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Regional Victoria Live Music Census 2013





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Introduction

Music Victoria's Regional Live Music Census is the first comprehensive attempt to collect quality data on annual live music performance from venues in non-metropolitan Victoria.

It does not claim to be definitive, but has significant authority as the only dedicated study thus far attempted.

While it was possible to conduct the previous metro 'census' in the traditional way with teams of data collectors visiting venues to observe and record operations first-hand, such an approach was not possible in the regions due to limited finance and personnel resources.

(Note: Attempts were made to involve a number of organisations and identify volunteers in key locations, but this proved beyond MV's capacity for this initial study).

Thanks go to the music business students at NMIT for their initial efforts to identify relevant venues and record and collate data; to Music Victoria's Student Council (RMIT, JMC, Box Hill Institute, Victoria University and NMIT) for their endorsement; to Bethany Osborne, Maria Fadljevic and Sam Caplan for their core leadership and hard work. Lastly my thanks to Patrick Donovan, Bek Duke and the Music Victoria Board for their encouragement and provision of the resources to undertake the work.

I can only hope that the data, findings and recommendations contained in this report will convince state and local government of the importance of live music in the regions, and encourage them to provide the resources and assistance necessary to ensure the future health of the sector.

The Regional Census certainly demonstrates that an investment in future studies - as part of a broader strategic plan, would be fully justified.

Dobe Newton
Editor
March, 2014

Background

In 2012 Music Victoria and the City of Melbourne commissioned a live music census of venue operations in the CBD and Greater Melbourne area.

The key findings of that study were –

- 470 small venues regularly presenting live music in the CBD, inner suburban ‘precincts’ and outer suburban areas. In addition, there were 17 theatres concert venues and a number of large, one-off festivals.
- The venues presented 62,000 gigs annually featuring live performance.
- These gigs (plus concerts and festivals) attracted 12.5 million patron visits.
- In small venues, patrons spent \$99.7 million annually on door/ticket entry and a further \$580 million on food, drink, transport and merchandise while attending those gigs.
- Those attending large concerts and festivals spent \$192 million on tickets and an additional \$204 million at the events.
- Live music performances in small venues (no figures available from Live Performance Australia for concerts/festivals), created 18,000 Full Time Equivalent jobs (ABS 35 hrs per week) for musos, 14,000 for DJs and 77,000 for part-time/casual venue staff.

These findings helped clarify some confusion that had arisen from three previous reports –

‘The Economic, Social and Cultural Contribution of Venue-Based Live Music in Victoria’ (DeLoitte Access Economics (DAE) - for Arts Victoria, June 2011).

‘Economic Contribution of Venue-Based Live Music Industry in Australia’ (Ernst and Young for APRA, September 2011).

‘Music Industry Economic Impact Study’ (SGS Economics and Planning for the City of Melbourne, November 2011).

Only one of these reports (DAE) included information from regional Victoria, but in most cases it was aggregated with data from metropolitan venues and not reported as discrete data.

So, one of the recommendations of the Live Music Census report was that, in order to complete the statistical picture, a data gathering exercise needed to focus on live music performance in regional Victoria.

Unfortunately, Music Victoria’s resources precluded putting physical teams of data gatherers in the field, so plans were revised to survey identified venues and report findings. This, to be combined with a number of interviews with key stakeholders – regional community leaders and music operatives and prominent Victorian performers with regional touring experience. In addition, Music Victoria live music ‘summits’ in Ballarat and Geelong were held to generate recommendations.

Methodology

As it was with the metro-based Victorian Live Music Census, the key to collecting quality data was to identify core live music venues – ie. those presenting regular and consistent, rather than occasional, live music performances.

Other studies had relied on a venue list supplied by APRA which included all operatives registered with that organisation to present live music.

Unfortunately, this approach did not discriminate between those who supplied live performance on a weekly, regular basis and those presenting performances occasionally.

Possibly, this explains why, of approximately 145 regional venues identified from APRA's database and surveyed by DAE, only some 20 (13%) responded.

(Note: Although DAE did not list the regional venues surveyed in their report, these figures are based on a map (p. 73) included in the report marking APRA registered regional venues and survey respondents).

Without access to the APRA data (for privacy reasons), or to centralised, street press (hard copy & web) which advertise the majority of live performances in Greater Melbourne, a different approach was needed.

The primary assumption was that the vast majority of regular live music performances take place in venues licensed by the Victorian Department of Justice, whether they be bars, hotels, clubs, performing arts centres or cafes/restaurants.

Using the search facility on the Liquor Licensing website, a comprehensive list of venues in six regional areas was assembled.

A team of NMIT volunteers then set about searching the web and social media to confirm (or otherwise) their presentation of live music.

That done, they were issued with a post-reply survey sheet.

The return rate – 65 from 197 (33%), justified the more focused approach on actual providers.

Music Victoria is thus confident that the sample is numerically large enough and of sufficient quality to justify the findings reported.

Note:

In addition to bricks-and-mortar venues, we know that there are a number of significant music festivals that take place in regional Victoria annually.

Unfortunately, most of the existing research fails to differentiate between metro/regional festival activity.

Certainly that is the case with Live Performance Australia's comprehensive, annual Revenue/Ticket Sales report.

However, the University of Wollongong's Centre for Cultural Environmental Research produced a detailed study in 2012 – *'Reinventing Rural Places – The extent and impact of festivals in rural and regional Australia'*, which contained a great deal of useful, Victoria-specific information.

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Conduct of the Census

September 2013

1. Regional Victoria divided into six geographic regions
2. NMIT music business students allocated specific geographic areas.

October/November 2013

3. Student teams use Department of Justice's web search facility used to compile an initial list of venues in those regions with permanent liquor licences.
4. Over a number of weeks, websites, social media sites and street press are used to identify venues with regular live performance. (Those with no live performance details or only occasional performances were removed from the list).
5. Core venue list with performance details and contacts forwarded to Music Victoria Regional Census team.

December 2013

6. Music Victoria team develops survey instrument and provides it to those venues on the list.

January/February 2014

7. Venue responses collected.
8. Data recorded, analysed and incorporated into –

March 2014

9. Draft & Final Report

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Key Findings

VENUES

- There are 197 venues in regional Victoria identified as providing regular (2 per week) live performances.
- Averaging 2.5 live music gigs per week, these venues host 458 gigs per week across the state and 22,900 gigs annually.
- Like their metro counterparts, regional venue operators - while utilising websites and social media (89%) to promote their gigs, still rely heavily on 'traditional' promotional tools - local press (81%), word of mouth (74%) and posters (65%).
- Solo artists, Duos (87% of venues) and Original Bands (65%) are the preferred live performance vehicles. However, cover bands - used by 57% of venues are far more popular in the regions than in metro Melbourne.
- Rock and pop - perennial favourites in the city, are challenged for popularity in the regions by country and folk/blues performances.
- The majority of regional venues are impacted by regulatory issues - 74% Licencing, 56% Noise, 33% Zoning, Parking and Development. 50% of those citing issues, reported that their impact had 'increased' during the last 12 months.
- When asked to gauge the health of the live music scene, 37% of venues reported an increase in patronage compared to 12 months ago (av 12%), 17% reported a decrease (av 8%) and 46% reported no change.

AUDIENCES

- 49% of the regional live music patrons are in the 26-40 age group - exactly the same percentage as for metro gigs. 31% of those aged 40+ attend regional gigs, while those aged 25 and under account for only 20%. These percentages are reversed in the metro area.
- On a typical weekend, regional venues attract an average of 150 patrons per gig. This translates to an average weekly total of 57,092 per week across 197 regional venues.
- Based on a 50-week operating year, regional venues attract a total of 2,854,500 patrons. Adding the estimated regional festival audience (1,000,000) produces an annual regional total of 3,854,000.

Key Findings

LIVE MUSIC ECONOMY

- 50% of venues have a door/ticket charge for 60% of their gigs. The average is \$21. This generates an annual total of \$35.9 Million in venue income. With regional festival tickets valued at \$25.4 Million, **the annual total for venues and events is \$60.9 Million.**
- The 3.8 million patrons attending regional small venue and festival gigs in regional areas **spend an additional \$215.3 Million** on food/drink/transport/merchandise (small venues \$116.9 million - festivals \$98.4 million).
- **The annual contribution to the regional Victorian economy generated by patron spending at live performances in venues and at festivals and special music events is \$276.2 Million.**

NOTE:

A great many people attending regional music events and festivals spend significant amounts of money 'off-site' - eg. meals travelling to and from, accommodation etc. Several studies on cultural value conducted by the City of Austin in 2006 & 2009, and a 2009 report - '*Contribution of Music Festivals and Major Concerts to Tourism in the UK*', estimate that this off-site spending is at least 50% of total patron spending.

Although we do not have specific data, it is likely this would add tens of millions to the reported ancillary spending total.

