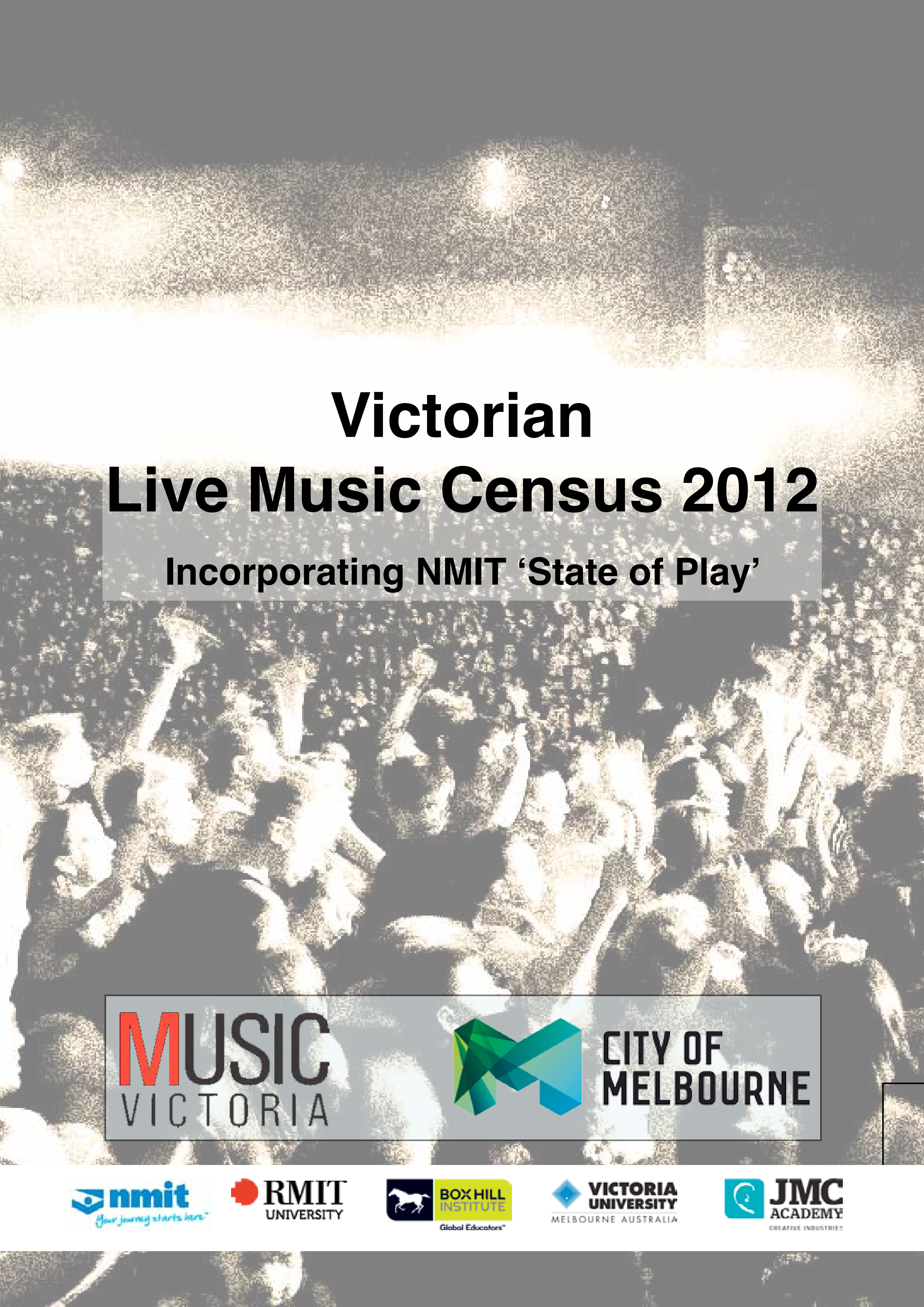

Victorian
Live Music Census 2012

Incorporating NMIT ‘State of Play’

MUSIC VICTORIA

CITY OF MELBOURNE

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JMC ACADEMY CREATIVE INDUSTRIES

Victorian Live Music Census 2012

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Victorian
Live Music Census
2012

Executive Summary

Live Music - Melboune's REAL Passion
Key Numbers

- **62,000+ annual gigs**
- **470 Greater Melbourne live music venues**
- **14.4 million patron visits annually**
- **$1.04 Billion spent in small venues, concerts and festivals**
- **116,000 Annual Full Time Equivalent jobs**

Foreword

The Victorian Live Music Census was a world-first project initiated by Music Victoria and the City of Melbourne, utilising the talents and energies of music performance, sound production and music business students from Melbourne's tertiary campuses at NMIT, RMIT, Victoria University, Box Hill Institute and JMC Academy.

Sending individual collectors into as many of Melbourne's music venues as possible on one night was seen as a unique and effective way of gaining first-hand data on the city's vibrant live music scene.

Music Victoria and the City of Melbourne - through their respective administrations, provided vital funding support.
My academic colleagues on the Music Victoria Education Advisory Committee distributed material across their various courses/campuses and encouraged students to volunteer. Special thanks to Greg Aronson, Rob Care, Ben O'Hara, Ed Montano and Greg Arnold.

Tania Wilson (Project Manager) and Sam Caplan (Census Coordinator) performed admirably and were largely responsible for the successful conduct of the project. They were ably assisted by NMIT music business students Sarah Cooley and Maria Fadljevic who took on the vital tasks of team organisation/allocation and venue mapping for the conduct of the physical Census.

Frank Sortino from the Melbourne office of the Australian Bureau of Statistics, Suzanne Daley and Zac Gillam from Live Performance Australia and Dean Ormston and Jenny Gomes from APRA provided important advice and information. Martin Cloonan and Adam Behr from the universities of Glasgow and Edinburgh respectively, supplied leads to comparative data.

The report builds on and draws upon the hard work of researchers and industry operatives who have contributed to a number of recent reports (Homan/Newton - City of Melbourne; DeLoitte Access Economics - Arts Victoria; Ernst & Young - APRA).

Finally, thanks to all those students – particularly the team leaders, who understood the importance of the Census project.

It was gratifying for industry 'veterans' to find so many young people - the next generation of industry leaders, who willingly got involved and contributed their energy and enthuiasm.
It was exciting to involve them in something that had never been attempted before.
Special thanks to those who put volunteered as team leaders - Jake Richards, Catherine Nicholls, Miki Novak, Ben Treyvaud, Maria Fadljevic, Louise Tatnell, Henry Barrat, Isabella Kranjec, Lauren Taylor, Natalie Taylor, Kara Varker, Lou Walters, Dugal McLachlan, Ben O'Brien, Cameron Allen.
Well done young folks!

Dobe Newton
December, 2012

Executive Summary

Census Night - Saturday 13th October, 2012

Venues & Gigs

- The Census confirmed that Greater Melbourne currently has a total of 465 small venues offering regular (minimum of 2 nights per week) live music performances.
  The CBD has a total of 137 venues - 120 hotels/bars/clubs plus 17 larger theatre/concert venues (less 'frequent', but obviously significant). There are 194 small venues in the inner suburban music 'Precincts' - Collingwood, Carlton, Brunswick, Fitzroy, Northote, Prahran/South Yarra, Richmond, St Kilda and South/Port Melbourne. There are 139 small venues in the outer suburbs.
  Bars and nightclubs predominate in the CBD, while hotels are a more significant live music presenter in the Precincts and outer suburbs.
  In addition, 50-odd venues (function centres, RSLs, sporting clubs etc) offer live music on an occasional basis.

- On a 'typical' Saturday night, 92% of small CBD venues (124) and 93% of small Precinct venues (180) presented a total of 311 live performance gigs involving musicians and/or DJs - often on multi-artist bills. We estimate an additional 115 gigs in outer suburban venues.

Attendance - A 'Grand Final' every Saturday night!

- Every Saturday night (and Friday night as well), 97,000+ people attend popular music live performances in Melbourne. 38,805 in CBD venues, 38,585 in Precinct venues and 20,000 in outer suburban venues.
  Note: Saturday 13th did not feature one of the major concerts/festival events which regularly feature on Melbourne's live music calendar.

Venues - Entry/Patron Spending - Economic Generation

- On Saturday 13th October, live performances in Melbourne venues generated $5.4 Million in turnover - Door/Entry tickets plus ancillary patron spending (food/drink/merch etc).

  Door

- 34% of CBD venues (50) and 22% of Precinct venues (42) charged for entry to live performances.
  Prices varied widely from $5 to $65, generating a total of $745,940 ($533,805 in the CBD and $212,135 in the Precincts).

  Ancillary Patron Spending

- The Census Consumer Survey showed that patrons attending live music performances spend an average $45 extra per visit to small venues, and $75 per visit to large/concert venues on transport, food, drink and merchandise. (Census Consumer Survey & NMIT 'State of Play').

- On Census night, this generated an additional $3.7 Million in ancillary spending -
  CBD $1.97 Million; Precincts $1.74 Million.
  (Based on post-Census research & analysis of advertised gigs/venue operation, we estimate an additional $900,000 in ancillary spending in outer suburban venues).

Census Night - 13th October, 2012

Venues - Employment

- Data collected on Saturday 13th October, revealed that live performances in Melbourne's CBD and Precinct venues created employment for 901 musicians, 739 DJs, 237 production staff and 2,731 venue staff.
- Using the formula applied by the Australian Bureau of Statistics - 35 hours = Full Time Equivalent employment, and assuming - based on standard industry practice, that a gig equates to a minimum 4 hours for performers and 6 hours for production and venue staff, these figures equate to -
  103 FTE jobs for musicians, 82 FTE jobs for DJs, 41 FTE jobs for production staff and 468 FTE jobs for venue staff.

Live Performance - The Big Picture

Using the Live Music Census data and additional information from recent reports (Homan/Newton, DeLoitte Access Economics, Ernst & Young, NMIT - see Section 1, Page 9), produces a comprehensive snapshot of annual live music operations in Greater Melbourne.
Note: For information on Regional Victoria, see Appendix C.

Venues - Gigs

Note:
To allow for the fact that venues have the occassional 'dark' night, and that there is a seasonal variation in audience/gig numbers, we have reported calculated based on a 50-week 'year' in order to allow for that variation.

- On an annual basis, 65% of CBD venues and 69% of Precinct venues regularly feature live music performances on 4 nights per week.
- Greater Melbourne's 465 small live music venues annually present 62,000 popular music performances - 19,100 in the CBD, 34,300 in the Precincts and a minimum of 9,000 in outer suburban venues.
  Many of these gigs involve multi-artist bills.
- Live Performance Australia's 'Ticket Attendance & Revenue Survey 2011' has comprehensive ticket sales/revenue and attendance information for the significant number of popular music concerts and festivals at large venues.
  These are almost entirely confined to the Greater Melbourne area. (see next page)

What's Not Included

- There are a number of major events with significnt popular music components which have NOT ben included due to lack of quality data. However, if we consider the ticket revenue, patron attendance and spending associated with live popular music perormances at - St Kilda Festival, Brunswick Music Festival, Melbourne International Arts Festival, Laneway Festival, Darebin Music Feast, Spanish Festival, Melbourne Fringe Festival, Moomba - to mention a few, the overall findings of the Census definitely err on the conservative side!

Venues - Annual Attendance

- Melbourne's live music fans attend an average of 4.5 live music performances per month and 1 concert/festival per month. (Source: Census Consumer Survey, NMIT 'State of Play', DeLoitte Access Economics)

- So, on an annual basis, there are14.4 million patron visits to popular music live performances in Greater Melbourne.

CBD small venues -	4.55 million
CBD large venues -	0.53 million
Precinct small venues -	5.53 million
Outer suburban small venues -	1.93 million
Major venue concerts (LPA) -	1.64 million
Major music festivals (LPA) -	0.22 million

- Note: These attendance figures do not include the 368 regional venues registered by APRA - many of which operate on multiple nights. A conservative estimate (one third of the total annual attendances at Precinct venues) would suggest a contribution of an additional 1.8 million patron visits.

Venues - Annual Income/Expenditure

- It's a billion dollar industry!
  Live performances in Greater Melbourne venues generates $1.04 Billion annually in ticket sales/door entry and patron spending.

- Door entry/ticket sales generated $292.7 Million and ancillary patron spending at live performances an additional $746.7 Million (transport/food/drink/merchandise).

Door/Ticket Revenue

CBD small venues -	$57.36 million
CBD large venues -	$18.16 million
Precinct small venues -	$31.82 million
Outer suburban small venues -	$10.61 million
Major venue concerts (LPA) -	$129.65 million
Major music festivals (LPA) -	$45.12 million

Ancillary Patron Spending

CBD small venues -	$204.9 million
CBD large venues -	$39.9 million
Precinct small venues -	$248.8 million
Outer suburban small venues -	$87.6 million
Major venue concerts (LPA) -	$121.5 million
Major music festivals (LPA) -	$44 million

Note: Adding APRA's regional small venues at one third Precinct activity would add an additional minimum $93 million.

Venues - Annual Employment

- On an annual basis, live music performances in Greater Melbourne venues provide employment opportunities for 159,250 musicians, 123,800 DJs, 37,550 production staff and 451,450 venue staff.
  (Note: These figures do not include employment created by major concerts and festivals, as the Live Performance Australia data does not include this information from their reporting sources).

- Using the ABS formula (Full Time Equivalent = 35 hours work), and assuming industry practice (Muso/DJ gig = 4 hours, production/venue shift = 6 hours), this equates annually to -
  18,200 FTEquivalent jobs for musicians, 14,149 FTE jobs for DJs, 6,437 FTE jobs for production staff and 77,391 FTE jobs for venue staff.
  The total of 116,000 FTE jobs annually, makes live performance a major employer in Greater Melbourne - ABS (2009) - Retail 229,000, Education 177,000, Food & Accom 136,000).

Comparisons: Music - Melbourne's Passion!

- **A Major Cultural Activity**

  In 2012, Arts Victoria reported that in 2009/2010 approximately 4 million Victorians visited cultural events and/or facilities - Cinema 69%, Libraries 33%, Popular Music Concerts 31%, Art Galleries 26%, Museums 26%, Musicals & Opera 21%, Theatre 17%, Classical Music 10% and Dance 9%.
  With the exception of Cinema, popular music fans had by far the highest rate of multiple attendance, with 45% attending 2-4 times and 20% 5 times or more.
  Adding the 14 million (minimum) visits annually to live performances in small venues, confirms the dominant cultural position of popular music performance.
  Source: 'Arts and Culture in Victoria 2012:A Statistical Overview' (Arts Victoria, based on Austraian Bureau of Statistics 'Attendance at Selected Cultural Venues and Events 2009-2010')

- **We love our sport - but we really love our music`!**

  Australians are often reported as 'obsessed' with sport, and Melbourne often referred to as the nation's sporting 'capital'.
  However, the Live Music Census (and data from other reports) confirms that we are VERY passionate about our music.

  In a year, fans make 14.4 visits to popular live music performances in Melbourne's pubs, clubs, bars, concert halls, music theatre and festival venues.
  This is more than double the total attendance (5.9 million patron visits) for all Melbourne AFL games (4.65 million), NRL (0.2 million), A-League (0.4 million) and Super Rugby (0.14 million) matches in Melbourne, plus the Spring Racing Carnival (690,000)!

  In fact, it's nearly 3 million more than the total AFL, NRL, A-League and Super Rugby patron attendances (11.8 million) for the whole country in 2011!
  Sources: AFL website/Wikipedia

- **Melbourne - A World Music City**

A comprehensive literature review/search, failed to unearth much in the way of city-specific live music research or data. Thanks to the academics from the UK, Canada & US who regularly contribute to the Live Music Exchange (www.livemusicexchange.org), for their efforts to unearth and highlight relevant material.

The most 'interesting', was released at the 2012 London Olympics by Mayor Boris Johnson. The *'World Cities Culture Report*' - a comprehensive analysis of 12 of the world's major cities (not including Melbourne) was compiled by BOP Consulting.
In that report comparative data on live music venues showed -
New York (8.2 million population) – 277 live music venues – 1 per 29,600 residents
Paris (11.7 miilion) – 423 venues – 1 per 27,660
London (7.8 million) – 349 venues – 1 per 22,350
Berlin (3.5 million) -250 venues – 1 per 14,000
Tokyo (13.1 million) – 385 venues - 1 per 34,000
Sydney (4.6 million) - 89 venues - 1 per 51,685

Note/Warning:
The figures should be viewed with obvious caution. We know that APRA lists 215 active live music venues for Sydney (reports by DeLoitteAcess Economics & Ernst&Young) - considerably more than the 89 sourced from '*Time Out*' magazine. Using the APRA list would reduce Sydney's figure to one venue per 21,000 residents.
That said, using APRA's 370 venues (from the same reports) for Melbourne produces a figure of one venue per 11,900 residents.

- **Melbourne or Austin? The REAL Live Music Capital?**

In 1991, the Austin City Council passed a resolution to brand their city the 'Live Music Capital of the World' on the basis that it had more live venues per capita than any other US city.

Several year's later (1994), *'Billboard'* magazine published an in-depth profile on Melbourne comparing it favourably with Austin as one of the world's great live music cities.

The City Council and the Austin Visitor's Bureau, have done a wonderful job of promoting their live music scene.
Their comprehensive website lists 200 occasional live music venues and 87 'core' regular presenters.
With a population of 820,000, this confirms one 'core' live music venue per 9,425 Austin residents.
The Live Music Census data (465 'core' venues) produces a result of one venue per 8,915 Melbourne residents.

- **Conclusion**

The Live Music Census confirmed that the venue list used in the '*Capital Report*' (City of Melbourne, 2010) was accurate.
Given the addition of 100-odd more venues in Greater Melbourne than used in other reports, plus the comprehensive reporting of activity from those venues, it is not surprising that the attendance, employment and economic generation totals are a considerable increase on those previously reported.

The figures are more impressive considering they do not include contributions from Victoria's regional small venues and only 'indicative' data from popular music-based theatre productions.
And even more noteworthy when we consider the additional indirect spending - by patrons and venues, involved in the presentation of live music - eg. sponsorship, advertising, venue purchases from suppliers, accommodation, restaurant dining, musical equipment purchase, production hire etc etc.

Note:
Although the scope of this study does not permit definitive value/totals to be ascribed to this indirect spending/income, several studies on cultural value conducted by the City of Austin in 2006 & 2009, estimated it at approximately 35% of the 'direct spending' total).
UK Music released commissioned a report in 2009 - 'Contribution of Music Festivals and Major Concerts to Tourism in the UK', which showed that 46% of the spending associated with major music events took place 'off-site'.

The totals reported in this Live Music Census are robust, based as they are, on a large quantity of collected data rather than estimates from smaller samples.

Not only is popular live music a major contributor to the state's Gross Domestic Product, the data shows that live music performance is one of the major employers in the CBD and Greater Melbourne.

The key findings not only confirm that Melbourne is Australia's centre of popular music live performance, but that it can clearly take it's place as on of the world's great music cities.

Victorian
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Section 1

The Background

Background To The Live Music Census & Previous Reports

After many years in the statistical 'wilderness', several reports in the last 18 months have revealed the economic significance of the live music sector in Melbourne and (to a lesser extent) regional Victoria.

During the same period, there have been a number of regulatory challenges to the viability of venues, and therefore to the enjoyment of fans and the livelihood of thousands of musicians and workers who create Melbourne's vibrant live music scene.

While the various reported findings have greatly assisted industry advocacy efforts in policy negotiations with the City of Melbourne and the Victorian state government, there were significant differences in methodology – and thus reported results, that needed to be resolved/reconciled In order to produce definitive data.

With additional funding unlikely to be forthcoming to employ another commercial research consultancy, a cheaper alternative needed to be found.
Cost however, was not the only consideration.
With one exception, these previous reports (see below) relied on a limited number of interviews and small survey sample numbers to reach their conclusions. None of them employed the human resources necessary to capture the detailed operational data from live performance in the hundreds of venues that operate every week.

Hence the idea of conducting a comprehensive 'census' emerged.
Using a large group of student volunteers would certainly be cost-effective. More importantly, the numbers of collectors would allow visits to the smallest bars and the largest clubs and everything in between, rather than estimations based on limited samples. Thus minimising sample irregularities.
Before detailing the Census process, a few words about the recent reports.

1.1 Recent Research

In the last 18 months a number of significant reports have highlighted the significance of the live performance sector of the popular music industry. They provide the statistical backdrop to the Live Music Census.

1.2.1 Capital Music Report:City of Melbourne Music Strategy
Dr Shane Homan (Monash) & Dobe Newton (NMIT) for City of Melbourne (May, 2010)

The live music section drew extensively on 10 years of NMIT's 'State of Play – Live Music in Melbourne' reports.
For 2009, it estimated 12.8 million patron visits across 500+ venues in Melbourne's CBD and inner-suburban music precincts, generating some $1.2 billion in ticket/door revenue and patron ancillary spending (food/drink/transport/merchandise), associated with venue attendance.

In addition to the small venue data, the final figures included information from Live Performance Australia's 2010 Ticket & Revenue Survey covering major concert and festival performances.

This was the only report to rely on an independently generated venue list (from NMIT's 5-year research)

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

The report focused on live music value in small venues, and found a total contribution to the Victorian state economy of $511 million in 2009/2010, with 5.4 million attendances and full-time equivalent employment for 17,200 persons.

This was the first report to carry the imprimatur of a major research company, and so was welcomed by the music industry.
However a significant methodology decision impacted the reported income generation total. This was the 'discounting' of the turnover value in many venues featuring live music.

DeLoitte was supplied with a list of 950 registered live music performance venues. Of these, they concluded (by survey) that 764 'regularly' featured live performance.
They then calculated turnover based on whether venues were 'dependent' on live music , whether live music 'supported' venue operation or whether live music was incidental.
Those that were dependent (40%) had 100% of turnover counted. Those where live performance was 'supportive' (14%) had 20% of turnover counted. Those where live music was 'incidental' (46%) were not included in calculations.
So nearly 50% of venues featuring live music were excluded from consideration.

In addition, the APRA list used by DAE identified 370 live music venues in Greater Melbourne. This was at odds with the 500+ identified in the 'Capital Report' (Homan/Newton, June 2010), and NMIT's annual 'Sate of Play – Live Music in Melbourne' report. The latter list regularly checked and updated.

Given that the report highlighted how popular major concerts and festivals were (according to their patron survey), it was unfortunate that there was no attempt to at least note the turnover/attendance data readily available from Live Performance Australia.

1.2.3 'Economic Contribution of Venue-Based Live Music Industry in Australia' Ernst & Young for APRA (September, 2011)

Estimated that in 2010, 41.97 million patron visits were made to live music performances in 3,900 venues across Australia, generating $1.2 billion in venue income (17% ticket sales, 83% patron spending) and creating 14,900 full time equivalent jobs.

Although the report did not set out to provide state-by-state analysis, it did report that Victoria's contribution was 22% of the national total (NSW 32%, Queensland 24%), thus –
In Victoria in 2010, 9.2 million attendances generated $267 million in turnover from 823 venues creating 3,264 full time equivalent jobs.

The disparity between these findings and those in the DAE report are immediately obvious – twice the attendance, half the turnover and one quarter of the jobs.

This report also used venue lists supplied by APRA, but does note that there may be a number of operating venues that are not registered as live music providers with that body.

It should also be noted that Victoria's 22% share needs to be questioned considering the fact that Live Performance Australia reports that in terms of Popular Music performance (concerts/festivals) the state breakdowns are –
Ticket Sales – NSW 33.7% (5.8 million), Victoria 33.8% (5.9 million), Queensland 12% (2 million).
Revenue - NSW 35% ($465 million), Victoria 34% ($451 million), Queensland 12% ($160 million).

Although NSW and Queensland have a significantly larger number of registered clubs, it is hard to believe – on LPA percentages, that Queensland, for instance, has a more active live music scene than that in Victoria, based as it is around activity in Melbourne - Australia's undisputed live music capital.

The overall findings were based on survey responses from approximately 7% of the total number of venues (275 from 3,900), and detailed consultation with 10 from that total.
This seemed an inadequate basis for definitive national – let alone Victorian, estimation.

1.2.4 'Music Industry Economic Impact Study' SGS Economics & Planning for City of Melbourne (Nov, 2011)

Reported that the total impact on Victorian state economy through Melbourne live music activity was – $281 million in turnover, $91 in gross regional product and support for 6,000 employees.

The report quoted extensively from ABS 'cultural industry' data for 2006/2007. This data is generic in nature and, more importantly, was not supplemented by specific or current data relevant to the popular music sector.
The report contained the following quote (page 45) –
"Contrary to popular belief, popular music performance in Australia is not the highest industry earner. Its income and value-added are low compared to symphony and choral performance and drama and dance productions".
According to this data popular music performance generated $56 million in turnover from 1.8 million attendances.
This was compared (unfavourably) with Classical - $168 miliion from 2.2 million attendances; Theatre - $151 million from 3.1 million attendances; Dance – $65 million from 527,600 attendances.

The popular music data produced by Live Performance Australia for the corresponding period (2007), plus that from the Australian Cultural Ministers Statistical Advisory Group - $500 million in ticket revenue from 6 million attendances, highlights the limitations of this report.

A very small sample of industry operatives/venues were interviewed, and no attempt to factor in the contribution from Melbourne's hundreds of pubs, clubs and bars – the heart of the city's live performance.

1.3 'Victorian Live Music Census'
Music Victoria & City of Melbourne (October 2012)

1.3.1 The Census - Venues

It was vital to try to reconcile the differences in data – primarily between the Homan/Newton , DeLoitte Access Economics and Ernst & Young reports.

The major discrepancies in the published reports centred on the accuracy of the venue list and thus the estimates of attendances and economic generation.

Music Victoria and the City of Melbourne endorsed the idea of a Live Music Census which would put a team of 100+ data collectors on the streets to visit as many live music venues as possible in Melbourne's CBD and famous inner-suburban music 'precincts' – Abbotsford/Collingwood, Brunswick, Carlton/Fitzroy, Prahran/South Yarra, Richmond, St Kilda and South/Port Melbourne.

It was hoped that conducting such a labour-intensive exercise would –

- Confirm the number of venues regularly supplying live music performance.
- Record accurate patron attendance on a prime live music night (Saturday).
- Produce accurate information on venue operation and patron attendance on other nights of live music performance.
- Produce data on the number of venue staff, musicians, DJs and production staff employed in delivering the performances.

1.3.2 The Census - Patrons and Musicians - Surveys

In addition to their collection of venue data on the night of the Census, collectors would encourage patrons and live performers in the venues visited to complete online Consumer and Musician surveys to add vital data to that collected on the night of the Census.
This would enable us to compare the data with that collected by the annual NMIT 'State of Play' report which has – for the last five years, reported responses from thousands of live music patrons and hundreds of working musicians.

Victorian
Live Music Census
2012

Section 2

Conduct of The Census

Conduct of the Census

2.1 Enlistment

Volunteer forms and information sheets were developed and distributed to students at NMIT, RMIT, Box Hill Institute, Victoria University and JMC Academy via representatives from those institutions on the Music Victoria Education Advisory Committee. This resulted in 100+ volunteers enrolling.
They enrolled as –
Team Leaders
General Volunteers
Data analysts

2.1 Team Leader Briefing

Tania Wilson & Sam Caplan conducted a briefing for team leaders at The Tote on Wednesday, 10th October. Teams were allocated areas and supplied with maps and venue lists.
The meeting concentrated on safety aspects – team members to work in pairs/team leaders to be responsible for signing on/off team members at the end of Census night.
Team leaders to be responsible for gathering venue record sheets from team members and submitting them for analysis.

