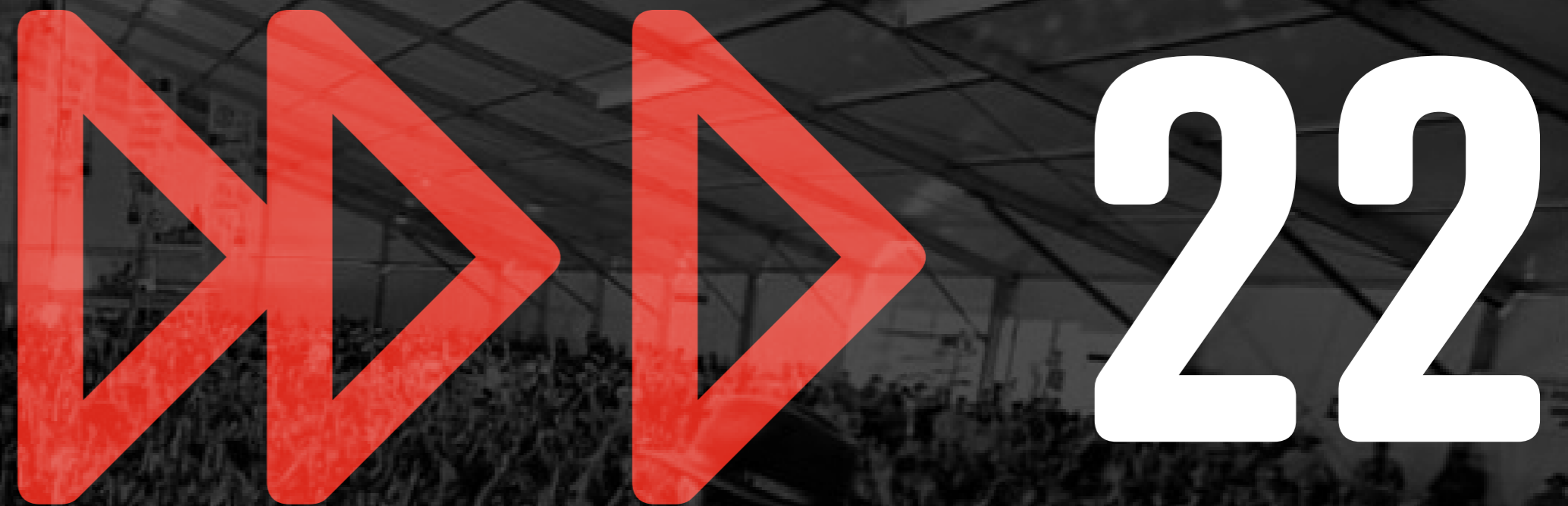




**MUSIC  
VICTORIA**



**22**

**REGIONAL LIVE MUSIC CENSUS REPORT**



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.