JOB CREATION

- Live music performances in regional Victoria create 1,000 full time jobs and 300 full time equivalent jobs for venue staff. Annually a total of 65,600 (50,000 full time, 15,000 full time equivalent). It is estimated that regional festivals provide an additional 4,000 full time and FTE jobs during the planning and operational phase.
- Live music performances in small venues in regional Victoria create an annual total of 22,500 full time equivalent jobs for musicians.

Recommendations

Venue operators were given the chance to make comments on matters affecting their provision of live music performances, and make recommendations to improve their viability. The following are based on their responses and those from artists, agents and promoters.

- **The implementation of a Live Music Plan, with a dedicated regional live music office to act as a one-stop-shop to build relationships and liaise with musicians, venues and the broader industry including agents and promoters.**
- **Encourage individual councils to develop their own tailored music action plan based on existing best practice - eg. Wollongong's Live Music Action Plan.**
- **Encourage sector operators to apply for grants through the \$1 Billion Regional Growth Fund for community-led ideas to build strong, vibrant cities and country communities.**
- **Engage with Tourism Victoria's regional strategy to promote industry development and infrastructure support, and utilise the Regional Tourism initiative to better promote events.**
- **Work more closely with Regional Arts Victoria and VAPAC (Victorian Association of Performing Arts Centres) to build economies of scale into the regional touring circuit.**
- **Support and utilise the Arts Atlas website and Melbourne City free app and gig guide to log and promote regional music events.**
- **Host live music workshops to promote the Live Music Best Practice Guide.**
- **Encourage the music sector to meet regularly at a live music venue to investigate issues facing the live music scene.**
- **Support regional All Ages gigs based on new, improved government conditions and reforms.**
- **Encourage councils to sign up to the implementation of the Agent of Change principle to protect existing venue operations.**
- **Reduce red tape and existing licensing fees to encourage more original live music.**
- **Encourage independent mediation between venues and residents in amenity disputes.**
- **Investigate opportunities for improved transport at night and maintain existing services.**
- **Host regional musician performance, information sharing and networking nights in Melbourne.**

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The Regional Census

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1.1 Annual Regional Venue Operation - Background

Prior to this Regional Census, the only 'data' available was connected with DAE's report although, as earlier noted, there was a lack of real discrimination in that report between metropolitan and regional venues. Nevertheless in last year's 'Live Music Census' we made an attempt to abstract some specific data based on DAE's methodology.

1.2 APRA/DAE - Venue Operations 2012

While confidentiality requirements prevent individual venues from being identified, a postcode analysis of APRA's database identified 455 venues in regional Victoria licensed to provide live music.

Of these -

203 are hotels/motels/resorts

63 are registered clubs

44 are cafe/restaurants

39 are bars

11 are theatres/performing arts centres

8 are nightclubs

TOTAL - 368

The remaining 87 from the list fall into the 'occasional' live music provider category - eg. wineries, sports clubs, function centres.

Using the APRA database, DAE found that 40% of regional Victorian venues were 'dependent' on live music performance, and another 15% were 'supported' by live music performance. It seems safe to assume that in these at least the majority operate on multiple nights of the week.

In the 2013 'Live Music Census' we suggested -

"It is reasonable to ascribe to the small venue sector in regional Victoria the same values as we have to those in the outer Melbourne suburban. That is, the equivalent of one 'premium' night in the precinct venues as their weekly contribution.

This would generate door/entry income of \$10.6 million and involve 1.9 million patrons spending an additional \$87 million at those performances."

The Regional Victoria Census allowed us to put these estimates to the test.

1.3 The Regional Census Venue Database

In the six regional areas studied (see larger map in Appendix A), 197 licenced venues were identified as providing and advertising regular live music performance – a minimum of 1 night on a weekly basis. The majority operated on multiple nights per week.

There are undoubtedly more venues from the APRA list that provide live music performance, but they were excluded from the Regional Census study because they are either ‘occasional’ providers or do not advertise regular live performance as part of their operation.

Our definitive list included –

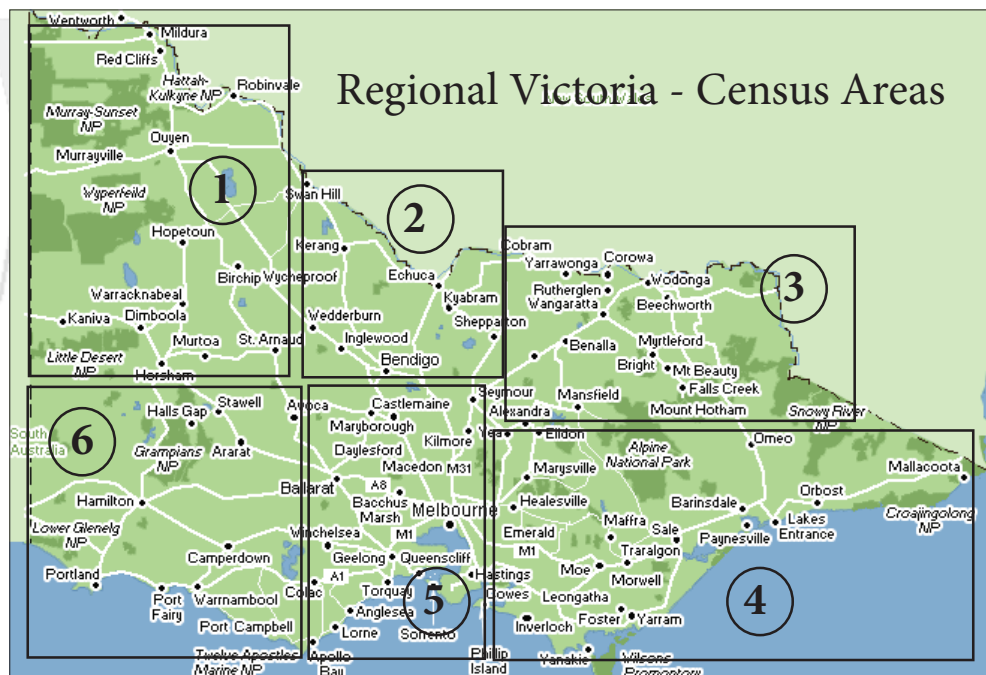
- 111 Hotels (56% of total)
- 25 Bars (16%)
- 17 Restaurants/Cafes (9%)
- 18 Licenced Clubs (9%)
- 12 Nightclubs (6%)
- 7 Performing Arts Centres/Theatres (4%)

1.4 Venue Responses n=65

65 venues of the 197 identified provided detailed survey responses. This excellent response rate – 33%, provided quality data for the report.

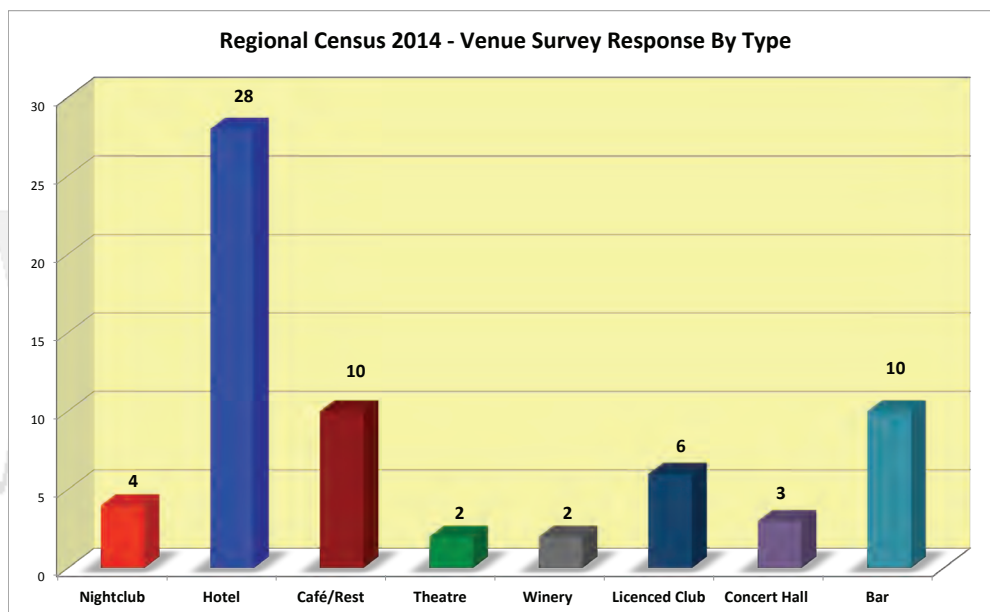
(Note: As detailed previously, the DAE regional venue map contained in their report identified approximately 150 APRA-registered venues, and a survey response rate of approximately 13%).

The survey responses were spread representatively across the six geographic areas.



