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VICTORIAN LIVE MUSIC CENSUS 2022

EXECUTIVE SUMMARY



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

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

KEY FINDINGS

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COVID Impact on Victorian Live Music 2020/2021

Live Music Impact in Victoria 2019–2021

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KEY FINDINGS



Live Music Activity in Victoria 2019



1,076

Victorian live music venues



\$235.1 million

Offsite attendee spending



184,043

Victorian live music gigs



9,165

Full Time Equivalent gig/
event jobs



50.15 million

Total live music audience



32,048

Number of Victorian
songwriters



\$638.8 million

Box Office/entry revenue




\$1.42 billion

Onsite attendee spending

▶ **Total Event/Gig Value**
 \$2.54 billion
 \$1.72 billion in 2017





COVID Impact on Victorian Live Music 2020/2021


 **69%**
of event revenue lost

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


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


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


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


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


HEALTH & WELLBEING

 **77%**
of performers reported their mental health impacted

 **66%**
of venue/event managers reported their mental health impacted

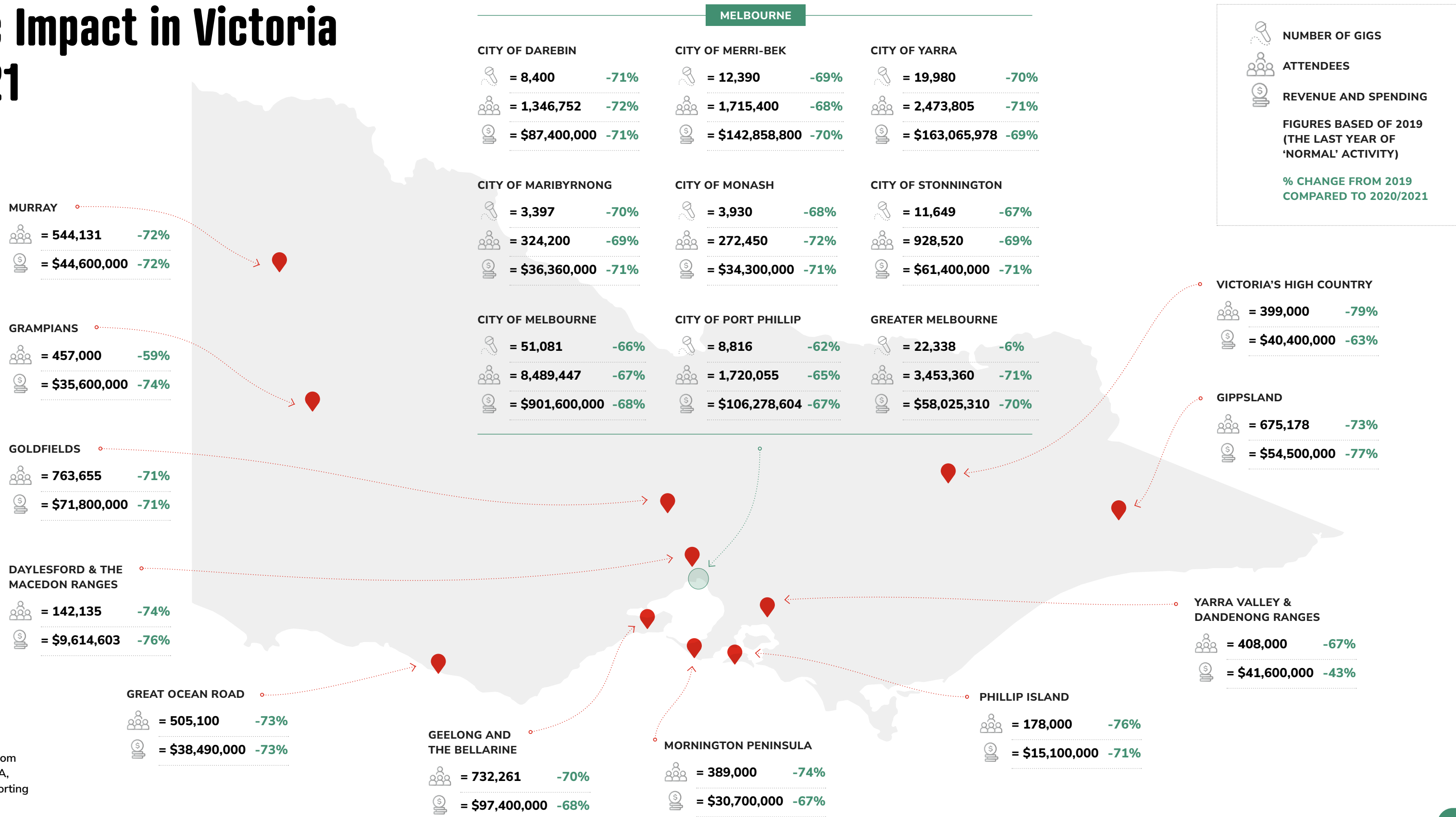
 **46%**
of performers considered leaving the industry