2.3 Census Teams - Process

Teams of 6 (ideally) were allocated areas of the CBD (including Southbank) and inner-suburban music precincts –
Abbotsford/Collingwood
Brunswick
Carlton
Fitzroy
Northcote/Thornbury
Prahran/Sth Yarra
Richmond
St Kilda
Sth Melb/Pt Melb

They were supplied with maps detailing the venues to be visited and verified. The lists were allocated from the latest NMIT venue list developed as part of the 2011/2012 'State of Play' report (last updated July 2012).

Census volunteers were supplied with a record sheet for each venue (see Appendix A).
In summary, they were asked to confirm whether or not the venue was offering live music on the night of the Census (Sat 13th October) and to record –

- The maximum number of patrons expected to attend
- The number of musicians (including DJs) employed in the venue on that night
- The number of staff employed in the venue

They were also required - wherever possible, to collect from venue staff whatever information they could gather on the venue's general live music operation – eg. audiences on other nights.
All team members were also supplied with a quantity of business cards advertising the links to the online Consumer and Musician surveys (Survey Monkey), and the Live Music Census Facebook page.
They were instructed to hand out the cards to patrons and musicians in the venues they visited, and to use their individual contacts and Facebook friends to spread the word.

2.4 Census Night - Saturday, 13th October

Team leaders gathered on the steps of Parliament House where they received a final briefing re the conduct of the Census, and were given their sign on/sign off sheets. Arrangements were also made re the submission/collection of their team data sheets.
Each pair of team members was issued with 150 cards directing musicians and patrons to the online surveys.

2.4 Data Analysis and Census Surveys

Team leaders were responsible for collecting the data sheets, signing off their team members, and organising the delivery of data sheets to Sam Caplan.
The collected sheets were then submitted to NMIT's music business students for recording, collation and analysis.
Responses to the Consumer and Musician surveys were likewise collected from Survey Monkey for collation and analysis.

2.5 Outcome & Disclaimer

The Victorian Live Music Census does not claim to be THE definitive source of all information on the live music sector. It lacks, for instance, the measurement tools and economic expertise to accurately measure the 'value add' which was a feature of other consultant's reports.

However, it's rigorous process has produced the most accurate and up-to-date list of Melbourne's live music venues available, and therefore extremely credible estimates re the operation of live music in those venues – ticket/door entry revenue, patron attendances and venue staff/production staff/musician employment.

The breadth and size of the Census Consumer Survey sample combined with previously reported data - from DAE, Ernst & Young, Homan/Newton etc, has allowed accurate estimates of patron spending to be developed.

Importantly, the Census report is the only study (apart from '*The Music Capital*') to incorporate data from Live Performance Australia on popular live music performance at major concert & festival events in Greater Melbourne.

Thus the findings associated with the Census in terms of live music audience/patron visits, venue revenue, patron spending and employment are the most comprehensive and authoritative estimates so far reported.

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2012

SECTION 3

Census Night
Sat 13th October

SECTION 3
Census Night - Saturday 13th October

3. Working from an NMIT 'State of Play'- generated venue master list (updated July, 2012), sixteen teams of volunteer collectors (104 in total), set out to try to visit all live music venues in the CBD and the music precincts.
Each team had 20-25 venues on their list and a map identifying areas/addresses. Team members were required to operate in pairs for safety reasons.
The CBD was divided into 6 areas to make the collection process as easy as possible.

A small number of venues were not operating on that particular night, and a number were running private functions which restricted the volunteers in terms of the information they could collect. Despite these minor limitations, over 90% of venues on the list were visited by collectors, and another 6% were cooperative in terms of supplying details of their live performance operation.

3.1. The Venue List
The Census, and follow-up checking by the data analysis team confirmed –
That there are currently 460+ venues in the Greater Melbourne area regularly providing live popular music performances.
(Note: For the purposes of this study, a venue is deemed to be a 'regular' provider if it presents live music performances on a minimum 2 nights per week).

There are 120 small venues (pub/club/bar) in the CDB (including Southbank/Docklands), plus 17 larger theatre/concert venues either in the CBD or adjacent .

There are 194 venues in the famous inner-suburban music precincts (Abbotsford/Collingwood, Bruswick, Carlton, Fitzroy, Northcote, Prahran/South Yarra, Richmond, St Kilda, South/Port Melbourne).

There are a further 139 small live music venues operating regularly in the outer suburbs.
(See Appendix C for full venue list).

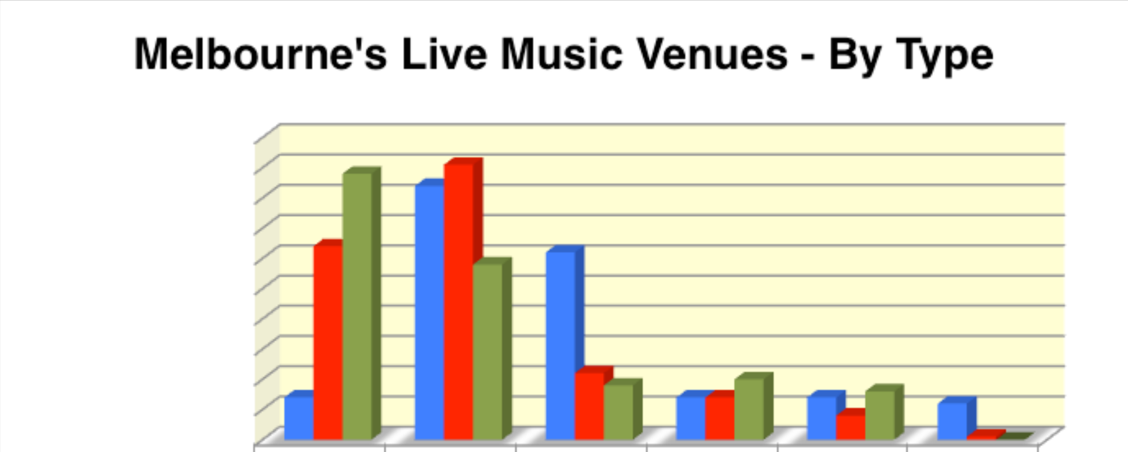
In addition, there are 50+ RSLs, Town Halls, Restaurants, Sporting Clubs, Cultural/Reception/Function Centres etc that feature popular live music performance on an occasional basis.
These latter have been excluded from this study.

On Saturday 13th October, 92% of venues in the CBD featured a live performance, and 94% of those in the music precincts.
From the information collected, there are only handful in both areas that do not regularly operate on Saturday nights – Friday being preferred by a few as their major night.

Note:
The provision and frequency of live music has been the determining factor in terms of including or excluding venues from the list. It may be that in some cases the provision of live music is not the venue's *raison d'etre*, but such judgements were not part of the Census terms of reference.
It should be noted that the Famous Spiegeltent has been included in the list of 'regular' venues for, although its operation is seasonal, it hosts dozens of live performances which makes it much more than an 'occasional' provider.

3.2 Venue Type

There is a higher proportion of Nightclubs and Bars in the CBD, while Hotels are a much more significant live music venue in the Precincts and the outer suburbs.



	Hotel	Bar	N'Club	Music Club	Café	Theatre
CBD	7%	42%	31%	7%	7%	6%
Precincts	32%	45.5%	11%	7%	4%	0.5%
Outer	44%	29%	9%	10%	8%	0%

CHART 3.2.1

3.3 Precinct Venue Numbers

The Census confirmed the following number of live music venues operating in the inner suburban area –

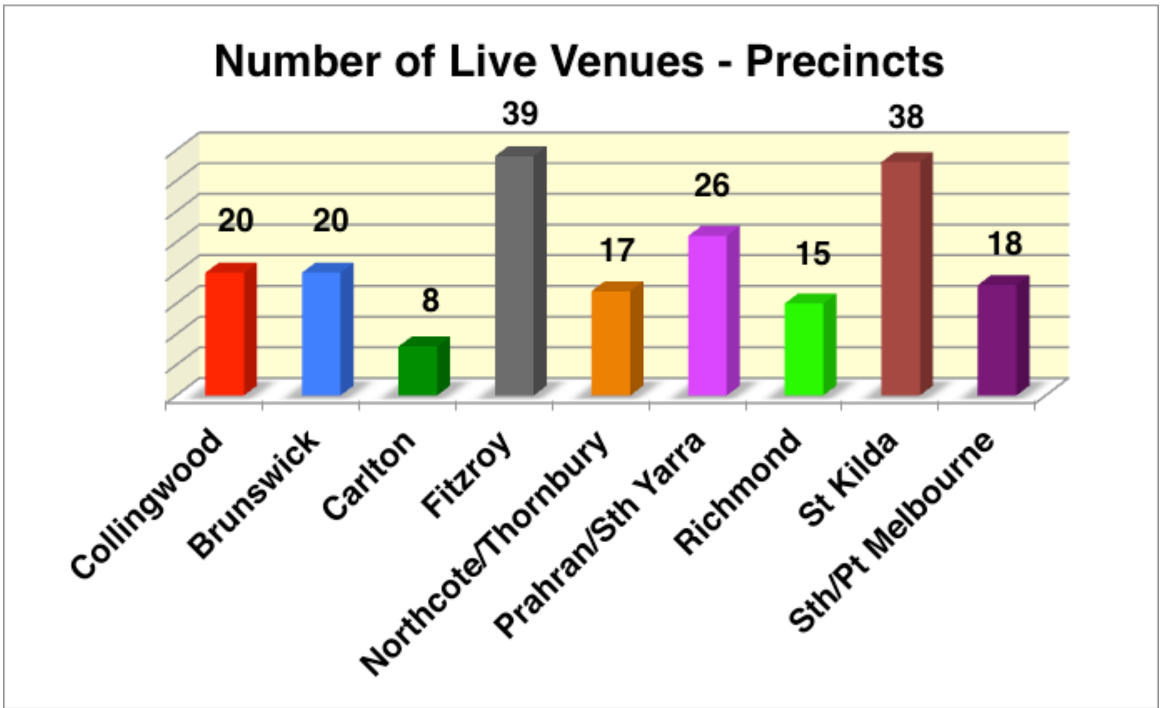


CHART 3.3.1

3.4 Closed, Non-Operating Live Venues
The other important outcome of a physical census was that it provided the opportunity to remove venues from the list that no longer offer live music.
Some had closed, some had moved and others had ceased live music performances.
Conversely, a number of new/recently opened venues were added to the list.

In some cases, volunteers had the chance to question venue operators/staff in venues that had ceased live performance. The most common reasons cited were difficulties stemming from licensing requirements, and noise complaints.

3.5 Venue Audiences
With Census volunteers required to report maximum attendances expected on the night they visited venues, and to collect information re attendance on a 'typical' Friday and other nights the particular venue operates, we have – for the first time, definitive (rather than estimated) attendances at live music performance in well over 90% of Melbourne's live venues.

Note:
For the purposes of this study, activity for three major CBD theatres - Her Majestys, The Regent and The Princess, has been omitted. (See expanded 'Note' in Section 4 - 'The Big Picture).

Live Music Audience - Sat 13th October

CBD (Including Southbank/Docklands)	**38,805**
Abbotsford/Collingwood	2,690
Brunswick	4,075
Carlton	1,140
Fitzroy	7,670
Northcote	2,035
Ricmond	2,910
Prahran/Sth Yarra	7,885
St Kilda	7,600
Sth/Pt Melb	2,580
PRECINCT TOTAL	**38,585**
SAT 13th TOTAL AUDIENCE	**77,390**

TABLE 3.5.1

This patronage represented 41% of the weekly total (93,567) for CBD venues, and 35% of the weekly total (110,637) for Precinct venues.
(See Section 4 for full details).

Note:
Although it was not possible to physically visit the venues, follow-up analysis of the 125 regular live music venues in the outer suburbs, plus research taken from the 'Capital Report' and 'NMIT State of Play' findings provide solid evidence for an additional 20,000 patrons

3.6 Venue Door/Entry Income

The intensive nature of the Census collection process produced detailed figures on the door/entry charges in the CBD and Precinct areas.
This was more reliable than the small sample of venues previously reported. Considering that live music venues vary so dramatically in size – a bar with a capacity of 50 through to a nightclub with a capacity of 1,000, the large sample was essential..

On Saturday, 13th October 50 CBD venues (35% of total) and 42 Precinct venues (22% of total) had a door/entry charge. As the venues vary greatly in size, so do the door charges.

Door/Entry $$ - Sat 13th

CBD	**$533,805**
Carlton	$22,050
Abbotsford/Collingwood	$6,000
Brunswick	$7,800
Fitzroy	$44,120
Northcote	$16,615
Prahran/South Yarra	$38,800
Richmond	$24,000
St Kilda	$46,750
South/Port Melbourne	$6,000
Total Precinct	**$212,135**
TOTAL Door/Entry	**$745,940**

TABLE 3.6.1

3.7 Patron Spending

An area on which all the previous reports (and this one) agree is the major contribution to income generation/turnover that can be attributed to patron expenditure associated with their attendance at live music performances.

Ernst & Young, for instance, estimated - in their APRA report, that door/ticket entry accounted for 16% of venue income, and patron spending (transport, food, drink, merchandise) accounted for 83%.

DAE estimated spending of $95 per patron per gig at small venues (including door). The small number of live music venues surveyed in their report were predominantly at the top end of the door/entry charge venue list. DAE did not make an estimate for concerts/festivals.

Ten years of ‘State of Play’ consumer surveys, and the 550+ patrons who completed the Live Music Census Consumer Survey confirm that a more realistic figure is $45 per patron per gig in small venues, $75 for concerts and $88 for festivals.

We know from the Census and previous research that 5% of patrons report no spending on food/alcohol (the largest ancillary component), so the patron figures have been adjusted in the calculation to allow for the ‘non spending’ patron component.

On Saturday 13th October, the following ancillary spending took place in CBD and Precinct venues -

	Patrons	Spending
CBD Small Venues (95%) @ $45 per patron	35,805	$1,746,225
CBD Large Venues (95%) @ $75 per patron	3,000	$225,000
Precinct Small Venues (95%) @ $45 per patron	38,585	$1,736,325
TOTAL SPENDING		**$3,707,550**

TABLE 3.7.1

So, on a 'typical' Saturday, live music performances in the CBD and Music Precinct venues generated a total of $4.5 million for venues from door/entry/ticket charges and ancillary patron spending.

Note 1:
Although we have not included the data from the three theatres identified earlier, on Census night, the 3,300 who attended generated $237,500 in ticket revenue and $280,000 in ancillary spending.

Note 2:
Including the 20,000 patrons who attended live music gigs in outer suburban venues on Saturday 13th October would add an additional $900,000 in ancillary spending.

3.8 Venue Employment

The diversity in venue size previously made it difficult to do anything other than produce rough estimates re the numbers employed in venues offering live performance.

Part of the Census volunteers' task was to record the number of musicians and DJs, production staff and general staff (management, door, bar, security etc) working in each venue they attended.

On 13th October, employment in CBD and precinct venues providing live music performances was –

	Musos	DJs	Production Staff	Venue Staff
CBD	307	368	132	1,186
PRECINCTS	594	371	105	1,545
TOTALS	901	739	237	2,731

TABLE 3.8.1

Using the ABS's measure for Full Time Equivalent employment (35 hours per week), and based on industry practice suggesting that the performance engagement for musicians and DJs averaged 4 hours, and that for Production and Venue staff 6 hours –

On Saturday, 13th October -
103 FTE jobs were created for musicians - 82 FTE jobs were created for DJs - 41 FTE jobs were created for Production Staff and 468 FTE jobs were created for Venue Staff

Victorian
Live Music Census
2012

SECTION 4

Annual Venue Activity

The Big Picture

4.1 It's a 'Grand Final' Every Saturday Night!

The Victorian Live Music Census confirmed that every Saturday night (and Friday as well), more than 97,000 people attend popular music performances in 460+ Melbourne live music venues.
On that one night, they spend $0.75 million on tickets/entry and an additional $4.6 million travelling to the gigs and on merchandise, food and drink while they're there.
On days/nights when there are major concerts/festivals – eg. Rod Laver, Palais, Showgrounds, Myer Music Bowl etc, the attendance numbers – and the associated spending, are even more impressive.

4.2 Economic Contribution of Venues

Because the Census gathered information on venue operation, attendance and employment on other nights of the week, we are in a unique position re calculating the annual economic contribution of venue live performance to the State economy.
However, to ensure the quality and credibility of the reported data, several statistical assumptions have been made to err on the side of 'caution'.

Notes –
A. All calculation of small venue door revenue and patron spending have been based on a 50-week year to allow for seasonal variation (eg. smaller audiences during winter months, the odd 'dark' night etc).

B. Although the 3 major theatres in the CBD (Her Majestys, Princess and Regent), were omitted from the Census calaculations, a conservative one-third mimimum of their activities are centred on popular music productions that employ hundreds of performers and staff per year. Therefore 33% of their data has been included in 'The Big Picture'.

C. In calculating the contribution of the 139 outer suburban venues – which it was not possible to include in the physical Census, we have utilised the approach verified in the 'Capital Report'. That is, a week's economic activity in those venues equates to (a minimum) one premium night in the Precinct venues. While many of these outer venues operate on multiple nights per week, and this is almost certainly under-reporting their contribution, we have again erred on the side of caution to avoid any suggestion of over-inflating the result.

D. We have not attempted to estimate a contribution from the hundreds of performances per year that take place in the 60+ 'occasional' music venues identified in our venue search.

E. It should be noted that there are a number of events in the CBD and suburbs that have a significant popular music component but are free – eg. St Kilda Festival, Brunswick Music Festival Street party, various Federation Square music series, Melbourne Music Week, Darebin Music Feast, Moomba … etc etc. While these do not generate ticket/door revenue, there is certainly significant patron spending associated with attendance. This has not been included.

F. Also beyond the scope of this study is an analysis of the popular music component of the programs of events that sit in Live Performance Australia's 'multi category' festivals – eg. Melbourne International Arts Festival, Australian World Music Expo, Melbourne Fringe Festival, Melbourne Comedy Festival etc.
There is no doubt that significant income/spending takes place, but Live Performance Australia's figures do not provide an accurate breakdown. Further work needs to be done to analyse the live music component of these events.

G. In order to prevent any suggestion of double counting, Live Performance Australia's

concert ticket revenue has been discounted by 10% to account for the fact that some of the top-end smaller venues (eg. The Corner Hotel, Northcote Social Club, Hi Fi Bar etc) regularly use the same ticket agencies (Ticketek, Ticketmaster, Moshtix) that supply LPA with their data.
For the same reason, we have discounted the LPA concert attendance total by 10% in calculating patron ancillary spending.

The summary which follows is conservative in nature, and provides the most comprehensive figures so far on the annual economic contribution of popular music live performance in Melbourne venues. Hopefully, the next stage of the Census project will include a detailed analysis of regional venues and events to produce definitive Victorian totals.

4.3 Economic Contribution - Activity Summary

The economic activity summary includes –

- Door entry/ticket income and patron spending from small venues in the CBD, inner suburban music precincts and outer Melbourne suburbs.
- Large venue/Concert ticket revenue and patron spending – mainly in the CBD
- LPA's Ticket revenue from major concerts/festivals (almost entirely based in Melbourne CBD and inner suburbs) and associated patron spending.

Supporting Evidence

4.4 Live Performance Australia - Ticket & Revenue Summary - 2011

Live Performance Australia annually collects box office information from major ticket agencies and the members of the Australian Major Performing Arts Group – mainly state-based Dance, Theatre, Opera and Classical Music companies.

In 2011, 17.3 million tickets were sold for live performances in all artforms at major venues/festivals generating box office revenue of $1,307.3 million.

4.5 LPA - The National Picture - Live Performance & Contemporary Music

Contemporary Music performances (re-named from 'Non Classical') accounted for 34% of all live performance tickets sold (5.9 million) and 41.3% of all ticket revenue ($539 million).
The absolute dominance of the sector is underlined by the fact that Ernst & Young (auditors for LPA) confirm that approx 98% of the 'Single Category' Festivals (985,000 tickets and $96.4 million in revenue) are contemporary music events – eg. Big Day Out, Creamfields, Harvest, Future Music, Good Vibrations, ParkLife, Summadayze, Soundwave, Stereosonic   … etc.
Further, a large number of events in the second largest category – Musical Theatre (16% of total tickets - 2.8 million, and 19% of total box office - $246.8 million), are built around contemporary music performance.

LPA noted that ticket sales and revenue for contemporary music declined from 2010 levels, but pointed out that the category is subject to significant variation based on international tours. In 2010 record numbers were recorded based on tours by AC/DC, Metallica, U2 and Lady Gaga.

Despite these fluctuations, Contemporary Music's industry share of ticket sales and box office revenue continues to easily exceed those for Dance, Theatre, Opera and Classical music combined.
It is the only sector to have grown significantly since LPA's first report in 2004.

	Audience - % of Industry		Revenue - % of Industry	
	2004	2011	2004	2011
Dance	4.4%	4.4%	5.1%	5.5%
Classical	6.1%	7.9%	7.9%	6.0%
Opera	9.1%	3.6%	4.7%	2.5%
Theatre	13.0%	5.0%	16.3%	8.0%
Musicals	20.0%	19.0%	14.0%	16.0%
Contemporary	23.0%	34.0%	28.0%	41.0%

TABLE 4.5.1

4.6 LPA - Contemporary Music Concerts/Festivals - Victoria

LPA's reporting for Victoria is almost exclusively Melbourne-based. Ernst & Young estimate that 98/99% of all concert/festival activity reported in LPA Contemporary Music data for Victoria is related to performances in Greater Melbourne. Almost exclusively in the inner suburbs.

In Victoria in 2011, 1.8 million tickets to major concerts were sold (30% of Australian industry total), generating $157.4 million in box office revenue (29.2% of industry total).

A further 219,000 tickets were sold for Contemporary Music festivals, generating a further $20.7 million in box office revenue.

The LPA figures for patronage, box office and ancillary spending** for in 2011 look like this -

2011 CONCERTS	
Audience	1,638,000
Ticket Revenue	$141,700,000
Ancillary Spending	$122,850,000
2011 FESTIVALS	
Audience	219,000
Ticket Revenue	$20,700,000
Ancillary Spending	$19,272,000
TOTALS	
Audience	**1,857,000**
Ticket Revenue	**$162,400,000**
Ancillary Spending	**$142,122,000**

TABLE 4.6.1

** The figure of $75 average patron ancillary spending (transport, food, drink, merchandise) per major concert and $88 per patron per festival, is based on responses to the Live Music Census online

Consumer Survey and 5 years of responses to the 'State of Play' Consumer Survey. A total sample of over 2,500. It is also in line with Ernst & Young's findings re patron spending.

4.8 Music Theatre - Popular Music

In 2011, Live Performance Australia reported sales of 1,062,386 music theatre tickets in Victoria (38% of national total), generating $91,147,602 in revenue (37%).

Considering that many are based almost entirely on popular music compositions (eg. Jersey Boys, Rock of Ages), it seems entirely appropriate to include a portion of their economic generation in this study.
Allowing for 33% of total activity to be thus allocated, we can add the following to the significant Victorian totals already recorded –

Additional annual patron numbers – 354,128
Additional ticket revenue - $ 30,382,534
Additional patron ancillary spending (@$75) - $ 26,559,600

ANNUAL VENUE OPERATION

4.9 Live Music Operation

65% of CBD venues and 69% of Precinct venues regularly feature live music 4 nights per week.
On the peak nights – Friday and Saturday, 92% of Precinct venues and 89% of CBD venues regularly feature live music.

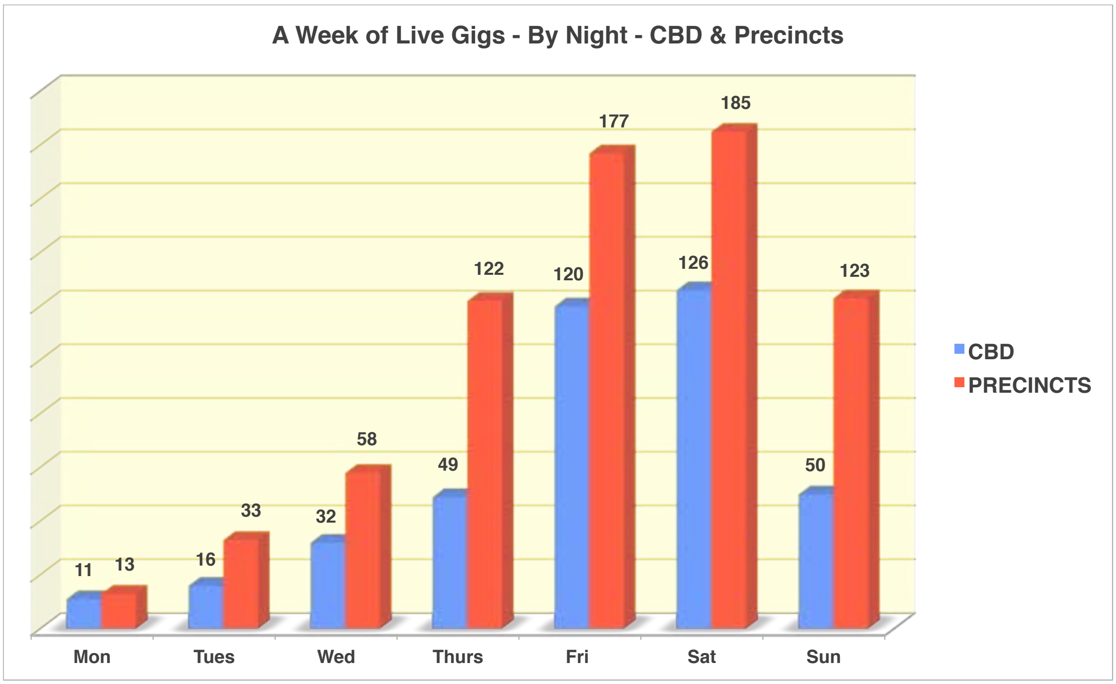


CHART 4.9.1

These venues - in the Melbourne CBD, music precincts and outer suburbs, annually create 62,000+ live music gigs. Many of these gigs feature multiple acts/performers - both musicians and DJs.

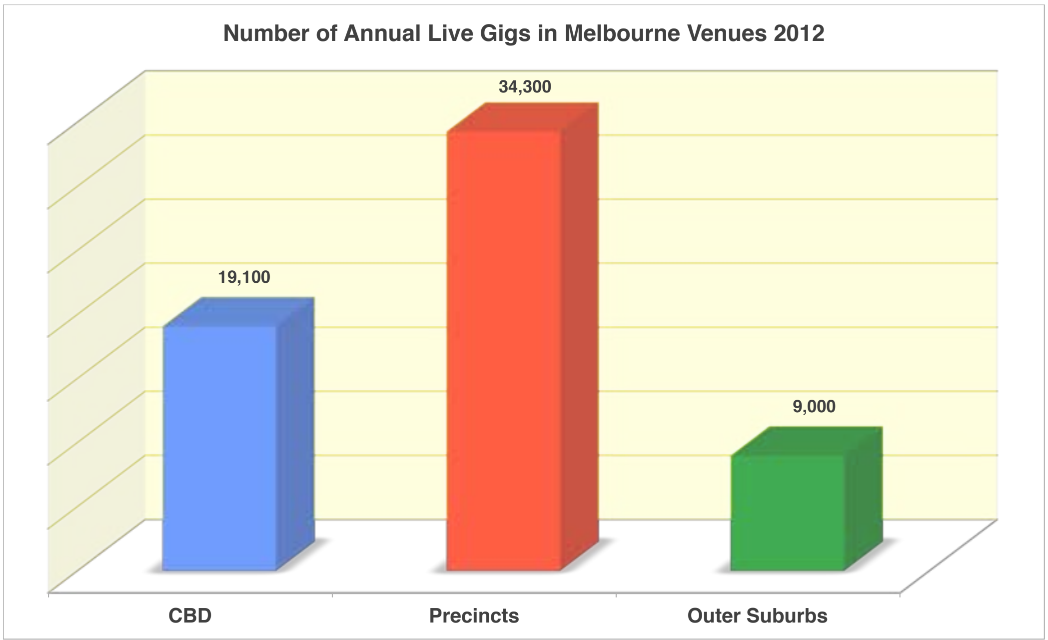


CHART 4.9.2

4.10 Annual Audience - Greater Melbourne

As measured by the Live Music Census, performances in Melbourne's CDB, music precincts and outer suburbs annually attract 12.5 million patrons.