Across the geographic areas, responses were received as follows –

Area 1	20	Area 4	22
Area 2	38	Area 5	49
Area 3	36	Area 6	32



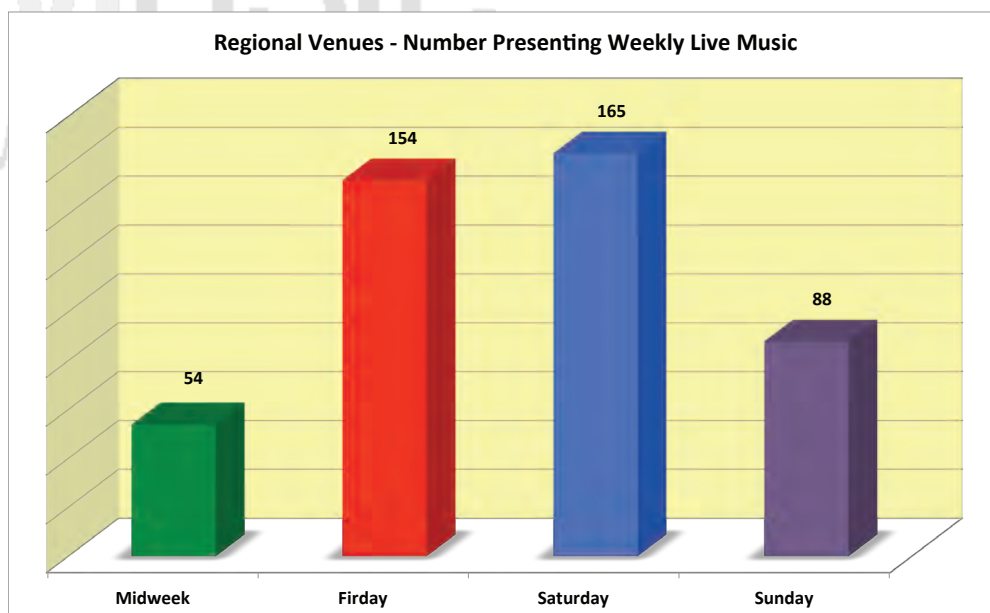
From the 197 master venue list the percentage responding by venue type was –

Hotel	25%
Licensed Club	33%
Performing Arts	70%
Bar	40%
Café/Restaurant	58%
Nightclub	50%

1.5 Venue Operations - Gigs

Regional venues present an average of 2.5 live performances per week.

The number of regional venues presenting regular live performances on a weekly basis were –



In the 65 surveyed venues, this produced a weekly total of 151 gigs, and an annual total of 7,550 gigs.

Using the percentages reported for the 33% Regional Census respondent sample, this would translate across the 197 core live music venues identified as part of the Regional Census - to 458 gigs per week, and 22,900 in a year.

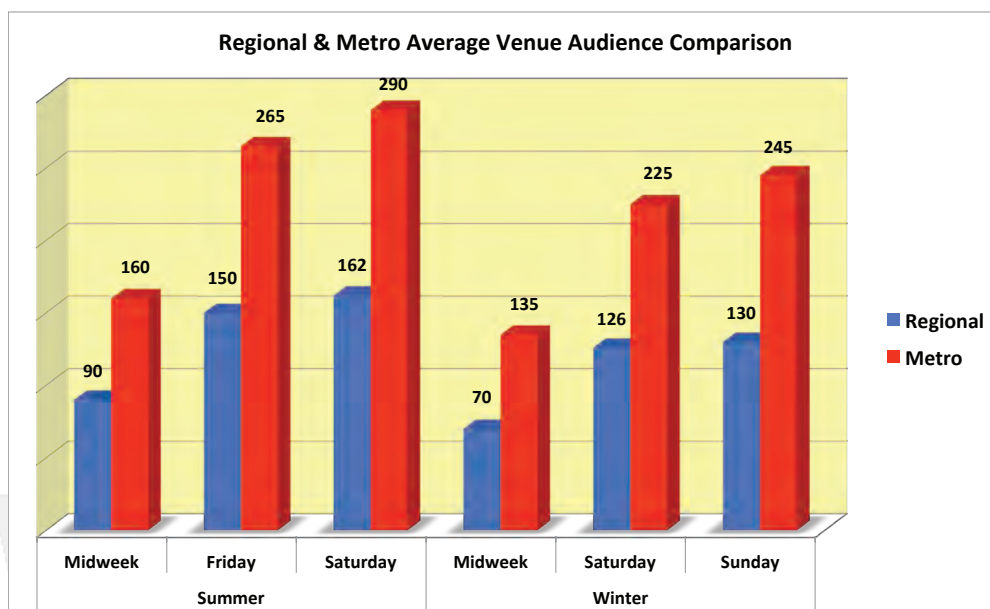
(Note: This compares to the annual total of 62,000 + Greater Melbourne metro gigs identified in the 2013 Live Music Census).

(Note: Neither the regional nor metro figures for festivals available in various reports detail event numbers accurately, however audience numbers/income/spending are available for both and are reported below).

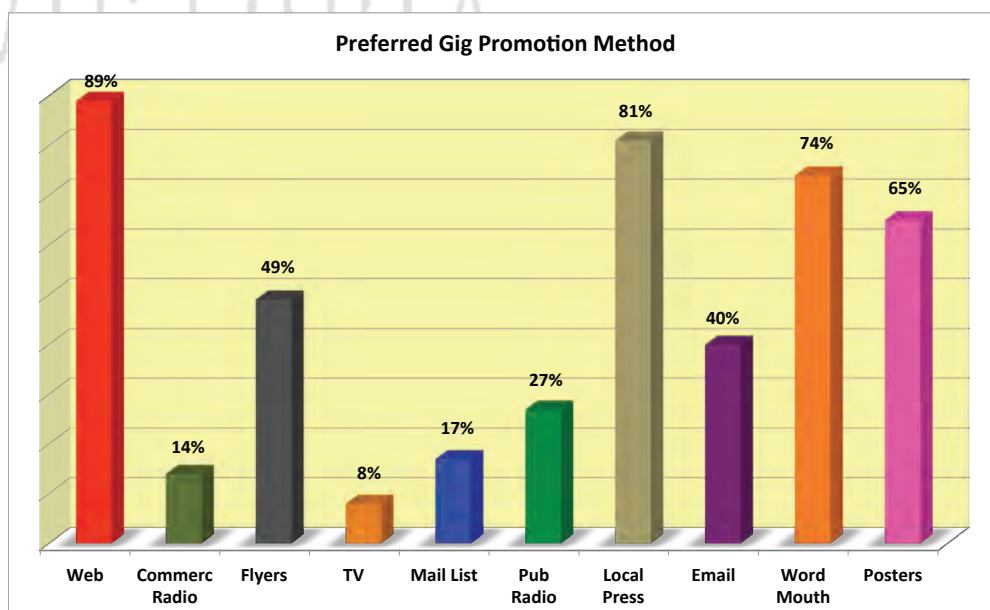
The average capacity of the 65 regional venues that responded was 283.

Removing the larger capacity Performing Arts Centre/Theatre venues from calculations produced an average capacity in small live music venues of 247.

85% of the venues (55) supply meals.