## KEY FINDINGS

Live Music Activity and Impact in Regional Victoria 2019

Live Music Activity and Impact in Regional Victoria 2020–2021

Live Music Tourism in Regional Victoria 2019–2021

## EXECUTIVE SUMMARY

The Financial Impact of Regional Live Music Events

The Employment Impact of Regional Live Music Events

The Growth of Live Music in Regional Victoria since 2014

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Queenscliff Music Festival

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# KEY FINDINGS





# Live Music Activity and Impact in Regional Victoria 2019



**29,339**  
live music gigs



**4,532**  
full time equivalent jobs created by live music events



**\$68.7 million**  
offsite food and beverage spending



**\$11.1 million**  
other community spending



**5,296,089**  
audience attendees



**10,000+**  
songwriters/composers based in regional Victoria



**\$18.5 million**  
offsite retail spending



**\$397 million**  
in event spending by attendees



**\$5.4 million**  
offsite tourist attraction spending



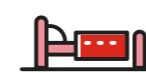
**\$97.8 million**  
event box office



**\$133 million**  
in community spending by event attendees



**\$299.3 million**  
onsite event spending



**\$29.8 million**  
accommodation spending

**\$530.6 million**  
Total Event Value





# Live Music Activity and Impact in Regional Victoria 2020–2021



74%

of events were cancelled/  
postponed/re-scheduled



90%

of performer's  
opportunities lost



66%

of casual and part-time  
jobs lost



76%

of visitor/attendee  
spending lost



62%

