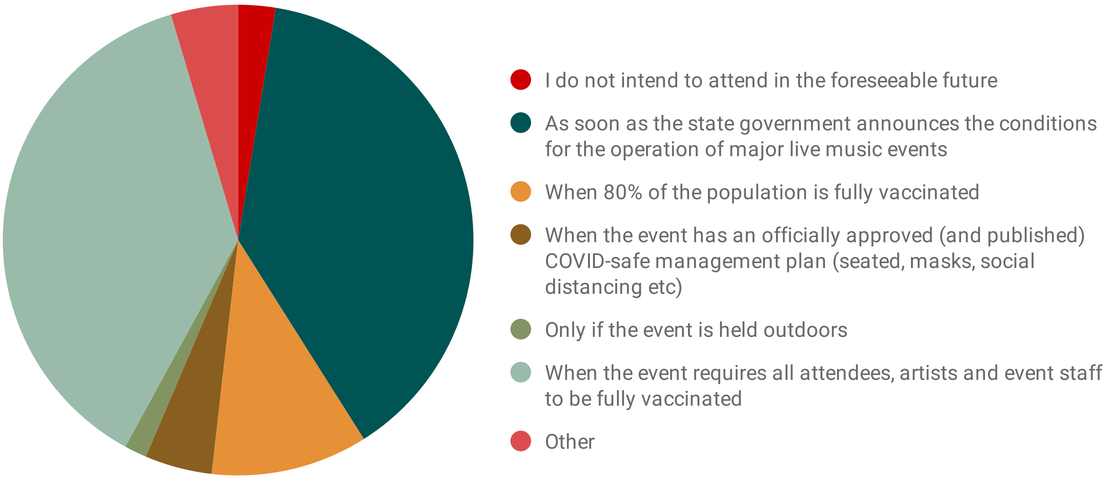


Figure 7I

7.8 Recommendations

Many responders wanted to suggest ways to support the music scene and these fell into a selection of categories. The most common of which are listed below:

- Living wage for musicians and crew
- Support for more outdoor events
- Government support for shows which ensure ticket prices are affordable ie funding for free shows
- Venue funding - particularly to help with extra COVID protocols
- Training for regional venue operators to increase their business
- Event insurance scheme
- Facilitating better ventilation at venues
- Accommodation provisions to encourage artists to travel to regional venues
- ‘Melbourne Money’ style initiatives for small venues

APPENDICES

1 Project Methodology

2 Arts & Music Funding 2019-2021

3 Small Venues List

4 Festivals List

5 Acknowledgements

6 References

Appendix 1 - Project Methodology

In order to quantify live music activity in Regional Victoria in the years between 2019 and 2021, we adopted a multi-pronged approach.

Desk Research

To create the context for the report, particularly with regard to music as a tourism driver in Victoria's designated Regional Tourism Areas, we assembled a significant amount of tourism-related data from reporting by a number of state and federal agencies, including –

- Visit Victoria
- Regional Arts Victoria
- Creative Victoria,
- Small Business Victoria
- Department of Jobs, Precincts and Regions
- Tourism Research Australia
- Australia Council for the Arts

Much of their reporting is based on the quarterly national reporting by Tourism Research Australia of the findings from their National Visitor Survey which, annually, involves 100,000 Australians (15 years and over) in supplying a range on data on their tourism visitations and consumption. This data is in turn translated and reported by the Australian Bureau of Statistics (nationally) and various state-based agencies such as those identified above.

In terms of their reporting, music activities and presentations are classified under a general tourism category of 'cultural activities'. As this includes visits to museums, galleries, historic and heritage buildings and sites, theatre and dance events – as well as music consumption, it hardly provides us with a definitive basis for analysing and reporting the visitation impact associated with live music events.

While more nuanced data was provided by reporting from the Australia Council for the Arts and the state government's primary arts funding agency Creative Victoria, the level of detail available was not sufficient to allow us to compile the basis for a comprehensive of the regional music event activity that the project required.

We note at this point a certain amount of frustration that Creative Victoria was unable, due to 'confidentiality' restrictions to share underlying data from several reports commissioned by their 'parent' agency DJPR – as has been noted.

The Census Approach

So, as have done in previous projects, we adopted a 'census' approach. That is direct contact and engagement with as many event organisers and presenters, venue operators, creative practitioners and event attendees as possible. Much as the national census attempts to gather a comprehensive range of data from as many Australian households and individuals as possible.

What it lacks in terms of statistical modelling, it certainly makes up for in comprehensive data collected at source that does not rely on the extrapolation from limited sampling and the consequent weighting that so many studies rely on.

Not analytically 'sophisticated', but reliable and verifiable. And, in the humble opinion of the authors, entirely appropriate to capturing the data for a sector where performances range across so many venues that vary significantly in nature – from bars with a capacity of 50, though to a variety of venues hosting **500+** to large-scale events attended by **20,000** patrons.

Venue and Event Lists

The key to accuracy, and thus a credible quantification is the compilation of a definitive list of venues and presenters.

The task began with an examination of the liquor licences issued to regional Victorian businesses by Liquor and Gaming Victoria and those issued by the Australasian Performing Right Association (APRA) for the presentation of live and recorded music in business premises (venues) and at special events (concerts, festivals, functions).

Of course the fact that a venue is licensed to present live music is no guarantee that it does so nor, as APRA readily admits, does every venue/event presenting live music apply for a licence. However, it's a starting point.

From these basic lists we allocated venues and events to their appropriate Regional Tourism Area, with one of the Collarts student research team designated as region coordinator. Their job was to confirm 2019 presentation activities – basically the number of gigs.

At the same time, we distributed these draft lists to the local council arts and culture officers who are part of the Municipal Association of Victoria network; venue manager members of the Victorian Association of Performing Arts Centres; Regional Tourism Boards and a significant number of industry professionals from Music Victoria's extensive database; Music Victoria's regional coordinators and regional-based graduates from their professional mentee program.

They were asked to use their local knowledge to identify any venues and events on the lists who had not presented live music in 2019 and, likewise, to add any they were aware of that were not on the list. Any additions/subtractions were passed on to the research team who then began the verification process.

This task was made much easier than previously, because of the increasing use of the internet by even the smallest presenters to promote gigs. As we discovered from our survey responses, at least **80%** of venues have a website and **95%** have a Facebook page. In terms of investigating 2019 activity, The Wayback Machine internet archive proved invaluable.

Small Venues

From an initial list of **700+** small venues, we identified **552** that presented live music in 2019. Further investigation gave us a definitive list of **308** whom we regarded as 'regular' presenters – a minimum of one gig per week. They were the key targets for our research team who began a three-month correspondence to encourage them to share details of their operation and presentation in 2019. They were also asked to provide information on the COVID-related impact on their business and live music presentations in 2020 and 2021 during lockdowns and restrictions. They did this via the completion of a detailed online survey.

We also identified **227** venues that presented live music on an occasional rather than regular basis. While their activities were not ignored and form part of our reporting, it was the **308** that we focused our attention and data gathering on.

We were assisted in promoting the small venue survey by a number of industry organisations, especially the Australian Hotels Association who distributed the online link to Regional Victorian members.

Concerts and Festivals

While the research team was engaged with the small venues, the reports authors took responsibility for contacting the major event presenters across the regions.
Having identified **89** dedicated music festival in 2019 and some **547** concert presentations, we engaged directly with as many presenters as possible to gain what access we could to their event information and to encourage them to complete an online survey designed to capture their specific data and feedback.

We received detailed information from a number of regional performing arts centres, a number of large festivals and the most-attended concerts presented in regional Victoria under the A *Day On The Green* banner.

We note that the gathering of data during the pandemic presented a range of challenges, not least of which was the fact that for a considerable period people were required to work from home and did not have access to the 'historic' record of operations we requested. That said, we received widespread cooperation.