 **49%**
of venue/event managers considered leaving the industry

 The impact was greater in metropolitan Melbourne than regional Victoria.



Live Music Impact in Victoria 2019–2021



NUMBER OF GIGS
 ATTENDEES
 REVENUE AND SPENDING
 FIGURES BASED OF 2019 (THE LAST YEAR OF 'NORMAL' ACTIVITY)
 % CHANGE FROM 2019 COMPARED TO 2020/2021

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

EXECUTIVE SUMMARY



This report draws on extensive desk research, plus data and insights directly and generously shared by music industry individuals, event and venue operators, stakeholder organisations and state and local government agencies. That information has been supplemented by extensive survey responses from venue operators, event presenters, performers and live music attendees involved in the Victorian music scene.

THE PROJECT

In July 2021, Music Victoria was commissioned by the Victorian Government’s Department of Jobs, Precincts and Regions to research and quantify the economic generation, job creation and visitation driven by live music events and presentations in regional Victoria. The first such study since our *Regional Music Census* of 2014.

This provided the incentive to update the *2017 Melbourne Live Music Census* to create the first ever whole-of-state live music report.

This metro component was made possible by the support of project partners — the cities of Darebin, Maribyrnong, Melbourne, Merri-bek (Moreland), Monash, Port Phillip, Stonnington and Yarra — the often identified music ‘precincts’ of this city. Also joining were the Australasian Performing Right Association (APRA) and the Live Music Office.

As previously, we adopted a ‘census’ methodology — the gathering of as comprehensive a data set as possible, rather than adopting a selective sampling approach. This was done in order to accurately capture activity at the ‘grass roots’ — in the hundreds of small venues that are such a core component of our live music ecosystem.

THE FOCUS WAS ON THE RANGE OF BENEFITS GENERATED BY LIVE MUSIC PRESENTATIONS IN VICTORIA IN



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



Enhancing the state’s brand as a cultural destination for residents, interstate and international visitors.



Stimulating regional and metropolitan economies through music tourism.



Identifying priorities for targeted policy and regulatory support and investment.



Contributing to Gross State Product by generating income for thousands of small businesses.

The vital ingredient in successfully carrying out the research was our ability to again enlist a team of students enrolled in entertainment degree courses at Collarts (Australian College of the Arts). They were appointed as coordinators for the state’s 12 designated Tourism Areas (11 regional plus Greater Melbourne). The results reported owe much to their diligence, enthusiasm and skill.

It was a unique challenge to gather data on activity in 2019 — the last year of ‘normal’ operations and compare it with that from 2020 and 2021 when entertainment and hospitality sector businesses, practitioners, workers and music fans were so adversely impacted by restrictions, closures and cancellations associated with COVID-related public health orders.

Providing that detailed comparison will better-inform the policy, investment and planning decisions required to restore our renowned live music scene to its former robust health.

Bob Newton

Project Manager
Music Victoria

Financial Impact of Victorian Festivals 2019–2021



FESTIVALS

As always, our examination of festivals in Victoria begins with an analysis of the data contained in the annual Ticket and Revenue Survey issued by Live Performance Australia covering 12 categories of performing arts activity.

The areas of interest for this research cover ticket sales and revenue for contemporary music concerts and festivals, opera, classical music and musical theatre.

The data is based on reporting to LPA by a range of events, arts organisations and agencies and major ticketing agencies.

It is indicative rather than definitive, as a number of events/venues are not involved. The authors, Ernst & Young, regularly note that for contemporary music concerts especially there is under-reporting.

The LPA information is supplemented by event licences issued by APRA for the performance of songs and recordings at festivals and concerts.