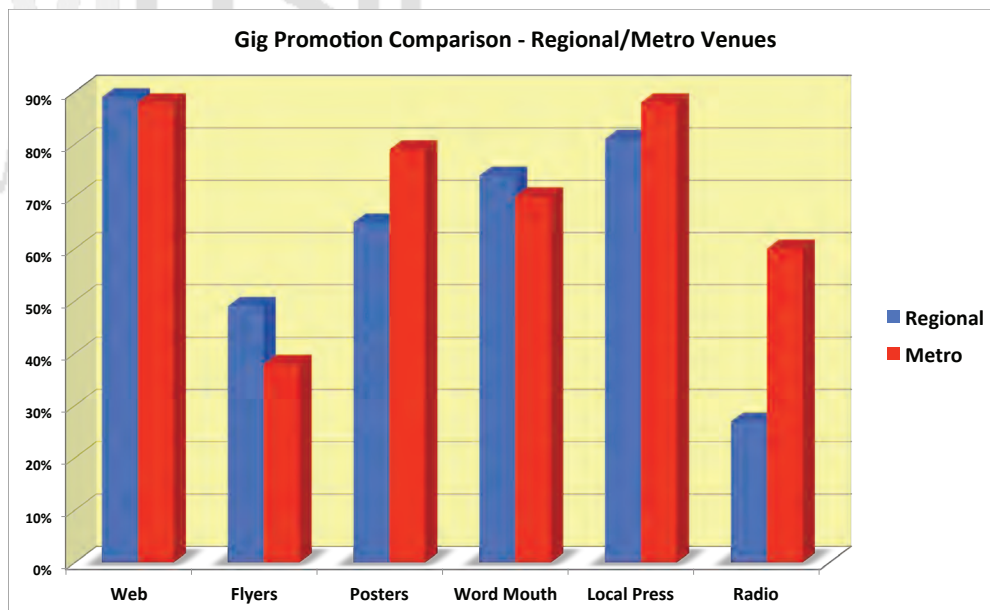
1.6 Promoting Regional Gigs n=65



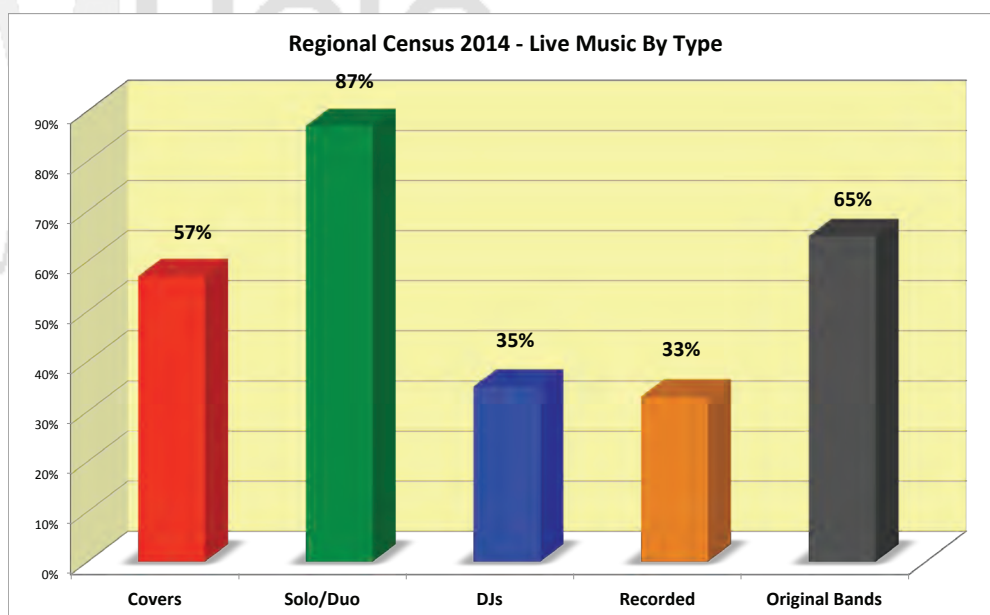
As is the case in metro areas, promoting gigs through the use of websites and social media is dominant but, also as is the case in Melbourne, 'traditional' methods – word of mouth, posters, flyers are still an essential part of the marketing mix.

The most significant difference between gig promotion in regional and metro areas, is the greater reliance on radio by metro venues.

This is readily explained by the obvious importance of public radio (PBS, Triple R) and Triple J in metropolitan Melbourne.



1.7 Type of Live Music Performance n=65

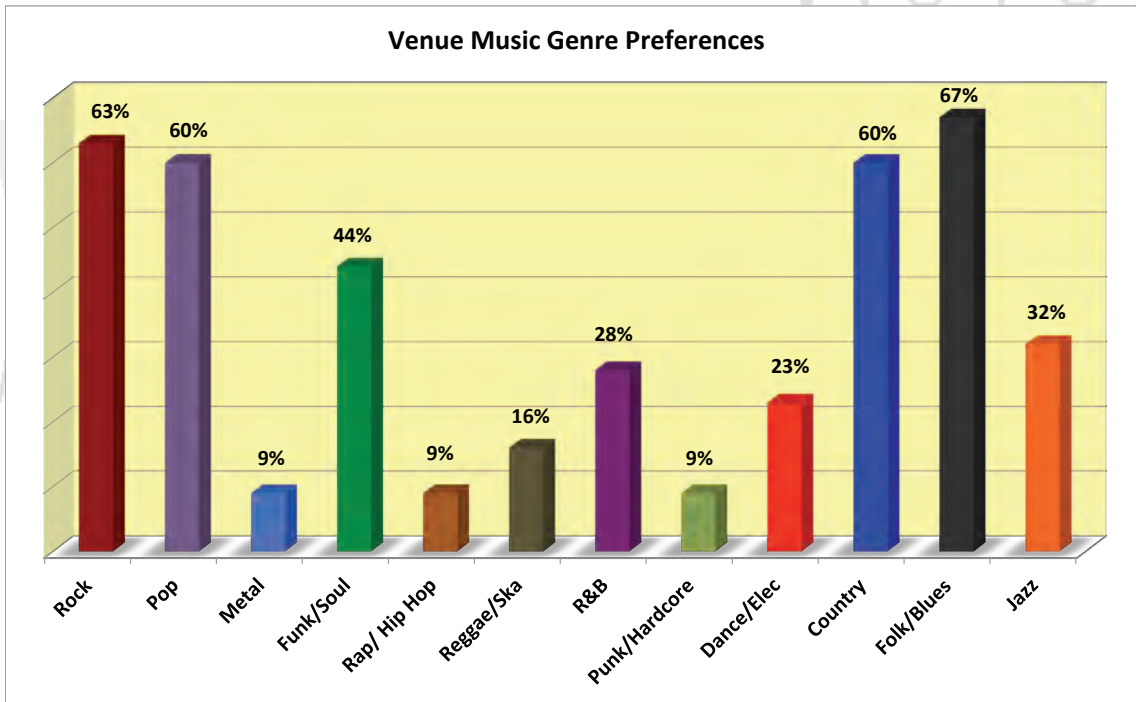


The regional popularity in solo/duo performances mirrors recent increases noted in metro venues (venue information noted in last year's 'Live Music Census' and annual NMIT 'State of Play – Live Music in Melbourne').

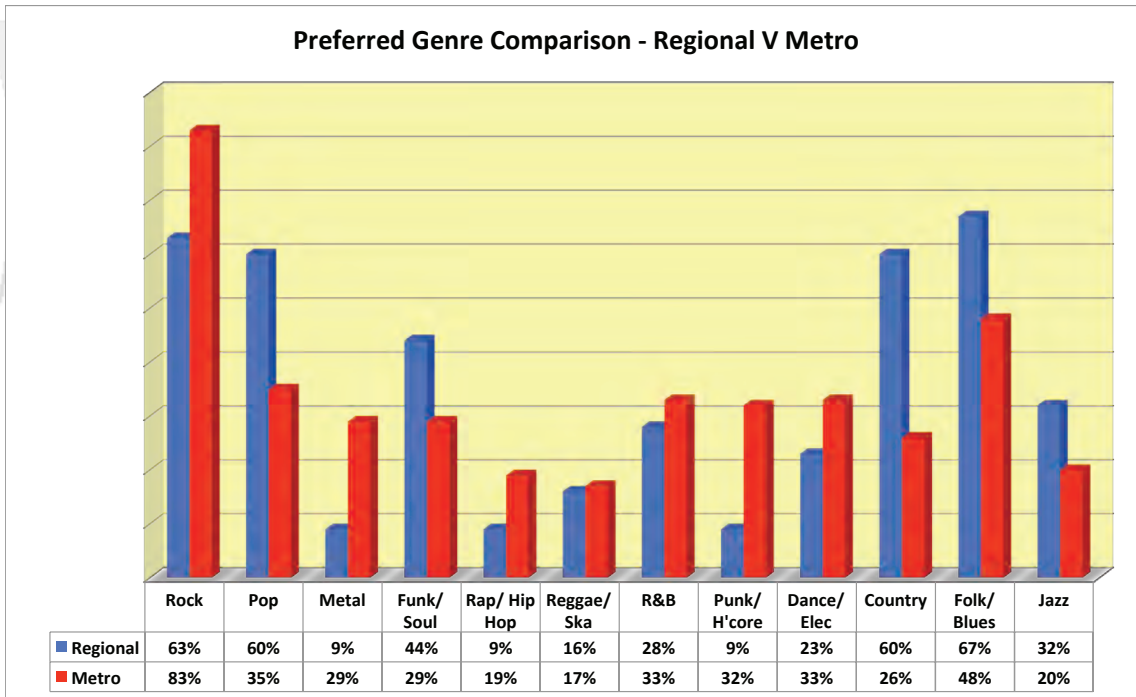
The other thing to note is that cover band performances are a much greater feature of the live music offered in regional Victorian venues than is the case in metro Melbourne.

(Source: NMIT 'State of Play – Live Music in Melbourne 2012' – cover bands were recorded at 13%).