Annual Audience

CBD Small Venues	4,553,350
CBD Large Venues	533,000
Collingwood	394,000
Brunswick	593,550
Carlton	164,500
Fitzroy	1,047,250
Northcote	307,150
Richmond	417,500
Prahran	1,080,150
St Kilda	1,133,750
Sth/Pt Melb	394,000
Outer Suburbs	1,934,750

CBD TOTAL	**5,086,350**
Precincts	**5,531,850**
Outer Suburbs	**1,934,750**
TOTAL ANNUAL AUDIENCE	**12,552,950**

TABLE 4.10.1

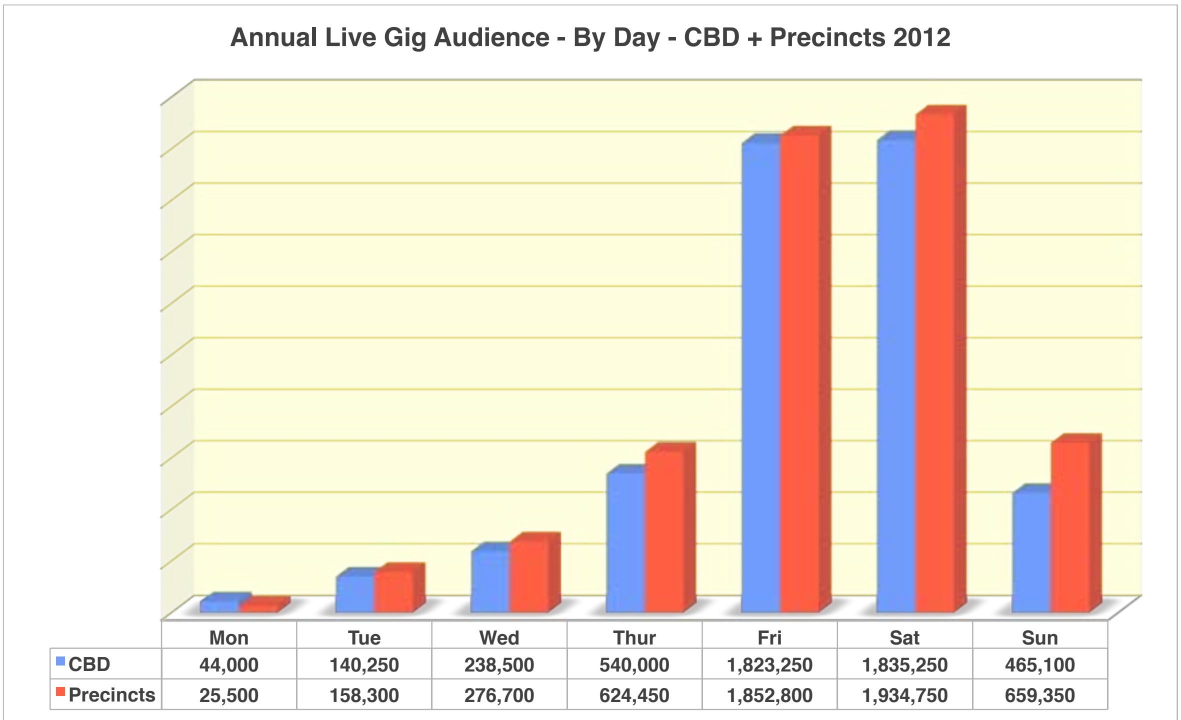


CHART 4.10.1

4.11 Greater Melbourne + LPA + Regional Festivals

In addition to the 12.5 million patron visits to small venues, Live Performance Australia recorded 1,857,000 attendances at Melbourne-based major concerts and festivals for a total of **14.5 million**.

In addition, a Wollongong University report (*'Reinventing Rural Places – The Extent and Impact of Festivals in Rural and Regional Australia'*), reported an additional 1,000,000 attendances at regional Victorian popular music festivals.
A total annual audience of 15.4 million.

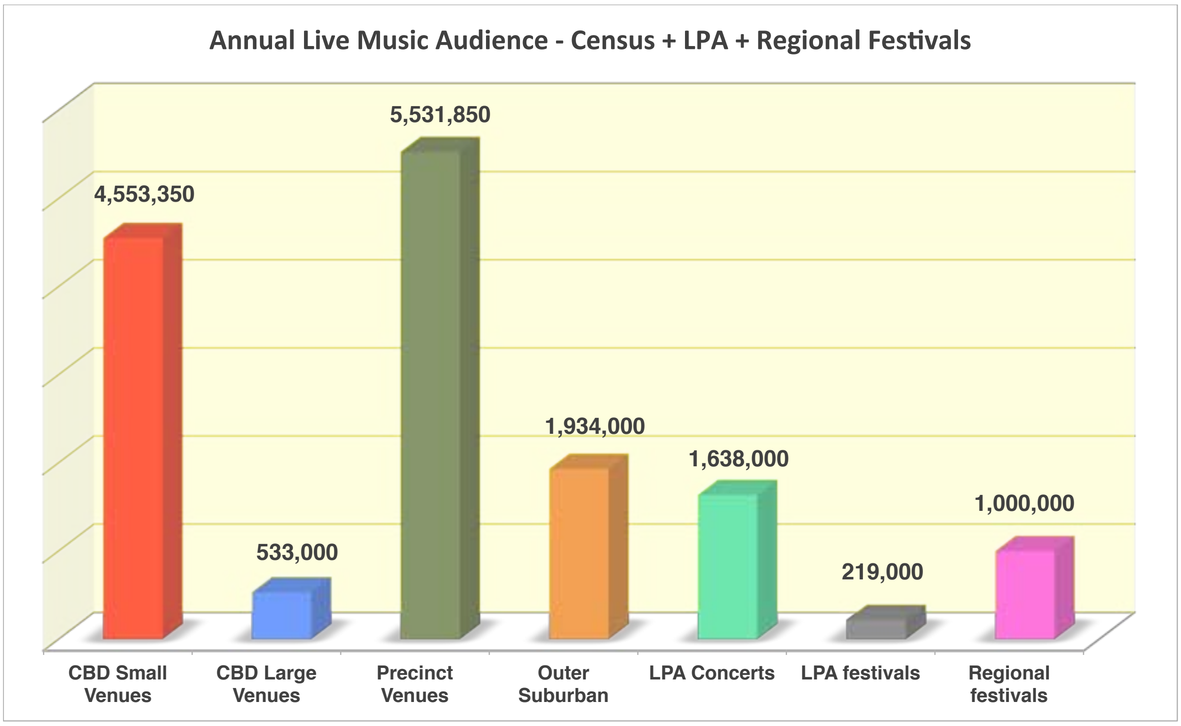


CHART 4.11.1

4.12 Additional Live Music Audience

If we add the 33% audience for popular music-based theatre productions (354,000) -
an annual total of 15.75 million attendances is indicated for popular music live performances in Greater Melbourne.

4.13 Annual Live Music Income/Expenditure - Door/Entry/Ticket

Victorian live music fans attend an average of 4.5 live music performances per month in small venues and 1 concert/festival performance per month.
As measured by the Live Music Census, entry charges in Greater Melbourne venues generate $117.94 Million annually.

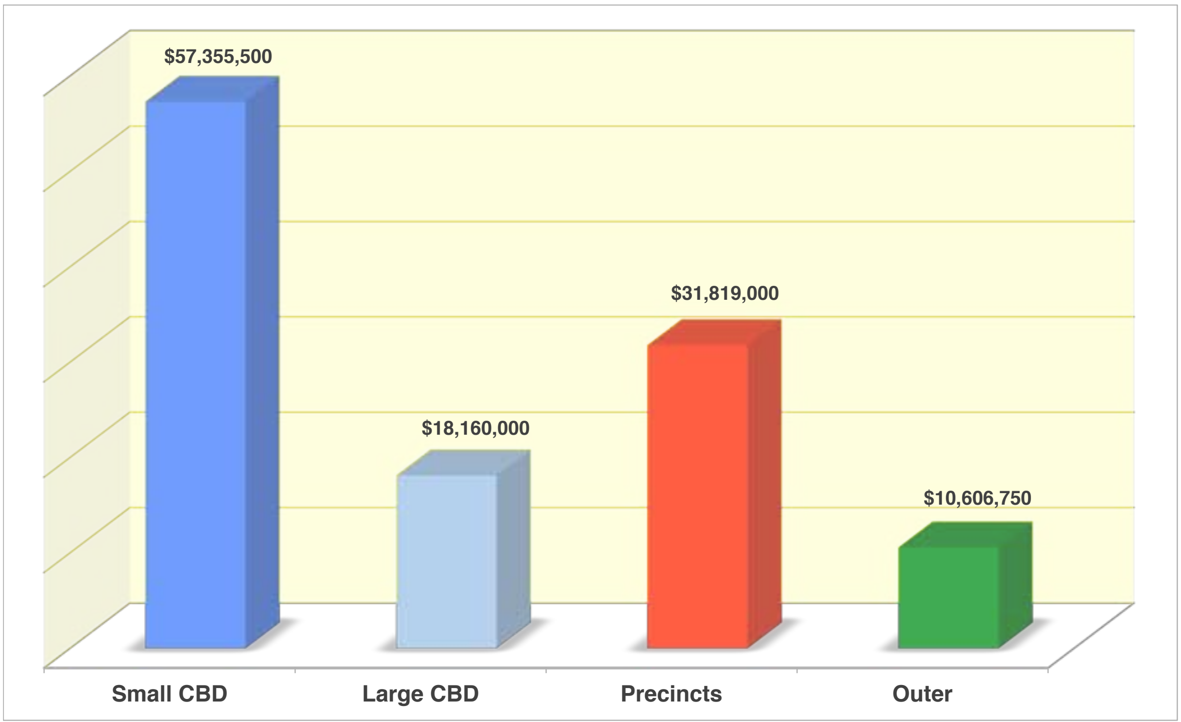


CHART 4.13.1

Annual Door/Entry Income

CBD - Small	$57,355,500
CBD - Large	$18,160,000
Collingwood	$1,071,000
Carlton	$4,785,000
Brunswick	$1,045,000
Fitzroy	$5,985,250
Northcote	$2,696,200
Prahran	$4,392,500
Richmond	$4,400,000
St Kilda	$6,368,750
Sth/Pt Melb	$1,072,100
Outer Suburbs	$10,606,750
TOTAL	**$117,941,250**

TABLE 4.13.1

4.14 Door/Entry/Ticket Income - Census + LPA + Regional Festivals

To the Census data we need to add the ticket revenue from Live Performance Australia's Ticket Revenue for - major concerts in Melbourne (90% to avoid double-count), popular music festivals and regional music festivals -

	Door/Ticket Revenue
CBD Small Venues	$57,355,500
CBD Concerts/Theatres (75%)	$18,160,000
Precinct Venues	$31,819,000
Outer Suburban Venues	$10,606,750
LPA Concerts (90%)	$129,653,124
LPA Festivals	$45,000,000
Regional Vic Festivals	$25,400,000
TOTAL DOOR/TICKET	**$317,994,374**

TABLE 4.14.1

Note: Addition of Percentage of Music Theatre
If we add 33% of the ticket revenue for music theatre productions based on popular music compositions ($30.38 Million), we come up with an annual figure of $**348 Million.**

4.15 Ancillary Patron Spending - General

As noted in the Census Consumer Survey, patrons attending live music performances are responsible for a considerable amount of ancillary spending associated with their consumption of live music pub/club/bar, concert and festival gigs -

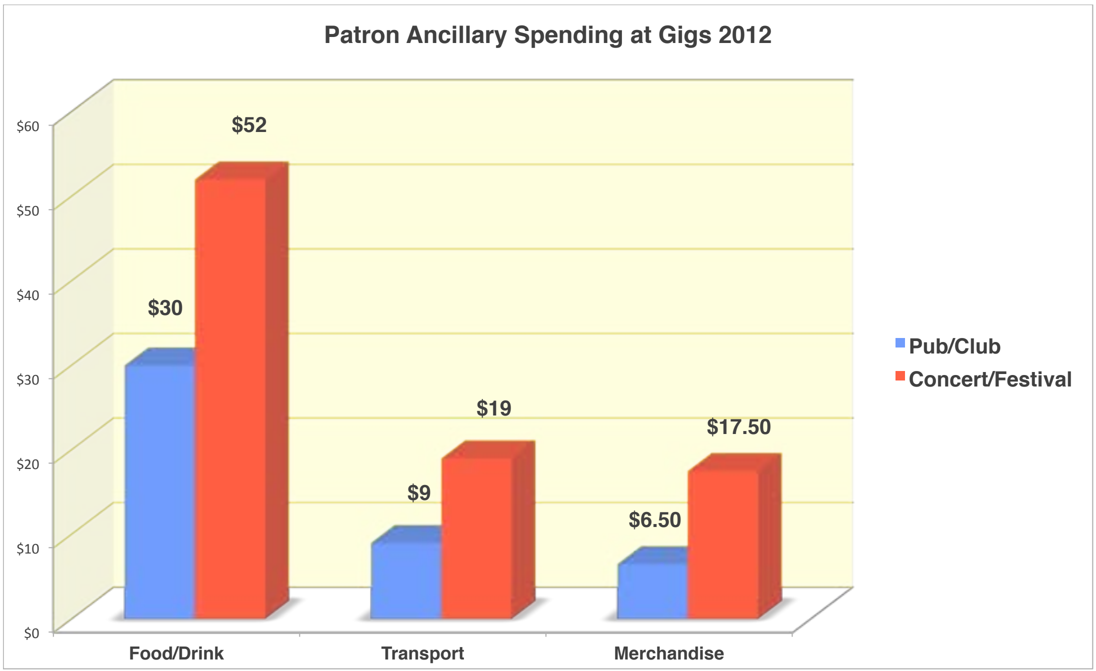


CHART 4.15.1

4.15 Ancillary Patron Spending - Census - Greater Melbourne

During a year of attendance at live music performances in small and larger venues in Greater Melbourne venues, there was $580.7 million spending in addition to door/entry/ticket expenditure.

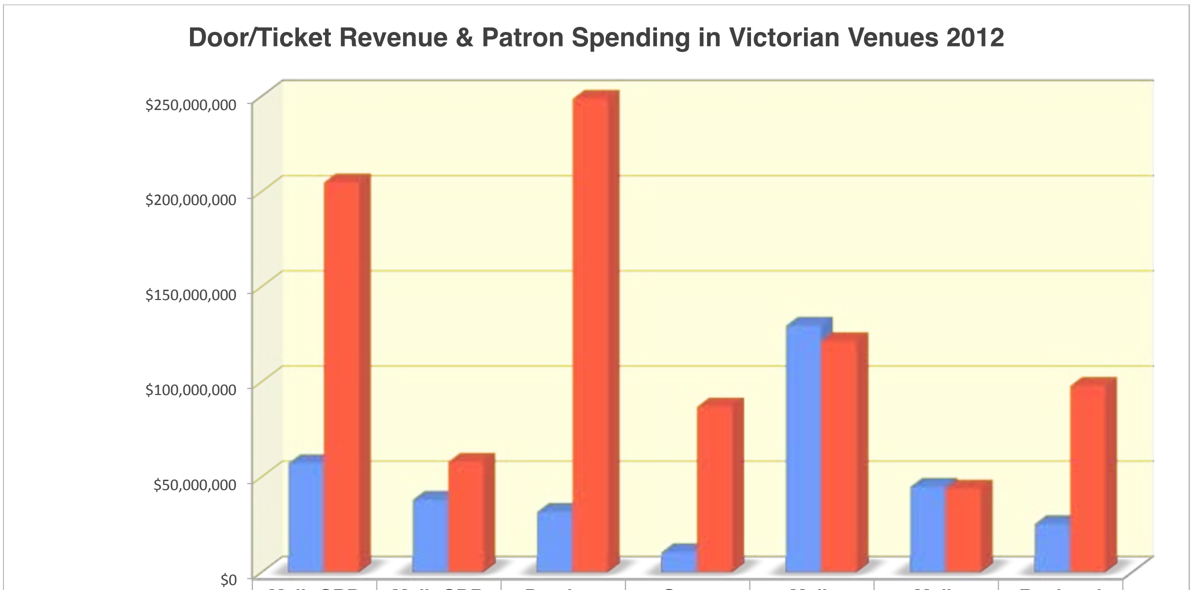
Annual Ancillary Spending

CBD Small Venues	$204,900,750
CBD Large Venues	$39,975,000
Collingwood	$17,730,000
Brunswick	$26,709,750
Carlton	$7,402,500
Fitzroy	$47,126,250
Northcote	$13,686,750
Richmond	$18,787,500
Prahran	$48,606,750
St Kilda	$51,018,750
Sth/Pt Melb	$17,730,000
Outer Suburbs	$87,063,750

CBD TOTAL	**$244,875,750**
Precincts	**$248,798,250**
Outer Suburbs	**$87,063,750**
TOTAL ANCILLARY SPEND	**$580,737,750**

TABLE 4.15.1

4.16 Ancillary Spending - Census + LPA + Regional Festivals



	Melb CBD - Small	Melb CDB - Concert/ Theatre	Precinct Venues	Outer Suburban	Melb Concert - LPA	Melb Festivals - LPA	Regional Vic Festivals
Door/Ticket	$57,355,500	$38,160,000	$31,819,000	$10,606,750	$129,653,124	$45,000,000	$25,400,000
Ancillary Spending	$204,900,750	$58,106,250	$248,933,250	$87,063,750	$121,500,000	$44,000,000	$98,000,000

CHART 4.16.1

Including the ancillary spending based on LPA (concert/festival) and regional Victorian music festival data adds an additional $263.5 Million to the CBD/Precinct/Outer Suburban total.

	Ancillary Spending
CBD Small Venues ($45)	$204,900,750
CBD Large Venues ($75)	$39,975,000
Precinct Venues ($45)	$248,933,250
Outer Suburban Venues ($45)	$87,063,750
LPA Concerts (90% @ $75)	$121,500,000
LPA Festivals ($88)	$44,000,000
Regional Vic Festivals	$98,000,000
TOTAL ANCILLARY SPENDING	**$844,372,750**

TABLE 4.16.1

Note: Addition of Percentage of Music Theatre
If we add 33% of the ancillary spending for music theatre productions based on popular music compositions ($26.5 Million), we come up with an annual figure of $ **871 Million.**

4.17 Total Income/Spending - The Big Picture

Leaving Music Theatre and regional Victorian small venues out of calculations, we are in a position to confirm that live performances in Greater Melbourne venues and at regional popular music festivals generate more than $1 Billion annually in patron spending.

	Door/Ticket Revenue
CBD Small Venues	$57,355,500
CBD Large Venues	$18,160,000
Precinct Venues	$31,819,000
Outer Suburban Venues	$10,606,750
LPA Concerts (90%)	$129,653,124
LPA Festivals	$45,000,000
Regional Vic Festivals	$25,400,000
TOTAL DOOR/TICKET	**$317,994,374**

	Patron Spending
CBD Small Venues ($45)	$204,900,750
CBD Large Venues ($75)	$39,975,000
Precinct Venues ($45)	$248,933,250
Outer Suburban Venues ($45)	$87,063,750
LPA Concerts (90% @ $75)	$121,500,000
LPA Festivals ($88)	$44,000,000
Regional Vic Festivals	$98,000,000
TOTAL ANCILLARY SPENDING	**$844,372,750**

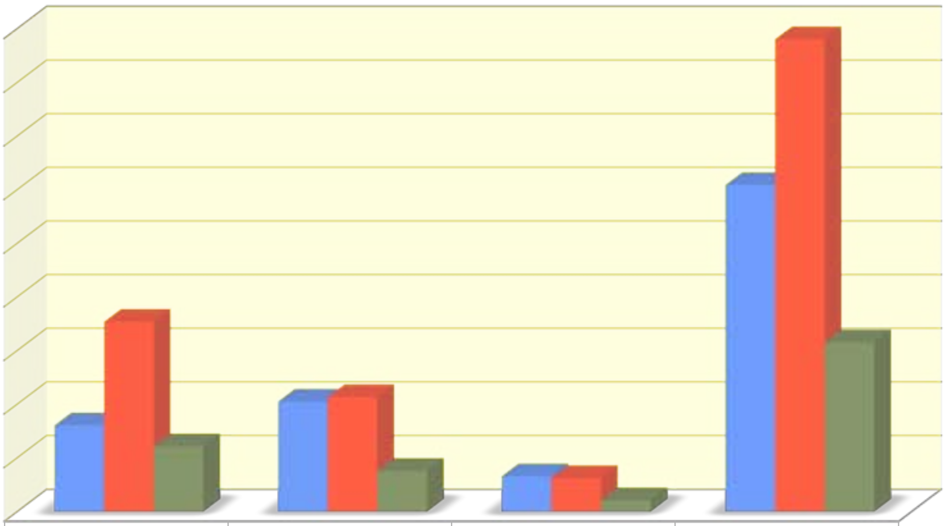
TOTAL MELBOURNE VENUES	**$1,039,366,750**
TOTAL MELBOURNE + Regional Festivals	**$1,162,366,750**

TABLE 4.17.1

4.18 Live Performance - Weekly and Annual Venue Employment

During a week of live performance activity in Melbourne's CDB, Precinct and Outer Surban venues, the following job opportunities are created -

Weekly Employment in Melbourne Live Music Venues 2012



	Musos	DJs	Production	Venue Staff
CBD	805	1,027	331	3,046
Precincts	1,771	1,068	313	4,405
Outer Suburbs	609	381	107	1,578

CHART 4.18.1

4.19 Live Performance - Annual Venue Employment

In year of activity, the following Full Time Equivalent jobs were created by live performances -

	Musos	DJs	Production	Venue Staff
CBD	40,250	51,350	16,550	152,300
Precincts	88,550	53,400	15,650	220,250
Outer Suburbs	30,450	19,050	5,350	78,900
TOTAL	**159,250**	**123,800**	**37,550**	**451,450**

Assuming -
Musos/DJs 4 hours per gig & Production Venue Staff 6 hours per gig
& ABS calculation of 35 hours = Full Time Equivalent employment

	Musos	DJs	Production	Venue Staff
TOTAL FTE	**18,200**	**14,149**	**6,437**	**77,391**

TABLE 4.18.1

Note:
Due to the nature of reporting to LPA, it was not possible to calculate the job creation associated with major concerts/festivals reported by that organisation.

4.20 Live Performance - Employment - Regional Victorian Music Festivals

As noted earlier ((*'Reinventing Rural Places – The Extent and Impact of Festivals in Rural and Regional Australia'*), Victoria's 116 annual popular music festivals make a significant contribution to the Full Time Equivalent jobs created by live performance -

Planning Phase
476 full time jobs annually
592 part time jobs annually

Operational Phase
1,578 full time jobs
1,462 part time jobs

4.21 Comparative Employment Data

The Australian Bureau of Statistics employment data uses the ANZSCO06 Major Occupation categories, meaning the majority of popular music's live performance practitioners do not register in the 'Arts and Recreation Services' category owing to the predominance of part-time/casual employment in the sector.
However, as the Census collected data allowing Full Time Equivalent employment to be calculated, there is an ability to make some interesting comparisons with data reported in the ABS's *'Labour Force Australia, Detailed Quarterly*' (cat no 6291.0.55.003) for August 2012.
This publication records 'Employed Persons' in the Melbourne Major Statistical Region and the Inner Melbourne Statistical Region.
In August, 2012 the ABS reported the following -

Melbourne Major Statistical Region - Annual Employment

Manufacturing -	223,000
Retail Trade -	229,000
Education & Training -	177,000
Accommodation & Food Services -	136,000
Live Music Performance Delivery -	**116,000**

Inner Melbourne Statistical Region - Annual Employment

Retail Trade -	14,000
Accommodation & Food Services -	16,000
Education & Training -	18,000
CBD Live Performance Delivery -	**39,500 (Performers 10,500; Production & Venue 29,000)**

Victorian
Live Music Census
2012

SECTION 5

Consumer Survey

Portrait of the typical live music consumer

Based on 560 online responses (Survey Monkey) to the Consumer Survey promoted on the night of the Census, our typical live music fan is -

- A male or female full-time worker or student, aged in their mid to late twenties and more likely to live in the inner north/south within 10 Kms of the Melbourne CBD, unless visiting from regional victoria for (14%).

- Prefers RRR, PBS and Triple J rather than commercial radio, but has an ongoing soft spot for GOLD FM. Internet radio is becoming increasingly important.

- Has always watched Rage - and still does, but is increasingly accessing web services for their music videos. Is not - and never has been, a fan of music reality shows.

- Attends an average 5 live music performances per month at a variety of venues - bars, pubs, clubs and an average 1 concert/festival per month.
  Spends an average $12 per gig on entry to pubs/clubs etc, an average $75 per concert ticket and $88 per festival ticket. At the gigs, spends an average additional $45.50 per pub/club gig and an average $88 per concert/festival on 'extras' - transport, food, drink, and merchandise.

- The Corner's the favourite pub/club venue, while Billboard is the top larger venue.

- Rock is clearly the preferred genre - especially the 'indie' variety, but our typical fan will happily consume reasonable helpings of Rap/Hip Hop, Blues/Folk, Country, Funk, Soul Pop, Metal and Punk. Overwhelmingly prefers original material.

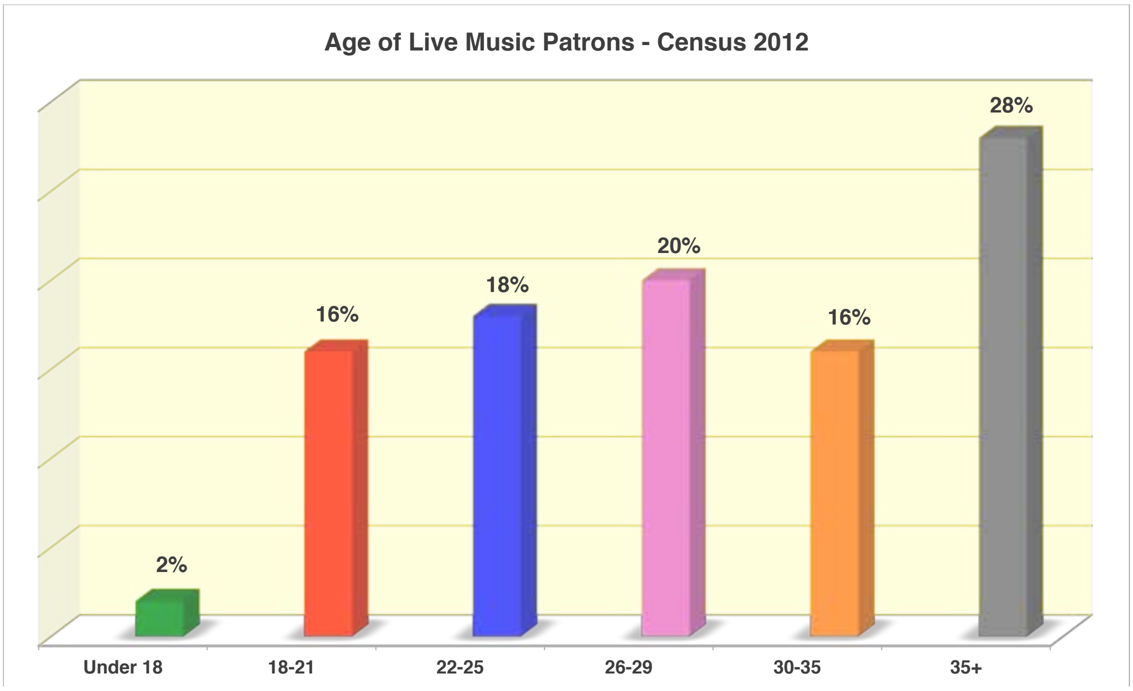
- Beat is - and always has been, the favourite music publication and a major source for gig information. Traditional promo tools - word-of-mouth, posters/flyers etc are as influential as ever, but there's increasing use of web-based services (eg. Facebook, Twitter, Faster Louder, Mess 'n Noise etc) to gather information on performances.