We should also note that some who had promised to share detailed information suddenly found themselves involved in a scramble to prepare their events for delivery once restrictions on live music events were eased at the end of 2021. Some had only weeks to prepare so were understandably otherwise focused.

Performer and Attendee Surveys

Important as it was to obtain event and venue information, without performers taking to the stages and fans paying to see their performances, none of this activity would take place or be paid for. We were therefore keen to repeat our previous practice by developing specific surveys for performers (musicians and DJs) who gigged in regional Victoria and the fans who attended regional music events.

In the case of performers, we were interested in details of their performance activity when it was possible (2019) and the impact of pandemic restrictions on their professional practice, income and mental health.
In the case of attendees, we wanted to report details of their live music consumption, spending patterns and the pandemic impact.

Importantly these surveys provided vital data on which to base our revenue generation calculations, but also provided an important cross-reference to corroborate (or question) information from other sources, including that from venues and events.

Communications

In order to promote all our surveys, but particularly those for performers and attendees, we appointed a communications manager and graphics consultant. They created a media and comms strategy and designed a range of social media assets so links to the online surveys could be distributed shared with a wide audience.

In seeking assistance to distribute our survey links, we targeted local councils, venue and event operators, industry organisation and operatives (mainly from Music Victoria's extensive database), online and print media (Industry and general interest), regional community radio stations and dozens of Facebook interest groups.

We received widespread support in spreading the word, particularly from Music Victoria's extensive regional volunteer network and from the 30+ regional FReeZA groups who not only present events, but are extensively connected with the music scene in all the towns, cities and regional communities covered by our project.

Limitations

Comprehensive and exhaustive as our process was, it was never likely – especially in the midst of what seemed a never-ending pandemic, to produce all the data we desired. Where we did have comprehensive data we nonetheless consciously erred on the conservative side in our calculations. In the interests of accuracy, where we were not comfortable with the nature or extent of available data, we declined to extrapolate and report findings without a strong foundation.

We are therefore confident that our process has been as rigorous as possible, that our findings are verifiable and based on credible and reliable data.

Appendix 2 - Arts & Music Funding 2019-2021 (March 7, 2022)

Compiled from publicly available data from The Australia Council For The Arts and Grant Recipients, Appendix 13 of DJPR Annual Reports (2019/2020 & 2020/2021)

A2.1 National – Australia Council

The Commonwealth government, through the Australia Council for the Arts, annually distributes approximately $200 million to individuals, groups, organisations and major companies involved in the creative industries. Approximately 19% is allocated to project grants (individuals/groups etc), 26% to small and medium size organisations and 22% to major performing arts organisations.

The level of funding has only just managed to keep pace with inflation (measured from 2009) and in fact, the percentage per capita spend of this public money has declined by 20% from a highpoint of $330 million in 2009.

Of the $200m available in grant funding, approximately 20% is allocated to Victoria year-on-year ($40 million). The total allocated to Regional Australia in 2019 was $30 million, suggesting that Regional Victoria's share was approximately $6 million.

The success rate of individual/group applicants is approximately 17%, although the performer responders to our online survey reported a success rate of only 5% in 2019.

An analysis of the funding for 2019/2020 highlights several things. The 4-year funding to major arts organisations, the annual project funding to organisations and grants to individuals and groups do not reflect the dominance of music practitioners in the creative industries workforce nor the huge audience share their performances attract – as recorded in Live Music Australia's annual Ticket and Revenue Survey[1].

This is particularly the case with regard to the involvement of Australians involved in contemporary music events and practice. The table below suggests a disproportionate allocation to music organisations and individuals. Something that music organisations and practitioners have been highlighting and complaining about for many years - to no avail!

Australia Council Funding	Music $ millions	Theatre $ millions	Visual Arts $ millions
2019			
Organisation Projects	1.3	0.9	1.1
Individuals and Groups	2.58	1.3	2.4
2020			
Organisation Projects	0.7	0.7	0.8
Individuals and Groups	1.1	0.5	0.8
4-year Major Organisations	16.5	22.1	15.1

Table A2.1

A2.2 Arts Funding in Victoria 2019-2021

In the 2019-2020 financial year, the Department of Jobs Precicnts and Regions allocated $1.37 billion to fund a vast range of grants. In the 2020-2021 the allocation was $4.6 billion. The largest component of that latter total was $1.85 billion for various business-based relief/stimulus programs as a result of the economic impact of COVID-19 lockdowns and restrictions.

1 Live Performance Australia 2021, *LPA 2019 and 2020 Ticket Attendance and Revenue Report*. https://reports.liveperformance.com.au/ticket-survey-2019-2020/#/

In order to compare like-for-like allocations across industry sectors and categories, we have therefore removed the COVID-19 business-related support.

We also note that in each year there are significant grants where the individual amounts are not reported for commercial-in-confidence reasons - $96 million in 2019/20 and $466 million in 2020/21. It is not possible from the named recipients to always identify an industry/sector individual, business or organisation.

In 2019/2020, the allocation to the arts from DJPR's funding of Creative Victoria was $62.2 million across a variety of grant categories. In 2020/2021 that allocation increased in total to $99.6 million. However in terms of the overall DJPR grant budget, the share to 'the arts' decreased from 4.5% to 3.6%.

Creative Victoria Funding	2019/2020 $ millions	2020/2021 $ millions
Organisation Investment	23.8	21
Major Performing Arts Organisations	11	11
Strategic Investment	4.3	4.8
Strategic Initiatives	11	32.4
Music Works	2.1	3.9
Victorian Arts Grants	2.6	2.7
Regional Partnerships	3.2	3.3
Regional Development	2	2.1
Sustaining Creative Workers	2.1	1.8
Regional Cultural Infrastructure		2.5
Live Music Venue Fund		14.1
TOTAL	**62.2**	**99.6**

Table A2.2

Note: It is not possible to identify the location of the Venue Fund grantees with certainty as many are only identified by applicant name. We can however, estimate that at least $2 million of the $14 million supported venues in Regional Victoria. The average grant per venue was $80,000.

A2.3 Funding Highlights

Prior to the pandemic, Creative Victoria's Organisation Investment Program was the largest single category in a 'normal year'.

Recipients cover the spectrum of artforms and cultural organisations – museums, galleries, theatre, dance, craft, writing, music and festivals. In 2020/21, among the largest recipients were – the Melbourne Festival ($5.8 million), The Wheeler Centre ($1.5 million), the Melbourne International Comedy Festival ($1.7 million) and Heide Museum of Modern Art ($1.4 million).

Creative Victoria's Strategic Initiatives Program
The recipients in 2020/21 included the range of artform organisations mentioned above, but also included grants to support programs developed by local and shire councils.
Among the major recipients were – Castlemaine State Festival ($1.8 million), Melbourne Symphony Orchestra ($2 million), Melbourne Theatre Company ($1.5 million), Regional Arts Victoria ($4.5 million), Rising Melbourne ($6.5 million) and The Push ($0.9 million).

Creative Victoria's Strategic Investment Program
As above, some of the major recipients in 2020/21 – Melbourne International Comedy Festival ($2 million), Shepparton Arts Festival ($0.25 million), Theatre Works ($0.24 million), La Mama ($0.25 million).

Creative Victoria's Major Performing Arts Organisations Fund
A small number of artform presenters/organisations are regularly supported with 4-year funding.
In 2020/21, the recipients were – Circus Oz ($190,000), Malthouse Theatre ($1.2 million), Melbourne Symphony Orchestra ($2.4 million), Melbourne Theatre Company ($485,000), Opera Australia ($1 million), Orchestra Victoria ($1.4 million), Australian Ballet ($652,000) and Victorian Opera ($3.8 million).

Creative Victoria's Regional Partnerships and Development Programs
Support a range of organisations planning regional performances and/or and regional-based presenters and facilities, predominantly galleries, museums, theatres and Performing Arts Centres.