of music related income  
lost by performers



# Live Music Tourism in Regional Victoria 2019–2021

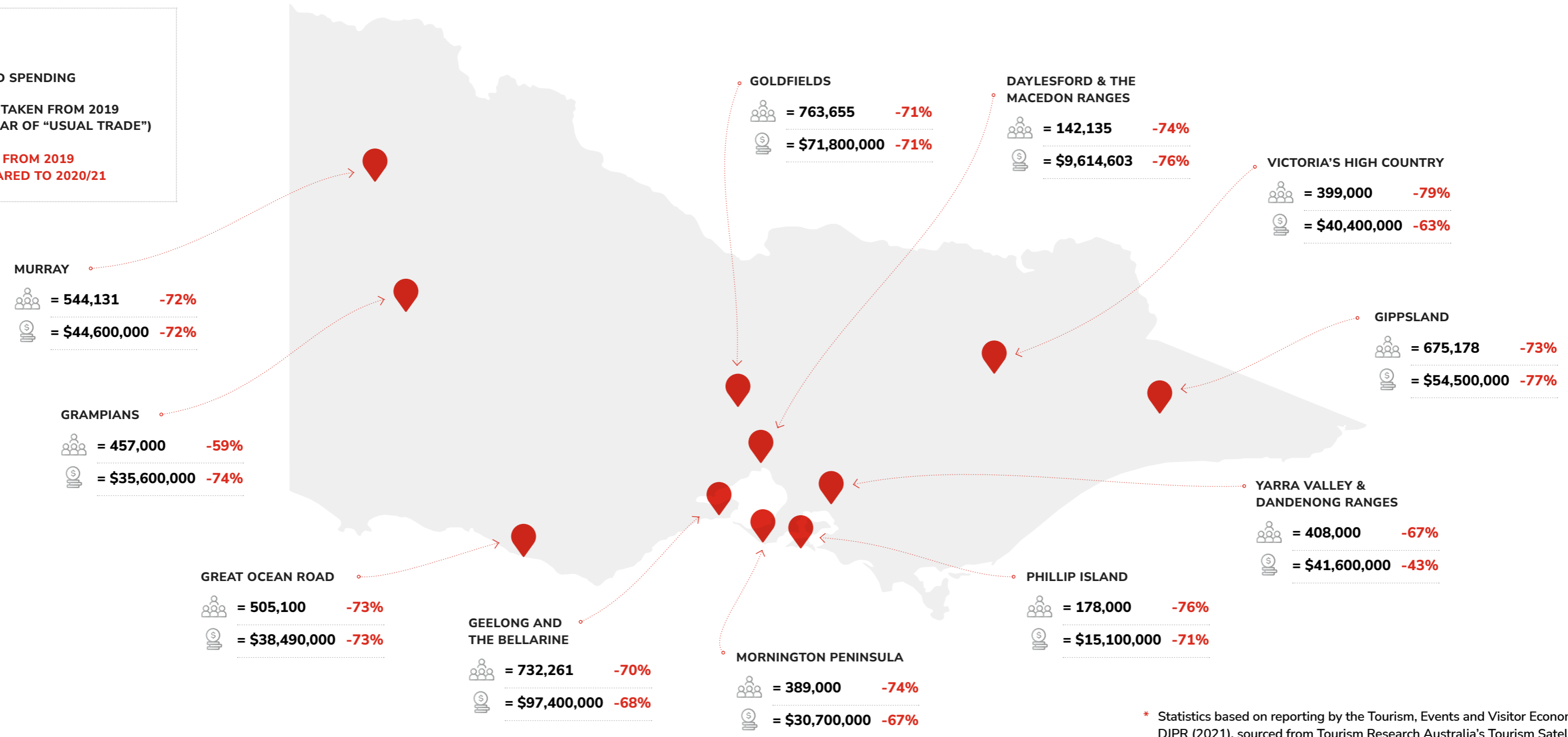


With \$530 million contributed to Tourism Gross Regional Product in 2019, live music presentations are economically significant. This is in addition to their social and cultural contribution to host communities and the wellbeing and mental health benefits they generate for participants and attendees.

**ATTENDEES**  
**REVENUE AND SPENDING**

FIGURES ARE TAKEN FROM 2019  
 (THE LAST YEAR OF "USUAL TRADE")

**% CHANGE IS FROM 2019  
 WHEN COMPARED TO 2020/21**



\* Statistics based on reporting by the Tourism, Events and Visitor Economy Research Unit of DJPR (2021), sourced from Tourism Research Australia's Tourism Satellite Accounts (July, 2021).



# EXECUTIVE SUMMARY

## 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 also wanted to understand the 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.



This report is based on extensive desk research, data sets collected and held by key stakeholders across arts, events, music, tourism and government (that were generously shared), and survey responses from venue operators, event presenters, event attendees and performers involved in the regional music scene.

### THE BRIEF WAS TO FOCUS ON THE ECONOMIC BENEFITS GENERATED BY REGIONAL LIVE MUSIC PRESENTATIONS AND EVENTS IN



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



Enhancing Victoria’s brand and reputation in other states and overseas



Stimulating and driving cultural tourism through regional visitation and consumption