In addition, our research team compiled a definitive list of festivals and presenters who shared their data with us directly or via an online survey.

The music festival category is the one where regional activations outweigh those in metropolitan Melbourne.

2019

Although there are hundreds of festivals with a music component, it is not possible to accurately apportion a specific live music value, so we have concentrated on dedicated music events identified by the research team — 89 in regional Victoria and 35 in metro Melbourne.

Some are genre-specific, others more eclectic; some free, some ticketed — or a combination; some take place on a single site, others spread across venues; some single-day others multi-day; some ‘boutique’ with small audiences, others attracting many tens of thousands.

Metro festivals attracted 388,000 paying patrons with an additional 500,000 attending free components.

Regional festivals attracted 405,000 paying patrons, who spent significant amounts off-site on accommodation, food and beverage and general retail.

Festival revenue in 2019 totalled \$313.8 million.

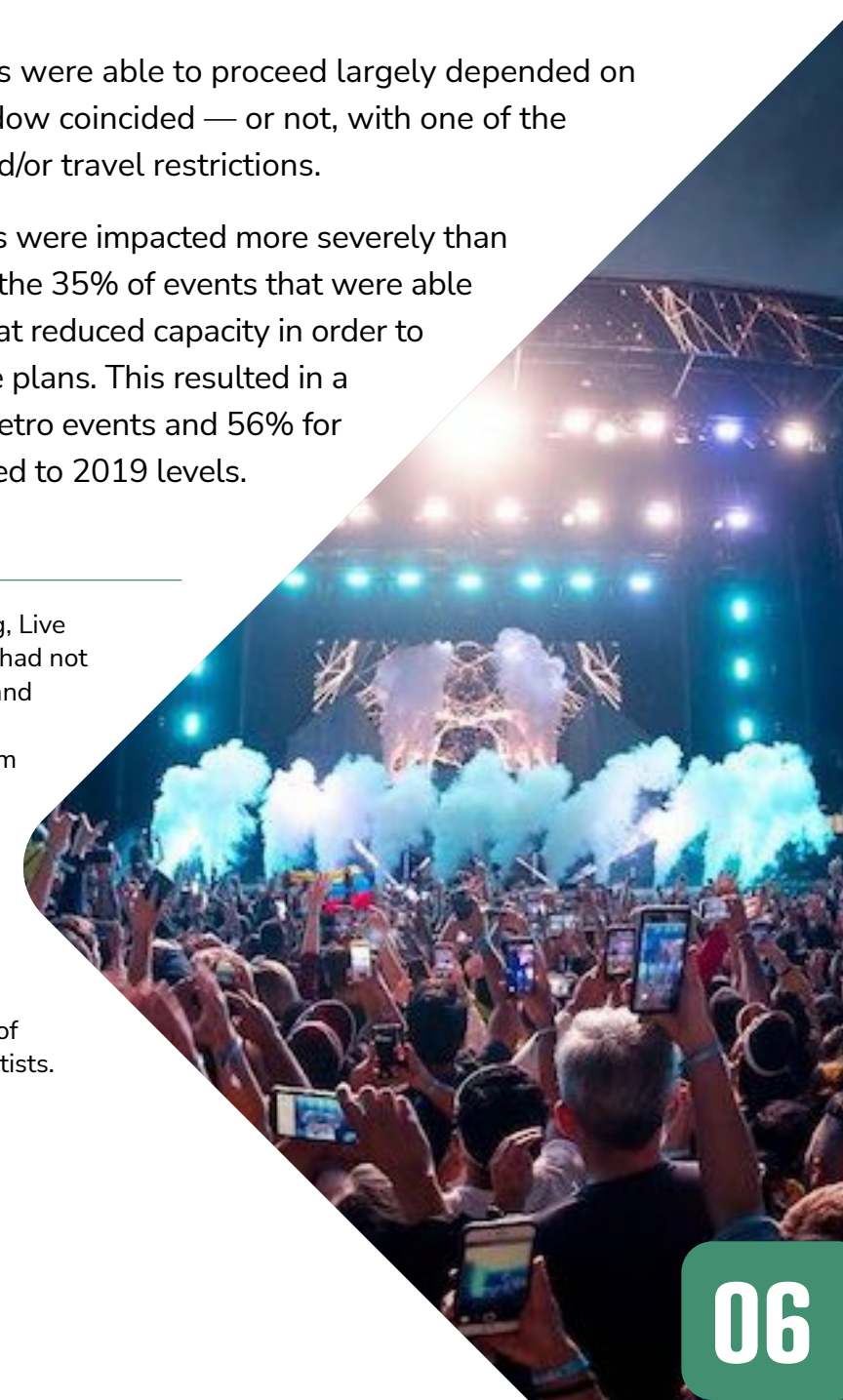
FESTIVAL REVENUE 2019	REGIONAL \$ MILLIONS	METRO \$ MILLIONS
Box Office	52.8	49.5
On-site Ancillary	47.4	54.6
Off-Site Ancillary	76.4	33.1