A2.4 Regional Tourism Infrastructure/Stimulus Grants

In 2020/21, DJPR provided new grants totalling $79 million to support Regional Victorian tourism operators and providers – Regional Tourism Investment Stimulus ($21 million), Regional Tourism Infrastructure ($35 million) and a Regional Tourism Voucher program to encourage visitation ($22 million). Most of the support funding was channelled through local/shire councils and recipients included a number of performing arts centres. In addition, regional operators and facilities likely benefited from a state-wide $47 million COVID-19 Infrastructure Stimulus package.

COVID-19 Business Support
DJPR reports that 85% of the $1.85 billion it allocated to support 187,000 Victorian businesses in 2020/2021 went to Metropolitan Melbourne businesses and 15% to regional businesses.

Regional Arts Victoria
During 2020/2021, $420,000 was distributed to regional organisations and individuals in Quick Response, Recovery Boost and Creative Worker funding.

A2.5 Sport V Arts and Culture

The *Melbourne Live Music Census 2017* established, beyond question, that live music events attracted an audience three times greater for music events than the combined total for ALL major sporting events held in the city in a single year. Logic would tend to suggest that this is almost certainly the case for regional music events, given that spectator sports events are much smaller and fewer in number than in the capital. In terms of sector participants, the opposite is likely to apply, given the significant part sport plays in regional community activities.

However, that would not seem to explain what appears to be a serious imbalance in the grant allocation to sports individuals and organisations across 2019/2020 and 2020/2021 as opposed to those involved in the creative industries.

Between 2019/20 individuals, businesses and organisations involved in a wide variety of sporting pursuits received funding or $234 million across around 30 program categories. This represented 17% of DJPR's total grant allocation.

In the same year, the figure for individuals, businesses and organisation involved in arts and cultural pursuits was $62 million, representing 4.5% of total grant allocation.

In 2020/21 the allocation to sport increased by $635 million (up 270%) to $869 million which represented 31% of DJPR's total grant allocation.

The funding for arts and culture increased by $38 million (up 61%) to $100 million representing 3.6% of total grant allocation.

	2019/2020		2020/2021	
	$ millions	% of Total	$ millions	% of Total
Total DJPR	1,377		2,775	
Sports	234.5	17%	869.1	31%
Arts & Culture	62.2	4.5%	99.6	3.6%

Table A2.5

Funding to sports ranged from thousands of small grants to community clubs and individual participants in metro and regional areas, to much larger infrastructure funding to support football, soccer, golf, motorsport and racing. Approximately $250 million of the sport allocation went to 'big ticket' items – community sports infrastructure ($157 million) and state facilities and major projects ($97 million).

In 2020/2021, the AFL and seven AFL teams received $78 million, or 78 % of the total arts/cultural funding for the year.

A2.6 Contemporary Music Support

Although the contemporary music industry welcomed the announcement (April, 2018) of a dedicated $22 million package which included the establishment of the Victorian Music Development Office and a dedicated Music Works grant program, the overall allocation of funding to the sector through Creative Victoria bears little relation to its 'dominance' over sport (and other artforms) in terms of audience participation, economic generation and job creation.

Of course, live music performances are likely to have been supported and facilitated in Regional Victoria by a range of funding allocated to venues, events and organisations (by local government especially), but it is not possible to report specific data due to Creative Victoria's confidentiality requirements. What can be said with certainty is that with the exception of The Push and Music Victoria, little contemporary music funding has flowed to dedicated organisations operating in that sector.

The irony of course is that in times of 'trouble', it is contemporary music artists and organisations that invariably step up to the plate in recognition that their performances provide the most involving engagement for communities recovering from natural disasters and pandemic impact. This has been exemplified by recent state government initiatives (Creative Victoria/Visit Victoria/Music Victoria/Victorian Music Development Office) to revitalise community engagement/celebration in metro and regional areas through contemporary music performances. These are not captured in the DJPR annual reports.

A2.7 COVID-19

As many commentaries have noted – and lamented, the majority of creative practitioners and workers in the performance supply chain operate in a casualised gig economy where the contractual status of their employment largely precluded them from eligibility for the majority of federal and state business support programs. It is hard to explain therefore why the allocation to Creative Victoria's Sustaining Creative Workers program was actually reduced in 2020/21 from its level the previous year.

We do note that in June 2021, the state government announced a $20 million emergency package to support the events sector. Presenters and venues hosting major events were eligible for grants of up to $250,000 while creative practitioners were able to apply for compensation of $500 per gig (to a maximum of 4). It was welcomed by the industry.

As we have noted in previous live music census projects, the vast majority of small businesses and practitioners involved in contemporary music presentation and performance regularly fly 'under the radar' of those tasked with developing strategies and policies to support the arts and culture sector. The nuanced approach required to assist them in sustaining their cultural practice has often proven difficult in comparison to dealing with other performing arts that are more conveniently structured in larger groups based around a small number of key organisations.

A2.8 RISE Funding

Traditionally, prior to the pandemic, the federal government's major funding of the arts was channelled through the Australia Council which is annually funded for more than $200 million.

The majority of that total supports multi-year funding for large arts organisations including orchestras and ensembles, theatre and ballet companies. Approximately $25 million is made available each year for peer assessed project applications by individuals, groups and organisations. Across the funded categories music, and contemporary music in particular, has not fared particularly well in terms of allocated percentage.

An analysis of project funding in 2020 and 2021 reveals that 22% went to see theatre projects, 19% to visual arts and 14% to music. The vast majority of those music grants went to genres other than contemporary music.

Following the outbreak of COVID-19 and the cancellation of many iconic festivals and tours across the performing arts, the industry lobbied the federal government for specific support funding.

The result was the announcement in August 2020 of the $200 million **RISE program** - **Restart Investment to Sustain and Expand the Arts**. Grants of up to $2 million were available to artists, organisations and venues. The programme is due to be phased out in December 2022 with a final allocation of $20 million. The 2023/2024 forward estimates in the budget provides for an ongoing $2.5 million.

The unique feature of this funding was that although the Australia council was reportedly involved in an advisory capacity re the distribution, final decisions on recipients were made in the office of the federal arts minister. **To date some 450 grants have been approved.**

With a focus on commercial projects to generate job creation an audience attendance, it is not surprising that music projects have fared much better under **RISE** than they do traditionally with the Australia council. This was particularly the case with contemporary music who's share of RISE funding has been 35% of the total allocation.

Between December 2020 and September 2021 a total of 387 projects were funded. They were expected to create 169,000 jobs and attract 46 million attendees.

Victoria's share was $50 million for 126 projects expected to create 65,000 jobs and attract an audience of 12.6 million. Included in this total were grants to some of Victoria's most iconic music festivals and events, many based in Regional Victoria.

As is the case with all funding programmes it has not being without its critics. A number of commentators, while welcoming the allocation of $2.4 million to re-establish an iconic music event (BluesFest in Byron Bay), nevertheless speculated on the fact that that amount of money could have had a serious impact in supporting hundreds of individual music projects and the consequent career development of practitioners and creators. Not to mention the negative reaction the minister received from allocating $1.5 million for a project based on 'an immersive scale recreation of Jurassic World' in Lego.

On balance, the reaction from the arts community has been positive but the point has also been made that although the events sector is seeing signs of recovery, ongoing support is needed to restore pre-pandemic levels of presentation, job creation and audience participation.

A2.9 Conclusion

Live music performance is a 'powerhouse' in terms of driving social and cultural interaction and economic generation in Metropolitan Melbourne and Regional Victoria.

At the very core of the generating mechanism are the creative practitioners. It makes little sense (to the casual but admittedly slightly biased observer) that given the vast majority of those are sole traders, freelance contractors etc, only 8% of Victoria's arts funding is allocated to support their creative practice.