- An early adopter of web-based music sites/services/products - listening to Net radio, participating in chatrooms and forums, buying CDs, visiting band sites and keeping up with industry news/views.
  A serious music downloader paying for approximately 50% of the music they download. They share 46% of those downloads across P2P and social media networks. They're sharing less than in previous years, maybe because they're beginning to seriously use music subscrition services (17%). Spotify's the big winner here.

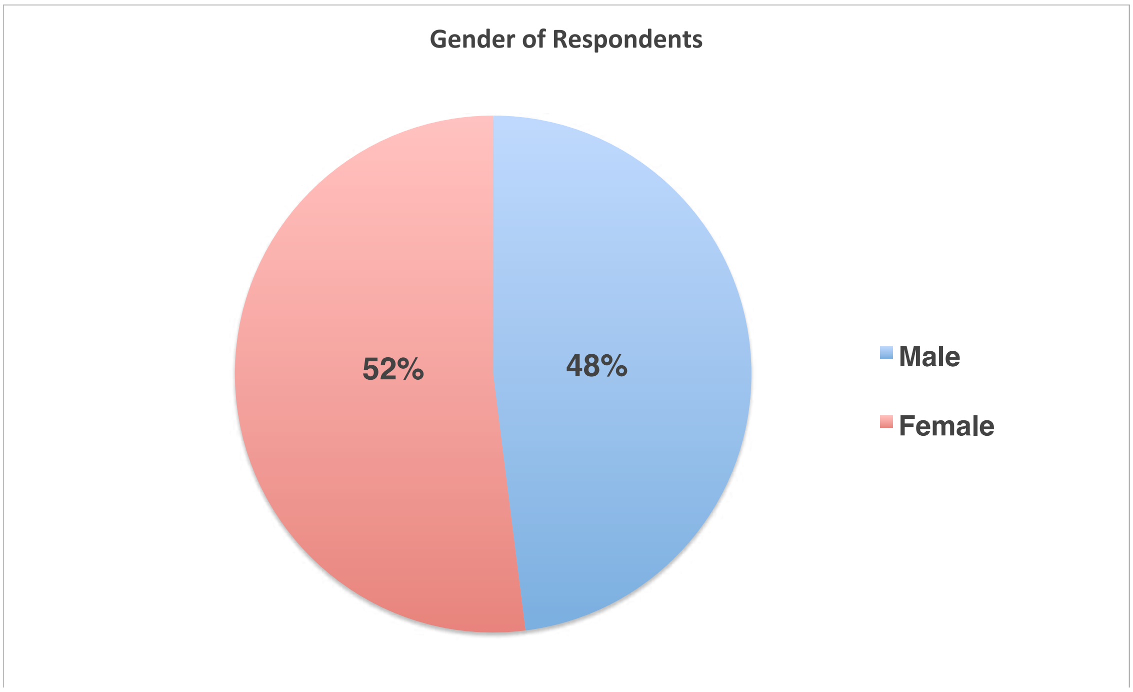
- Approximately half the music they own is Australian, and most (76%)would like to hear more of it programmed on radio (especially commercial). Even more (83%) want an increase in local material produced recentlyparticularly that released in the last 12 months.

- Travels an average of 10Kms to gigs and uses a mix of transport modes, including public transport (72%) and private car (60%).

Question 1.
Age Group of Respondents
We made a conscious effort this year to survey as representative a sample as possible of the live music going public – particularly those either side of the 20s 'hard core'. This was been achieved.

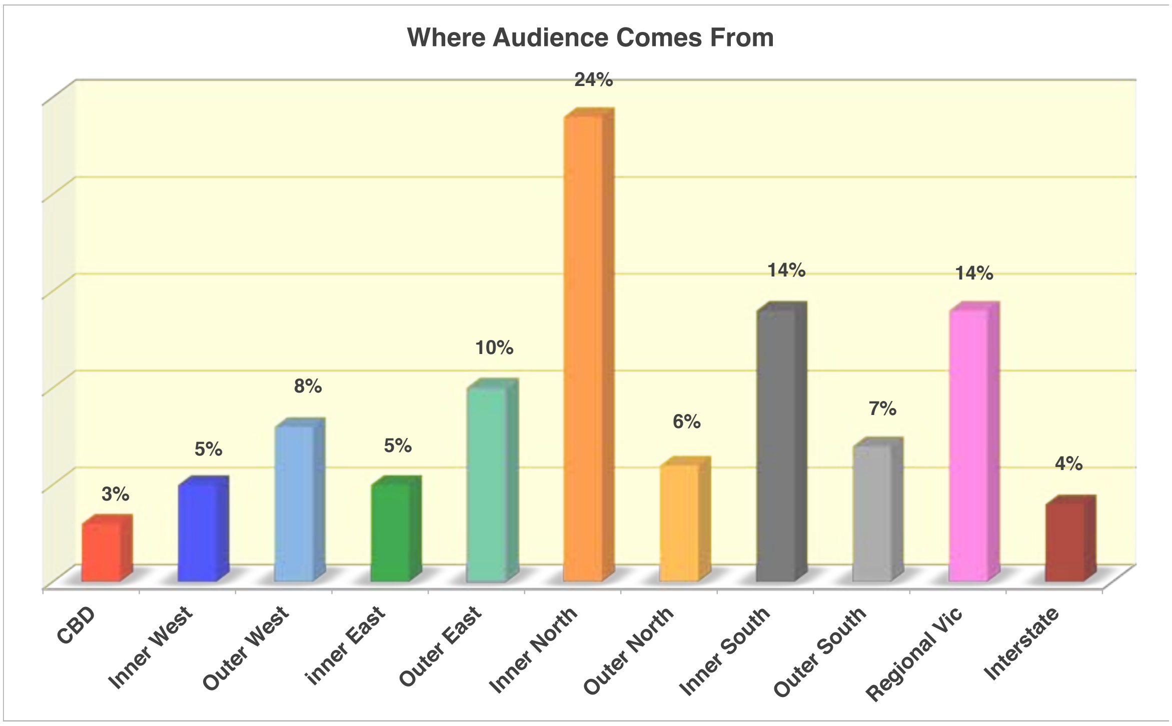


Question 2.
Gender of Respondents
The gender balance of respondents to this year's survey is consistent with previous years and, we would suggest, reflects the general audience at most live music performances.

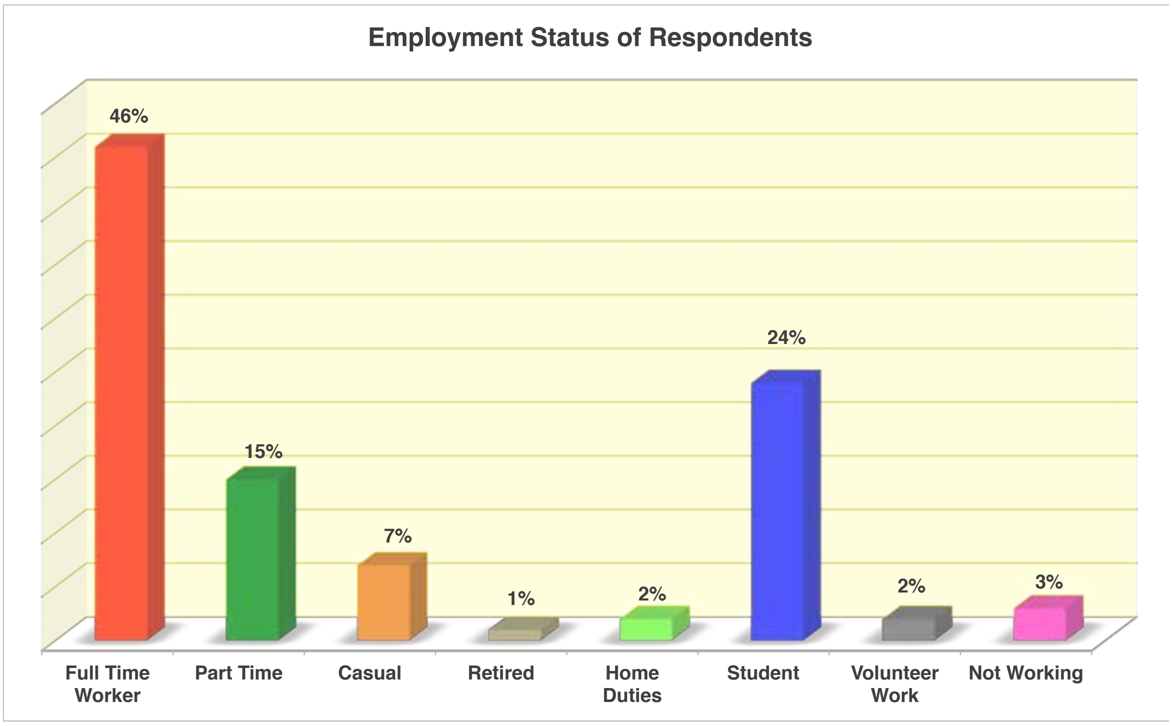


Question 3.
Geographical Location of Respondents

The audience for live music in Melbourne is widely spread with the exception of the 'Inner North' which supplies approximately 25% of the attendees. The area has blossomed in recent years as a cultural/arts/music hub, housing many practitioners and those wanting to be close to the 'action'. It is interesting to note that 14% of patrons are regionally based.



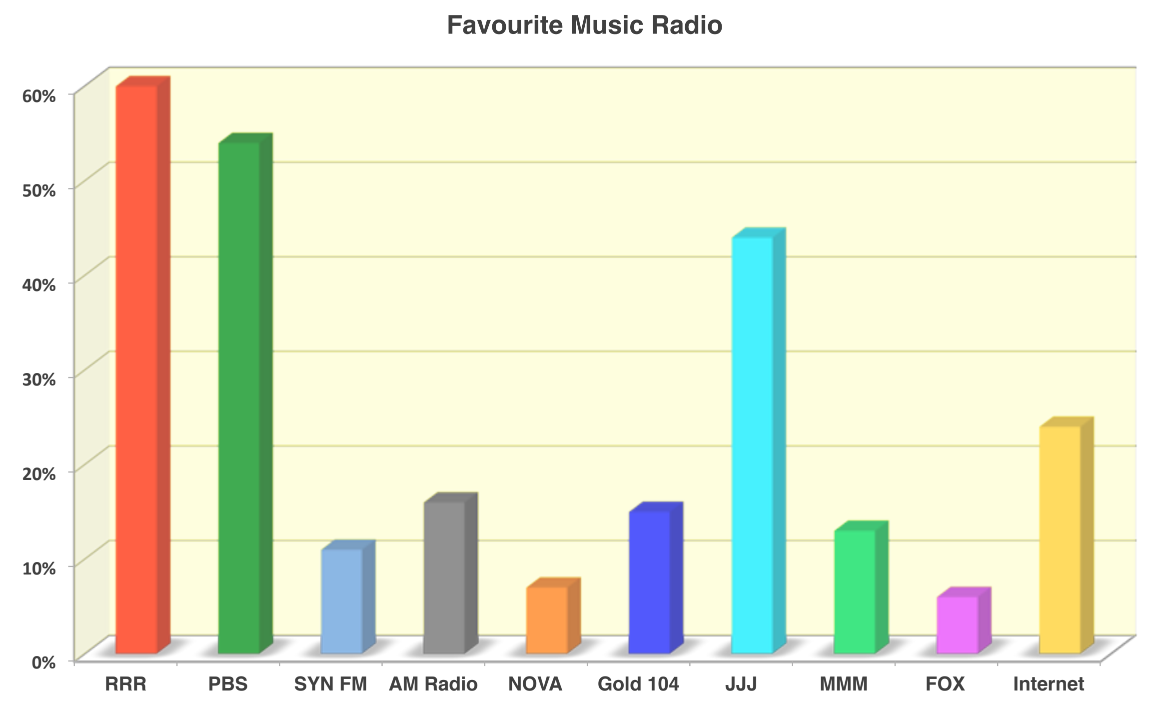
Question 4.
Occupation of Respondents



Question 5.

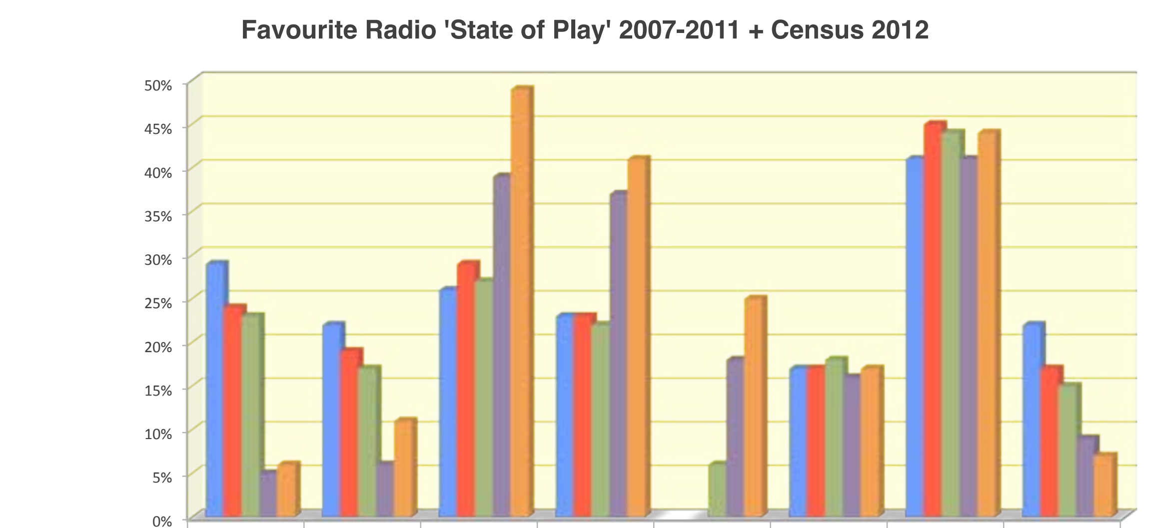
Radio Audience – Which radio station is your favourite ?

In the years of NMIT surveys Triple J was a consistent favourite. However the unique strength of Melbourne's public radio has seen RRR and PBS finally overtake it. This possibly has as much to do with public radio's support for local/original acts, as it has with a perceived move to the 'mainstream' by Triple J.



ALL Radio Listening Compared – 'State of Play '2005 - 2011 + Census 2012

Melbourne's public radio broadcasters continued to increase their popularity, mainly at the expense of commercial FM, although our live music fans continue to have a soft spot for Gold's unashamed 'retro' programming. Perennial winner Triple J finally surrendered the No.1 spot to RRR, while internet radio continues to increase its share.

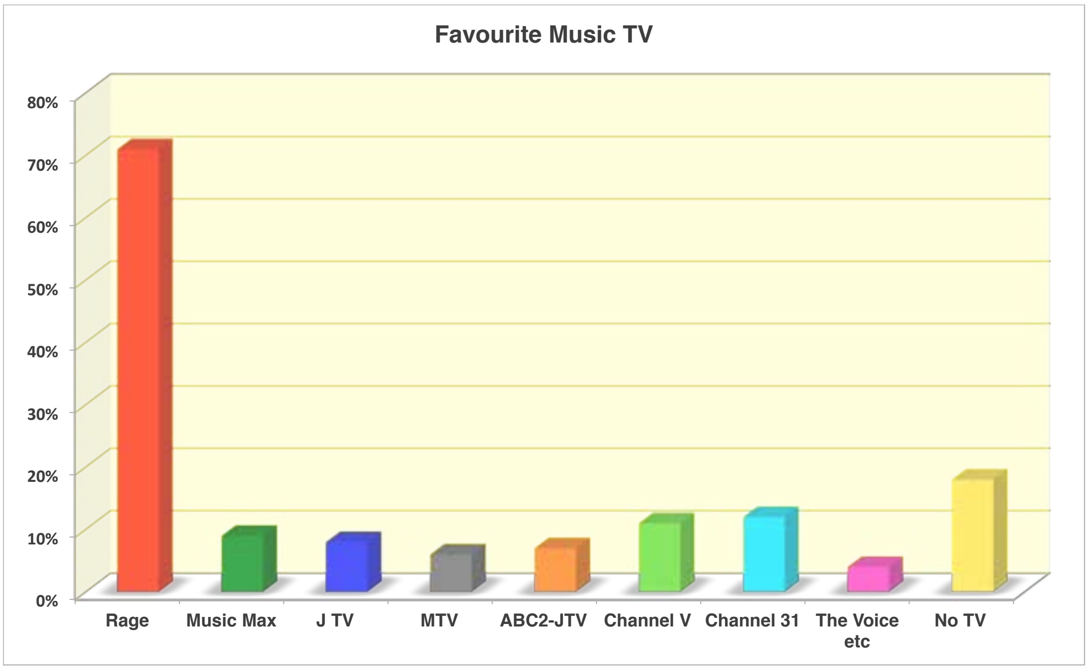


	Fox	MMM	RRR	PBS	Internet	Gold	JJJ	NOVA
2007-2008	29%	22%	26%	23%		17%	41%	22%
2008-2009	24%	19%	29%	23%		17%	45%	17%
2009-2010	23%	17%	27%	22%	6%	18%	44%	15%
2010-2011	5%	6%	39%	37%	18%	16%	41%	9%
2012 Census	6%	11%	49%	41%	25%	17%	44%	7%

Question 6.

TV Audience – Which music TV show is your favourite ?

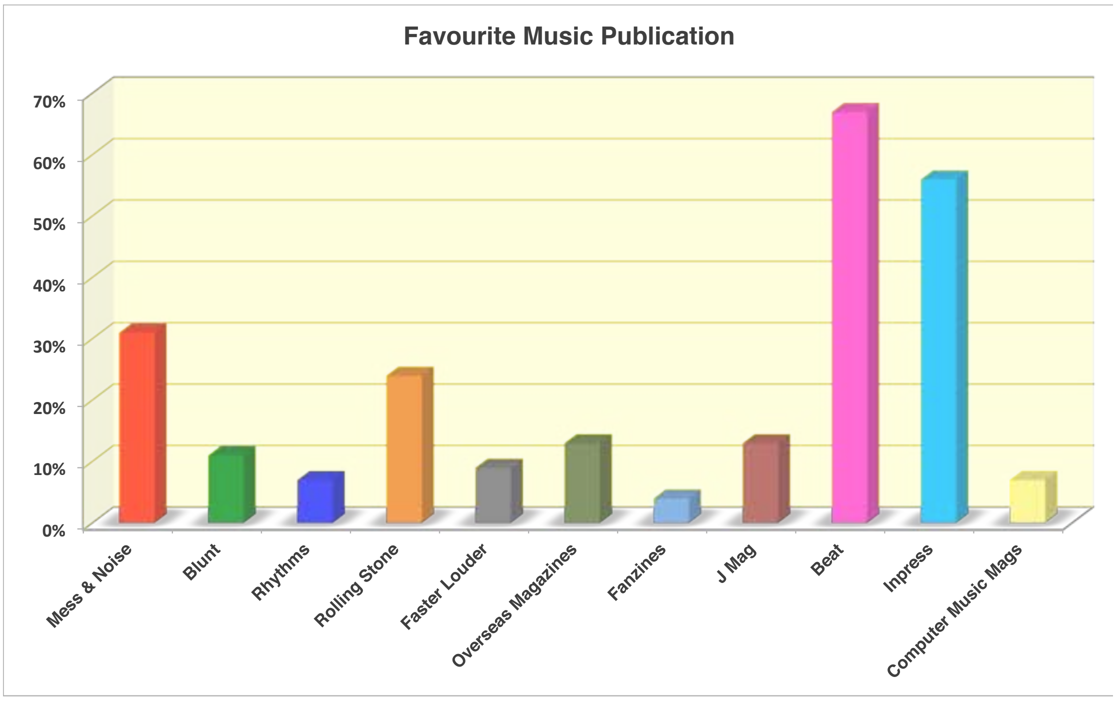
Again the ABC's 'Rage' streeted the Free-To-Air/Pay TV opposition, more than tripling its nearest rival. As in previous years, music 'reality' TV has failed to make any lasting impression on our survey sample, but J TV has built on its respectable 2008 debut (10%).
Consumers are increasingly accessing their music video via artist's websites and YouTube (see Question 11).



Question 7.

Favourite music publication

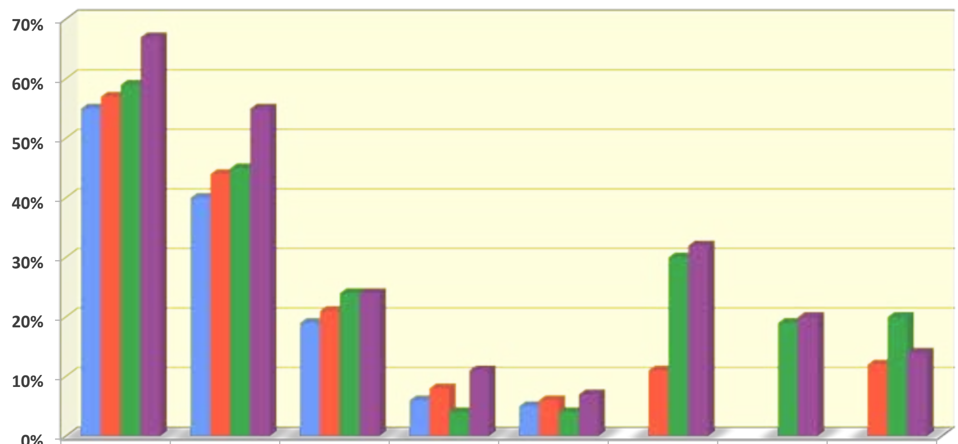
Beat remains the dominant favoured music publication - as it has been since our first report in 2000. Interesting, considering that both street press claim roughly the same circulation (32,000 approx), the same readership 'multiplier' (5) and have almost identical distribution. The big movers have been the exclusively internet-based *'Mess & Noise'* and *'Faster Louder'*.



Favourite Music Publication - 'State of Play' 2008-2011 + Census 2012

It is interesting to consider that despite the vastly increased amount of music information available on the Net (especially), and the growing importance of other sources of gig information (eg social media), print media - especially the Street Press, has managed to maintain a very strong position. The fact that both Beat and InPress have online versions has obviously helped them to maintain position..

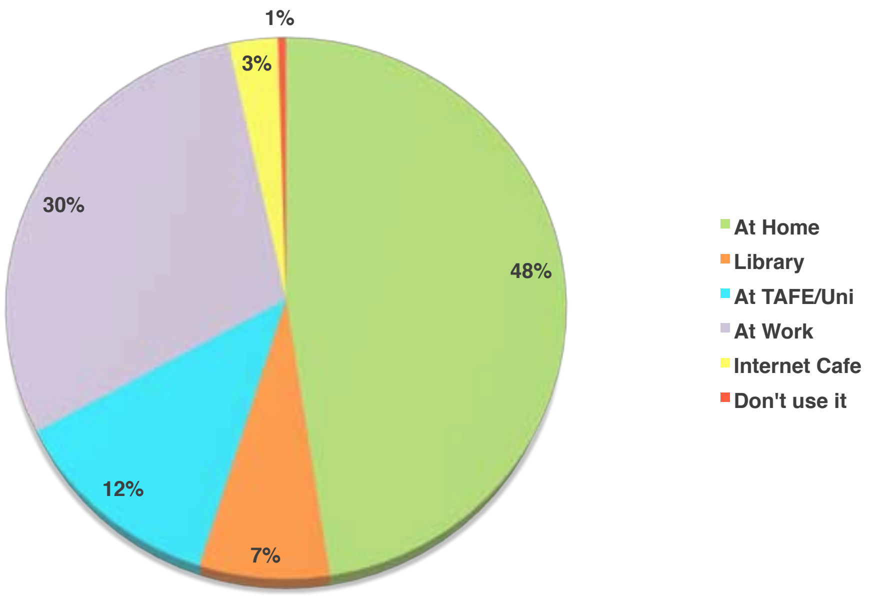
Favourite Music Publications 'State of Play' 2008-2011 + Census 2012



	Beat	InPress	Rolling Stone	Blunt	Rhythms	Mess & Noise	J Mag	Faster Louder
2008/2009	55%	40%	19%	6%	5%			
2009/2010	57%	44%	21%	8%	6%	11%		12%
2010/2011	59%	45%	24%	4%	4%	30%	19%	20%
Census 2012	67%	55%	24%	11%	7%	32%	20%	14%

Question 8.
Where Do You Use The internet ?

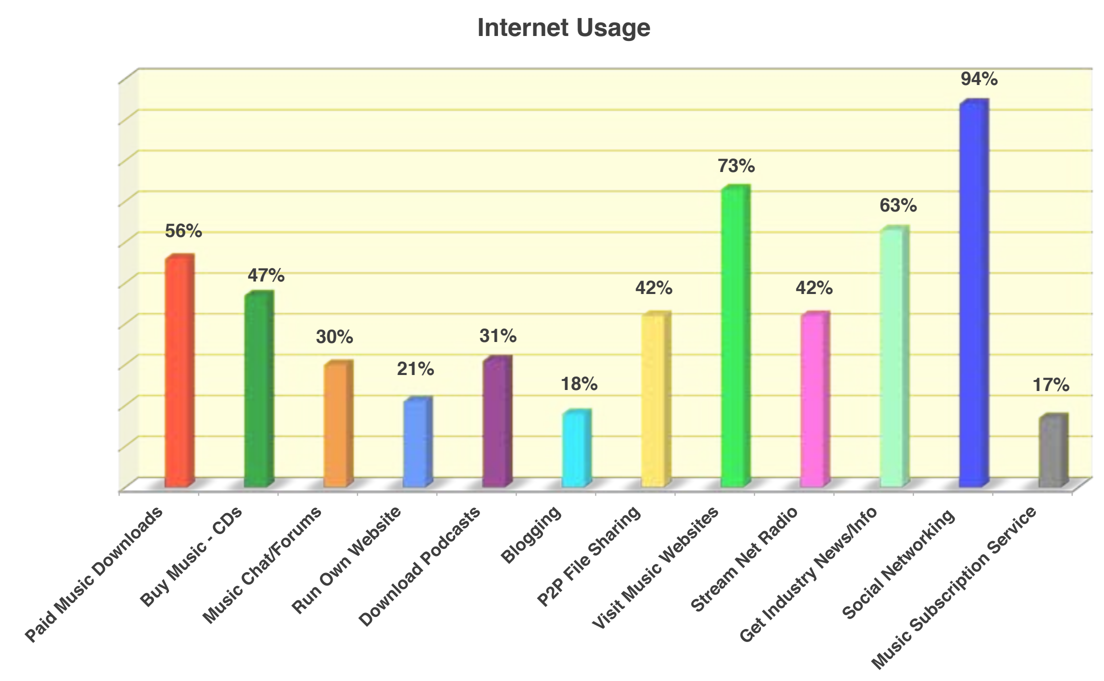
Location of Internet use



Question 9.