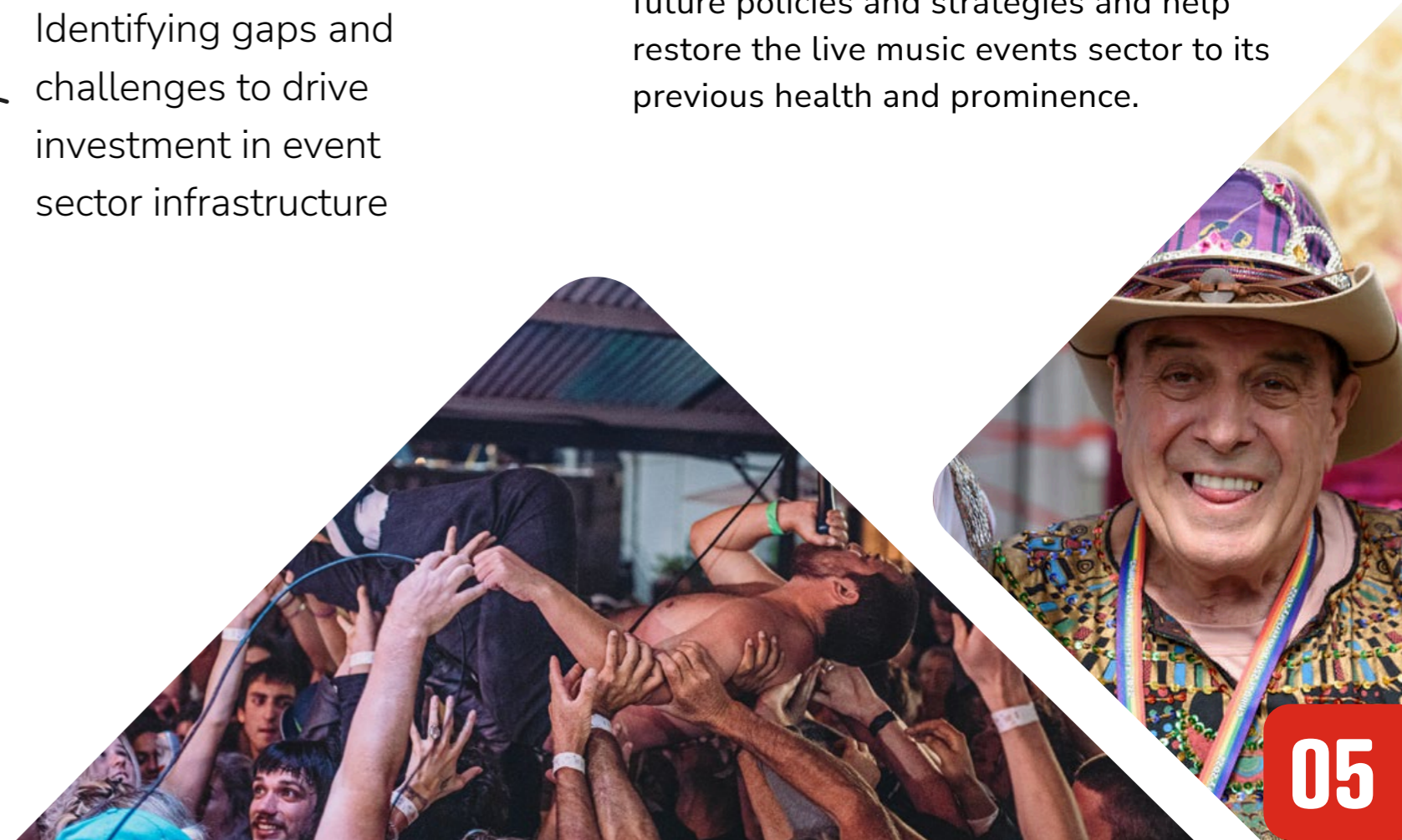


Identifying gaps and challenges to drive investment in event sector infrastructure



Contributing significantly to Gross Regional Product by generating income for thousands of businesses across Regional Victoria

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 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 Financial Impact of Regional Live Music Events



## 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, 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 On-site (Food & Beverage)           | 47.4         |
| Ancillary Spending Off-site (Food & Beverage & Retail) | 35.1         |
| Tourism Attraction                                     | 2.2          |
| Accommodation  | 29.8         |
| Spending in Other Communities                          | 9.3          |
| <b>TOTAL</b>   | <b>176.6</b> |

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 (e.g. wineries).

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.

| CONCERT REVENUE SUMMARY 2019 | \$ MILLIONS |
|------------------------------|-------------|
| Box Office                   | 32.1        |
| On-site Spending             | 12.7        |
| Off-site Spending            | 18.5        |
| <b>TOTAL</b>                 | <b>63.3</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 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.

| VENUES PRESENTING 1+ GIG A WEEK | NUMBER     |
|---------------------------------|------------|
| Daylesford & the Macedon Ranges | 8          |
| Geelong and the Bellarine       | 44         |
| Gippsland                       | 42         |
| Goldfields                      | 49         |
| Grampians                       | 29         |
| Great Ocean Road                | 23         |
| Mornington Peninsula            | 21         |
| Murray                          | 40         |
| Phillip Island                  | 10         |
| Victoria's High Country         | 21         |
| Yarra Valley & Dandenong Ranges | 21         |
| <b>TOTAL</b>                    | <b>308</b> |

The 16,000+ gigs presented in small venues 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.