Appendix 3 - Small Venues (by Regional Tourism Area)

Daylesford & Macedon Ranges

Flanagans Border Inn	Bacchus Marsh
Taco Bill Mexican Restaurant	Bacchus Marsh
The Royal Hotel Bacchus Marsh	Bacchus Marsh
Animus Distillery	Kyneton
Dr Abalone	Kyneton
Kyneton RSL	Kyneton
Kyneton Town Hall PAC	Kyneton
Major Tom's	Kyneton
The Albion Hotel Kyneton	Kyneton
Lancefield Hotel	Lancefield
Keatings Hotel / Holgate Brew House	Woodend
Victoria Hotel Woodend	Woodend
Wallace Hotel	WALLACE
Gisborne Telegraph Hotel	Gisborne
Wine Oclock Wine Bar	GISBORNE
Macedon Railway Hotel	Mount Macedon
Mount Macedon Hotel	Mount Macedon
Baringo Food & Wine Pty Ltd	New Gisborne
Riddells Creek Hotel	Riddells Creek
Vic At Seasons	Riddells Creek
Swiss Mountain Hotel	Blampied
Clunes Farmers' Market	Clunes
National Hotel	Clunes
The Daylesford Hotel	Daylesford
The Cosmopolitan Hotel	Trentham
The Grande Hotel	Hepburn Springs

Geelong & The Bellarine

Bannockburn Railway Hotel	Bannockburn
Clyde Park Vineyard	Bannockburn
At The Heads Wine Bar	Barwon Heads
Barwon Heads Hotel	Barwon Heads
Coffetti Gelato	Barwon Heads
Terindah Estate	Bellarine
Bellbrae Estate	Bellbrae
Belmont Hotel	Belmont
Bloom Bar & Lounge	Belmont
Geelong RSL Club	Belmont
There There	Belmont
Unwined Belmont Pty Ltd	Belmont
Buckleys Entertainment Centre	Breakwater
White Eagle House	Breakwater
Music at the Basilica	Clifton Springs
The Minya	Connewarre
The Shell Club	Corio
The Potato Shed	Drysdale
East Campus	East Geelong
Seasons Cafe	East Geelong
Fyansford Hotel	Fyansford
Provence Wines, The papermills	Fyansford
The Door gallery Café, The Papermills	Fyansford
Beavs Lounge Lounge	Geelong
Black Hatt	Geelong
Charles & Co Cafe	Geelong
City Quarter Bar	Geelong
Courthouse Arts	Geelong
Edge Geelong	Geelong
Eureka Hotel	Geelong
Geelong Gallery	Geelong
Geelong Library and Heritage Centre	Geelong
Geelong Performing Arts Centre	Geelong
Home House	Geelong
Irish Murphys Geelong	Geelong
Lamby's Tavern	Geelong
Lord Nelson Hotel	Geelong
Novotel Waterfront	Geelong
Palace Of The Orient	Geelong
Pistol Pete's	Geelong
Recess Bar And Eat	Geelong

Appendix 3 - Small Venues (by Regional Tourism Area) continued

Royal Geelong Yacht Club	Geelong
Sporting Globe Hotel	Geelong
The Barking Dog Wine Bar & Cafe	Geelong
The Carlton Hotel	Geelong
The Edge	Geelong
The Elephant & Castle Hotel	Geelong
The Green Room	Geelong
The Inn Hotel Geelong	Geelong
The Max Hotel	Geelong
the Piano Bar	Geelong
the Pier	Geelong
The Rheingold	Geelong
The Studio	Geelong
The Valley Inn	Geelong
The Workers Club Geelong	Geelong
The Yarra Hotel	Geelong
Toast Nightclub	Geelong
Westfield Shopping Centre	Geelong
Wool Exchange	Geelong
Petrel Hotel	Geelong West
Grovedale Hotel	Grovedale
Inverleigh Hotel	Inverleigh
The Phoenix	Lara
Leopold Sportsmans Club Inc	Leopold
Henry's Corner Country Hotel	Meredith
The Hop Inn Mt Duneed	Mt Duneed
Peninsula Hotel-Motel	Newcomb
Gold Diggers Arms Hotel	Newtown
The Cremorne Hotel	Newtown
The Sphinx Hotel	North Geelong
The Arena	Nth Geelong
The Gateway Hotel	Nth Geelong
Ocean Grove Bowling Club	Ocean Grove
Piping Hot Chicken Shop	Ocean Grove
Grand Hotel Portarlington	Portarlington
Hooked On Fish Cafe Bar @ 360	Queenscliffe
Queenscliff Brew House	Queenscliffe
The Blues Train	Queenscliffe
Barwon Club Hotel	South Geelong
Little Creatures	South Geelong
St Leonards Hotel By The Sea	St Leonards
Austins Wines Pty Ltd	Sutherlands Creek
Flying Brick	Wallington
Leura Park Winery Bellarine	Wallington

Gippsland

Butcher Shop Hotel	Bunyip
Victoria Hotel - Alberton	Alberton
Blue Duck Inn	Anglers Rest
Bairnsdale Bowling Club	Bairnsdale
Bairnsdale RSL Sub Branch	Bairnsdale
Charlie's Bar	Bairnsdale
Forge Theatre	Bairnsdale
Grand Terminus Hotel	Bairnsdale
Main Hotel Bairnsdale	Bairnsdale
Pincic Point hall	Bairnsdale
The Bairnsdale Club	Bairnsdale
The Club Hotel	Bairnsdale
Bemm River Hotel	Bemm River
Benambra Hotel	Benambra
Boolarra Community Hotel	Boolarra
Briagolong Hotel	Briagolong
Bruthen Mechanics Hall	Bruthen
Bullant Brewing Company	Bruthen
The Bruthen inn	Bruthen
Belbird Hotel	Cann River
Cann River Hotel	Cann River
Dargo Hotel	Dargo
Drouin Family Hotel	Drouin
Drouin Golf & Country Club	Drouin
Middels	Drouin
Parnassus Function Centre	Drouin
Robin Hood Inn	Drouin

Appendix 3 - Small Venues (by Regional Tourism Area) continued

Royal Hotel Drouin	Drouin
Brandy Creek Wines & View Cafe	Drouin East
Glengarry Hotel	Glengarry
Kalimna Hotel	Kalimna
Djinta Djinta Winery	Kardella South
Austral Hotel	Korumburra
Korumburra Bowling Club	Korumburra
Lake Tyers Beach Hall	Lake Tyers Beach
Waterwheel Beach Tavern	Lake Tyers Beach
Bellevue on the Lakes Function room	Lakes Entrance
Central Lakes Hotel	Lakes Entrance
Lakes Entrance Bowls Club Inc	Lakes Entrance
Lakes Entrance Golf Club	Lakes Entrance
Lakes Entrance Surf Club	Lakes Entrance
Slipway Precinct	Lakes Entrance
Lardner Park Events	Lardner
Leongatha RSL Sub-Branch Inc	Leongatha
Lindenow Pub	Lindenow
Macalister Hotel	Maffra
Mallacoota Hotel	Mallacoota
Mallacoota Mudbrick Pavillion	Mallacoota
Mallcoota Golf Club	Mallacoota
Marlo Hotel	Marlo
Meeniyan Hotel	Meeniyan
Metung Hotel	Metung
Encore Entertainment Complex	Moe
Moe RSL	Moe
Morwell Bowling Club	Morwell
Morwell Club	Morwell
Morwell R.S.L.Sub-Branch Inc	Morwell
Neerim South Hotel	Neerim
Newborough Bowling Club	Newborough
S & A Hotel Newborough	Newborough
Yallourn Newborough RSL	Newborough
Noojee Hotel	Noojee
Toolshed Bar	Noojee
Golden Age Hotel	Omeo
Hill Top Hotel	Omeo
Omeo soldiers Hall	Omeo
Orbost Club Inc	Orbost
Orbost Exhibition centre	Orbost
Le Rock	Paynesville
Paynesville Wine Bar	Paynesville
The Floating Tin Shed	Paynesville
The Paynesville Hotel	Paynesville
Rawson Stockyard Hotel	Rawson
Bond Street Event Centre	Sale
Criterion Hotel Sale	Sale
Jack Ryans Bar	Sale
Sale Memorial Hall	Sale
Wellington Entertainment Centre	Sale
Swan Reach Hotel	Swan Reach
Swifts Creek recreation Hall	Swifts Creek
Royal Standard Hotel	Toora
Criterion Hotel	Trafalgar
Traf East Blues	Trafalgar
Latrobe Regional Performing Arts Centre	Traralgon
Newborough Public Hall	Traralgon
Spirit Bar And Lounge	Traralgon
Star Bar	Traralgon
The 3844	Traralgon
The House of Frank	Traralgon
Traralgon RSL Sub Branch Inc	Traralgon
Courthouse Warragul	Warragul
Euphoria / Furphy Deck -Bank Warragul	Warragul
Jak's Music	Warragul
Newmason Eat Drink Relax	Warragul
Railway Hotel Warragul	Warragul
Warragul Country Club	Warragul
Warragul Downtowner	Warragul