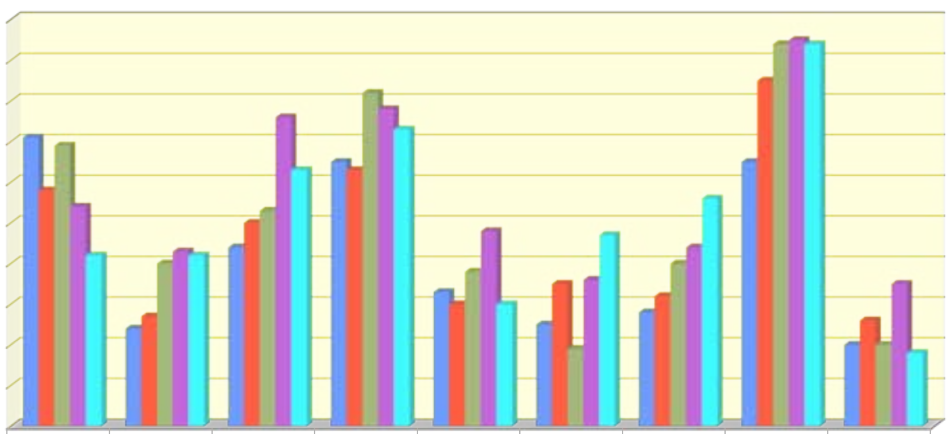
Internet Use – What Do you use the internet For?

P2P sharing remains significant - tough declining from a 2009/2010 high of 69%. CD buying remains strong, but the increse in Paid Downloads reflects the general industry trend. Social networking usage is dominant while music subscription services have made a strong initial entry.



Internet Usage Compared - 2007 to 2011 + Census 2012

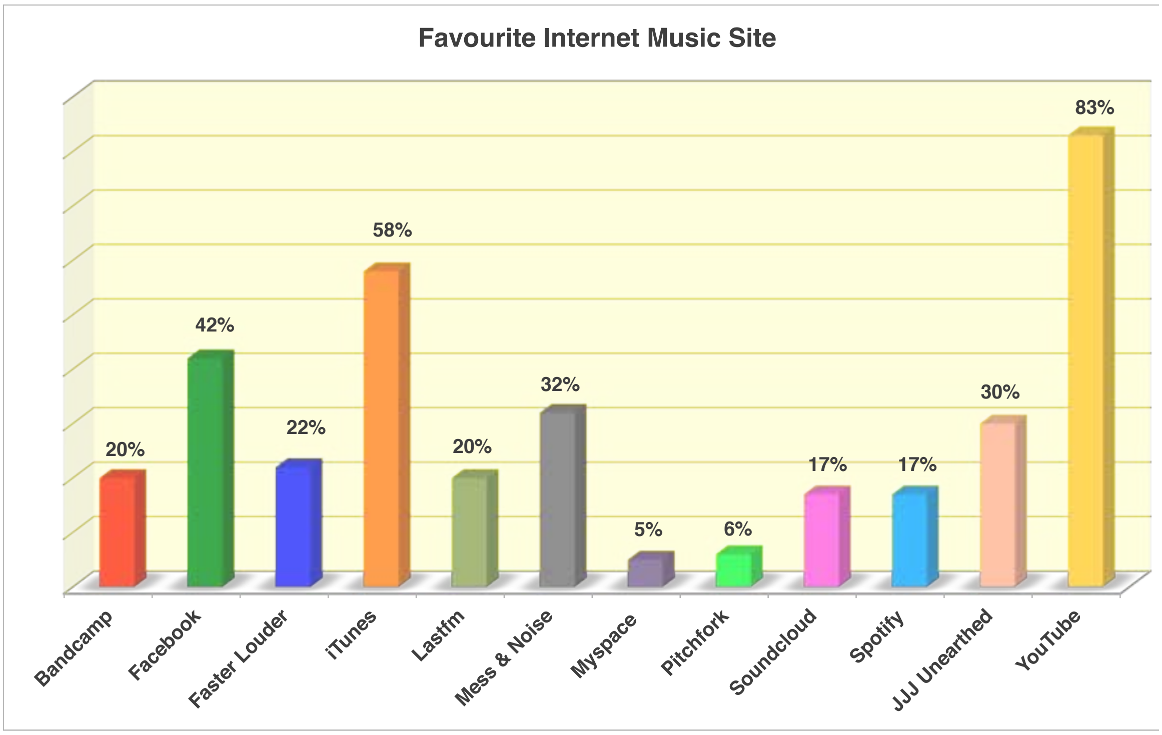
Internet Usage 'State of Play' 2007-2011 + Census 2012



	P2P Sharing	Net Radio	Music News	Music Sites	Chat/ Forums	Buy CDs	Paid D'Load	Soc Netw'k	Blog
2007/2008	71%	24%	44%	65%	33%	25%	28%	65%	20%
2008/2009	58%	27%	50%	63%	30%	35%	32%	85%	26%
2009/2010	69%	40%	53%	82%	38%	19%	40%	94%	20%
2010/2011	54%	43%	76%	78%	48%	36%	44%	95%	35%
2012 Census	42%	42%	63%	73%	30%	47%	56%	94%	18%

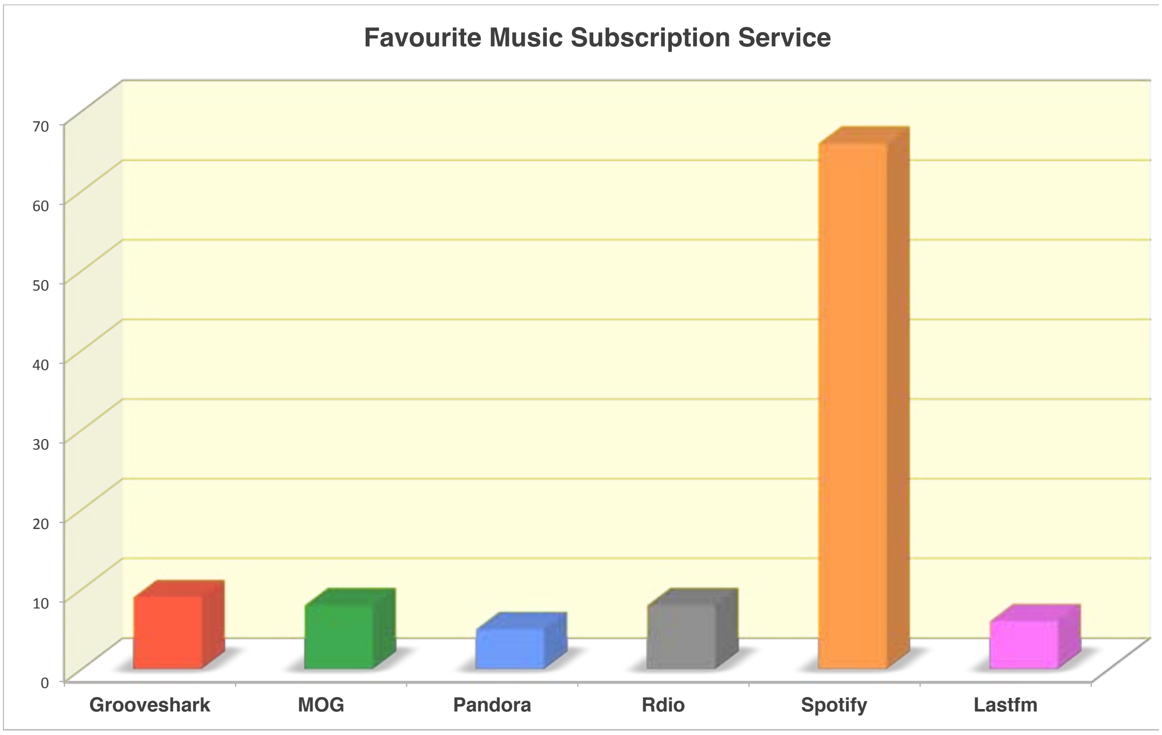
Q11. Favourite Music Internet Site

YouTube is the dominant favourite as a music source, while iTunes and Facebook recorded strong results.



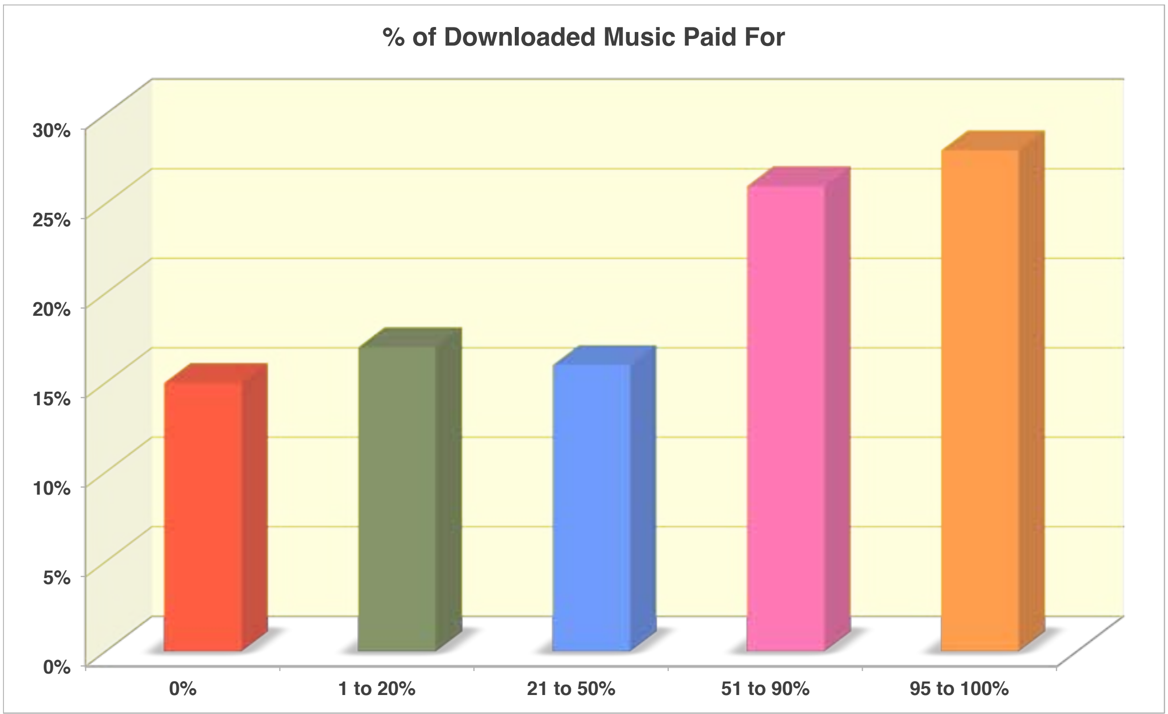
Q12. Favourite Music Subscription Service

17% of respondents are using a music subscription service other than iTunes.

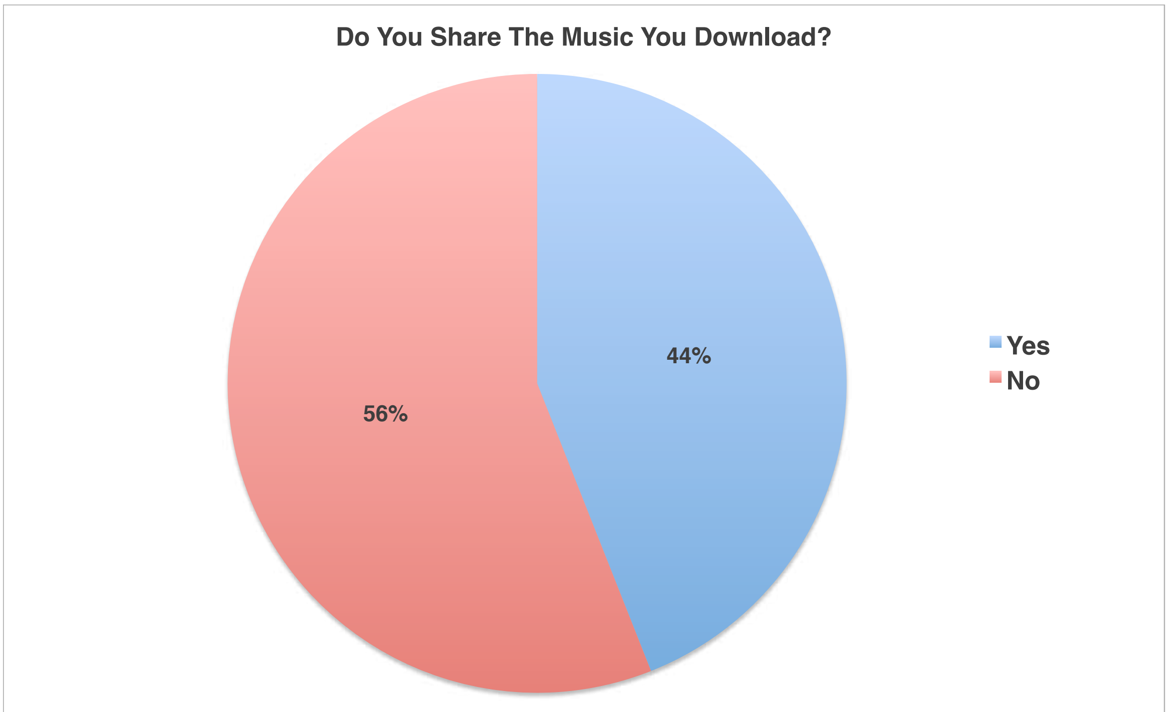


Q13. Percentage of Downloaded Music Paid For

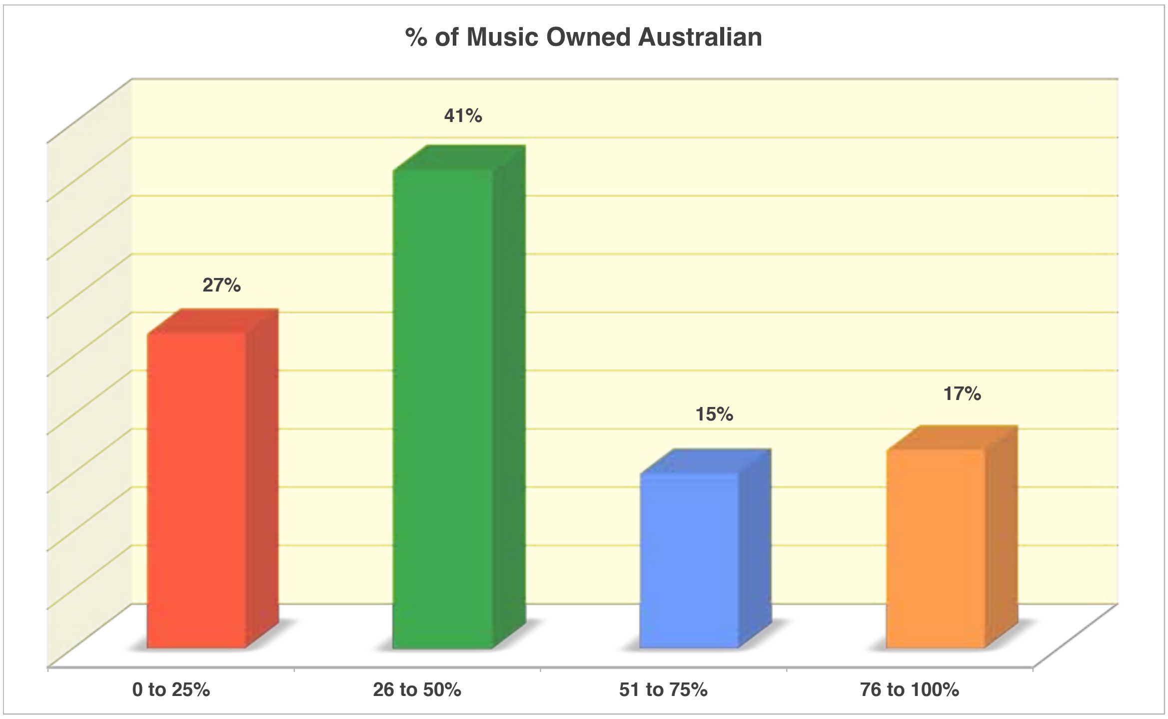
Approximately 85% of consumers pay something (average 60%) for the music they download.



Q14. Percentage of Downloaded Music Shared

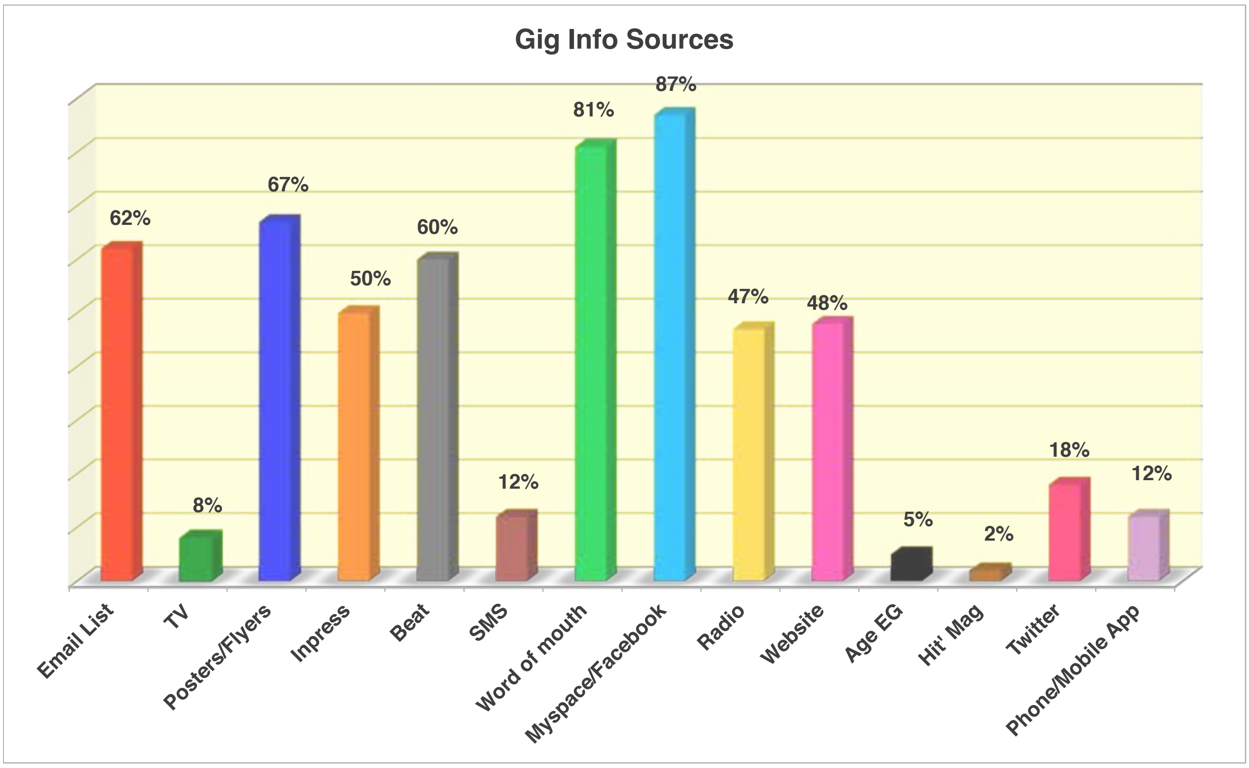


Q15. What Percentage of the music you own is Australian?

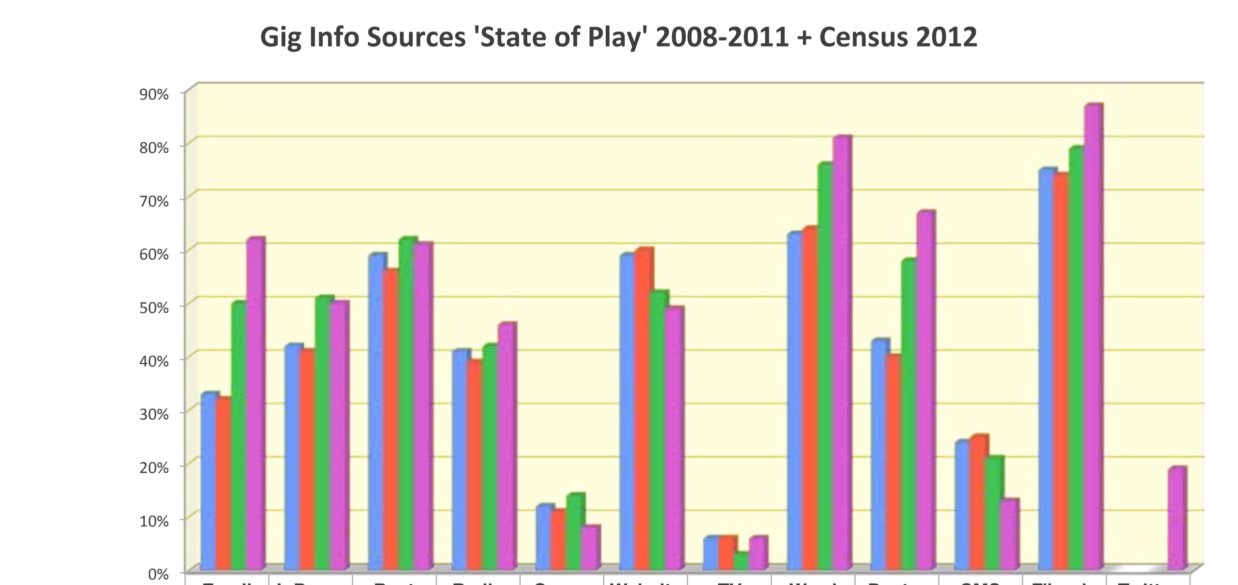


Q16. Where do you get your information on Live Performances ?

'Traditional' sources - word of mouth/posters & flyers and radio, continue to record strong results.



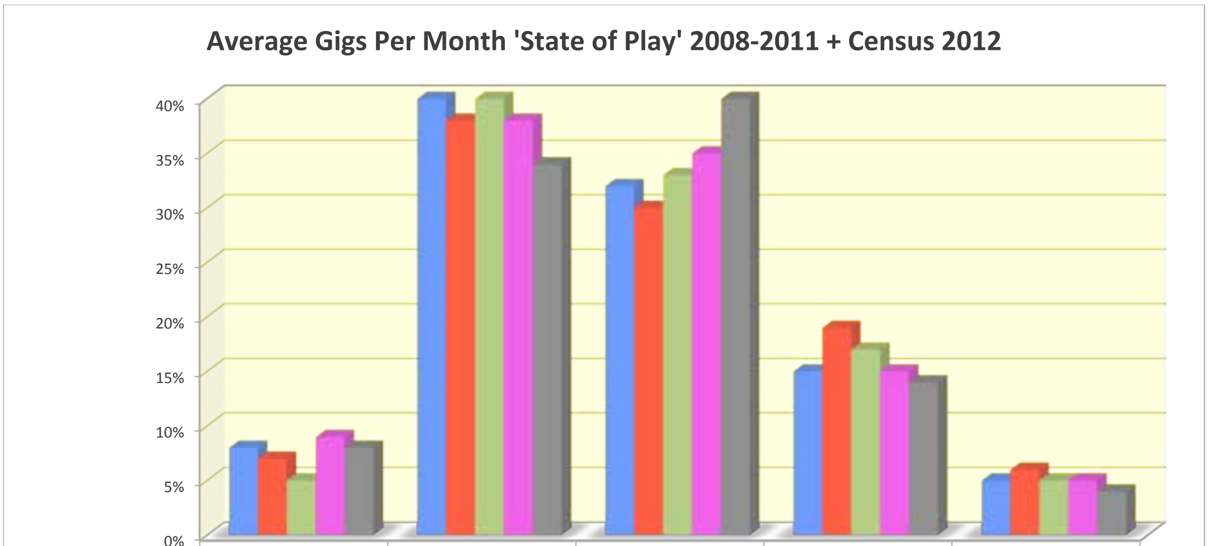
Gig Info Sources Compared 2008 - 2012



	Email	InPress	Beat	Radio	Comm Press	Website	TV	Word Mouth	Poster etc	SMS	F'book	Twitter
2008-2009	33%	42%	59%	41%	12%	59%	6%	63%	43%	24%	75%	
2009/2010	32%	41%	56%	39%	11%	60%	6%	64%	40%	25%	74%	
2010/2011	50%	51%	62%	42%	14%	52%	3%	76%	58%	21%	79%	
Census 2012	62%	50%	61%	46%	8%	49%	6%	81%	67%	13%	87%	19%

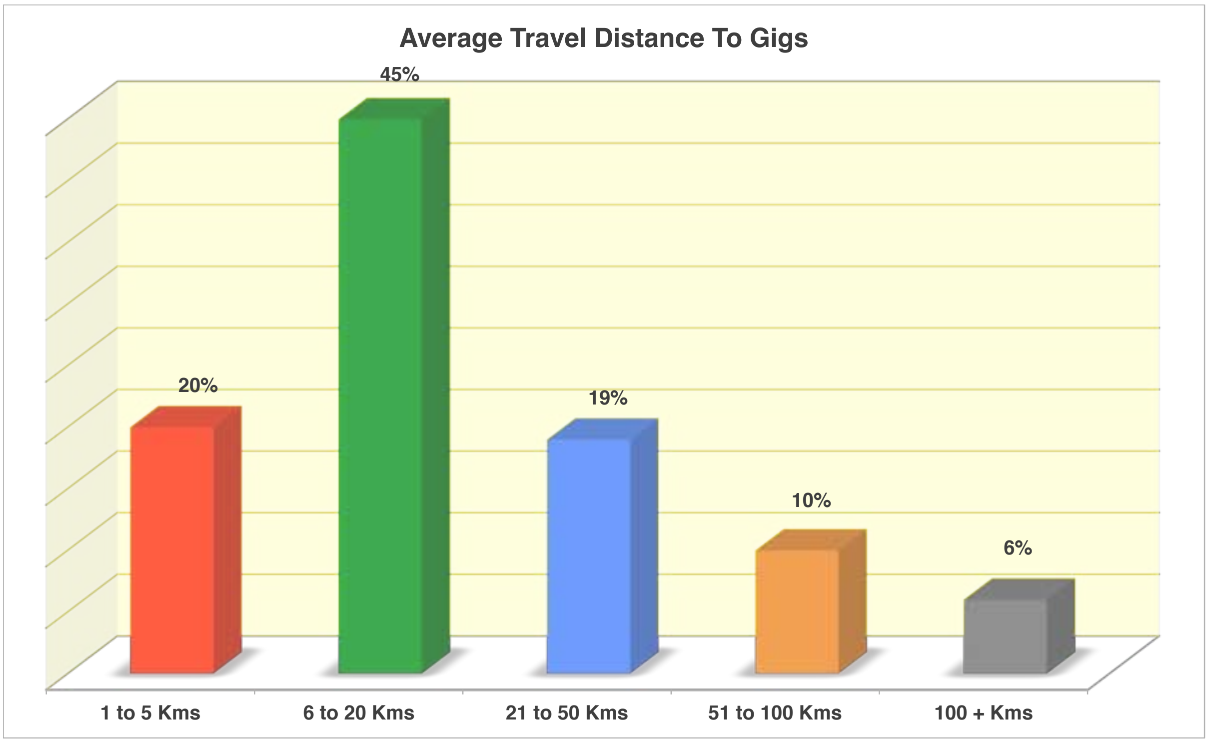
Q 17. On average, how many gigs per month do you attend?

The averages for 2012 were - 4.5 pub/club/bar gigs per month and 1 Festival/Concert per month.