COVID IMPACT

Whether or not festivals were able to proceed largely depended on whether the event window coincided — or not, with one of the periods of lockdown and/or travel restrictions.

Metro Melbourne events were impacted more severely than those in the regions. Of the 35% of events that were able to proceed, 80% did so at reduced capacity in order to comply with COVIDSafe plans. This resulted in a 75% revenue loss for metro events and 56% for regional events compared to 2019 levels.

At the time of reporting, Live Performance Australia had not released their festival and concert data for 2021. However, we know from other sources that while some major events proceeded, most could not viably do so due to audience capacity restrictions and the ongoing unavailability of international touring artists.



Financial Impact of Victorian Concerts 2019–2021



CONCERTS

In 2019, APRA issued 2,230 special event licences for concert presentations in Victoria — 1,520 for metro events and 730 for regional.

As is the case with festivals, these events cover all popular music genres and vary significantly in size, from international artist performances attracting many thousands to metro stadiums and arenas and regional wineries, to concert events in much smaller venues such as performing arts centre theatres, seated bandrooms and community halls.

In addition to the analysis of the APRA information, we had access to direct reporting from the major ticketing agencies and major concert presenters including The Melbourne Park Olympic Trust (Rod Laver Arena, John Cain Arena, Margaret Court Arena, AAMI Park), The Arts Centre of Melbourne (Hamer Hall, State Theatre, Sidney Myer Music Bowl) and A Day On The Green.

As has been the case with previous Census projects, we have had access to information from the LPA’s Ticket & Revenue Survey which details concert activity associated with opera, classical music and musical theatre. As we have previously done, revenue and attendance for the latter category has been discounted by 30% to allow for comparison with the 2017 Live Music Census.

In 2019, we calculate that 3,704 popular music concerts in the state attracted 3,928,000 paying patrons – 3.6 million in metro Melbourne and 328,000 in regional Victoria. The performances created 35,000 performance opportunities for artists.

Concert Revenue in 2019 totalled \$992.4 million.

CONCERT REVENUE 2019	REGIONAL \$ MILLIONS	METRO \$ MILLIONS
Box Office	32.1	363.2
On-site Ancillary	12.7	323.3
Off-Site Ancillary	18.5	42.6

COVID IMPACT

As seated events, some concerts were able to adhere to density/capacity limits which prevented many festivals and small venues with standing crowds from operating.

However, the border closures largely prevented interstate and international artist from touring and regional and interstate fans from attending Melbourne concerts.

The experience of the Arts Centre Melbourne — one of our most prolific presenters was typical. In 2019, 2.1 million patrons attended 2,022 concerts. In 2020, 244 events (-81%) attracted an audience of 325,000 (-78%). In 2021, although the number of events doubled to 548, density limits restricted the audience to 403,000 — a 24% increase.