Appendix 3 - Small Venues (by Regional Tourism Area) continued

Warragul Sporting & Social Club Inc	Warragul
Wesley of Warragul	Warragul
West Gippsland Arts Centre (Theatre)	Warragul
Wy Yung Pub Hotel & Function Centre	Wy Yung
Commercial Hotel	Yarram
The Yarram Country Club Inc	Yarram
Yarram Regent Theatre	Yarram
Goldfields	
Ballarat Fine Art Gallery	Ballarat
Axedale Hotel	Axedale
Anglican Cathedral - Lydirard St	Ballarat
Aunty Jacks	Ballarat
Ballarat & Clarendon Grammar	Ballarat
Ballarat Civic Hall	Ballarat
Ballarat Golf Club	Ballarat
Ballarat High School	Ballarat
Ballarat Mechanics Institute	Ballarat
Ballarat Trades Hall	Ballarat
Craig's Hotel	Ballarat
Freight Bar & Restaurant	Ballarat
George Hotel	Ballarat
Her Majesty's Ballarat	Ballarat
Hop Temple	Ballarat
Irish Murphy's	Ballarat
Karova Lounge	Ballarat
Loreto College	Ballarat
Meigas	Ballarat
Munsters Arms	Ballarat
Piano Bar	Ballarat
Sovereign Hill	Ballarat
St Patrick's College	Ballarat
The Bluestone	Ballarat
The Building	Ballarat
The Deck	Ballarat
The Lost Ones Basement Bar	Ballarat
The Main Bar	Ballarat
The Mallow	Ballarat
Thompson's Hotel Cobden	Ballarat
Uptown Ballarat	Ballarat
Wendouree Performing Arts Centre	Ballarat
Western Hotel	Ballarat
Zagames Golden Point Club Hotel	Ballarat
RJM's Wine Bar	Ballarat East
Robin Hood Hotel	Ballarat North
The Eastern	Ballarat North
Beaufort Golf Club	Beaufort
All Seasons International Hotel	Bendigo
All Seasons Quality Resort	Bendigo
Basement Bar	Bendigo
Belmont Hotel Bendigo	Bendigo
Bendigo District RSL Sub-Branch Inc	Bendigo
Black Swan	Bendigo
Brian Boru Hotel	Bendigo
British and American Hotel	Bendigo
Cambrian Hotel	Bendigo
Foundry Arms Hotel	Bendigo
Golden Hills Motel	Bendigo
Golden Square Hotel	Bendigo
Golden Vine Hotel	Bendigo
Handle Bar	Bendigo
Metropolitan Hotel	Bendigo
National Hotel Motel	Bendigo
Newmarket Hotel	Bendigo
One Tree Hill Hotel	Bendigo
Queens Arms Hotel	Bendigo
Rifle Brigade Pub Brewery	Bendigo
Shamrock Hotel (Gold Dust Lounge)	
St Andrews Uniting Church	Warragul
The Bridge Bendigo	Warragul

Appendix 3 - Small Venues (by Regional Tourism Area) continued

The Capital Performing Arts Centre	Bendigo
The Musicman Megastore	Bendigo
Ullumbarra Theatre	Bendigo
Universal On McCrae	Bendigo
Black Hill Hotel	Black Hill
Brown Hill Hotel	Brown Hill
Criterion Hotel	Castlemaine
The Bridge Hotel	Castlemaine
The Castlemaine Brewing Company	Castlemaine
Theatre Royal Castlemaine	Castlemaine
Farmers Arms Hotel	Creswick
Odessa at Leavers	Creswick
Shamrock Hotel	Dunnstown
Dunolly Bistrol and Bar	Dunolly
Dunolly Golf Club	Dunolly
Dunolly Railway Hotel	Dunolly
Red Lion Hotel	Eureka
Goldmines Hotel	Golden Square
The Hibernian Hotel Bendigo	Golden Square
Greendale Country Pub	Greendale
Guildford Family Hotel	Guildford
The Goldfields Track Cafe	Harcourt
Empire States Hotel	Inglewood
Royal Hotel	Inglewood
Kangaroo Flat Hotel	Kangaroo Flat
Windermere Hotel	Kangaroo Flat
Ballarat Yacht Club	Lake Wendouree
Stag Hotel Learmonth	Learmonth
Kryal Castle	Leigh Creek
Manchester Arms Hotel	Long Gully
Kangaroo Hotel Maldon	Maldon
Maldon Hotel	Maldon
Maldon Spring Show	Maldon
Marong Family Hotel	Marong
Albion Hotel	Maryborough
Bull & Mouth Hotel	Maryborough
Cambrian Hotel	Maryborough
Highlands Society	Maryborough
Madam Chi Chi	Maryborough
Maryborough Golf Club	Maryborough
Park Hotel	Maryborough
Railway Café & Tracks Bar	Maryborough
Ripples On The Res	Maryborough
Supreme Court Bar & Restaurant	Maryborough
Burke & Wills Winery	Mia Mia
Moonambel Hotel	Moonambel
Cubby Haus Brewing	Mount Pleasant
Damascus College	Mt Clear
Mt Clear College	Mt Clear
Federation University	Mt Clear/Ballarat
Allies Hotel	Myers Flat
Railway Hotel Newstead	Newstead
PepperGreen Farm	North Bendigo
No Lights No Lycra Bendigo	Quarry Hill
Phoenix College	Sebastopol
Royal Hotel	Snake Valley
Chisholm St Salon - Bronwyn Blaiklock	Soldiers Hill
The Bendigo Club	Strathdale
Braidie's Tavern	Strathfieldsaye
Talbot Court House	Talbot
Cabaret Club	Warrenheip
Ballarat Grammar	Wendouree
Dribs N Drabs	White Hills

Grampians

Ararat RSL Club	Ararat
Ararat Town Hall Pac	Ararat
Ararat Hotel	Ararat
Court House Hotel Bar and Grill	Ararat
Leopold Hotel	Ararat
The Central Motel	Ararat
Beulah Memorial Hall	Beulah
Brim Memorial Hall	Brim
Brim Sports & Community Club	Brim