# The Employment Impact of Regional Live Music Events



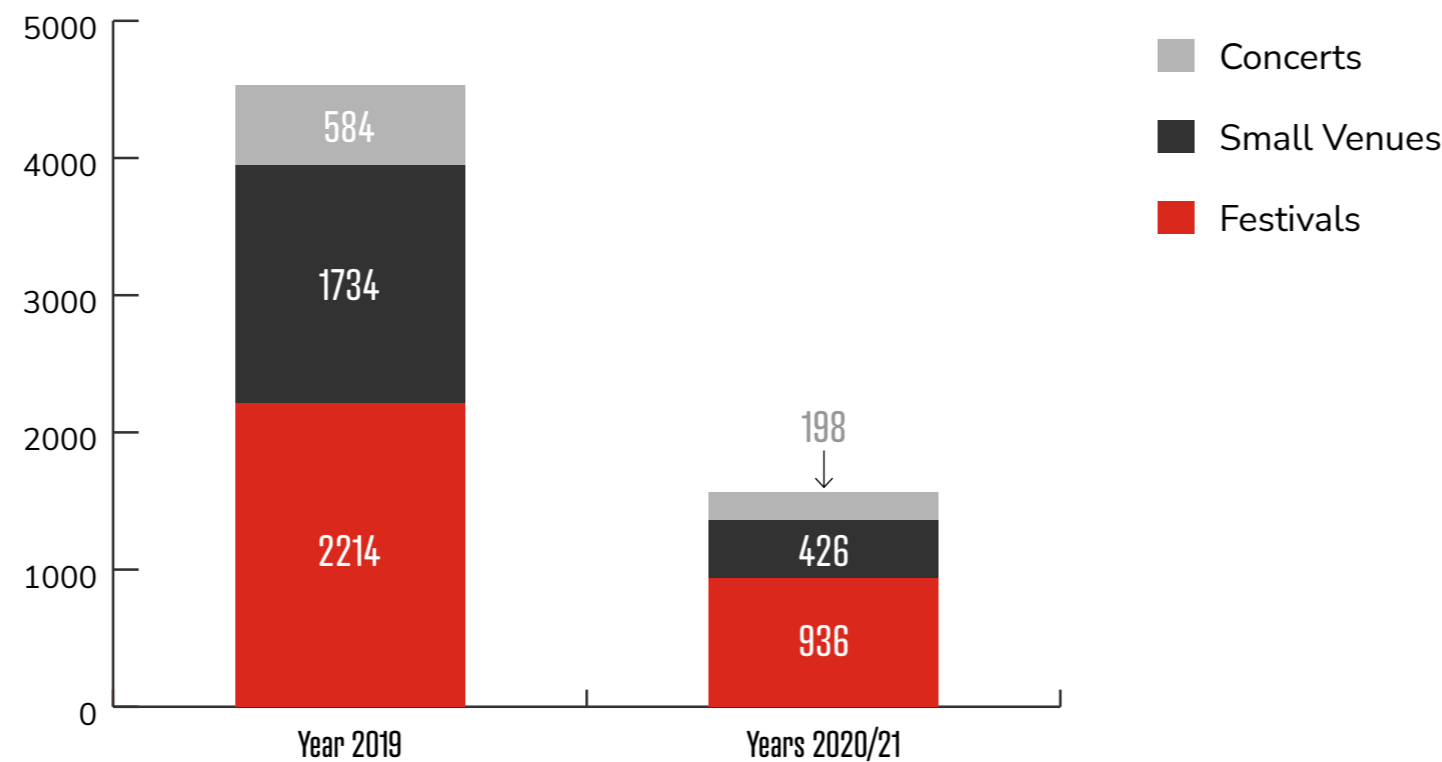
There were more than 4,500 Full Time Equivalent (FTE) jobs created by regional live music events in 2019. However, the covid related cancellations and/or postponement of events and the shutdown of small venues during 2020/2021 had a massive and disproportionate employment impact (compared to other industry sectors), due to the significant casualised workforce, many of whom were not eligible for federal and/or state government support payments and programs.

The effects across the live music industry were also 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.

Festivals retained a greater percentage of their workers. However, as the 2021 Legislative Council inquiry into the impact of COVID-19 on the events and tourism sectors heard from

**FTE EVENT JOBS**  
(2019 compared to 2020/2021)



numerous responders, the uncertainty of ongoing employment saw a significant number of qualified staff exit the sectors during 2020/2021. Widespread concern was expressed that they will not return, creating a significant skills deficit.