Financial Impact of Victorian Small Venue Gigs 2019–2021

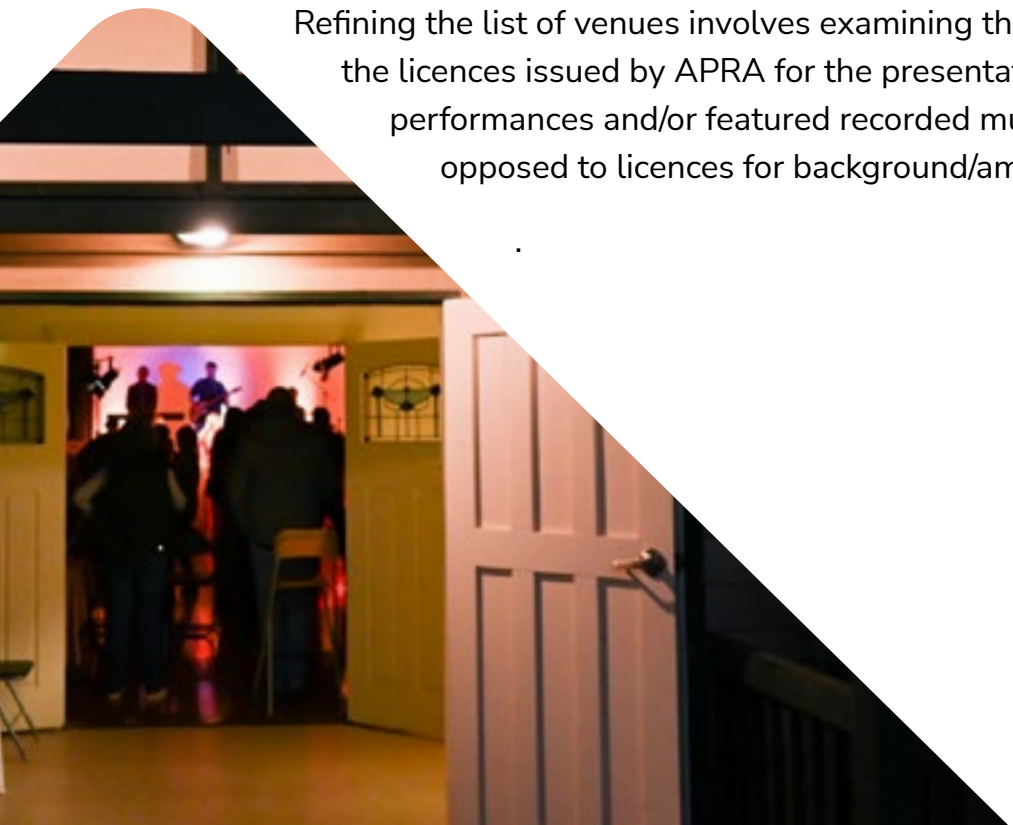
SMALL VENUES

As we have explained in all our live music research projects, the exhaustive ‘census’ approach was developed mainly in order to capture data from gigs in the hundreds of small venues across regional and metropolitan Melbourne.

Mainly because there are no reporting agencies nor centralised mechanism for data collection, this vital sector of the industry has often gone unreported.

The starting point is the many thousands of liquor licences issued to Victorian venues — typically On-Premises, Full Club, General and Late-Night, which are typically issued to premises presenting live music.

Refining the list of venues involves examining the details of the licences issued by APRA for the presentation of live performances and/or featured recorded music — as opposed to licences for background/ambient music.



2019

1,461 ‘appropriate’ licences were issued by APRA 799 for regional venues and 662 for metropolitan.

Using venue websites, social media pages, gig listings in ‘Beat Magazine’ and responses from individual venues, the research team identified 308 regional venues and 505 metropolitan venues that were ‘regular’ presenters — a minimum of one gig per week. We note that metro Melbourne recorded 464 regular venues in the 2017 Melbourne Live Music Census.

Approximately 60% of shows presented in small venues are free entry.

48,120 shows attracted 15.1 million patrons and generated total revenue of \$1,189 million.

SMALL VENUES REVENUE 2019	REGIONAL \$ MILLIONS	METRO \$ MILLIONS
Box Office	17.6	123.6
On-site Spend	160.1	823.9
Off-Site Spend	29.4	35.1

COVID IMPACT

Victoria’s small venues were the hardest hit in the nation through seven periods of lockdown and restriction across 2020 and 2021.

The impact has been reported by several advocacy groups — I Lost My Gig and Save Victorian Live Music Events, with Music Victoria reporting to a Parliamentary Inquiry that the sector operated across the two years at approximately 8% of pre-pandemic capacity.

Responders to our small venue survey estimated that 75% of planned gigs were cancelled or postponed and that they were able to operate for an average of only 10–12 weeks across the period.

Performers who rely so heavily on this sector reported a 68% loss of music-related income.

Their plight is underlined by the experience of one of our most prolific presenters — The Tote Hotel in Collingwood. Pre-pandemic, it presented an average of 730 shows annually (2,500 gigs). From the announcement of the State of Emergency in March 2020 through to December, they were only able to present 5 shows in total. Although things improved in 2021 — especially during the 1st and 2nd quarters, the venue was still only able to present 157 shows (540 gigs).