1.7 Live Music Performance by Genre n=65



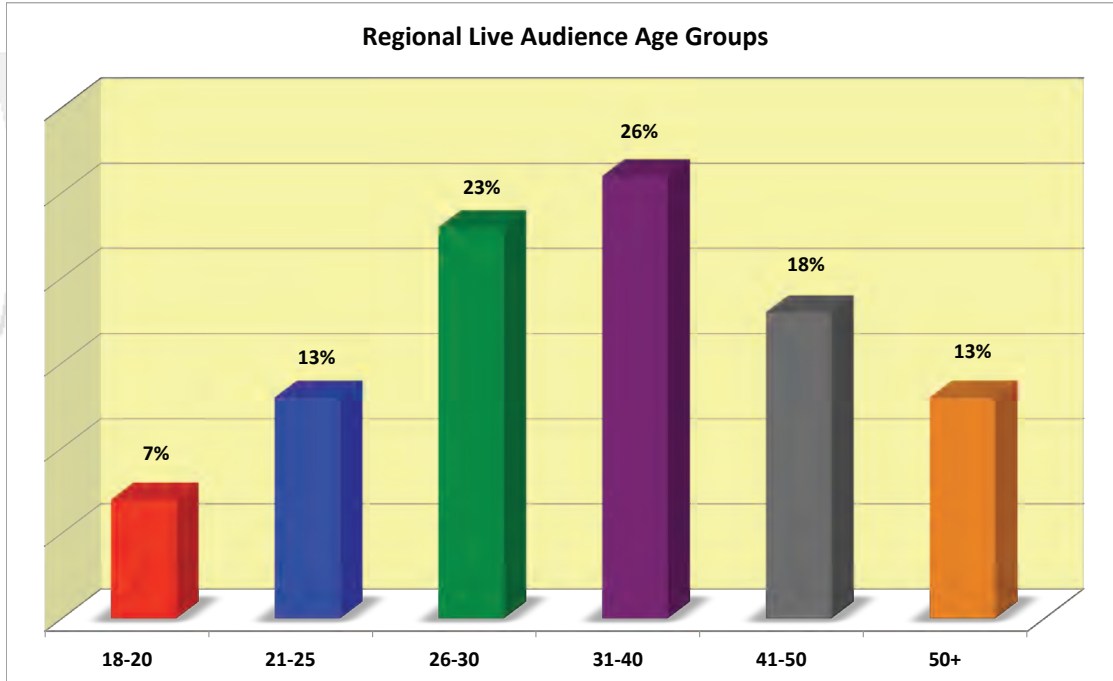
The predominance of solo/duo performances would partly account for the popularity of Folk/Blues and Country genres as a feature of performance - as would the regional area of the survey for the latter. The popularity of Pop would also seem consistent with the significant popularity of cover bands (compared to the Melbourne metro area).



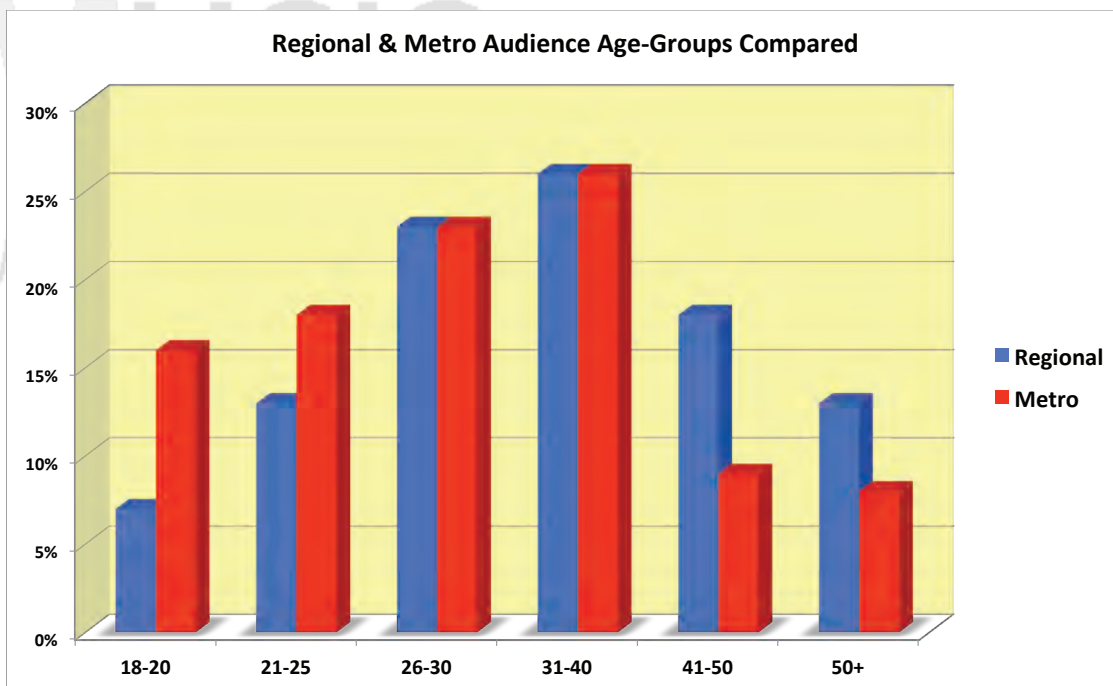
23% of regional venues regularly use a booker or agent to source and contract their live performances.

1.8 Venue Audience - Profile n=65

Venues reported that their typical audience profile was -



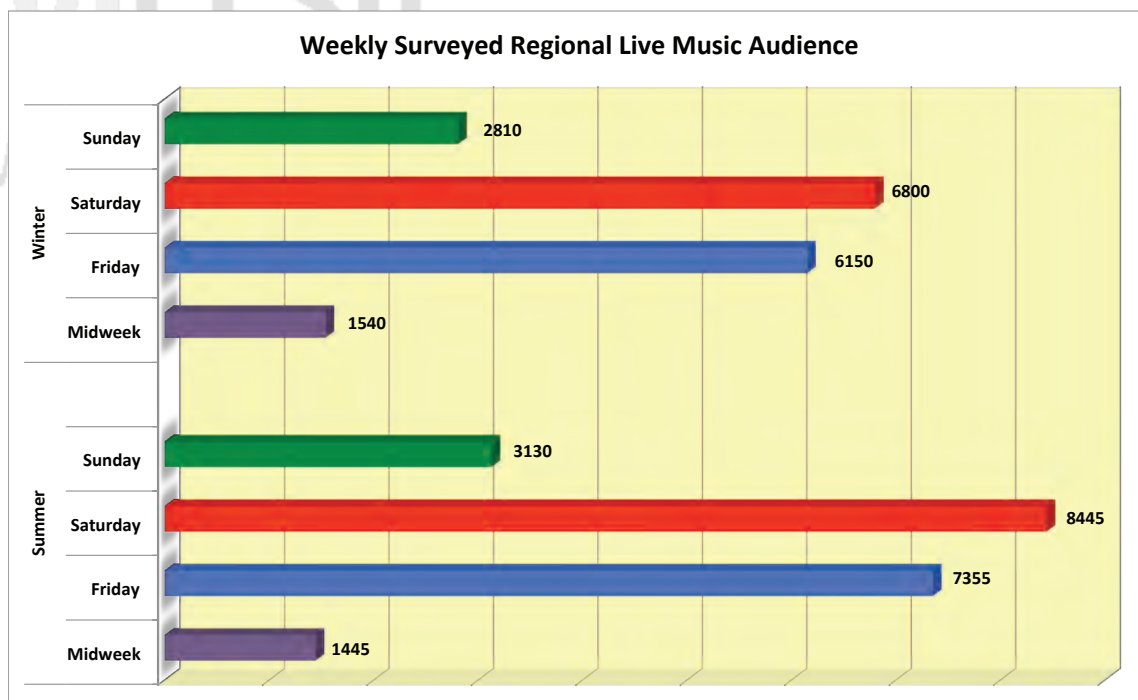
On the basis of the regional and metro surveys, there is little difference in live gig attendance in the age range 26 – 40 years. At the other ends of the age ranges, metro gigs attract more young people, and regional gigs attract an older audience.



1.9 Venue Audience - Small Venue Numbers n=65

On a typical summer weekend, surveyed regional venues attracted 155 patrons per gig. In winter, the average number was 140 per gig.

Across a typical summer and winter fortnight, live music gigs in our surveyed venues attracted 37,675 patrons. (20,375 during a summer week, and 17,300 during a winter week).



Across the 197 regional live music venues identified as 'core' during the study, This would suggest weekly attendance figures of -
 Summer 61,752
 Winter 52,432

Calculating on an annual operating basis of 50 weeks (as was done for the Greater Melbourne Census), to allow for the odd dark night, seasonal variation etc), the total annual audience for live music gigs in 197 small venues regional Victoria in 2013 was - **2,854,500**.

If we add the annual estimated audience for regional Victorian festivals (1,000,000) reported in 'Reinventing Rural Places ...', the annual audience total is **3,854,500**.

Regional Audiences - A Healthy Scene ?

When asked to compare 2013 crowds with those 12 months ago -
37% of venues reported an increase (estimated average - 12%)
17% of venues reported a decrease (estimated average - 8%)
46% of venues reported no change

Total Annual Audience		
65 venues	av 2 gigs per week	
	(50 weeks)	6,500 gigs
6,500 gigs	av 145 per gig	942,500
197 venues	av 2 gigs per week	
	(50 weeks)	19,700 gigs
19,700 gigs	av 145 per gig	2,856,500
	Regional Festivals	1,000,000
TOTAL REGIONAL LIVE MUSIC		3,856,500

Note:

By comparison, annual activity in Greater Melbourne's 460+ small venues was 12,000,000 in 2013.

1.10 Venue Audience - Regional Festival Numbers

Although there are a number of high profile festivals in regional Victoria, there has been a distinct lack of publicly available quality data.