Appendix 3 - Small Venues (by Regional Tourism Area) continued

Coleraine Hotel	Coleraine
Victoria Hotel Dimboola	Dimboola
Dooen Hotel	Dooen
The Halls Gap Hotel	Halls Gap
Alexandra House	Hamilton
Caledonian Hotel Motel	Hamilton
Grand Central Hotel	Hamilton
Grand Central Hotel	Hamilton
Hamilton Golf Club	Hamilton
Hamilton Pac	Hamilton
Commercial Hotel	Hamilton
George Hotel	Hamilton
Hermitage Hotel	Harrow
Hopetoun Community Hotel	Hopetoun
Hopetoun Community Hotel	Hopetoun
Lake Lascelles Hopetoun - Mallee Bush Retreat	Hopetoun
Exchange Hotel Horsham	Horsham
Horsham RSL Club	Horsham
Horsham Town Hall Pac	Horsham
Royal Hotel Horsham	Horsham
Victoria Hotel	Horsham
White Hart Hotel	Horsham
Wilsons Hotel & Nightclub	Horsham
Minapre Hotel	Lascelles
Minyip Hotel	Minyip
Minyip Memorial Hall	Minyip
Murtoa Mechanics Institute Hall	Murtoa
Murtoa Stick Shed	Murtoa
National Hotel Natimuk	Natimuk
Patchewollock Hotel	Patchewollock
Rupanyup Community Centre	Rupanyup
Rupanyup Memorial Hall	Rupanyup
Botanical Hotel	St Arnaud
Farmers Arms Hotel	St Arnaud
La Cochon Rose	St Arnaud
St Arnaud Royal Hotel	St Arnaud
St Arnaud RSL	St Arnaud
St Arnaud Sporting Club	St Arnaud
Brix Hotel	Stawell
Gift Hotel Stawell	Stawell
The National Hotel Stawell	Stawell
The Stawell Club	Stawell
Town Hall Hotel	Stawell
Tempy Memorial Hall	Tempy
Warracknabeal Community Centre	Warracknabeal
Warracknabeal Creekside Hotel	Warracknabeal
Warracknabeal Palace Hotel	Warracknabeal
Warracknabeal Town Hall	Warracknabeal
Woomelang Hotel	Woomelang
Woomelang Memorial Hall	Woomelang
Yaapeet Community Centre	Yaapeet

Great Ocean Road

Apollo Bay Hotel	Apollo Bay
Little Feast	Aireys Inlet
The Aireys Pub	Aireys Inlet
Anglesea Hotel	Anglesea
Great Ocean Road Gin Pty Ltd	Anglesea
Great Ocean Road Brewhouse	Apollo Bay
Otway Estate	Barongarook
The Beechy Hotel	Beech Forest
Royal Mail Hotel Birregurra	Birregurra
The Courthouse Camper-down	Camperdown
Austral Hotel Colac	Colac
Colac Otway Pac	Colac
Colac RSL Club	Colac
Union Club Hotel	Colac
Forrest Brewing Company	Forrest
Heywood Hotel	Heywood
The Beach Hotel Jan Juc	Jan Juc

Appendix 3 - Small Venues (by Regional Tourism Area) continued

Izzys Restaurant Bar & Grill	Koroit
Koroit Commercial Hotel	Koroit
Koroit Hotel	Koroit
Cuda	Lorne
Lorne Hotel	Lorne
Mac's Hotel	Mortlake
Nelson Hotel	Nelson
Commercial Hotel	Panmure
Mamre Hotel	Pirron Yallock
Port Campbell Hotel	Port Campbell
Blarney Books And Art	Port Fairy
Caledonian Inn Hotel	Port Fairy
Charlie's On East	Port Fairy
Star Of The West Hotel	Port Fairy
Victoria Hotel Port Fairy	Port Fairy
Gordon Hotel	Portland
Macs Hotel Motel	Portland
Portland Arts Centre	Portland
Portland RSL Memorial Bowling Club	Portland
Crawley's Terang Hotel	Terang
Railway View Hotel	Timboon
Seaside Swing	Torquay
Senors	Torquay
Torquay Bowls Club	Torquay
Torquay Hotel	Torquay
Barrabool Hills Brewery (Cockie's)	Wandana Heights
Ti Tree Hotel	Warrion
Caledonian Hotel	Warrnambool
City Memorial Bowls Club	Warrnambool
Criterion Hotel	Warrnambool
Kulcha Shift	Warrnambool
Mac's Hotel	Warrnambool
Rafferty's Tavern	Warrnambool
Simon's Waterfront	Warrnambool
The Dart And Marlin	Warrnambool
The Last Coach	Warrnambool
The Loft	Warrnambool
Victoria Hotel	Warrnambool
Warrnambool Hotel	Warrnambool
Warrnambool Summer Markets	Warrnambool
Whalers Hotel	Warrnambool
Mount Duneed Winery	Waurn Ponds
Barwon Hotel	Winchelsea
Woolsthorpe National Hotel	Woolsthorpe

Mornington Peninsula

City Of Frankston Bowling Club	Frankston
Westernport Yacht Club	Balnarring Beach
Baxter Tavern Hotel Motel	Baxter
Blairgowrie Yacht Squadron Inc	Blairgowrie
Dainton Family Brewery	Carrum Downs
Hickinbotham Of Dromana	Dromana
Jetty Road Brewery	Dromana
Frankston Arts Centre	Frankston
Frankston City Council - Various	Frankston
Frankston RSL Sub Branch Inc	Frankston
Southside Social	Frankston
The Deck	Frankston
Young Street Supper Club	Frankston
Yamala Park Bowling Club	Frankston South
Kings Creek Hotel	Hastings
Tamarind Bay	Hastings
Westernport Hotel	Hastings
La Baracca & T'gallant Cellar Door	Main Ridge
The Pig & Whistle Tavern Main Ridge	Main Ridge
Alatonero	Mccrae
Stonier Wines	Merricks
Beaches Of Mornington	Mornington
Mornington	Mornington
Beleura - The House & Garden	Mornington
Brass Razu Wine Bar	Mornington

Appendix 3 - Small Venues (by Regional Tourism Area) continued

God's Kitchen	Mornington
Grand Hotel	Mornington
Merchant Lane	Mornington
Mornington On Tanti Hotel	Mornington
Mornington Peninsula Brewery	Mornington
Mornington Racecourse Market	Mornington
Mr Paul's Beer & Wine	Mornington
Publican Mornington	Mornington
Royal Hotel Mornington	Mornington
Stillwater At Crittenden	Mornington
The Rocks	Mornington
Canadian Bay Hotel	Mount Eliza
Dava Hotel	Mount Martha
South Beach Project	Mount Martha
Point Nepean Portsea Market	Portsea
Portsea Hotel	Portsea
Music On The Hill	Red Hill
Polperro Bistro	Red Hill
Red Gum Bbq	Red Hill
Red Hill Community Market	Red Hill
Montalto Vineyard	Red Hill South
Montalto Vineyard & Olive Grove (Restaurant)	Red Hill South
Red Hill Estate	Red Hill South
Rosebud Country Club	Rosebud
Rosebud Hotel	Rosebud
Rosebud Rsl Sub Branch Inc	Rosebud
Sound Bar Music Cocktail Food	Rosebud
Baha Tacos	Rye
Rye Hotel	Rye
Rye RSL Club	Rye
Westernport Hotel	San Remo
Vesbar Wine Lounge	Somerville
Hotel Sorrento	Sorrento
Sorrento Golf Club	Sorrento
Sorrento Portsea RSL	Sorrento
Lights No Lycra	St Andrews
St Andrews Hotel	St Andrews

Murray

Watchem Hotel	Watchem
Club Mandalay	Beveridge
Birchip Hotel	Birchip
Gasworks Bar	Cobram
Royal Victoria Hotel	Cobram
Cohuna Memorial Hall	Cohuna
Garden Park, Cohuna (Sound Shell)	Cohuna
The Colbinabbin Country Hotel	Colbinabbin
Shiraz Republic Winery	Cornella
American Hotel	Echuca
Caledonian Hotel	Echuca
Echuca Hotel	Echuca
Gypsy Bar Echuca	Echuca
Opt Bar	Echuca
Paramount Cinema & PAC	Echuca
Shamrock Hotel	Echuca
Star Hotel	Echuca
The Palace Hotel	Echuca
Harvest Hotel	Echuca
Henrys Bridge Hotel	Echuca
Euroa Third Age Club	Euroa
Northern Republic	Euroa
Old Flour Mill Gallery	Euroa
Treetops Scout Camp	Gannawarra
Irymple Hotel	Irymple
Atkinson Park, Kerang (Sound Shell)	Kerang
Exchange Hotel	Kerang
Kerang Bowling Club	Kerang
Kerang Memorial Hall	Kerang
Kerang Sports And Entertainment Venue	Kerang
Royal Hotel	Kerang
Peppermill Inn Hotel Motel	Kialla