At no time was it able to operate at more than 36% of pre-pandemic levels.

The Employment Impact of Live Music in Victoria



2019

In 2019, live music performances in Victoria created 14,755,650 hours of employment for performers, production personnel, security operatives and casual and part-time venue and hospitality staff employed in pubs, clubs, bars, concert venues and at festival sites. This equates to 9,165 Full Time Equivalent Jobs.

This work includes the window of event presentation and the lead-up period where appropriate. It does not include full-time management positions.

As a general rule, part-time employment is more prevalent in the event sector (concerts and festivals) than the small venue sector where the workforce is more casualised — the shift-based ‘gig economy’.

FTE JOBS 2019	REGIONAL	METRO
Festivals	2,214	812
Concerts	584	1,150
Small Venues	1,734	2,671
TOTAL JOBS	4,532	4,633

COVID EMPLOYMENT

Federal and Victorian State governments created a range of funding mechanisms over the years of pandemic restrictions to support businesses and workers. However, differing nature of employment produced different outcomes for the live music sectors.

The average job loss across the whole sector was 69%, but the impact was not uniform. Jobs in the regions held up better than those in metro Melbourne.

The major job support mechanism was the Federal Government’s JobKeeper which subsidised employers at an initial \$1500 per fortnight (wound back progressively to \$700 when it ended in March 2021).

The eligibility criteria which included GST registration and 20 hours per week in a single business, excluded many small venue casuals, 75% of whom lost their jobs.

Festival and concert presenters were able to retain more of their employees. However, as the 2021 Legislative Council’s *Inquiry into the Impact of COVID-19 on the Events and Tourism Sectors* heard from numerous responders, the uncertainty of ongoing employment saw a

significant number of qualified staff exit the sector during 2020/2021. Probably, never to return.

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.

Performers were of course impacted with our survey responders reporting 75% music-related job loss.

Many, as sole traders, were ineligible for funding support.

FTE JOBS 2020/21	JOBS	VARIATION
Festivals	1,059	(-65%)
Concerts	642	(-63%)
Small Venues	1,101	(-75%)
TOTAL JOBS	2,802	(-69%)

Comparative Data 2017 & 2019

The nature of reported data doesn't always allow like-for-like comparison over the years, however we wanted to provide an indication of the results for this project compared with those recorded in the *2017 Melbourne Live Music Census*.

The comparison below is limited to data for metropolitan Melbourne as the last detailed regional data was from our 2014 census project and too 'historic' for reliable comparison.

	2019	GROWTH SINCE 2017	2020/2021	VARIATION
NUMBER OF ANNUAL GIGS	141,000	17%	26,518	-72%
ATTENDANCE	47,459,528	16%	5,431,120	-84%
BOX OFFICE REVENUE	\$505,201,000	21%	\$126,250,000	-74%
ANCILLARY PATRON SPENDING	\$1,361,900,000	13%	\$309,216,000	-76%
SMALL VENUE FTE JOBS	2,671	31%	1,842	-69%

CONCLUSION



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, venues and practitioners that many are facing the prospect of failure. There will need to be a much more collaborative approach between the events and venue sectors, all levels of government and associated agencies and stakeholders, in order to restore the fortunes of the vitally important economic and social generator that is live music.

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

Restoring the sector to its previous health is therefore a priority in terms of reinvigorating a vital contributor to the state economy. This project updates the *Melbourne Live Music Census 2017*, which followed the first such project in 2012.

Although mindful of the fact that the scope of reporting and thus the quality of data available for analysis has varied significantly since those earlier reports, where credible comparisons are possible and appropriate they have been made.

What is not in doubt is that the key findings — more live gigs, more performers, increased audiences, revenue and employment across small venues, concerts and festivals demonstrate the health of the live music scene in 2019.

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

And, while it is obvious how relieved and joyful we are to be able to attend live gigs again, we must not underestimate the challenges ahead. During the last two years, bands have broken up, workers have left the industry, fan networks have broken down and, perhaps most importantly, the venues and events that program original music and provide the career development path for our artists, have absorbed a range of increasing costs without the income to balance the books. Their ongoing viability is vital.

Given the consistent and significant growth in revenue and attendance between 2014 and 2019, there is every reason to suggest that with appropriate, targeted investment and support for practitioners, presenters and workers, Victoria's live music sector can be restored to previous levels of activity.