However, a team of researchers from NSW universities studied regional festivals in NSW, Victoria and Tasmania between 2006 and 2009.

The findings were detailed in '*Reinventing Rural Places – The Extent and Impact of Festivals in Rural and Regional Australia*', released at the Monash University 'Policy Notes' Conference in Melbourne (May 2012).

The study identified 2891 festivals in the 3 states – NSW 1340, Vic 1325 (46%) and Tasmania 226.

Regional Victoria was identified as the Aussie 'champ' in regard to the number of festival events.

Ballarat was No. 1 with 73 festivals. Greater Geelong (52 festivals), Mildura (44), Warrnambool (43) and Greater Bendigo (43) were all in the report's top 10, and another 6 Victorian local government areas were in the top 20.

Regional Music Festivals

Between 2006 and 2009 there were 116 regional popular music festivals in Victoria annually.

This represented 10% of the Victorian total. Sport was No.1 (36%), followed by Community (15%) and Agriculture (13%).

The events range from the small, local and boutique to a number of major events such as Groovin' The Moo, Pyramid Hill, Apollo Bay, Meredith, Golden Plains, Falls, Port Fairy Folk, Queenscliff, Wangaratta Jazz and Rainbow Serpent etc

The '*Reinventing Rural Places*' report estimated that these regional music festivals attract an estimated **1,000,000 patrons annually**.

1.11 Regional Venues - Economic Generation

Door/Ticket Income

The Regional Census revealed that 50% of venues have a door/ticket charge for 60% of their gigs. The average charge was \$21, with a range from \$5 in pubs etc through to \$50+ for concerts etc.

On the basis of an average of 2 gigs per week, annual door/ticket revenue is calculated at just short of \$36 million.

Regional festival ticket sales are calculated at \$25.4 million, for **total door/ticket sales of \$60.9 million annually.**

Note:

In order to be consistent with the approach adopted for the 2013 Live Music Census, all calculations are based on 50 weeks of venue operation to allow for dark nights, cancellations and seasonal variation.

Annual Door/Ticket Income		
65 Venues	(50% of venues have charge)	3,250 gigs
	(60% gigs have charge)	1,950 gigs
	(av door charge \$21)	
1950 gigs x \$21 X av 145 patrons		\$6,220,500
197 venues	(50% of venues have charge)	19,700 gigs
	(60% gigs have charge)	11,820 gigs
	(av door charge \$21)	
11,820 gigs x \$21 x av 145 patrons		\$35,991,900
	Regional Festivals	\$25,400,000
TOTAL DOOR/TICKET INCOME		\$60,991,900

Ancillary Spending/Income

The Live Music Census (2013), reported that patrons attending live music performances in small venues spent an average of \$45.50 (food/drink/transport/merchandise) per gig in addition to paid entry.

This figure was entirely consistent with five years of live music consumer research as part of NMIT's annual 'State of Play – Live Music in Melbourne' reporting, and closely matched reported spending levels in DAE's 2011 report for Arts Victoria.

On that basis, patron visits to small venues in regional Victoria generated an estimated **\$117 Million annually in ancillary spending.**

Regional Festival goers were reported by the 'Reinventing Rural Places ...' report as spending an additional **\$98.4 million.**

Note:

Given that the Live Music Census estimated metro festival attendees spent an average additional \$88, this figure seems entirely consistent given that attendance at regional festivals (especially large ones) involves considerably more expense than attending a metro event.

Annual Patron Ancillary Spending		
65 venues	942,500 patrons	
	(90% of patrons)	848,200
848,200 x \$45.5		\$38,595,375
197 venues	2,856,500 patrons	
	(90% of patrons)	2,570,850
2,570,850 x \$45.5		\$116,973,675
	Regional Festivals	\$98,400,000
TOTAL ANCILLARY SPENDING		\$215,373,675

1.12 Regional Venues - Job Creation

Adopting the approach used in the 2013 Live Music Census of Greater Melbourne, we estimate that casual venue staff work an average 6-hour shift.

Using the Australian Bureau of Statistics formula – ie. Full Time Equivalent job = 35 hours, we estimate that annually in regional Victoria, live performances in venues **generate 65,000+ FTE jobs for full time and casual staff.**

Venue Staff Employment			
65 Venues	Venues	Full Time	Casual
Weekly			
Midweek	20	33	47
Friday	48	107	166
Saturday	51	133	195
Sunday	27	64	94
Annual (50 weeks)			
Midweek	20	1,650	2,350
Friday	48	5,350	8,300
Saturday	51	5,650	9,750
Sunday	27	3,200	4,700

Venue Staff Jobs	Full Time	FTE
Weekly	1,011	301
Annual	50,550	15,060
Annual FTE Staff Jobs		65,610

Festival Jobs

Although the ‘Reinventing Rural Places ...’ report did not provide detailed regional festival employment data, it did estimate that during the planning and operational phases of the events there were approximately **4,000 annual FTE jobs created for staff.**

Muso Jobs

Using the DUO as the base for calculation – a conservative approach, and using an average 4-hour involvement per gig as the basic employment measure, we estimate that **22,000+ annual FTE jobs are created for musicians in regional Victorian venues.**

Annual Muso Employment		
(Based on 2 gigs per week in 197 venues)		
Annual Gigs	No. Musos	4 Hours
19,700	39,400	157,600
Total FTE Jobs (@ ABS 35 hrs)		22,514

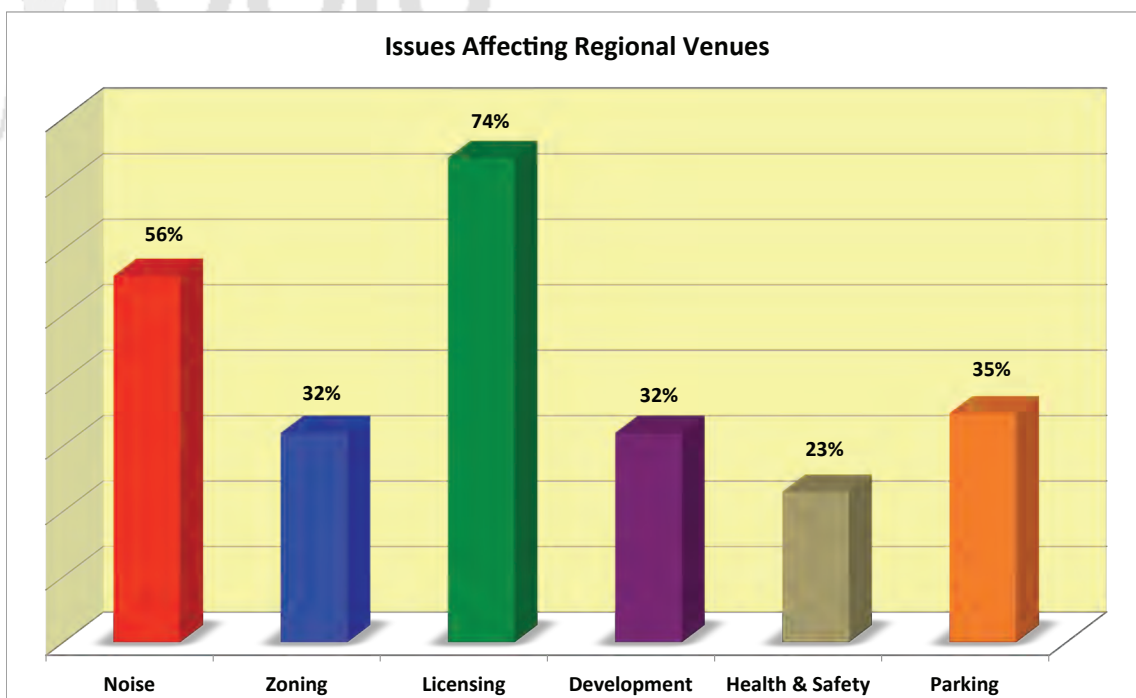
1.13 Regional Venues - Operational ‘Issues’

Despite the fact that there is significant economic generation and job creation as a result of venue live performance in regional Victoria, the majority of venues reported that they had ‘issues’ which affect their operation.

The most significant – licencing and noise, mirror the experience of their fellow operators in metropolitan Melbourne.

Despite recent attempts to simplify elements of the regulatory structure, 50% of the venues reporting these issues identified the impact as ‘increased’ during the last 12 months.

There would seem to be an obvious case for closer cooperation between local government and agencies and venue operators.



The 'New' Big Picture

Updating the 2013 Live Music Census

The 2013 Live Music Census reported on live music activity in Greater Melbourne's 470 small music venues, plus metro concert/festival and regional festival activity supplied by Live Performance Australia's annual Ticket/Revenue report and the 'Reinventing Rural Places ...' report.

The missing piece in a whole-of-state, live music big picture has now been supplied by this Regional Victoria Live Music Census.

We can now update the initial Census findings to provide more detailed figures for live music operations in Victoria.

VENUES

We can now add the 197 small venues confirmed in the Regional Census to the 470 identified in the Melbourne CBD, inner suburban music 'precincts' and outer suburbs.