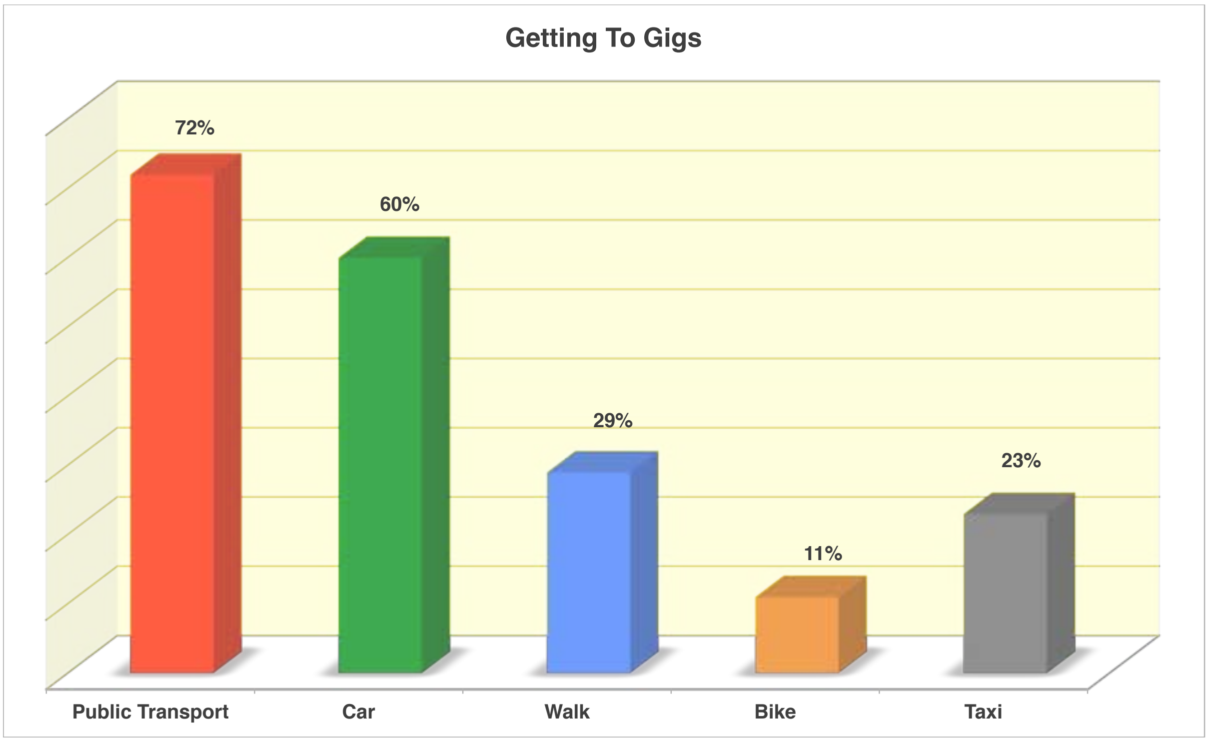


	0	1 to 2	3 to 5	7 to 12	12+
2007/2008	8%	40%	32%	15%	5%
2008/2009	7%	38%	30%	19%	6%
2009/2010	5%	40%	33%	17%	5%
2010/2011	9%	38%	35%	15%	5%
Census 2012	8%	34%	40%	14%	4%

Q 18. On average, how far do you travel to gigs?



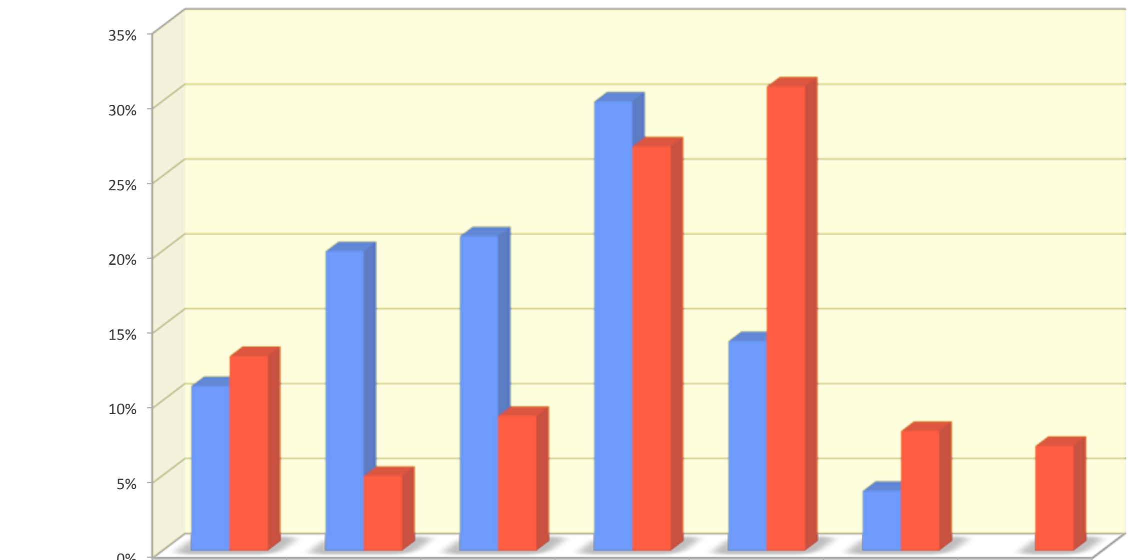
Q 19. How do you usually travel to/from gigs ?



Q 20. On average, how much do you spend per month on entry/tickets to pub/club and concert/festival gigs ?

The averages for 2012 were - $12 per gig (pub/club), $75 for concerts and $88 for Festivals.

Patron average Door/Ticket Spending per month 2012

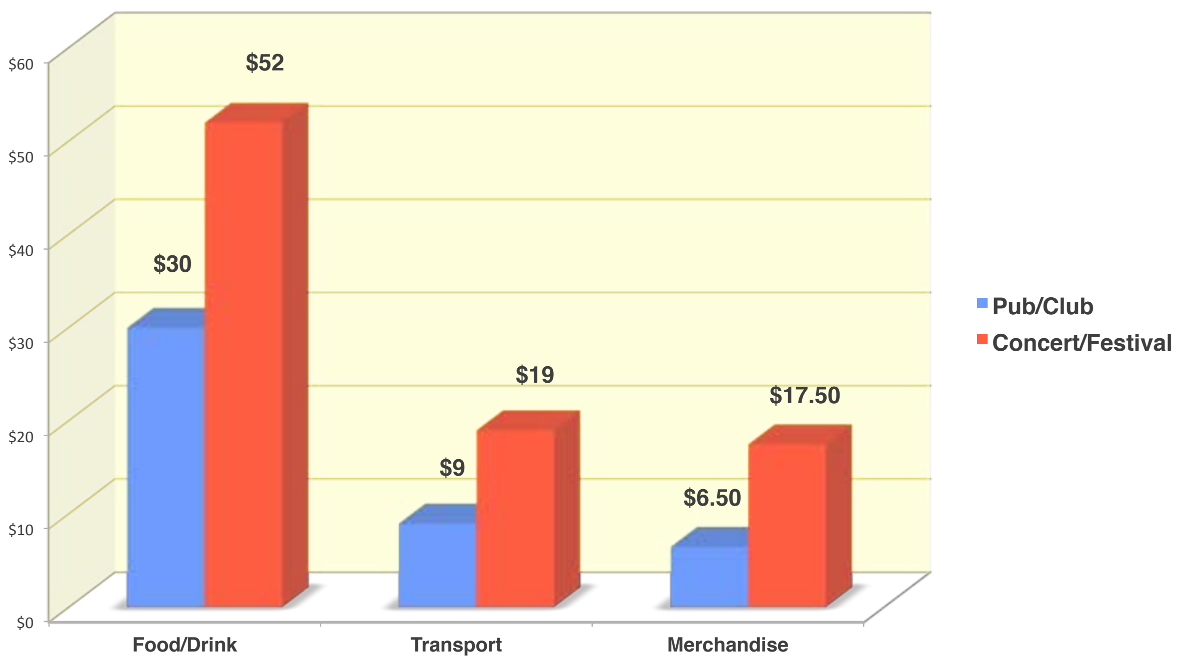


	$0	$10-30	$30-50	$50-100	$100-150	$150-200	$200+
Pub/Club	11%	20%	21%	30%	14%	4%	
Fest/Concert	13%	5%	9%	27%	31%	8%	7%

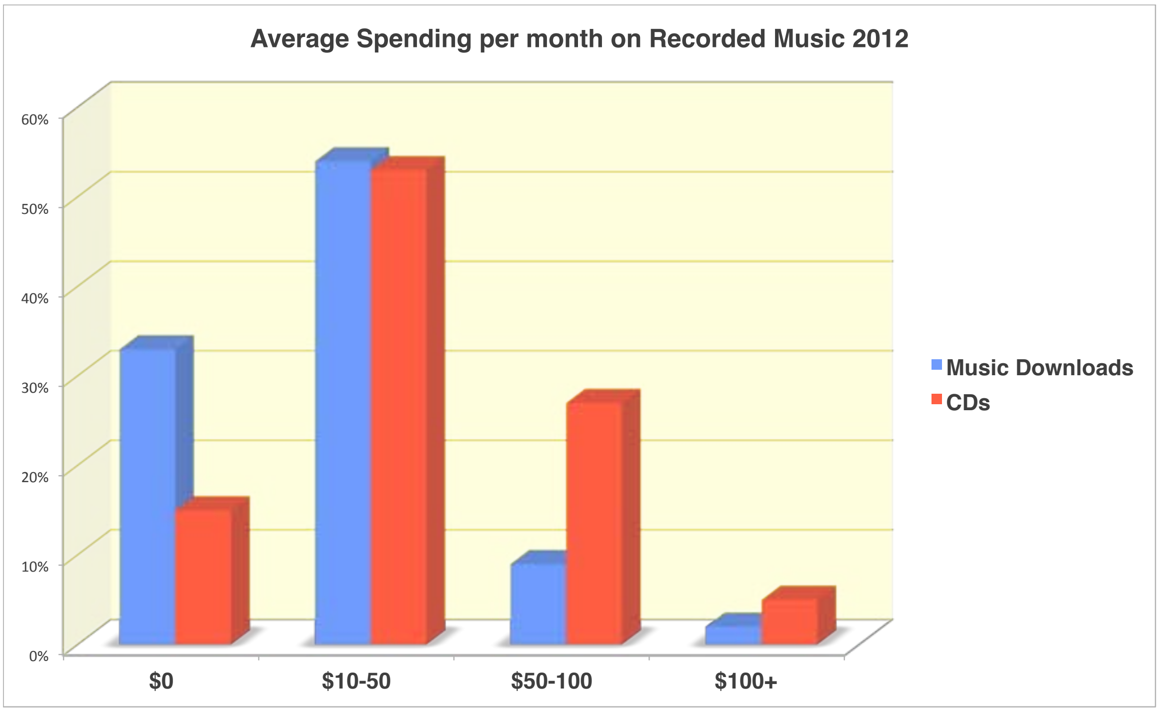
Q 21. On average, how much do you spend on food/drink/transport/mercahndise at pub/club and concert/festival gigs ?

The averages for 2012 were - $45.50 per gig (pub/club) and $88.50 (concerts/festivals).

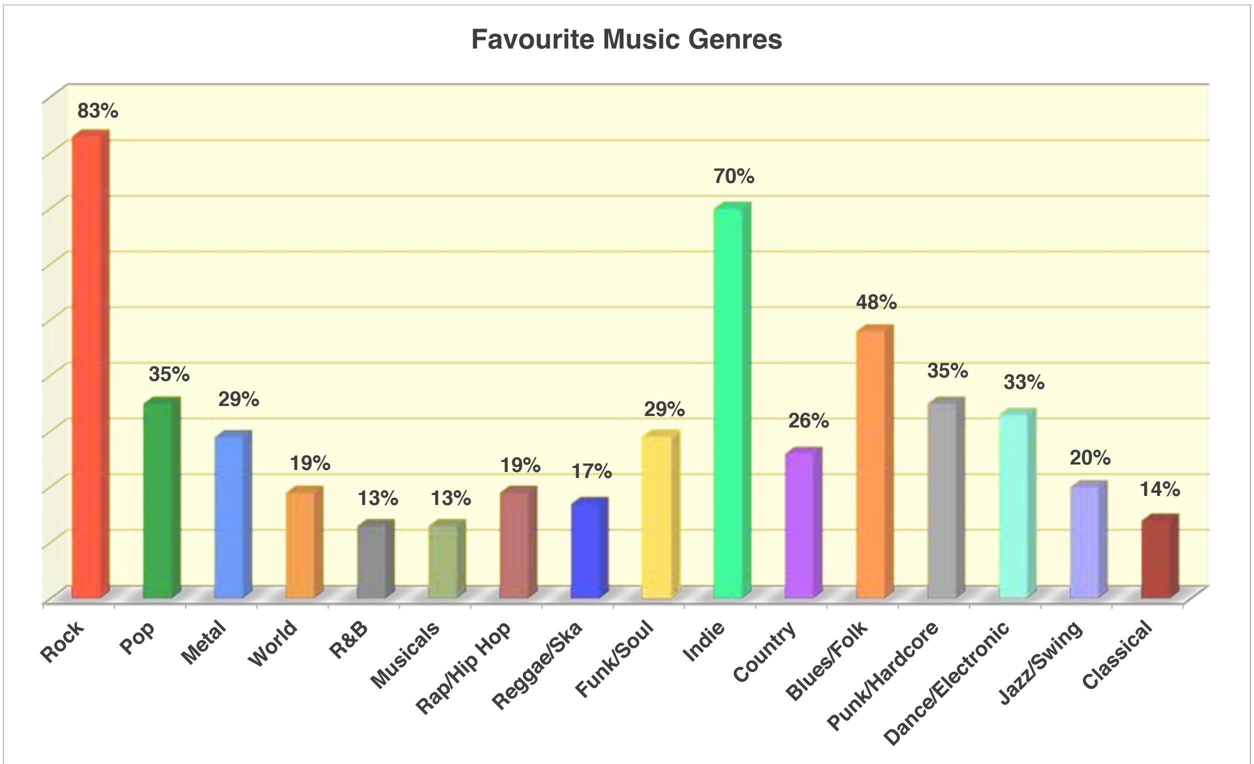
Patron Ancillary Spending at Gigs 2012



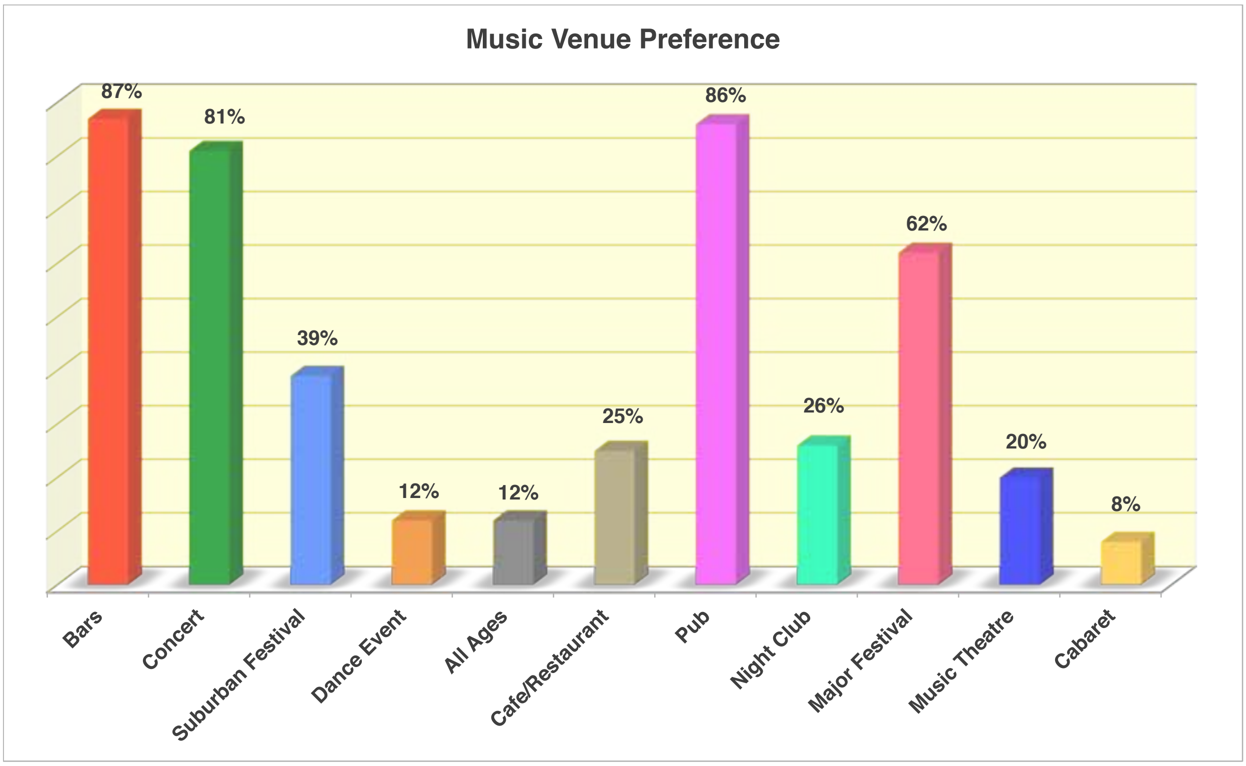
Q 22. On average, how much do you spend per month on recorded music ?
Live music punters spent an average $40 per month on CDs and $29 per month on downloads



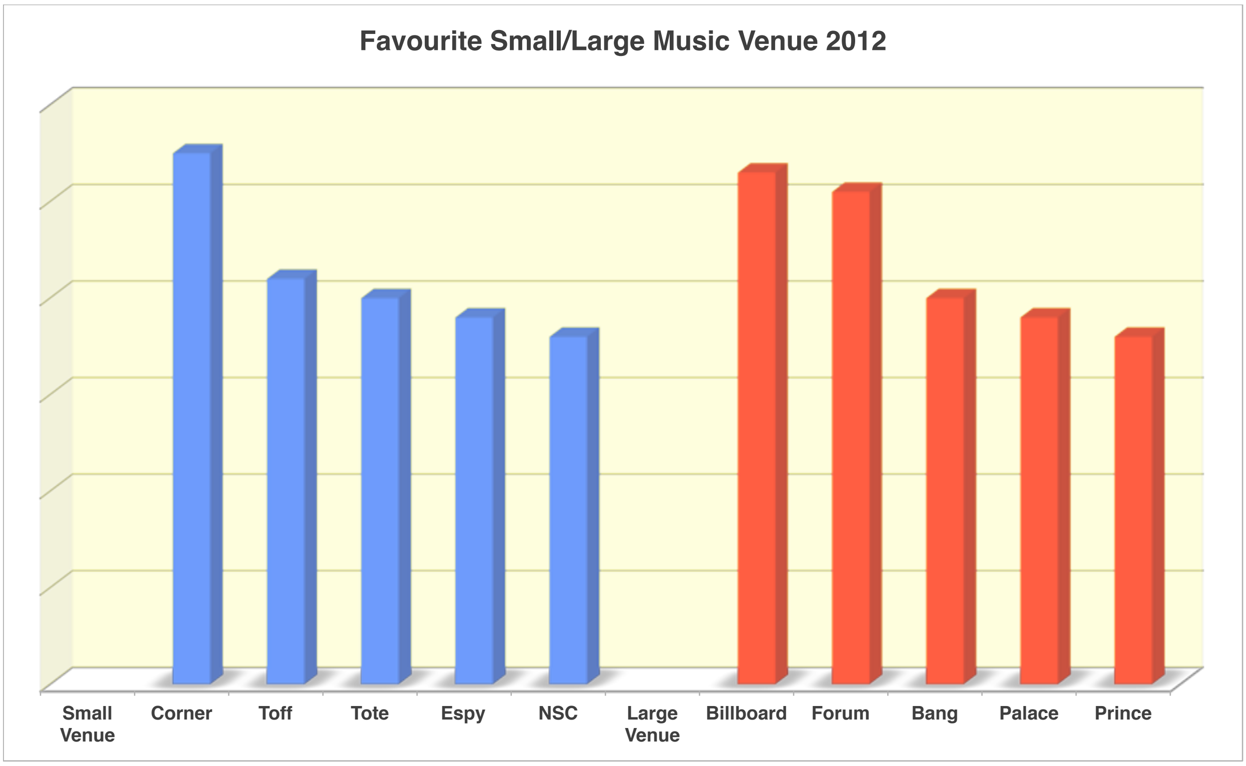
Q 23. What's your favourite music genre ?
Our consumers are an eclectic bunch with a strong preference for rock of the 'indie' variety. Their preferences have changed little over the years of 'State of Play' surveys.



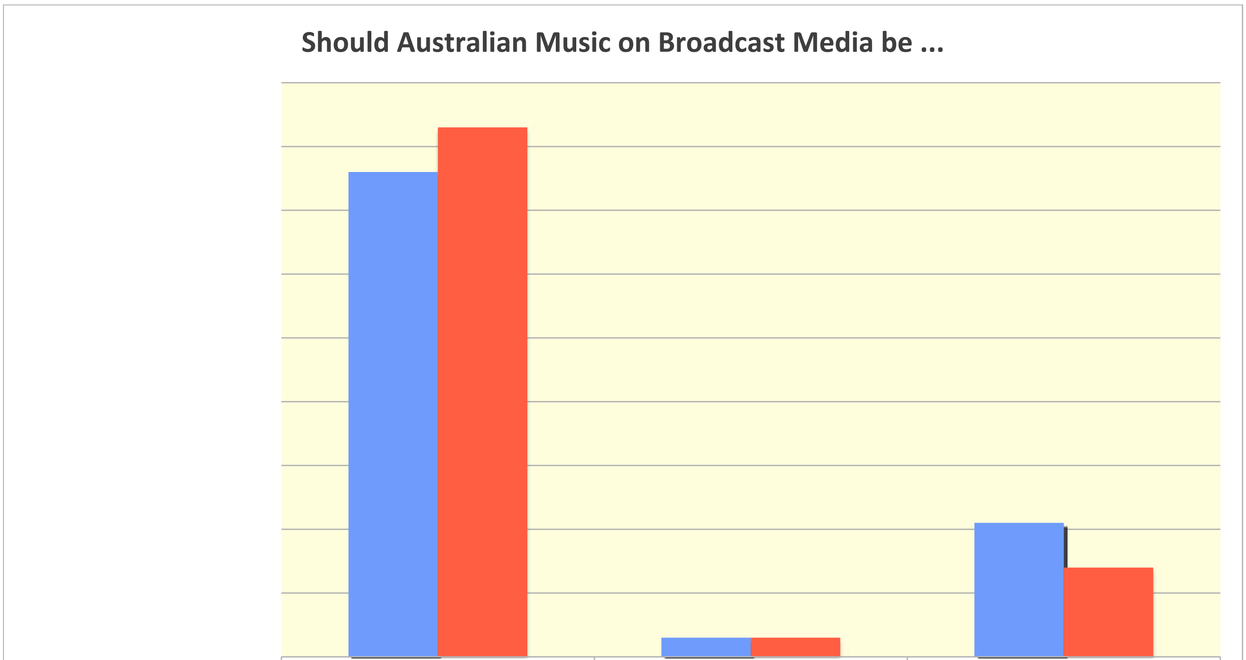
Q 21. Where do you prefer to go to see live performances ?



Q 22. What are your favourite music venues ?



Q 23. Australian music on broadcast media.



	Increased	Decreased	Stay The Same
All Australian Music	76%	3%	21%
New Australian Music	83%	3%	14%

Victorian
Live Music Census
2012

SECTION 6

Musician Survey

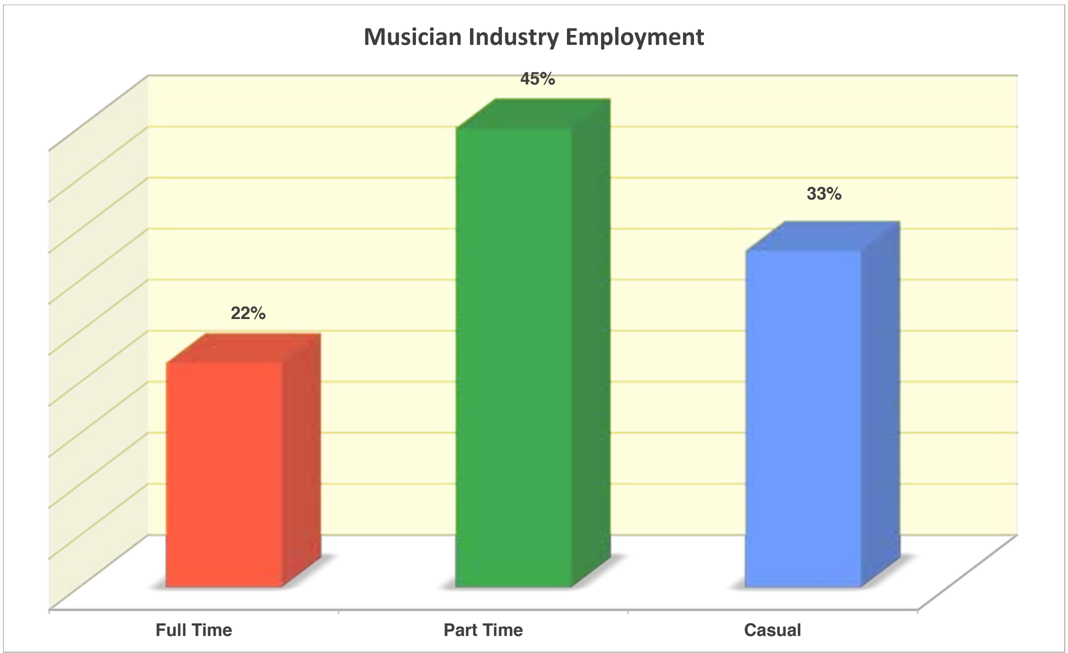
Portrait of the typical live music performer

Based on 258 online responses to Survey Monkey, promoted on the night of the Census, our typical live music performer -

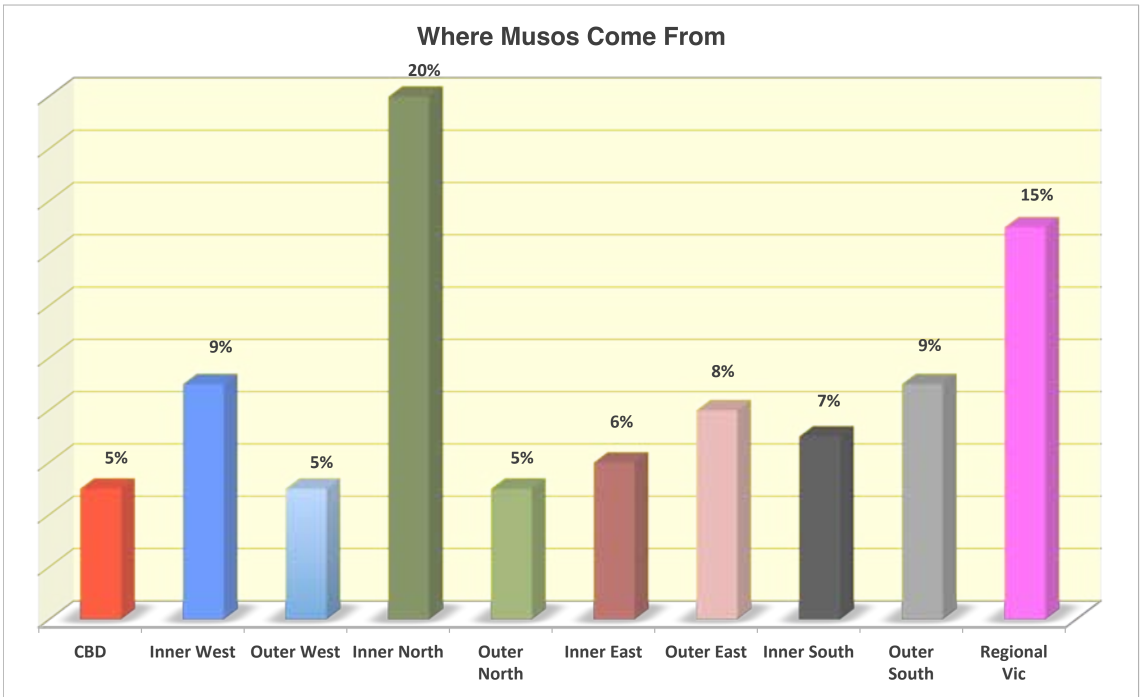
- Is predominantly involved in music on a part-time basis (45%), living within 8-10kms of the CBD (primarily North), with an average 7-8 years in the industry.
- Earns the majority (65%) of his/her income from sources other than their music performance activities, which account for the other 35%.
- Has had some formal music tuition/training (66%), but much less formal music business training (36%). 92% are self-managed, and 48% of those reate their music industry knowledge as 'Below Average' or 'Poor'. They would access more training if it was cheaper (69%).
- Operates as a sole proprietor (41%) or in a partnership (32%), although 22% don't know what their business structure is! 72% have an ABN but only 29% are registered for GST.
- Plays as average 5 gigs per month of which 73% are paid - 50% by guarantee, 50% by door takings. Solo/Duos earn an average $168 per gig and bands $ 345.
- Prefers to play The Espy/Tote (pub), Bennetts Lane/Toff (club), Cherry/Bar Open (bar), Forum (concert) and Meredith/St Kilda (festival).
- Is an APRA member (72%), but not yet a Music Victoria one (26%).
- Still promotes gigs using 'traditional' street press, word of mouth, posters/flyers, but is increasingly utilising social media.
- Are increasingly using internet sites to promote themselves and their music (Facebook, Bandcamp, Soundcloud, Youtube), rather than their own websites. They are dedicated music downloaders (76%), and share almost all they download (73%).
- Has issued at least one commercial recording (93%), with over 60% have released 2 or more singles, EPs and CDs which they record at both home and professional recording studios. They are sold at gigs and increasingly through online aggregators/distributors.
- Believes that in the last 12 months, their audiences have increased (46%) or stayed the same (39%), and the number of gigs they perform has increased (37%) or stayed the same (31%).
  Believes the overall scene is growing (31%) or remaining static (46%).
- Reports that noise, development, parking issues are increasingly impacting on gigs.
- Is predominantly a Melbourne 'native', but has been joined by many (15%) who have moved from regional Victoria or from interstate for more performance opportunities.