Appendix 3 - Small Venues (by Regional Tourism Area) continued

Mac's Hotel	Kilmore
Koondrook Retreat	Koondrook
Mate's Royal Hotel	Koondrook
Hurleys Bar And Bistro	Kyabram
Kyabram Club	Kyabram
White Hart Hotel	Longwood
Merbein Citizens Club	Merbein
Dom S Restaurant & Bar	Mildura
Mildura Arts Centre	Mildura
Mildura Brewery Pub	Mildura
Mildura Gateway Tavern	Mildura
Mildura RSL Memorial Club	Mildura
Mildura Workingmans Club	Mildura
The Black Stump Bistro	Mildura
The Corporate Moose	Mildura
The Office Wine Bar & Lounge	Mildura
The Sandbar Winebar	Mildura
Cricketers Arms Hotel	Mooroopna
Mooroopna Golf Club	Mooroopna
Railway Hotel	Murchison
Mystic Park Hotel	Mystic Park
Royal Mail Hotel	Nagambie
Zephyrz	Nagambie
The G.R.A.I.N Store	Nathalia
Mcdougall Wines	Nichols Point
Willow And Ivie	Nichols Point
Numurkah Golf And Bowls Club Inc	Numurkah
Telegraph Hotel	Numurkah
Red Cliffs Club	Red Cliffs
Criterion Hotel	Rushworth
Railway Hotel	Seymour
Royal Hotel	Seymour
Aussie Hotel	Shepparton
Flo Lounge	Shepparton
Goulburn Valley Hotel	Shepparton
Shepparton RSL Club	Shepparton
Victoria Hotel	Shepparton
Commercial Hotel	Swan Hill
Lake Boga Hotel	Swan Hill
Murray Downs Golf & Country Club	Swan Hill
Robinvale Golf Club	Swan Hill
Swan Hill Club	Swan Hill
Swan Hill Rsl Club	Swan Hill
Swan Hill Town Hall	Swan Hill
Tongala Motel Hotel	Tongala
Tooborac Hotel & Brewery	Tooborac
Tungamah Hotel	Tungamah
Rattlers Hotel	Wallan East
Creekside Hotel	Warracknabeal
Warracknabeal Arts Council	Warracknabeal
Warracknabeal Golf Club	Warracknabeal
Birallee Tavern	Wodonga
Carrier Arms Hotel	Wodonga
O'maille's Hotel	Wodonga
The Cube Pac	Wodonga
The Woomelang Hotel	Woomelang
Royal Mail Hotel Wycheproof	Wycheproof
Criterion Hotel	Yarrawonga
Phillip Island	
Archie's Couch/Tavern	Archies Creek
Cape Tavern	Cape Paterson
Hotel Phillip Island	Cowes
Rusty Water Brewery Restaurant & Cafe	Cowes
Trumpet Bar	Cowes
Esplanade Hotel Inverloch	Inverloch
Inverloch Bowling Club	Inverloch
Racv Inverloch Resort	Inverloch
Vela Nine	Inverloch
Food And Wine Store Kernot	Kernot
Ocean View Hotel	Kilcunda
Westernport Hotel	San Remo
San Remo Hotel	San Remo

Appendix 3 - Small Venues (by Regional Tourism Area) continued

The Caledonian Hotel	Wonthaggi
Wonthaggi Union Comm Arts	Wonthaggi
Wonthaggi Workmen's Club Inc	Wonthaggi

Victorian High Country

Alpine Hotel	Bright
Bridge Road Brewers	Beechworth
Empire Hotel	Beechworth
George Kerferd Hotel	Beechworth
Hibernian Hotel	Beechworth
Nicholas Hotel	Beechworth
Tanswell's Commercial Hotel	Beechworth
Benalla Bowls Club	Benalla
Benalla Campus	Benalla
Commerical Hotel	Benalla
Farmers Arm Hotel	Benalla
North Eastern Hotel	Benalla
Victoria Hotel	Benalla
Bright Brewery	Bright
Telegraph Hotel	Chiltern
Corryong Hotel / Motel	Corryong
Court House Hotel	Corryong
Hotel High Plains	Dinner Plain
Mcevoy Tavern Eldorado	Eldorado
Astra Lodge	Falls Creek
Falls Creek Hotel	Falls Creek
Qt Falls Creek	Falls Creek
Victorian Alps Wine Company	Gapsted
Harrietville Hotel Motel	Harrietville
Kevington Hotel	Kevington
Gracebrook Vineyards	King Valley
Bos Taurus	Mansfield
Delatite Hotel Mansfield	Mansfield
Mansfield Bush Market	Mansfield
Hunt Club Hotel	Merrijig
Brown Brothers Milawa Vineyard	Milawa
Mitta Pub	Mitta Mitta
Abom	Mount Buller
Ivor Whittaker Memorial Lodge	Mount Buller
Swindlers	Mount Hotham
The General Of Mt Hotham	Mount Hotham
The Old Factory	Myrtleford
Happy Valley Hotel	Ovens
Cambells Rutherglen Wines	Rutherglen
Poachers Paradise Hotel	Rutherglen
George Kerferd Hotel	Stanley
Victoria Hotel	Tallangatta
Sweetwater Brewing Company	Tawonga South
The Tolmie Tavern	Tolmie
All Saints Estate	Wahgunyah
Cofield Wines	Wahgunyah
Pfeiffer Wines	Wahgunyah
St Leonards Winery	Wahgunyah
Wandi Pub	Wandiligong
Albion Hotel	Wangaratta
Grand Central Hotel	Wangaratta
Malt Shed Brewery	Wangaratta
Pinsent Hotel	Wangaratta
Precinct Bar & Restaurant	Wangaratta
Wangaratta Arts Council	Wangaratta
Wangaratta Bowls Club	Wangaratta
Wangaratta Campus	Wangaratta
Wangaratta Club Inc	Wangaratta
Wangaratta Performing Arts Centre	Wangaratta
Dal Zotto Wines	Whitfield
Mountain View Hotel	Whitfield
Star Hotel	Yackandandah
Yackandandah Hotel	Yackandandah

Yarra Valley and Dandenong Ranges

St Andrews Hotel	St Andrews
Rubicon Hotel Motel	Thornton
Yea Peppercorn Hotel	Yea

Appendix 3 - Small Venues (by Regional Tourism Area) continued

The Corner Hotel	Alexandra
Yea Peppercorn Hotel	Yea
Barpiccolo	Eltham
Montsalvat	Eltham
Prosciutto Bros. Craft Bar	Eltham
Skaterz	Eltham
The Grape & Hop	Montmorency
Nar Nar Goon Hotel	Nar Nar Goon
Cardinia Cultural Centre	Pakenham
Pakenham Hotel	Pakenham
Micawber Park Tavern	Belgrave
Oscar's Alehouse	Belgrave
Sooki Lounge	Belgrave
Ezard @ Levantine Hill - Amphitheatre	Coldstream
Oakridge Wines Pty Ltd	Coldstream
Rochford Wines	Coldstream
Beechworth Bakery	Healesville
Fluid Lounge Bar & Cafe	Healesville
Grand Hotel Healesville	Healesville
Healesville RSL	Healesville
Terminus Hotel	Healesville
The Memo	Healesville
Kinglake Pub	Kinglake
Reefton Hotel	Mcmahons Creek
The Watering Hole Tavern	Monbulk
Montrose Town Centre	Montrose
Mount Dandenong Hotel	Olinda
Selby Folk Club	Selby
The Fat Goat	Upwey
Upwey Belgrave RSL	Upwey
The Arts Centre	Warburton
The Yarra Glen Grand	Yarra Glen
Yarrawood Estate Pty Ltd	Yarra Glen
Bulong Wines	Yarra Junction
Cunninghams Hotel	Yarra Junction
Upper Yarra RSL Sub Branch	Yarra Junction