Total Victorian small venues supplying regular, weekly live music performances - 667.

AUDIENCE

The previous Census estimated annual patron visits at 15.4 million - Greater Melbourne - 12.5 million, Metro concerts and festivals - 1.85 million and regional festivals - 1 million.

If we now add the 2.85 million reported for small regional venues -

Total annual Victorian live music patron visits - 18.25 million.

ECONOMIC GENERATION

DOOR/TICKET

The previous Census reported total annual door ticket sales of \$317.9 million - Greater Melbourne - \$117.9 million, metro concerts/festival;s - \$174.6 million and regional festivals - \$25.4 million.

Add to this the \$35.9 million reported here for regional small venues -

Total annual door/ticket revenue from Victorian live music performances - \$353.8 million.

ANCILLARY SPENDING

The previous Census reported the total patron ancillary spending (gig-related food/drink/transport/merch) at an annual \$844.2 million - Greater Melbourne - \$580 million, metro concerts/festival;s - \$165 million and regional festivals - \$98 million.

Add to this the \$116.9 million reported here for regional small venues -

Total annual ancillary spending at Victorian live music performances - \$961.1 million.

Total Annual Door/Entry + Ancillary Spending Revenue - \$1.31 billion.

MUSIC
VICTORIA

Regional Victorian Live Music Census 2013

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APPENDIX A,B,C

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Census Area Map Census Survey Venue List

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New South Wales

Wentworth
Murray-Sunset NP
Murrayville
Wyperfeld NP

1

2

3

4

5

6

Tasmania

Twelve Apostles NP

Port Campbell

Port Fairy

Geelong

Ballarat

Hamilton

Portland

Lower Glenelg NP

Melbourne

Daylesford

Castlemaine

Stawell

Halls Gap

Ararat

Mansfield

Shepparton

Yea

St. Arnaud

Horsham

Marysville

Mansfield

Yarrawonga

Benalla

Myrtleford

Bright

Mount Hotham

Mansfield

Wodonga

Beechworth

Falls Creek

Orbost

Mallacoota

Mansfield

Traralgon

Morwell

Paynesville

Lakes Entrance

Croajingalong NP

Mansfield

Healesville

Emerald

Moorabool

Moorabool

Wilson's Promontory NP

Mansfield

Cowes

Leongatha

Foster

Yarram

Phillip Island

Mansfield

Swan Hill

Kerang

Birchip

Wycheeproof

Wimmera

Mansfield

Robinvale

Hattah

Kulkyne NP

Ouyen

Hopetoun

Mansfield

Wedderburn

Inglewood

Bendigo

Castlemaine

Maryborough

Mansfield

Daylesford

Kilmore

Macedon

M31

Avoca

Mansfield

Bacchus Marsh

Winchelsea

Geelong

Queenstown

Torquay

Mansfield

Anglesea

Lorne

Sorrento

Phillip Island

Yanakie

Mansfield

Phillip Island

Phillip Island

Phillip Island

Phillip Island

Phillip Island

Dear Venue Owner/Operator,

Thanks for your help. The information we gather annually is made available in a special live music report to industry and government to help better inform decisions. We shall provide a copy of the final findings to all those who assist. Thanks again.

1. What sort of venue do you operate?

Nightclub Hotel Bar Concert
 Cafe/Restaurant Other

2. What is the venue's postcode?

3. What is the capacity of the venue?

4. Do you provide meals? Yes No

5. Do you regularly feature - (Tick all appropriate)

Cover Bands Solos/Duos DJs
 Recorded Music Original Bands
 Other

6. Which music do you regularly feature? (Tick All)

Rock Rap/Hip Hop Dance/Electronic
 Pop Reggae/Ska Country
 Metal R & B Blues/Folk
 Funk/Soul Punk/Hardcore Jazz

Other

7. Do you use a Booker/Agent? Yes No

8. Please estimate your average crowd -

Midweek - Summer Midweek - Winter
 Friday - Summer Friday - Winter
 Saturday - Summer Saturday - Winter
 Sunday - Summer Sunday - Winter

9. When promoting gigs, which do you regularly use? (Tick all appropriate)

Website/s Flyers Local Press
 Beat - Paid Ads TV Email
 Beat - Free Mail List Word of Mouth
 InPress - Paid Age EG Posters
 InPress - Free Herald 'Hit' SMS
 Commerc Radio Public Radio

Other

10. Which two of the above are the most effective?

1 2

11. Do you have your own website? Yes No

If yes, how long have you had it Years

12. Do you use social networks to promote gigs, artists, the venue? Yes No

Facebook MySpace Twitter

13. Do you hire for private functions? Yes No

14. Do you have a beer garden? Yes No

If yes, music in the garden? Yes No

15. How many nights a week do you usually have live music?

Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

16. What % of gigs have a door/ticket charge? %

17. If there's a charge, what is the \$ average ?

Midweek \$ Fri \$ Sat \$ Sun \$

18. On live music nights, how many staff do you employ?

Midweek Full Time Casual
Friday Full Time Casual
Saturday Full Time Casual
Sunday Full Time Casual

18. Do you have -

In-house PA Yes No In-house Engineer Yes No

19. Is your venue currently affected by -

A. Noise Restrictions Yes No
 B. Zoning/Planning Issues Yes No
 C. Licensing Issues Yes No
 D. Building/Development Issues Yes No
 E. Health & Safety Issues Yes No
 F. Parking/Loading Yes No

20. In the last 12 months has the impact of the above -

A. Increased Decreased Stayed the same
 B. Increased Decreased Stayed the same
 C. Increased Decreased Stayed the same
 D. Increased Decreased Stayed the same
 E. Increased Decreased Stayed the same
 F. Increased Decreased Stayed the same

21. Please estimate what % of your live music punters are -

18-20 yrs % 21-25 yrs % 26-30 yrs %
 31-40 yrs % 41-50 yrs % 50+ yrs %

22. How have smoking bans affected your audiences -

Increased % Decreased % The same

23. If De-Licensing was easier, would you hold more all-ages gigs? Yes No

24. Overall, in the last 12 months have your audiences -

Increased % Decreased % The same

25. On performance nights, what are your operating hours ?

Midweek Friday
 Saturday Sunday

26. How could government improve the live music scene ?

.....

Regional Census - Venue List

AREA 1			
Open	Evolution Lounge	Mildura	3500
Open	The Sandbar	Mildura	3500
Open	Dom's Nightclub	Mildura	3500
Open	Setts Bar & Function Centre	Mildura	3500
Open	Mildura Brewery Club	Mildura	3500
Open	Bull and Mouth Hotel	Horsham	3400
Open	Commercial Hotel	Horsham	3400
Open	Exchange Hotel	Horsham	3400
Open	Horsham RSL	Horsham	3400
Open	Horsham Ballan Social Club	Horsham	3400
Open	Royal Hotel	Horsham	3400
Open	Victoria Hotel	Horsham	3400
Open	Wesley PA&Cultural Centre	Horsham	3400
Open	White Hart Hotel	Horsham	3400
Open	Wilson's Hotel & Nightclub	Horsham	3400
Open	Botanical Hotel	St Arnaud	3478
Open	Farmers Arms Hotel	St Arnaud	3478
Open	La Cochon Rose	St Arnaud	3478
Open	St Arnaud Hotel	St Arnaud	3478
Open	St Arnaud RSL	St Arnaud	3478
AREA 2			
Open	Empire States Hotel	Inglewood	3517
Open	Royal Hotel	Inglewood	3517
Open	Universal On McRae	Bendigo	3550
Open	All Seasons International Hotel	Bendigo	3550
Open	The Capital	Bendigo	3550
Open	Brian Boru Hotel	Bendigo	3550
Open	British and American Hotel	Bendigo	3550
Open	Cambrian Hotel	Bendigo	3550
Open	HuHa Club	Bendigo	3550
Open	Newmarket Hotel	Bendigo	3550
Open	Pugg Mahone's	Bendigo	3550
Open	The Hotel Shamrock	Bendigo	3550
Open	Basement Bar	Bendigo	3550
Open	Black Swan	Bendigo	3550
Open	Aussie Hotel Shepparton	Shepparton	3630
Open	Bohjass Wine Bar	Shepparton	3630
Open	Bullion Bar	Shepparton	3630