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





# The Growth of Live Music in Regional Victoria since 2014



|                              | 2014            | 2019            | GROWTH | 2020/2021      | VARIATION |
|------------------------------|-----------------|-----------------|--------|----------------|-----------|
| <b>NUMBER OF ANNUAL GIGS</b> | 22,750          | 29,339          | 29%    | 7,628          | -74%      |
| <b>EVENT ATTENDEES</b>       | 3,854,500       | 5,296,089       | 35%    | 535,584        | -71%      |
| <b>EVENT BOX OFFICE</b>      | \$60.9 Million  | \$97.8 Million  | 60%    | \$24.5 Million | -75%      |
| <b>ONSITE EVENT SPEND</b>    | \$215.3 Million | \$299.3 Million | 39%    | \$71.8 Million | -76%      |
| <b>EMPLOYMENT (FTE JOBS)</b> | 3,285           | 4,532           | 38%    | 1,560          | -66%      |



# CONCLUSION

Live music presentations create opportunities for regional (and metro) 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.

Restoring the sector to its 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.

This 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.



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).

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.

The information in this report identifies the needs of creative practitioners, venue owners and event presenters who provide the opportunity to involve their communities in significant celebration of our music and incentivise the necessary

investment to underpin a framework to restore the important economic, social and cultural benefits identified.

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.

*Dolbe Newton & Rosa Coyle Hayward*

Music Victoria





# REGIONAL EVENTS SNAPSHOTS



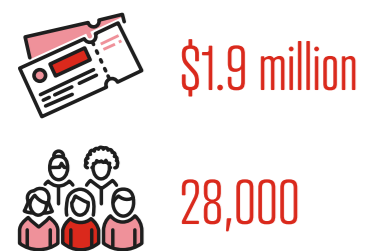


# Queenscliff Music Festival

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% 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.





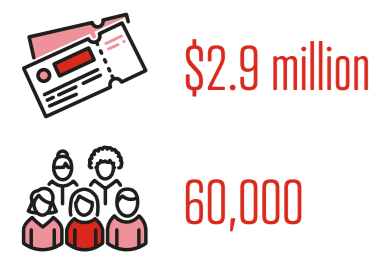
# Port Fairy Folk Festival

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 in late 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, this festival 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.

\* KPMG Port Fairy Folk Festival Economic Impact Study, 2016





# A Day on the Green

This annual winery-hosted concert series was founded by Roundhouse Music (Mushroom Group) at Mount Eliza in 2001.

Since then, some 490 concert events, featuring a range of 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 (Victoria's High Country) and Rochford Estate (Yarra Valley and Dandenong Ranges).

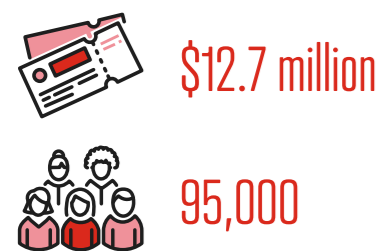
In terms of their value as music tourism generators, they assumed added significance in 2020/21 as their annual January/February window allowed the events to fortuitously take place between periods of lockdown and travel restriction.

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.

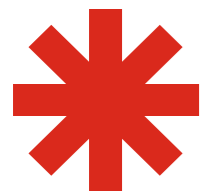




# RECOMMENDATIONS







The recommendations below reflect insights gained from the full report. They articulate the common themes found within the hundreds of responses to our online event, venue and practitioner surveys as well as aligned 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*), direct reporting from event presenters, venue operators and local council officers in the 11 Regional Tourism Areas, and our own insights gained in the process of undertaking this research. To properly understand the context of the recommendations provided below, the full report should be referred to, where a full list of the recommendations that were received/identified is detailed in the Event and Tourism section.