Appendix 4 - Festivals (by Regional Tourism Area)

Daylesford & Macedon Ranges

Kyneton Music Festival	Kyneton

Geelong & The Bellarine

Queenscliff Festival	Queenscliff
Golden Plains	Meredith
Meredith Music Festival	Meredith
National Celtic Folk Festival	Portarlington

Gippsland

Beyond The Valley	Lardner
Bruthen Blues and Arts	Bruthen
Paynesville Music Festival	Paynesville
Boolarra Folk Festival	Morwell/Traralgon
NYE On The Hill	Loch Village
Hills Are Alive	Leongatha
Unify Gathering	Tarwin Lower
Inward Goods	Briagolong

Goldfields

Ballarat Rock 'n Roll & Rockabilly Festival	Ballarat
Festival of Bands and Strings	Ballarat
Ballarat Winter Festival	Ballarat
Bendigo Chamber Music Festival	Bendigo
Bendigo Blues & Roots	Bendigo
Groovin' The Moo	Bendigo
Castlemaine Jazz Festival	Castlemaine
Macedon Folk Festival	Macedon
Rainbow Serpent	Lexton
White Night	Ballarat

Grampians

Pitch Festival	Moyston
Sanford Bush Festival	Sanford
Grampains Music Festival	Halls Gap
Halls Gap Jazz & Blues	Halls Gap
Horsham CM Festival	Horsham
Jailhouse Rock	Ararat
Hopkins Creek	Tatyoon
Babylon Festival	Carapooee

Great Ocean Road

Winter Wild	Apollo Bay
Inner Varnika	Bookaar
Loch Hart Music Festival	Port Campbell
Kennedys Creek Music Festival	Kennedys Creek
Rock The Clock	Camperdown
Arockalypse	Warrnambool
Port Fairy Folk Festival	Port Fairy
Port Fairy Jazz Festival	Port Fairy
Port Fairy Spring Festival	Port Fairy
Aireys Inlet Open Mic Festival	Aireys Inlet
Ecstatic Festival	Otways
Falls Festival	Lorne
(By The) Meadow	Bambra

Mornington Peninsula

Let Go Festival	Mornington
Mornington Country Music Festival	Mornington
Mornington Winter Music Festival	Mornington
Peninsula Summer Music Festival	Mornington

Murray

Riverboats Music Festival	Echuca
Winter Blues Festival	Echuca
Under The Southern Stars	Yarrawonga
Boogie Festival	Tallarook
Earthcore	Pyalong
Kilmore Celtic Festival	Kilmore
The Town	Euroa
Mildura Country Music Festival	Mildura

Phillip Island

Inverloch Jazz Festival	Inverloch
Sounds of Summer	Inverloch
Phillip Island Jazz Festival	Phillip Island
Ocean Sounds	Phillip Island

Appendix 4 - Festivals (by Regional Tourism Area)

Victorian High Country

Mount Beauty Music Festival	Mount Beauty
Wangaratta Jazz & Blues	Wangaratta
Benalla Music Festival	Benalla
Happy Wanderer Festival	Benalla
Beechworth Music Festival	Beechworth
Yackandandah Folk Festival	Yackandandah
Euroa Music Festival	Euroa
A Hitch To The Sticks	Moyhu

Yarra Valley and Dandenong Ranges

Marysville Jazz and Blues	Marysville
Day On The Green	Coldstream
Grapevine Gathering	Coldstream
Healesville Music Festival	Healesville
Gaytimes	Marysville

Various

OK Motel	Charlton/Geelong

Appendix 5 - Acknowledgements

This six-month project involved hundreds of people. Many of them were involved in meetings and discussions which resulted in the direct sharing of information, data and feedback. Very many more participated via the online surveys for small venue operators, concert and festival presenters, performers and live event attendees. The information these latter groups supplied on their business/event operations and professional practice, attendance, patron behaviour and spending patterns were illuminating and central to the success of the project.

When there are so many to thank, someone is almost certain to be missed. They don't deserve to be, but we apologise in advance for any omission.

Firstly, thanks to the **Victorian Government** for funding this project. this study would not have been possible without their support. We have been privileged to work with **Music Victoria** since the first music census project in 2012. It's always been a positive and rewarding experience, and so it proved again. Simone Schinkel, Dale Packard and their team were endlessly supportive and their knowledge and wisdom informed our efforts.. Without access to their knowledge base, membership and comprehensive database of industry operatives, the project outcomes could not have been achieved. Couldn't possibly wish for a better boss!

All that's reported here is the result of the dedication and hard work of the core project team. The most important person in that team was Rosa Coyle-Hayward, the project coordinator and co-author of this report. She occupied the same role when we worked on the *Melbourne Live Music Census* in 2017, so I was delighted that she signed on again. It is no exaggeration whatsoever to say that without her skills, enthusiasm and amazing attention to detail, this report would not exist as the valuable document we believe it to be.

We were fortunate, through the efforts of staff members, and good mates Penny Weber and Chrissie Vincent to again enlist students from **Collarts Entertainment Management** (Applied Business) degree course as our research team. Each of them was allocated one of the 11 Regional Tourism Areas and the professionalism and enthusiasm they displayed in creating our master lists and their dealings with hundreds of regional venue operators indicate a bright future awaits them in the industry. Special thanks then to Hope Cumming, Jonty Czuchwicki, Jae Dromgold, Olivia Gomotos and Grace Treloar. Chrissie recommended two of her graduates, Anniemae Goldring and Chelsea Vandenberg, who came on board respectively as communications manager and graphics consultant. They were responsible, among other things, for designing and distributing the social media assets which allowed us to promote our survey links to the widest possible audience.

The credibility of our reporting relied on access to comprehensive data from all tiers of event presentation, from pubs, clubs and bars through concert presentations in theatres, performing arts centres, community halls and large outdoor venues, to the major regional festivals that have been a much-loved part of the music landscape for many years.

It was obviously a difficult time to be asking owners and operators to revisit a good year in 2019 and document the impact of the pandemic in 2020/2021, so I am very grateful for the 100-odd small venue operators who responded to our survey.

In terms of concert presentations, the regional performing arts centres play a key role. Through Jenny Ryssenbeek, Executive Director of the **Victorian Association Performing Arts Centres**, we were connected with more than 20 venue managers who provided details of their programming and operations via information sharing and survey feedback, as well as highlighting infrastructure gaps and needs in their region.

Likewise, Emma Lake from the **Municipal Association of Victoria** facilitated contact with her network of arts and culture officers across the 47 municipalities within the Regional Tourism Areas. We thus had access not only to programming information, but also to their feedback on infrastructure challenges and needs. We were also assisted by Kate Duncan from **The Push** and Greg Box from the Department of Families, Fairness and Housing who helped us with contacts and supply of information from the dozens of FReeZA groups across the regions.

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Lastly, thanks to the many unnamed here who shared their advice and expertise in numerous conversations and communications and to the hundreds who gave a not inconsiderable amount of time to complete our surveys in such detail.

Hopefully, I'll have the chance to thanks you personally for your contribution at a gig sometime soon. It'll be my shout!

Dobe Newton
Census Project Manager

Appendix 6 - References

Much of the information/data for this report was sourced directly from a range of private and public sector individuals and organisations with an interest in live music event presentations and the intersection with regional tourism, or abstracted from hundreds of responses to online surveys.
Still more was obtained through numerous meetings and conversations.

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