It will require an unprecedented level of cooperation and consultation but hopefully, the findings in this report will inspire action to that end!

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



LIVE MUSIC – VICTORIA'S REAL PASSION



THE LIVE MUSIC CAPITAL

This report again confirms that although Victorians are often identified as being 'obsessed' with sport and Melbourne often referenced as the nation's sporting capital, it is live music that truly engages the passion of city and state.

The 47 million attendances at festivals, concerts and small venue gigs in 2019 again dwarfed the audience (estimated at 11 million) for all major sporting codes/events — including AFL, A-League, NRL, Cricket, Basketball, Netball, Australian Grand Prix, Spring Racing Carnival and the Australian Tennis Open.

We note that the attraction of live music is further demonstrated by the fact that many of those sports include a live music program component as part of their event offering.

MELBOURNE — THE LIVE MUSIC CAPITAL — STILL #1

The *Melbourne Live Music Census 2017* report was released in April 2018 when our city hosted the international Music Cities Convention.

Among all the data, there was one statistic that grabbed the attention of policy makers and generated media headlines. Namely, that Melbourne — on a live music venue per capita basis, had a legitimate claim to be regarded as the 'Live Music Capital' of the world. We had first made the claim in our 2012 census report.

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

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

The following decades saw increasing focus and growth in international interest in 'music cities' and particularly the value of music tourism — the

contribution of music production and presentation to economic bottom lines and social wellbeing measures. Particularly in reviving urban night-time economies.

The 'World Cities Cultural Report' (2012), issued to coincide with the London Olympics, prompted our interest. Although Melbourne and Austin were not on the list of 12 cities, we undertook detailed research to include a comparison with those reported.

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

It was an analysis of that data and verification by the Music Victoria census research team, that led to the 'capital' claim, with Melbourne recording one live music venue per 8,087 inhabitants (Austin one per 11,050, Sydney one per 11,126, New York one per 18,500 ... etc).

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

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

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



'Counting The Beat'

For many years, fans, performers and small venue operators in Greater Melbourne have relied on the free listings in the weekly 'Beat Magazine' to source and promote gig information. Concerts and/or festivals are most often promoted via paid ads.

The spreadsheet data generously shared by the magazine for this study provides a valuable insight into small venue operation in Melbourne in 2019.

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

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

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

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

All of the 60 most regular venues presented live music at least once per week throughout the year. In addition, 33% of them presented shows at least twice per week, 26% of them presented at least three times per week and 27% of them presented four times a week or more.

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

COVID IMPACT

The printing of the physical magazine ceased in March 2020 following the shutdown of the majority of small music venues, and did not resume until May 2022.

The listings upon resumption demonstrate how far the sector recovery has to go.

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

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



RECOMMENDATIONS





The recommendations contained in this report are drawn from a combination of sources — direct reporting from event presenters, venue operators, local council officers and from hundreds of responses to our online event, venue and practitioner surveys and from submissions and suggestions contained in other reports (eg. Parliament of Victoria’s Inquiry Into *The Impact Of The COVID-19 Pandemic On The Tourism And Events Sectors* (2021) and the research team’s observations based on overall reporting and findings.

EMPLOYMENT & SKILLING

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

INFRASTRUCTURE

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

VENUE SUPPORT

- That, as a matter of urgency, the state government establish a business operations fund to assist dedicated live music venues — our essential industry incubators, to restore their balance sheets and underpin key operating costs given the ongoing challenges to their bottom line, including increased insurance, rent/lease costs and the impact of increased product/wage costs associated with the cost of living pressures. Especially now that most pandemic-related support has ceased.



COLLABORATION & INDUSTRY DEVELOPMENT

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



THE BODY WOULD BE TASKED WITH

- i. Facilitating the sharing of information between regional and metropolitan councils, Regional Tourism Boards and other relevant bodies/ stakeholders to create consistency in the development of live music action plans — already developed and/or in planning. Including the potential creation of ‘music precincts’ in appropriate areas.
- ii. Acting as a conduit for the promotion of recommendations to create a uniform and simplified approach to help venue operators and event presenters to navigate the regulatory requirements (permits/licences) associated with live music presentation.
- iii. Working with Visit Victoria, local councils and Tourism Boards to facilitate the incorporation of live music offerings in marketing campaigns targeting potential consumers — local, regional, interstate and international.
- iv. Creating a ‘round table’ for the identification of challenges impacting live music sector businesses and workers, including policy and investment priorities to ensure long-term sector viability.
- v. 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 the ‘industry’ work with the Municipal Association of Victoria to ensure that local councils are aware of the importance of live music in their municipalities and create mechanisms for more formal interaction with local businesses, creative practitioners and event presenters.
- That Music Victoria and Victorian Association of Performing Arts Centres expand their cooperative relationship to include detailed assessment of the needs of 50+ regional and metropolitan venues to address the replacement/upgrade of ageing infrastructure.