NOTE:
Integration of previous data
The Live Music Census collected 258 online survey responses from practising musicians. The data was - in the main, thoroughly consistent with 500 musician responses collected over 2010 and 2011 as part of NMIT's 'State of Play' research.
For comparison and interest purposes, the earlier responses have been included - **2011 in RED**, and **2010 in BLUE.**

Question 1.
Employment Status



Question 2.
Residential Location



SECTION A.
Musician Profile

		Census 2012	2011	2010
Is Music Your major Source of Income?	Yes	38%	35%	36%
	No	62%	65%	64%

	Census 2012	2011	2010
If NO, what percentage of income is music-related?	35%	35%	36%

		Census 2012	2011	2010
How long have you been in the industry?	Less Year	5%	6%	8%
	1 to 3 yrs	15%	12%	14%
	3 to 5 yrs	32%	31%	26%
	6 to 10 yrs	29%	24%	23%
	10+ yrs	18%	27%	29%

		Census 2012	2011	2010
Have you had formal music training?	Yes	66%	66%	63%
	No	34%	34%	37%

		Census 2012	2011	2010
Where Did You Get Formal Music Tuition?	TAFE	31%	27%	29%
	Private	33%	39%	38%
	University	20%	12%	13%
	School	16%	22%	20%

		Census 2012	2011
Would you access more training if it was ...	Cheaper	69%	60%
	Part Time	31%	40%

SECTION B.
Musician Business Affairs

		Census 2012	2011	2010
Have you had formal music business training?	Yes	36%	28%	24%
	No	64%	72%	76%

		Census 2012	2011	2010
Where did you get music business training?	TAFE	66%	67%	63%
	University	23%	17%	10%
	Industry	11%		

		Census 2012	2011	2010
How would you rate your industry knowledge?	Excellent	11%	15%	14%
	Adequate	41%	38%	36%
	Below Av.	35%	30%	28%
	Poor	13%	17%	22%

		Census 2012	2011	2010
Are You ...	Managed	8%	11%	12%
	Self Managed	92%	89%	88%

		Census 2012	2011	2010
Business Structure	Sole Proprietor	41%	42%	35%
	Partnership	32%	31%	35%
	Company	5%	7%	8%
	Don't Know	22%	20%	22%

		Census 2012	2011	2010
If Patnership, do you have a written agreement?	Yes	23%	20%	16%
	No	77%	80%	84%

		Census 2012	2011	2010
Do you have an ABN?	Yes	72%	73%	68%
	No	28%	27%	32%

		Census 2012	2011	2010
Are you registered for GST?	Yes	29%	32%	33%
	No	71%	68%	67%

		Census 2012	2011
Have you applied for Government funding?	Yes	37%	54%
	No	63%	46%

		Census 2012	2011
Have you been successful?	Yes	20%	23%
	No	80%	77%

SECTION C.
Professional Practice/Live Performance

		Census 2012	2011	2010
Are you an APRA member?	Yes	72%	73%	63%
	No	28%	27%	37%

		Census 2012	2011
Are you a Music Victoria member?	Yes	26%	24%
	No	74%	76%

		0 Gigs	1 to 2	3 to 6	7+
Average No. gigs per month	Census 2012	4%	41%	39%	16%
	2011	6%	41%	36%	17%
	2010	5%	40%	34%	21%

	0	1 to 20%	21 to 50%	51 to 75%	76 - 95%	100%
What % of gigs paid?	7%	9%	18%	4%	15%	47%

		Guarantee	Door	Both
How Paid?	Census 2012	36%	33%	31%
	2011	21%	52%	27%
	2010	25%	50%	25%

		Solo/Duo	Band
How much paid per gig?	Census 2012	$168	$345
	2011	$160	$320
	2010	$150	$310

		Facebook	Posters	W/Mouth	Beat	InPress	Radio	Twitter
Gig	Census 2012	96%	75%	88%	62%	46%	44%	34%
Promo	2011	80%	76%	91%	67%	54%	48%	
How?	2010	73%	67%	90%	65%	51%	41%	

	Pub	Club	Bar	Concert	Festival
Favourite Gig	Espy	Bennetts Lane	Cherry	Forum	Meredith
	Tote	Ding Dong	Bar Open	Palace	St Kilda
	Corner	Toff	Wesley Anne	Palais	Queenscliff

		Census 2012	2011	2010
Are your gigs affected by	OH&S Issues	31%	30%	28%
	Parking	67%	70%	54%
	Development Issues	43%	45%	37%
	Licensing Issues	30%	40%	28%
	Noise Restrictions	74%	80%	71%

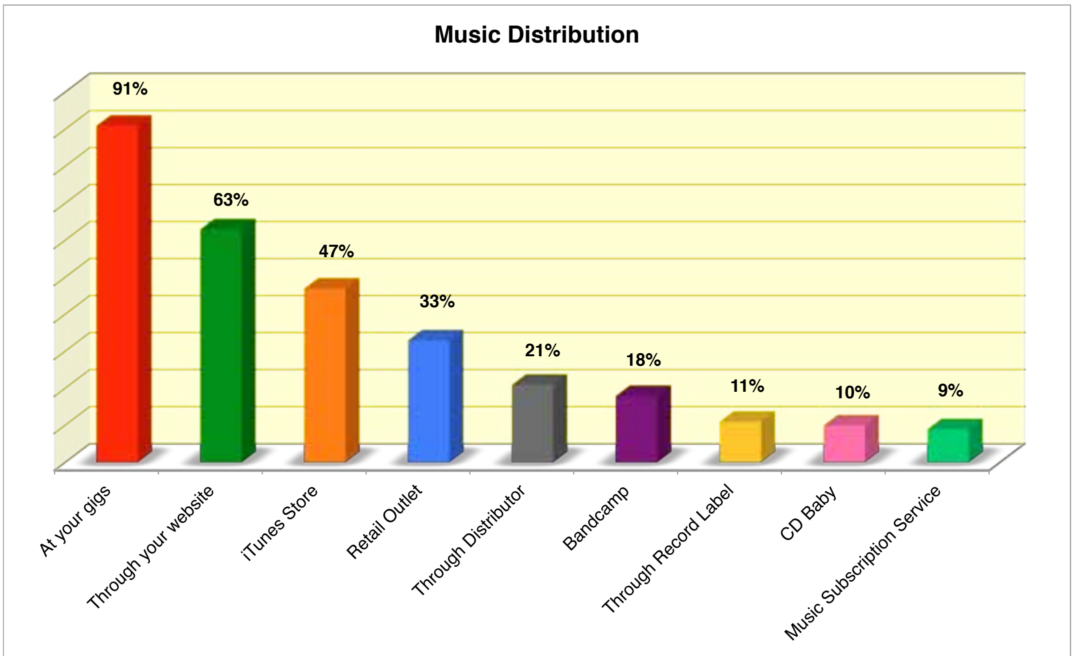
			From Regional Vic	From Interstate
Have you moved to Melbourne	Yes	30%	45%	55%
for more music opportunities ?	No	70%		

SECTION D.
Professional Practice/Recording

		Census 2012	2011	2010
Commercial	Yes	93%	86%	82%
Recordings	No	7%	14%	18%

		1 to 2	3 to 5	5+
How Many?	**SINGLES**			
	Census 2012	29%	38%	33%
	2011	50%	31%	19%
	2010	40%	30%	30%
	EP			
	Census 2012	46%	32%	22%
	2011	58%	33%	9%
	2010	56%	36%	8%
	CD			
	Census 2012	48%	29%	23%
	2011	69%	22%	9%
	2010	70%	21%	9%

		Census 2012	2011	2010
Where do you record?	Rec Studio	22%	24%	28%
	Home Studio	29%	25%	24%
	Both	49%	51%	49%

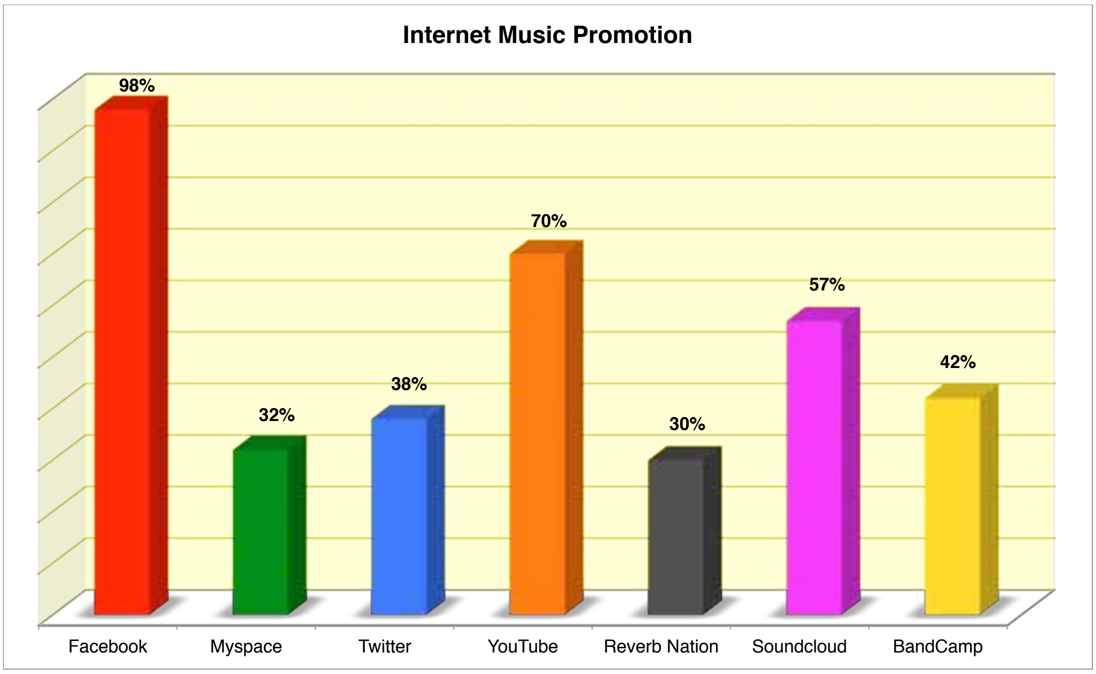


SECTION E.
The Internet

		Census 2012	2011	2010
Use of Internet	Industry News	80%	84%	83%
	Forums/Chat	49%	62%	59%
	P2P Sharing	73%	75%	74%
	Interact with fans	83%	88%	84%
	Download Music	76%	69%	75%
	Social Networking	97%	97%	86%

		Census 2012	2011	2010
Do you have	Website	69%	79%	73%
	Facebook	98%	97%	83%
	Myspace	46%	72%	91%
	YouTube	71%	58%	
	Twitter	39%	39%	38%

		Videos	Paid D'Loads	Gig Guide	Database	Sell CDs	Merch
Website Use	Census 2012	67%	51%	89%	67%	59%	43%
	2011	64%	45%	88%	68%	50%	41%
	2010	49%	38%	87%		52%	38%



SECTION F.
The Live Scene/Health of Industry

		Census 2012	2011
In last 12 months have your audiences	Increased	45%	41%
	Decreased	16%	14%
	The Same	39%	45%

		Census 2012
In the last 12 months have your gig numbers	Increased	37%
	Decreased	32%
	The Same	31%

		Census 2012	2011	2010
Based on last 12 months is the scene	Growing	31%	37%	35%
	Shrinking	23%	23%	21%
	The Same	46%	40%	44%

		Census 2012	2011
How should government funding be allocated?	Recording Assistance	47%	41%
	All Ages Gigs	35%	30%
	Showcase Assistance	30%	20%
	Industry Education	32%	27%
	International Touring	39%	39%
	Regional Touring	60%	
	Artist Web Development	35%	29%

Victorian
Live Music Census
2012

APPENDIX A

Census
Record Sheet

MUSIC VICTORIA

LIVE VENUE SURVEY - CENSUS 2012

CITY OF MELBOURNE

Dear Census Volunteer,
Please record as much of the information you can. Thanks.

1. **Name of Venue:** .... **Address**: ....

2. **Time of Visit** ....

3. **Type of Venue** Hotel ☐ Bar ☐ Nightclub ☐ Cafe/Rest ☐ Music Club ☐

4. **Hours of Operation on Sat. 13th October** ....

5. **Door Charge?** Yes ☐ No ☐ If Yes, $ ....

6. **How Many?** Live Music Rooms/Spaces (Musos/DJs) ☐ Recorded Music Rooms/Spaces ☐

7. **Estimate the number of patrons in Live Music Areas/Rooms <u>at the time of your visit</u> -**

   Area/Room 1 .... Area/Room 2 .... Area/Room 3 ....

8. **What is the maximum number of patrons <u>expected</u> in these Areas/Rooms on this night?**

   Area/Room 1 .... Area/Room 2 .... Area/Room 3 ....

9. **How many people are/will be employed in the live music areas on this night?**

   Area/Room 1: Musicians .... DJs .... Venue Staff .... Prod Staff ....

   Area/Room 2: Musicians .... DJs .... Venue Staff .... Prod Staff ....

10. **Does the venue have In-House PA?** Yes ☐ No ☐

11. **How many nights per week does the venue offer Live Music?**

    Spring/Summer (Please Circle)

    Musos M TU W TH F SA SU

    DJs M TU W TH F SA SU

    Autumn/Winter (Please Circle)

    Musos M TU W TH F SA SU

    DJs M TU W TH F SA SU

12. **What sort of Live Music does the venue <u>USUALLY</u> offer?** (Tick All Appropriate)

    Jazz ☐ Pop ☐ Rock ☐ R n B ☐ Country ☐ Blues/Folk ☐ Rap/Hip Hop ☐

    Dance/Electronic ☐ Punk/Hardcore ☐ Reggae/Ska ☐ Metal ☐ Funk/Soul ☐

    Other: ....

13. **Is the venue affected by Noise/Planning/Development issues?** Yes ☐ No ☐

14. **How does the <u>average Friday</u> audience compare with the <u>average Saturday</u>?**

    Approx The Same ☐ Larger .... Approx % Smaller .... Approx %

Victorian
Live Music Census
2012

APPENDIX B

Census Venue List

MELBOURNE CDB - Pubs, Clubs, Bars (120)

1000 Pound Bend	361 Lt Lonsdale St	Melbourne	3000
All Nations Bar	2 Spencer Street	Melbourne	3000
Amber Lounge	388 Lonsdale Street	Melbourne	3000
Balcony Bar	422 Little Collins Street	Melbourne	3000
Bambu Bar & Lounge	10 Flinders Lane	Melbourne	3000
Bang! (Royal Melb Hotel)	621-629 Bourke Street	Melbourne	3000
Baraki Bar	168 Lonsdale Street	Melbourne	3000
Baroq House	9 Drewry Lane	Melbourne	3000
Basemint	95 Queen Street	Melbourne	3000
Bass Lounge	91-103 Little Bourke Street	Melbourne	3000
Belgian Beer Café (Eureka)	557 St Kilda Road	Melbourne	3004
Bennetts Lane	25 Bennetts Lane	Melbourne	3000
Berlin Bar	16 Corrs Lane	Melbourne	3000
Bertha Brown	562 Flinders Street	Melbourne	3000
Billboard	170 Russell Street	Melbourne	3000
Bond Lounge	24 Bond Street	Melbourne	3000
Brown Alley	cnr King & Lonsdale Streets	Melbourne	3000
Bunker Lounge	407 Swanston Street	Melbourne	3000
Café Segovia	33 Block Place	Melbourne	3000
Canary Club	6 Melbourne Place	Melbourne	3000
Carlton Club	193 Bourke Street	Melbourne	3000
CBD (3-D/DV8)	12 McKillop Street	Melbourne	3000
Celtic Club	316 Queen Street	Melbourne	3000
Chaise Lounge	105 Queen Street	Melbourne	3000
Champagne Lounge	39-41 Little Collins Street	Melbourne	3000
Charlies Bar	71 Hardaware Lane	Melbourne	3000
Cherry	AC/DC Lane	Melbourne	3000
Chi Lounge	195 Lt Bourke Streert	Melbourne	3000
Cho Gao	Level 3, Melbourne Central	Melbourne	3000
Clique	26 King Street	Melbourne	3000
Club Retro	383 Lonsdale Street	Melbourne	3000
Colonial Hotel (Next)	585 Lonsdale Street	Melbourne	3000
CQ Bar	113 Queen Street	Melbourne	3000
Croft Institute	21-25 Croft Alley	Melbourne	3000
Decca Bar	95 Queen Street	Melbourne	3000
Deep 11	456 Queen Street	Melbourne	3000
Déjà vu	525 Lonsdale Street	Melbourne	3000
Ding Dong Lounge	18 Market Lane	Melbourne	3000
E55	55 Elizabeth Street	Melbourne	3000
Ed Hardy Bar	Level 3, Melbourne Central	Melbourne	3000
Element Lounge	85 Queen Street	Melbourne	3000
Elephant & Wheelbarrow	94 Bourke Street	Melbourne	3000
Eurotrash	18 Corrs Lane	Melbourne	3000
Exchange Hotel	120 King Street	Melbourne	3000
Exford Hotel	199 Russell Street	Melbourne	3000
Fad Gallery	14 Corrs Lane	Melbourne	3000
Famous Spiegeltent	25 St Kilda Road	Melbourne	3000
Fashion Lounge	121 Flinders Lane	Melbourne	3000
Fortyfive downstairs	45 Flinders Lane	Melbourne	3000
Galley Room	Lvl 1, 510 Flinders Street	Melbourne	3000

Geddes Lounge	Geddes Lane	Melbourne	3000
Gin Palace	10 Russell Street	Melbourne	3000
Hairy Canary	212 Little Collins Street	Melbourne	3000
Hi-Fi Bar	125 Swanston Street	Melbourne	3000
Horse Bazaar	397 Little Lonsdale St	Melbourne	3000
Hush Bar	Lvl 3 Melbourne Central	Melbourne	3000
Inflation	60 King Street	Melbourne	3000
Insignia Bar	502 Flinders Street	Melbourne	3000
Irish Times	427 Little Collins St	Melbourne	3000
Key Club	117 Lonsdale Street	Melbourne	3000
Khokolat Bar	43 Hardware Lane	Melbourne	3000
Korova Milk Bar	12 Bourke Street	Melbourne	3000
La Dida	577 Little Bourke Street	Melbourne	3000
Liberty Social	279 Flinders Lane	Melbourne	3000
Lion Hotel	Level 3, Melbourne Central	Melbourne	3000
Little Penninsula	308 Little Lonsdale Street	Melbourne	3000
Lounge Upstairs	243 Swanston Street	Melbourne	3000
Madisons	461 Bourke Street	Melbourne	3000
Marrakech	25 Bank Place	Melbourne	3000
Max Bar	54-58 Hardware Lane	Melbourne	3000
Melbourne Central Lion	211 A La Trobe St, Level 3	Melbourne	3000
Mercat Cross (Hotel)	456 Queen Street	Melbourne	3000
Metropolitan Hotel	263 William Street	Melbourne	3000
Misty	3-5 Hosier Lane	Melbourne	3000
Murmur	1/17 Warburton Lane	Melbourne	3000
Nectar Lounge	228 Flinders Lane	Melbourne	3000
New Guernica	318-322 Lt Collins Street	Melbourne	3000
Night Owl	33 Elizabeth Street	Melbourne	3000
Order Of Melbourne	401 Swanston Street	Melbourne	3000
Paris Cat	6 Goldie Place	Melbourne	3004
Penny Blue	2 Driver Lane	Melbourne	3000
Platform One	371 Flinders Street	Melbourne	3000
Pony	68 Little Collins Street	Melbourne	3000
Portland Hotel	115-127 Russel Street	Melbourne	3000
Pugg Mahones	106 Hardware Lane	Melbourne	3000
Purple Emerald Bar	191 Flinders Lane	Melbourne	3000
Randy Dragon	313 Flinders Lane	Melbourne	3000
Red Violin	231 Bourke Street	Melbourne	3000
Redlove Musicroom	401 Swanston Street	Melbourne	3000
Robot	12 Bligh Place	Melbourne	3000
Rooftop Bar	Lvl 7, 252 Swanston Street	Melbourne	3000
Roxanne Parlour	2 Coverlid Place	Melbourne	3000
Royal Melbourne Hotel (Bang)	629 Bourke Street	Melbourne	3000
Section 8 Bar	27 Tattersalls Lane	Melbourne	3000
Sorry Grandma	590 Little Bourke Street	Melbourne	3000
Spice Market	504 Elizabeth Street	Melbourne	3000
Stork Hotel	504 Elizabeth Street	Melbourne	3000
Syn Bar	163 Russell Street	Melbourne	3000
The Apartment	401 Little Bourke Street	Melbourne	3000
The Carlton	193 Bourke Street	Melbourne	3000
The Deck (Waterside Hotel)	508 Flinders Street	Melbourne	3000

The Palace	20-30 Bourke Street	Melbourne	3000
The Red Hummingbird	246 Russell Street	Melbourne	3000
The Toff In Town	252 Swanston Street	Melbourne	3000
The Workshop	413 Elizabeth Street	Melbourne	3000
Three Degrees	QV Square, Swanston Street	Melbourne	3000
Tony Starr's Kitten Club	267 Little Collins Street	Melbourne	3000
Transport Hotel/Transit	Cnr Swanston & Flinders Streets	Melbourne	3000
Troika Bar	106 Little Lonsdale Street	Melbourne	3000
Turf Bar	131 Queen Street	Melbourne	3000
Tuscan Bar	79 Bourke Street	Melbourne	3000
Two Floors Up	159 Lonsdale Street	Melbourne	3000
U Bar	2 Spencer Street	Melbourne	3000
Vatican Bar	272 City Road	Melbourne	3000
Velvet Underground	167 Franklin Street	Melbourne	3000
Vialleto	75 Hardware Lane	Melbourne	3000
Wah Wah Lounge	185 Lonsdale Street, Melbourne	Melbourne	3000
West Space Inc	15-19 Anthony Street	Melbourne	3000
Word	14 Goldie Place	Melbourne	3000
Wow	243 Lonsdale Street	Melbourne	3000
Young & Jackson	Cnr Swanston & Flinders Streets	Melbourne	3000

MELBOURNE CBD & Inner - Large Venues (17)

Etihad Stadium	740 Bourke Street	Docklands	3008
AAMI Park	Olympic Boulevard	Melbourne	3000
Arts Centre - Fairfax Studio	St Kilda Road	Melbourne	3000
Athenaeum Theatre	188 Collins Street	Melbourne	3000
Comedy Theatre	240 Exhibiyion Street	Melbourne	3000
Federation Square	Cnr Flinders & Swanston Sts	Melbourne	3000
Forum Theatre	Cnr Flinders & Russell Sts	Melbourne	3000
Hamer Hall	St Kilda Road	Melbourne	3000
Her Majesty's Theatre	219 Exhibition Street	Melbourne	3000
Hisense Arena	Batman Avenue	Melbourne	3000
Melbourne Town Hall (Main)	90 Swanston Street	Melbourne	3000
Ormond Hall	557 St Kilda Road	Melbourne	3004
Plenary Hall	1 Convenmtion Place	Melbourne	3000
Princess Theatre	163 Spring Street	Melbourne	3000
Regent Theatre	161 Collins Street	Melbourne	3000
Rod Laver Arena	Batman Avenue	Melbourne	3000
Sidney Myer Music Bowl	21 Linlithgow Avenue	Melbourne	3000

MELBOURNE INNER - Clubs, Pubs, Bars

Docklands (4)

Alumbra	161 Harbour Esplanade	Docklands	3008
Fix	Lvl 1, 119 Docklands Drive	Docklands	3008
James Squire Brewhouse	439 Docklands Drive	Docklands	3008
Shed 4	North Wharf Road	Docklands	3008
Watermark	9/800 Bourke Street	Docklands	3008

Southbank (8)

Club Odeon at Crown	8 Whiteman Street	Southbank	3006

Co. at Crown	8 level 3 Whiteman Street	Southbank	3006
Eve	334 City Road	Southbank	3006
Fusion at Crown	8 Whiteman Street	Southbank	3006
Melbourne Recital Centre	31Sturt Street	Southbank	3006
Palms at Crown	8 Whiteman Street	Southbank	3006
PJ O'Brien	3 Southgate Avenue	Southbank	3006
World Restaurant Bar	4/2 Riverside Quay	Southbank	3006

MELBOURNE MUSIC PRECINCTS

Abbotsford & Collingwood (20)

Aviary	271 Victoria Street	Abbotsford	3067
Carringbush Hotel	228 Langridge Street	Abbotsford	3067
Idgaff	160 Hoddle Street	Abbotsford	3067
Opium Den Hotel	176 Hoddle Street	Abbotsford	3067
Retreat Hotel	226 Nicholson Street	Abbotsford	3067
Yorkshire Hotel	48 Hoddle St	Abbotsford	3067
A Bar Called Barry	64 Smith Street	Collingwood	3066
Acoustic Cafe	187 Johsnton St	Collingwood	3066
Bendigo Hotel	125 Johnston Street	Collingwood	3066
British Crown Hotel	14 Smith Street	Collingwood	3066
Caz Reitop's Dirty Secrets	80 Smith Street	Collingwood	3066
Fox Hotel	351 Wellington Street	Collingwood	3066
Gasometer Hotel	484 Smith Street	Collingwood	3066
Grace Darling Hotel	114 Smith Street	Collingwood	3066
Prince Patrick Hotel	135 Victoria Street	Collingwood	3066
The Barleycorn	177 Johnston Street	Collingwood	3066
The Fox Hotel	351 Wellington Street	Collingwood	3066
The Gem bar	289 Wellington Street	Collingwood	3066
The Horn	20 Johnston Street	Collingwood	3066
The Tote	71 Johnson Street	Collingwood	3066

Brunswick (19)