Open	The Victoria Hotel	Shepparton	3630
Open	Yahoobar	Shepparton	3630
Open	Flo Lounge	Shepparton	3630
Open	Commercial Hotel	Swan Hill	3585
Open	Pizza Graffiti Bar	Swan Hill	3585
Open	Swan Hill Club	Swan Hill	3585
Open	Exchange Hotel	Kerang	3579
Open	Down Town Motor Inn	Kerang	3579
Open	Royal Hotel Kerang	Kerang	3579
Open	Kerrang Sports and Entertainment Venue	Kerang	3579
Open	Caledonian Hotel	Echuca	3564
Open	Echuca Hotel	Echuca	3564
Open	The Palace Hotel	Echuca	3564
Open	Shamrock Hotel	Echuca	3564
Open	American Hotel Echuca	Echuca	3564
Open	Bridge Hotel	Echuca	3564
Open	Harvest Hotel	Echuca	3564
Open	OPT Bar and Resturant	Echuca	3564
Open	Star Hotel	Echuca	3564
Open	Wedderburn Hotel	Wedderburn	3518
AREA 3			
Open	The Nicholas Hotel	Beechworth	3747
Open	The Hiberian Hotel	Beechworth	3747
Open	The Man Hotel	Falls Creek	3699
Open	Bright Brewery	Bright	3741
Open	The General Mt Hotham	Mt Hotham	3741
Open	Chill Bar and Café	Mt Hotham	3741
Open	Hotel High Plains	Mt Hotham	3741
Open	Commerical Hotel	Benalla	3671
Open	Farmers Arm Hotel	Benalla	3671
Open	North Eastern Hotel	Benalla	3671
Open	Victoria Hotel	Benalla	3671
Open	Buffalo Hotel	Myrtleford	3736
Open	Railway Hotel	Myrtleford	3736

Open	Albion Hotel	Wangaratta	3676
Open	Grand Central Hotel	Wangaratta	3676
Open	North Eastern Hotel	Wangaratta	3676
Open	Vine Hotel	Wangaratta	3676
Open	West Side Tavern	Wangaratta	3676
Open	Biralle	Wodonga	3689
Open	Carrier Arms Hotel	Wodonga	3689
Open	O'Maille's Hotel	Wodonga	3689
Open	Bar 3909	Lakes Entran	3909
Open	Central Lakes Hotel	Lakes Entran	3909
Open	Lakes Entrance R.S.L.	Lakes Entran	3909
Open	The Lakes Entertainment Centre	Lakes Entran	3909
Open	Lakes Entrance Bowls Club	Lakes Entran	3909
Open	Golden Age Hotel	Omeo	3898
Open	Hill Top Hotel	Omeo	3898
Open	The Orbost Club	Orbost	3888
Open	Orbost Club Hotel	Orbost	3888
Open	The Commonwealth Hotel	Orbost	3888
Open	George Kerferd Hotel	Beechworth	3747
Open	Hibernian Hotel	Beechworth	3747
Open	Nicholas Hotel	Beechworth	3747
Open	Commercial Hotel	Beechworth	3747
Open	Malacoota Mudbrick	Malacoota	3892
AREA 4			
Open	Mac's Hotel	Melton	3337
Open	The Red Lion Hotel	Kilmore	3764
Open	Crossways	Marysville	3779
Open	Marysville Patisserie	Marysville	3779
Open	Mocha and Lime	Healesville	3777
Open	bohdi Tree café	Healesville	3777
Open	Café Redboc	Emerald	3782
Open	Elevation at Emerald	Emerald	3782
Open	Westernport Hotel	Hastings	3915

Open	HARBOUR VIEW VICTORIANA RESTAURANT	Hastings	3915
Open	KINGS CREEK HOTEL	Hastings	3915
Open	TAMARIND BAY	Hastings	3915
Open	WESTERNPORT HOTEL	Hastings	3915
Open	ESPLANADE HOTEL	Inverloch	3996
Open	LEONGATHA LYRIC THEATRE	Leongatha	3953
Open	THE RHYTHM CAFE	Foster	3690
Open	BAIRNSDALE RSL CLUB	Bairnsdale	3875
Open	BAIRNSDALE BOWLS CLUB	Bairnsdale	3875
Open	CHARLIES BAR	Bairnsdale	3875
Open	THE CLUB HOTEL	Bairnsdale	3875
Open	THE FORGE THEATRE	Bairnsdale	3875
Open	MOTOR CRUISER CLUB	Paynesville	3875
AREA 5			
OPEN	Apollo Bay Hotel	Apollo Bay	3233
OPEN	Great Ocean Road Hotel	Apollo Bay	3233
OPEN	Café Naughtigals	Apollo Bay	3233
OPEN	Apollo Bay Surf Lifesaving Club	Apollo Bay	3233
OPEN	Cuda Bar Lorne	Lorne	3232
OPEN	Lorne Hotel	Lorne	3232
OPEN	Sea Eyes	Anglesea	
Open	Anglesea Hotel	Anglesea	3230
Open	Uber Mama	Anglesea	3230
OPEN	Bird Rock Café	Jan Juc	3228
OPEN	Left Off The Rocks	Torquay	3228
OPEN	Alberts Bar	Torquay	3228
OPEN	Torquay Hotel	Torquay	3228
Open	Growlerz	Torquay	3228
Open	Cafe Moby	Torquay	3228
Open	Front Beach Cafe	Torquay	3228
Open	Kobo Cafe & Bar	Torquay	3228
Open	The Max Hotel	Geelong	3220
Open	The Barwon Club	South Geelong	3220
Open	The Yarra Hotel	Geelong CBD	3220
Open	The Studio	Geelong CBD	3220

Open	The Carlton Hotel	Geelong CBD	3220
Open	Cloud 9 Cocktail Bar	Geelong West	3218
Open	Beavs Bar	Geelong	3220
Open	Eureka Hotel	Geelong CBD	3220
Open	The Edge	Geelong	3220
Open	Geelong Performing Arts Centre	Geelong	3220
Open	Sphinx Hotel	North Geelong	3215
Open	Black Hatt	Geelong	3220
Open	Club Titanium	Geelong	3220
Open	Lamby's	Geelong	3220
Open	Rumors Night Club	Geelong	3220
Open	The Barking Dog	Geelong	3220
Open	the Dive Bar	Geelong	3220
Open	The Wool Exchange	Geelong	3220
Open	Toast Nightclub	Geelong	3220
Open	Barwon Heads Hotel	Barwon Heads	3227
Open	The Grovedale Hotel	Grovedale	3216
Open	Piping Hot Chicken Shop	Ocean Grove	3226
Open	Continental Hotel	Sorrento	3943
Open	Hotel Sorrento	Sorrento	3943
Open	Sorrento-Portseas RSL	Sorrento	3943
Open	Cuda Bar	Lorne	3232
Open	Qdos Art Centre	Lorne	3232
Open	Barwon Hotel	Winchelsea	3241
Open	Winchelsea Hotel	Winchelsea	3241
Open	the court house hotel	Bacchus Marsh	3340
Open	Battlers Tavern	Ballarat	3350
Open	Peter Lalor Hotel	Ballarat	3350
Open	Robin Hood Hotel	Ballarat	3350
Open	Eastern Station Hotel	Ballarat	3350
Open	Karova Lounge	Ballarat	3350
Open	The Palais	Hepburn Springs	3461
Open	Theatre Royal	Castlemaine	3450
Open	The Bridge Hotel	Castlemaine	3450
Open	The Avoca Hotel	Avoca	3467

Open	Union Club Hotel	Colac	3250
AREA 6			
Open	Halls Gap Hotel	Halls Gap	3380
Open	GIFT HOTEL Stawell	Stawell	3380
Open	TOWN HALL HOTEL	Stawell	3380
Open	STAWELL ENTERTAINMENT CENTRE	Stawell	3380
Open	Brix Hotel	Stawell	3380
Open	National Hotel	Stawell	3380
Open	The Stawell Club	Stawell	3380
Open	ARARAT HOTEL	Ararat	3377
Open	COURT HOUSE HOTEL	Ararat	3377
Open	LEOPOLD HOTEL	Ararat	3377
Open	THE CENTRAL HOTEL	Ararat	3377
Open	ARARAT RSL	Ararat	3377
Open	CALEDONIAN HOTEL MOTEL	Hamilton	3300
Open	COMMERCIAL HOTEL	Hamilton	3300
Open	GEORGE HOTEL	Hamilton	3300
Open	HAMILTON PERFORMING ARTS CENTRE	Hamilton	3300
Open	MOJO BAR	Hamilton	3300
Open	ATTIC 491	Hamilton	3300
Open	GRAND CENTRAL HOTEL	Hamilton	3300
Open	CALEDONIAN HOTEL Warrnambool	Warrnambool	3280
Closed	CRITERION HOTEL Warrnambool	Warrnambool	3280
Open	MAC'S HOTEL Warrnambool	Warrnambool	3280
Open	WARRNAMBOOL HOTEL	Warrnambool	3280
Open	WHALERS HOTEL	Warrnambool	3280
Open	The Loft	Warrnambool	3280
Open	Victoria Hotel	Warrnambool	3280
Open	The Lighthouse	Warrnambool	3280
Open	Port Campbell Hotel	Port Campbell	3269
Open	Hampden Hotel	Camperdown	3260
Open	CALEDONIAN HOTEL	Port Fairy	3284
Open	Star of The West Hotel	Port Fairy	3284
Open	GORDON HOTEL Portland	Portland	3305
Open	THE RICHMOND HENTY HOTEL, PORTLAND	Portland	3305