CREATIVE PRACTITIONER SUPPORT

- That the Victorian state government, through its arts funding agencies, consider an urgent and substantial increase of the funding allocation to individuals and groups through its various funding programs. (These practitioners received 11% of total arts budget in 2019/2020 and 8.4% in 2020/2021). Specifically increase the allocation for contemporary music (Music Works) program (3.3% of total arts budget in 2019/2020 and 3.9% in 2020/2021).
- This to include a range of professional development fellowships (across all genres) in recognition of the fact that the majority of creative practitioners were not eligible for COVID-related funding support and will need assistance while they restore the live performance income lost during the pandemic.
- Create a formal process to investigate the potential implications of creating a 'living wage' for professional creative practitioners involved in the live music sector.

FUTURE RESEARCH

- That the state government acknowledge the importance of current data to underpin policy development and resource allocation and make a budget allocation to enable Music Victoria to undertake a full Victorian music census project (regional and metropolitan) in 2023 to accurately assess the recovery from COVID-19. And that an in-principle commitment be made to repeating the process every three years.
- That the state government make an immediate allocation of funds to enable the conduct of a 'mini' census (based on selective sampling) to confirm — or otherwise, the significant anecdotal evidence that the live music sector will require ongoing investment/support to regain previous activity levels.
- That state and local governments develop a robust mechanism/ methodology to capture comprehensive and reliable data on the value of 'music tourism'. The spending and consumption in the broader economy associated with visitation to live music events and venues.



PHOTO CREDITS

TITLE PAGE

A seated crowd at Town Folk Music Festival, Castlemaine February 2022

Photo by Josh Brynjac

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Chalkboards advertising gigs outside the Tote Hotel, Collingwood October 2019

Photo by Dobe Newton

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Down South Performance

Photo by Kirsty Hill

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Crowd at St Jerome's Laneway Festival 2019

Photo courtesy City of Monash

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Crowd at Sydney Road Party (Brunswick Music Festival 2019)

Photo courtesy City of Merri-bek

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Crowd at Festival X 2019

Photo by Ami Sullivan-Rowe

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Music Victoria Awards Performance 2019

Photo by Martin Philbey

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Hall entrance for High Country Halls Music Festival at Tolmie

Photo by YouUssys Creative

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Neil Morris at Riverlinks for Shepp Music Week, Shepparton (The Murray), 12 March 2022

Photo by Josh Brnjac

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GMF performing in Grampians National Park, February 2019

Photo by Monique Pizzica

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Sooki Lounge performance

Photo by Josh Brynjac

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St Kilda Festival Main Stage 2020

Photo courtesy City of Port Phillip

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[Bottom] Crowd at Save Live Australia Music rally (Melbourne)

Photo courtesy Australian Music Vault

[Right] Various front pages from 'Beat Magazine' 2019

Photo by Dobe Newton

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Ed Sherran onstage at AAMI Park 2018

Photo courtesy Melbourne Olympic Parks Trust

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[Bottom Left] Bob Wilson at Gippsland Country Music Festival 2022

Photo by Lisa Burge

[Bottom Right] A seated crowd at Town Folk Music Festival, Castlemaine (Goldfields), 12 February 2022

Photo by Josh Brnjac

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Kindred Studios Footscray

Photo courtesy Kindred Studios

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[Bottom] Australian Music Vault, Arts Centre Melbourne

Photo by Jason Lau

[Right] Goomfest performance 2019

Photo by Kirsty Hill

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Posters from the Australian Music Vault, Arts Centre Melbourne

Photo by Dobe Newton

END PAGE

Missy Higgins and child at Queenscliff Music Festival (Geelong and the Bellarine), 2019

Photo by David Harris



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