Bar Etiquette	408 Sydney Road	Brunswick	3056
Bridie O'Reillys	29 Sydney Road	Brunswick	3056
Brunswick Green	313 Sydney Rd	Brunswick	3056
Brunswick Hotel	140 Sydney Road	Brunswick	3056
Cornish Arms	163 Sydney Road	Brunswick	3056
Edinburgh Castle	681 Sydney Road	Brunswick	3056
My Aeon	791 Sydney Road	Brunswick	3056
Noise Bar (Railway Hotel)	291 Albert Street	Brunswick	3056
Penny Black	420 Sydney Road	Brunswick	3056
Retreat Hotel	280 Sydney Road	Brunswick	3056
Sporting Club Hotel	27 Weston Street	Brunswick	3056
Union Hotel	109 Union Street	Brunswick	3056
Victoria Hotel	380 Victoria Street	Brunswick	3056
Lomond Hotel	225 Nicholson Street	Brunswick East	3057
Mi Corazon	462 Lygon Street	Brunswick East	3057
Spotted Mallard	314 Sysdney Road	Brunswick	3056
The B.East	80 Lygon Street	Brunswick	3056
The Comfortable Chair	98 Lygon Street	Brunswick East	3057
Grandview Hotel	47 Pearson Street	Brunswick West	3055

Carlton (8)

Bella Union	Cnr Victoria & Lygon Streets	Carlton	3053
Clare Castle Hotel	421 Rathdowne Street	Carlton	3053
Clyde Hotel	385 Cardigan Street	Carlton	3053
Dan O'Connell Hotel	225 Canning Street	Carlton	3053

Draculas	100 Victoria Street	Carlton	3053
John Curtin Hotel	29 Lygon Street	Carlton	3053
Pugg Mahones	175 Elgin Street	Carlton	3053
Sippers	164 Rathdowne Street	Carlton	3053

Fitzroy (39)

Bar Open	317 Brunswick Street	Fitzroy	3065
Bebida	325 Smith Street	Fitzroy	3066
Bimbo Deluxe	376 Brunswick Street	Fitzroy	3065
Black Cat	252 Brunswick Street	Fitzroy	3065
Burlesque Bar	42 Johnston St	Fitzroy	3065
Cape Lounge	367 Brunswick Street	Fitzroy	3065
Cider House	388 Brunswick Street	Fitzroy	3065
Copa Cabana	139 Smith Street	Fitzroy	3065
Cruzao Arepa Bar	365 Brunswick Street	Fitzroy	3065
First Floor	393 Brunswick Street	Fitzroy	3065
Gasometer Hotel	484 Smith Street	Fitzroy	3065
Gertrude's Brown Couch	30 Gertrude Street	Fitzroy	3065
Grumpy's Green	125 Smith Street	Fitzroy	3065
Kanela Bar & Rest	56 Johnston Street	Fitzroy	3065
Kent Street	201 Smith Street	Fitzroy	3065
Labour In Vain	197 Brunswick Street	Fitzroy	3065
Laundry	50 Johnston Street	Fitzroy	3065
Luwow	62 Johnston Street	Fitzroy	3065
Marquis of Lorne	411 George Street	Fitzroy	3065
Napier Hotel	210 Napier Street	Fitzroy	3065
Workers Club	51 Brunswick Street	Fitzroy	3065
Night Cat	141 Johnston Street	Fitzroy	3065
Old Bar	74-76 Johnston Street	Fitzroy	3065
One Twenty Bar	120 Johnston Street	Fitzroy	3065
Perserverance Hotel	196 Brunswick Street	Fitzroy	3065
Provincial Hotel	299 Brunswick Street	Fitzroy	3065
Rainbow Hotel	27 St David Street	Fitzroy	3065
Rochester Castle Hotel	202 Johnston Street	Fitzroy	3065
Royal Derby Hotel	446 Brunswick Street	Fitzroy	3065
Standard Hotel	293 Fitzroy Street	Fitzroy	3065
The Evelyn	351 Brunswick Street	Fitzroy	3065
The Spanish Club	59-61 Johnston Street	Fitzroy	3065
Uptown Jazz Café	177 Brunswick Street	Fitzroy	3065
Yah-Yah's	99 Smith Street	Fitzroy	3065
Boite World Music Café	1 Mark Street	Fitzroy North	3068
Empress of India Hotel	714 Nicholson Street	Fitzroy North	3068
Longplay	318 St Georges Road	Fitzroy North	3068
Pinnacle	251 St Georges Road	Fitzroy North	3068
Railway Hotel	800 Nicholson Street	Fitzroy North	3068

Northcote & Thornbury (16)

303	303 High Street	Northcote	3070
Bar Nancy	61 High Street	Northcote	3070
Carters Public House	300 High Street	Northcote	3070

Ember Lounge	111 High St	Northcote	3070
Northcote Social Club	301 High Street	Northcote	3070
Open Studio	214 High Street	Northcote	3070
Purple Emerald	349 High Street	Northcote	3070
Sagi	57 High Street	Northcote	3070
Salty Dog Bar	300 High Street	Northcote	3070
Thornbury Local	635 High Street	Northcote	3070
Wesley Anne	250 High Street	Northcote	3070
Willow Bar	222 High Street	Northcote	3070
Oktobar	911 High Street	Thornbury	3071
Prague	911 High St	Thornbury	3071
Tago Mago	741 High Street	Thornbury	3071
Thornbury Theatre	859 High Street	Thornbury	3071

Prahran, South Yarra, Toorak (26)

Blue Bar	330 Chapel Street	Prahran	3181
Boutique	134 Greville Street	Prahran	3181
Chapel Off Chapel	12 Little Chapel Street	Prahran	3181
College Lawn Hotel	36 Greville Street	Prahran	3181
Electric Ladyland	265-267 Chapel Street	Prahran	3181
Jett Black	177 Greville Street	Prahran	3181
Ladro	162 Greville Street	Prahran	3181
Love Machine	Little Chapel Street	Prahran	3141
Lucky Coq	179 Chapel Street	Prahran	3141
Marmalade	194 Commercial Road	Prahran	3181
Mofo Lounge	157 Greville St	Prahran	3181
Mount Erica Hotel	420 High St	Prahran	3181
One Six One	161 High Street	Prahran	3181
Prince Maximillian	32 Commercial Road	Prahran	3181
Red Bennies	373 Chapel Street	Prahran	3181
Revellers South	274 Chapel Street	Prahran	3181
Revolver Upstairs	229 Chapel Street	Prahran	3181
Station Hotel	96 Greville Street	Prahran	3181
White Charlie	255 Chapel Street	Prahran	3181
Arcadia Hotel	2 Toorak Rd	South Yarra	3141
Bridie O'Reillys	462 Chapel Street	South Yarra	3141
Chasers	386 Chapel Street	South Yarra	3141
Cristal	402 Chapel Street	South Yarra	3141
Temperance Hotel	426 Chapel Street	South Yarra	3141
Tryst Bar	3 Wilsons Street	South Yarra	3141
Trak	445 Toorak Rd	Toorak	3142

Richmond (13)

Bar 9T4	94 Swan Street	Richmond	3121
Bridge Hotel	642 Bridge Road	Richmond	3121
Corner Hotel	57 Swan Street	Richmond	3121
Der Raum	438 Church Street	Richmond	3121
Dizzys Jazz Club	381 Burnley Street	Richmond	3121
Great Britain Hotel	447 Church Street	Richmond	3121

Maeve Fox	472 Church Street	Richmond	3121
Pint On Punt	42 Punt Road	Richmond	3121
Precinct Hotel	60 Swan Street	Richmond	3121
Prince of Wales	109 Church Street	Richmond	3121
Scarlett Lounge	174 Burnley St	Richmond	3121
Station 59	59 Church Street	Richmond	3121
Swan Hotel	425 Swan Street	Richmond	3121

St Kilda & Windsor (38)

29th Apartment	3/29 Fitzroy Street	St Kilda	3182
Abode	374 St Kilda Road	St Kilda	3182
Big Mouth	168 Ackland Street	St Kilda	3182
Claypots	213 Barkly St	St Kilda	3182
Cushion Lounge	99 Fitzroy Street	St Kilda	3182
Dogs Bar	54 Acland Street	St Kilda	3182
Doulton Bar	202 Barkly Street	St Kilda	3182
Elephant & Wheelbarrow	169 Fitzroy Street	St Kilda	3182
Esplanade Hotel (Basement)	11 The Esplanade	St Kilda	3182
Esplanade Hotel (Front Bar)	11 The Esplanade	St Kilda	3182
Esplanade Hotel (Gershwin Room)	11 The Esplanade	St Kilda	3182
Felix	11 Fitzroy Street	St Kilda	3182
George Public Bar	125 Fitzroy Street	St Kilda	3182
Greyhound Hotel	1 Brighton Road	St Kilda	3182
Hotel Barkly	109 Barkley Street	St Kilda	3182
Laika Cocktail Lounge	9 Fitzroy Street	St Kilda	3182
Lobby Bar	133-135 Fitzroy Street	St Kilda	3182
Local Taphouse	184 Carlisle Street	St Kilda	3183
Melbourne Wine Room	125 Fitzroy Street	St Kilda	3182
Metropol	60 Fitzroy Street	St Kilda	3182
National Theatre	20 Carlisle Street	St Kilda	3182
Next Level	109 Barkly Street	St Kilda	3182
Palais Theatre	Lower Esplanade	St Kilda	3182
Post Office Club Hotel	306 St Kilda Road	St Kilda	3182
Pretty Please	61C Fitzroy Street	St Kilda	3182
Prince Bandroom	29 Fitzroy Street	St Kilda	3182
Red Eye Bar	17 Carlisle Street	St Kilda	3182
Robarta	109 Fitzroy Street	St Kilda	3182
Soco Cargo	Lower Esplanade	St Kilda	3182
St Kilda Bowling Club			
Tongue 'n Groove	16 Grey St	St Kilda	3182
Veludo	175 Ackland Street	St Kilda	3182
Vineyard Bar & Rest	71a Ackland Street	St Kilda	3182
Violet Tears	192 Barkly Street	St Kilda	3182
White Bar	129 Fitzroy Street	St Kilda	3182
Balaclava Hotel	123 Carlisle Street	St Kilda East	3183
Back Bar	67 Green Street	Windsor	3181
Borsch, Vodka & Tears	173 Chapel Street	Windsor	3181
Hoo Haa Bar	105 Chapel Street	Windsor	3181
Killing Time Garden Bar	11 Chapel Street	Windsor	3181
SocialBar	116 Chapel Street	Windsor	3181

Port Melbourne (4) & South Melbourne (15)

Clare Castle Hotel	354 Graham Street	Port Melbourne	3207
Prince Alfred Hotel	355 Bay Street	Port Melbourne	3207
Sloaney Pony	1 Crockford Street	Port Melbourne	3207
The Local	22 Bay Street	Port Melbourne	3207
7 Nightclub	52 Albert Road	South Melbourne	3205
Butterfly Club	204 Bank Street	South Melbourne	3205
Clarendon Hotel	209 Clarendon Street	South Melbourne	3205
Club Blowfish	160 Clarendon Street	South Melbourne	3205
Emerald Hotel	415 Clarendon Street	South Melbourne	3205
Fleece Hotel	120 Montague Street	South Melbourne	3205
Golden Gate Hotel	238 Clarendon Street	South Melbourne	3205
Honey Bar	345 Clarendon Street	South Melbourne	3205
Inc Bar	446 City Road	South Melbourne	3205
Marquee Club	127 Dorcas Street	South Melbourne	3205
Montague Hotel	355 Park Street	South Melbourne	3205
Motel	172 York Street	South Melbourne	3205
Neverland	32 Johnson Street	South Melbourne	3205
Star Bar Hotel	160 Clarendon Street	South Melbourne	3205
The George	139 Cecil Street	South Melbourne	3205

Outer Suburban - Pub, Clubs, Bars (139)

Albert Park Hotel	Cnr Montague & Dundas Place	Albert Park	3206
Ascot Vale Hotel	447 Mt Alexander Road	Ascot Vale	3032
Argy Bargy	263 Carlisle Street	Balaclava	3183
Pause Bar	268 Carlisle Street	Balaclava	3183
Baxter Tavern	117 Baxter-Tooradin Rd	Baxter	3911
Cardinia Park Hotel	200 Emerald Beaconsfield Road	Beaconsfield	3807
Bell Tavern	1645 Burwood Highway	Belgrave	3160
Micawber Tavern	61 Monbulk Rd	Belgrave	3160
Oscars Alehouse	7 Bayview Rd	Belgrave	3160
Ruby's Lounge	1648 Burwood Highway	Belgrave	3160
Berwick Inn Hotel	1 High Street	Berwick	3806
Brighton Hotel	286 Bay Street	Brighton	3186
Elsternwick Hotel	259 Elsternwick Road	Brighton	3185
Milanos Brighton Beach	4 The Esplanade	Brighton	3186
New Bay Hotel	329 New Street	Brighton	3186
Khyats Hotel	25 Wilson Street	Brighton North	3186
Palace Camberwell	893 Burke Rd	Camberwell	3124
Rosstown Hotel	1084 Dandenong Road	Carnegie	3163
London Tavern	414 Hawthorn Road	Caulfield South	3162
Matthew Flinders/Tom Thumb	667 Warrigal Rd	Chadstone	3148
Chelsea Heights Hotel	Cnr Springvale & Wells Road	Chelsea Heights	3196
Clayton RSL	155 Carinish Road	Clayton	3168
Clifton Hill Hotel	89 Queens Parade	Clifton Hill	3068
Terminus Hotel	605 Victoria Street	Clifton Hill	3068
Post Office Hotel	231 Sydney Road	Coburg	3058
Gateway Hotel	218-230 Princes Highway	Corio	3214
Croydon Hotel	47 Maroondah Highway	Croydon	3136
Dorset Gardens	335 Dorset Road	Croydon	3136
Pulse	115 Foster Street	Dandenong	3175
Route 31	31A Langhorne Street	Dandenong	3175
The Castle	Hennings Park, Princes H'way	Dandenong	3175
Dingley International Hotel	334 Boundary Road	Dingley	3172
Shoppingtown Hotel	19 Williamsons Road	Doncaster	3108
Prince Mark Hotel	28A Princes Highway	Doveton	3177
After The Tears	9B Gordon Street	Elsternwick	3185
Antique Bar	218 Glen Huntly Road	Elsternwick	3185
Caulfield RSL	4 St Georges Road	Elsternwick	3185
Eltham Hotel	746 Main Street	Eltham	3095
Elwood Lounge	49-51 Glenhuntly Road	Elwood	3184
Casa D'Abruzzo	55 O'Herns Road	Epping	3076
Lincolnshire Arms Hotel	1 Keilor Road	Essendon	3040
Nova Bar	100 Fletcher Street	Essendon	3040
Royal Essendon Hotel	863-881 Mt Alexander Road	Essendon	3040
Ruby Bar	859 Mt Alexander Road	Essendon	3040
Grandview Hotel	429 Heidelberg Rd	Fairfield	3078
Musicland	1359a Sydney Rd	Fawkner	
Ferntree Gully Hotel - Middle	1130 Burwood Highway	Ferntree Gully	3156
Quiet Man	271 Racecourse Rd	Flemington	3031
Dancing Dog Café	42a Albert Street	Footscray	3011
Mona Castle	53 Austin Street	Footscray	3011

Reverence Hotel	28 Napier Street	Footscray	3011
Small Poppies Bar	165 Nicholson Street	Footscray	3011
21st Century	1 Davey Steet	Frankston	3199
B'Artiste Lounge	12 Young Street	Frankston	3199
Davey's Hotel	510 Nepean Highway	Frankston	3199
Frankston RSL	183 Cranbourne Road	Frankston	3199
Glacier Lounge Bar	480 Nepean Highway	Frankston	3199
Pier Live	508 Nepean Highway	Frankston	3199
Mountain View Hotel	186 Springvale Rd	Glen Waverley	
The Hawthorn	481 Burwood Road	Glenferrie	3122
Grovedal;e Hotel	236 Torquay Road	Grovedale	3216
Hallam Hotel	241 Princes Highway	Hallam	3803
Geebung Polo Club	85 Auburn Road	Hawthiorn East	3122
Caseys Nite Spot	660A Glenferrie Road	Hawthorn	3122
Glenferrie Hotel	324 Burwood Road	Hawthorn	3122
Room 680	680 Glenferrie Road	Hawthorn	3122
Grind 'n Groove	274 Maroondah Highway	Healesville	3777
Panton Hill Hotel	633 Main Road	Hurstbridge	3099
Wellers of Kangaroo Ground	150 Eltham & Yarra Glen Road	Kangaroo Ground	3097
Doutta Galla Hotel	337 Racecourse Road	Kensington	3031
Hardimans	521 Macaulay Road	Kensington	3031
Harp of Erin	636 High Street	Kew	3102
Skinny Dog Hotel	155 High Street	Kew	3101
Famous Blue Raincoat	25b Vernon Street	Kingsville Sth	3015
Lou Lou - Knox Ozone/Hush Bar	425 Burwood Highway	Knox	3152
Bada Bing	180 Glenferrie Road	Frankston	3162
Anglers Tavern	2 Raleigh Road	Maribyrnong	3132
All Nations Bar	2 Spencer Street	Melbourne	3000
Pure Nightclub	92 McKenzie Street	Melton	3337
Mentone Hotel	9 Palermo Street	Mentone	3194
Nighthawk cafe bar rest	114 Nepean Highway	Mentone	3194
Middle Park Hotel	102 Canterbury Road	Middle Park	3206
Santiago Tapas Bar	14 Armstrong Street	Middle Park	3206
Cassablanca Tavern	499 Maroondah Highway	Mitcham	3132
Clocktower Centre	750 Mt Alexnder Road	Moonee Ponds	3039
Cubby House	674 Mt Alexander Road	Moonee Ponds	3039
Deluxe Bar	595 Mt Alexander Road	Moonee Ponds	3039
Empire Nightclub	Level 1, 1 Puckle Steet	Moonee Ponds	3039
Mango Lounge	17 Hall Street	Moonee Ponds	3039
Vinyl Lounge	549 Mt Alexander Road	Moonee Ponds	3039
Chandelier Room	91 Cochranes Rd	Moorabbin	3189
Lucky 13 Garage	8 Cochranes Road	Moorabbin	3189
Sandbelt Club Hotel	630 South Road	Moorabin	3189
Brycee's Tavern	30-32 Brice Avenue	Mooroolbark	3138
Doyles Bridge Hotel	1 Nepean Highway	Mordialloc	3195
The Bay	6 Centreway Road	Mordialloc	3195
The Playhouse	229 Boundary Rd	Mordialloc	3195
Bay Hotel	62 Main Street	Mornington	3931
York on Lilydale	Cnr York & Swansea Rds	Mount Evelyn	3140
Bruce County Hotel	445 Blackburn Road	Mount Waverley	3149
Village Green	Springvale & Ferntree Gully Rds	Mulgrave	3170

Leveson	46 Leveson Street	North Melbourne	3051
Prose Bar	7 Errol Street	North Melbourne	3051
Town Hall Hotel	33 Errol Street	North Melbourne	3051
Victoria Hotel	380 Victoria Street	North Melbourne	3051
Burvale Hotel	Springvale Road	Nunawading	3131
Whitehorse Centre	397 Whitehorse Road	Nunawading	3131
Caravan Music Club	95-97 Drummond Steet	Oakleigh	3166
Oakleigh Bowling Club	95A Drummond Street	Oakleigh	3166
Mount Dandenong Hotel	1451 Mt Dandenong Tourist Rd	Olinda	3788
Carni	60 High Street	Preston	3072
Stolberg Beer Café	197 Plenty Road	Preston	3072
Club Dakota	123 Marrondah Highway	Ringwood	3134
Manhattan Hotel	131 Heatherdale Rd	Ringwood	3134
Zu Bar	121 Maroondah Highway	Ringwood	3134
Lyrebird Lounge	61 Glen Eira Rd	Ripponlea	3183
Rye Hotel	2415 Point Nepean Road	Rye	3941
Westernport Hotel	161 Marine Parade	San Remo	3925
Continental Hotel	21 Ocean Beach Road	Sorrento	3943
Sorrento-Portsea RSL	3 Hurley Street	Sorrento	3943
Commercial Hotel	820 Plenty Rd	South Morang	3752
St Andrews Hotel	St Andrews Road	St Andrews	3761
Westend Market Hotel	47 McIntyre Road	Sunshine	3020
Q Room	371 Settlement Road	Thomastown	3074
Mr Pockets	217 Mickleham Road	Tullamarine	3043
Burrinja	Matson Drive & Glenfern Road	Upwey	3158
Seamus O'Tooles Irish Pub	425 Burwood Highway	Wantirna South	3152
Alfred's Homestead Retaurant	420 Ringwood/Warrandyte Road	Warrandyte	3113
Grand Hotel	110 Yarra Street	Warrandyte	3113
Mynt Lounge	185 Watton Street	Werribee	3030
Drunken Poet	65 Peel Street	West Melbourne	3003
Spensers Live	419 Spencer Street	West Melbourne	3003
Wheelers Hill Hotel	Ferntree GullyRoad	Wheelers Hill	3150
Customs House Hotel	161 Nelson Place	Williamstown	3016
Stags Head Hotel	39 Cecil Street	Williamstown	3016
Yarra Valley Grand Hotel	Bell Street	Yarra Glen	3775
Acqua e vino	18a Anderson Street	Yarraville	3013
Commercial Hotel	238 Whitehall St	Yarraville	3141
Yarraville Club	135 Stephen Street	Yarraville	3013

Occassional Melbourne Live Music Venues (50)

Abbotsford Convent Bakery	1 St Heliers Street	Abbotsford	3067
Arthur's Bar	Duckboard Place	Melbourne	3000
Bentleigh Club	Yawla Street	Bentleigh	3204
Brighton Town Hall	Wilson Street	Brighton	3186
Camberwell Centre	340 Camberwell Road	Camberwell	3124
Canterbury Centre	2 Rochester Road	Canterbury	3126
CERES	Cnr Roberts & Stewart St	East Brunswick	3056
Chelsea RSL	4 Thames Promenade	Chelsea	3196
Coburg Town Hall	90 Bell Street	Coburg	3058
Collingwood Town Hall	140 Hoddle St	Collingwood	3066
Darebin RSL	402 Bell St	Preston	3070
Eltham RSL	804 Main Road	Eltham	3095
EV's Youth Centre	212 Mt Dandenong Road	Croydon	3136
Fairfield/Alphington RSL	7 Railway Place	Fairfield	3078
Fitzroy Town Hall	201 Napier Street	Fitzroy	3065
Fitzroy Victoria Bowling Club	578 Brunswick Street	Fitzroy North	3068
Footscray Boat Club	40 Farnsworth Road	Footscray	3011
Footscray Club	43 Paisley Street	Footscray	3011
Frankston Arts Centre	Davey Street	Frankston	3199
Hawthorn Bowling Club	1 Wood Street	Hawthorn	3122
Hawthorn Town Hall	360 Burwood Road	Hawthorn	3122
Irenes Community Warehouse	5 Pitt St	East Brunswick	3056
Lady Cutler Showboat	Central Pier	Docklands	3008
Maribyrong/maidstone RSL	56 Raleigh Road	Maribyrnong	3032
Melba Hall	Uni Melbourne Royal Parade	Parkville	3052
Mitcham RSL	26 McDowall Street	Mitcham	3132
Narre Warren Mechanics Institute	59 Webb Street	Narre Warren	3805
Nash Hotel	344 Victoria Street	Richmond	3121
Northcote Uniting Church	251 High Street	Northcote	3070
Oakleigh RSL	Drummond Street	Oakleigh	3166
Pascoe Vale RSL	40 Cumberland Avenue	Pascoe Vale	3044
Peninsula Community Theatre	Cnr Wilson Rd & Nepean H'way	Mornington	3931
Phoenix Youth Centre	71 Buckley Street	Footscray	3011
Plenty Ranges Arts Centre	35 Ferres Blvd	Morang South	3752
Port Phillip Town Hall	333 Bay Street	Port Melbourne	3207
Preston Town Hall	411 High Street	Preston	3072
Regal Ballroom	216 High Street	Northcote	3070
Richmond Uniting Church	314 Church Street	Richmond	3121
Robert Blackwood Hall	Monash Uni	Clayton	3800
Rosamond Bowls Club	114 Rosamond Road	Maidstone	3012
Rye RSL	5-11 Nelson Street	Rye	3941
South Melbourne Town Hall	208 Bank Street	South Melbourne	3205
Stones of Yarra Valley	14 St Huberts Road	Coldstream	3770
Sunbury Youth Centre	51-53 Evans Street	Sunbury	3429
The Commune Café, Bar, Grill	2 Parliament Place	East Melbourne	3004
The Substation	1 Market Street	Newport	3015
Vic Uni Student Village	Williamson Road	Footscray	3011
Victoria University of Technolgy	Cnr Nicholson & Buckley Streets	Footscray	3011
Way Out West Music Club	Cnr Melbourne Rd and Ferguson St	Williamstown	3016
Williamstown RSL	128 Ferguson Street	Williamstown	3016

Williamstown Town Hall	104 Ferguson Street	Williamstown	3016

Victorian
Live Music Census
2012

APPENDIX C

Regional Victoria

Regional Venues & Activity

The Live Music Census did not have the resources to duplicate the intensive date gathering exercise in regional Victoria. Important though it is, that remains for another day.
However, both the DeLoitte Access Economics and Ernst & Young reports included some information re regional venues, and there is a detailed report available on regional Victorian festivals (see below). This information provides an ability to provide some estimates of the contribution of live music performances in the regions.

Regional Festivals

Between 2006 and 2009 a team of researchers from NSW universities studied regional festivals in NSW, Victoria and Tasmania.
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).
Some of their findings are relevant to our attempt to calculate the economic, social and cultural significance and impact of popular music events on Victorians and Victoria.
The study identified 2891 festivals in the 3 states – NSW 1340, Vic 1325 (46%) and Tas 226.

Regional Victoria is the Aussie 'champ' in regard to the number of festival events held in its regional areas.
Ballarat is No. 1 with 73 festivals. Greater Geelong (52 festivals), Mildura (44), Warrnambool (43) and Greater Bendigo (43) are all in the report's top 10, and another 6 Victorian local government areas are in the top 20.

Victoria's share of all regional festivals was –
Event Turnover (ticket revenue) - $254 Million
Patron Attendance – 10.5 Million
Visitor Spending - $984 Million

Regional Music Festivals - Income/Audience

Between 2006 and 2009 there were 116 regional popular music festivals in Victoria annually.
This represented 10% of the Victorian total. Sport accounts for 36% of festivals, followed by Community (15%) and Agriculture (13%).

Major events such as Groovin' The Moo, Pyramid Hill, Apollo Bay, Meredith, Golden Plains, Falls, Port Fairy Folk, Queenscliff, Wangaratta Jazz and Rainbow Serpent generated –

$25.4 Million in ticket/entry revenue
1 Million in patron attendances
$98.4 Million in visitor spending

Regional Music Festivals - Employment

The study found that – on average, these regional events generated 4.1 full time and 5.1 part time jobs during the planning phase, and 13.6 full time and 12.6 part time jobs during the operational phase.
In terms of regional Victoria' music events, this translates to –

Planning Phase
476 full time jobs annually
592 part time jobs annually

Operational Phase
1,578 full time jobs
1,462 part time jobs

Regional Victoria - Small Venues

Although it was not possible to conduct a detailed analysis of regional Victoria's small venues as part of this Live Music Census, APRA has been happy to cooperate with our efforts.
While confidentiality requirements prevent individual venues from being identified, a postcode analysis of their database confirmed that in regional Victoria there are currently 455 venues 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.

While we do not have specific details re operation, DAE - using the same database, 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.

On that basis, and in order to come up with indicative data, 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 extra door/entry income of $10.6 million and involve 1.9 million patrons spending an additional $87 million at those performances.

The performances would also produce the following Full Time Eqivalent jobs -
3,363 FTE jobs for Musicians
2,114 FTE jobs for DJs
900 FTE jobs for Production Staff
13,500 FTE jobs for Venue Staff