## EMPLOYMENT & SKILLING

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

## INFRASTRUCTURE

- That the state government consider establishing a specific funding program to enable local councils to create fully equipped (audio/lighting), all-weather outdoor performance areas and venue operators to likewise adapt existing outdoor spaces.
- Need 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.
- 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

→ Music Victoria be sufficiently resourced 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, Arts Industry Council, Australian Festivals Association etc).

### AMONG OTHER THINGS THE BODY WOULD BE TASKED WITH

- i. Working with local councils and Regional Tourism Boards (RTAs) 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 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.
- 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).





## 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.





# PHOTO CREDITS

## COVER IMAGE

Ash Grunwald performing at Port Fairy Folk Festival (Great Ocean Road), 2019  
Photo by David Harris

## CONTENTS IMAGE

Entrance to Goomfest, Wangoom (Great Ocean Road), 19 March 2022  
Photo by Kirsty Hill

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GMF in Grampians National Park (Grampians), February 2019  
Photo by Monique Pizzica

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DJ Sugar at Birregurra Mechanics Hall (Great Ocean Road), 28 May 2022  
Photo by Josh Brnjac

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Backstage at Riverlinks for Shepp Music Week, Shepparton (The Murray),  
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Photo by Josh Brnjac

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Merch stand at Down South Festival, Port Fairy (Great Ocean Road),  
26 February 2022  
Photo by Kirsty Hill

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Crowd surfing at Down South Festival, Port Fairy (Great Ocean Road),  
26 February 2022  
Photo by Kirsty Hill

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Molly Meldrum enjoying ChillOut Festival at Victoria Park, Daylesford  
(Daylesford and the Macedon Ranges), 13 March 2022  
Photo by Mish Donnelly

## REPORT DESIGNED BY

Kyla Davies 2022

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Kent Burnside performing at Queenscliff Music Festival (Geelong and the  
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Photo by David Harris

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Aerial photo of Mexican Fiesta at The Shiraz Republic, Cornella (Goldfields),  
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Sound operator at Wrapped Up 3, Phoenix Park, Ballan, (Daylesford and the  
Macedon Ranges), 2 April 2022  
Photo by Josh Brnjac

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Aerial photo of A Day on The Green, Rochford Wines, Coldstream (Yarra Valley  
and Dandenong Ranges)  
Photo by Mushroom Creative

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A seated crowd at Queenscliff Music Festival (Geelong and the Bellarine), 2019  
Photo by Queenscliff Music Festival

## PAGE 11 RIGHT

Missy Higgins and child at Queenscliff Music Festival (Geelong and the  
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Photo by David Harris

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Find Your Voice Choir at Port Fairy Folk Festival (Great Ocean Road), 2022  
Photo by David Harris

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Down South Festival, Port Fairy (Great Ocean Road), 26 February 2022.

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Goomfest, Wangoom (Great Ocean Road), 19 March 2022  
Photo by Kirsty Hill

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A seated crowd at Town Folk Music Festival, Castlemaine  
(Goldfields), 12 February 2022  
Photo by Josh Brnjac

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Barefoot & Whistling rock school at the Pig and Whistle Main Ridge  
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Photo by MP Music Network

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Bob Wilson at Gippsland Country Music Festival (Gippsland), 23 April 2022.  
Photo by Lisa Burge

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Gretta Ray performing at Ocean Sounds Festival at Churchill Island (Phillip  
Island), 8 January 2022  
Photo by Chloe Hall

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Neil Morris at Riverlinks for Shepp Music Week, Shepparton (The Murray),  
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Photo by Josh Brnjac

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Hall entrance for High Country Halls Music Festival at Tolmie (High Country),  
April 2022  
Photo by Youlissys Creative

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Kasey Chambers at Gippsland Country Music Festival (Gippsland),  
23 April 2022.  
Photo by Lisa Burge

## BACK COVER

Baby wearing ear protection headphones at Town Folk Music Festival,  
Castlemaine (Goldfields), 12 February 2022  
Photo by Josh Brnjac







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