MUSIC VICTORIA

CITY OF MONASH

LIVE MUSIC IN THE CITY OF MONASH 2019-2021

A REPORT PREPARED BY DOBE NEWTON BASED ON DATA FROM THE MELBOURNE LIVE MUSIC CENSUS 2022

TABLE OF CONTENTS

FOREWORD & INTRODUCTION

FOREWORD

The live music census results for the City of Monash contained in this report are provided in the context of the ‘Big Picture’ - live music activity in Greater Melbourne 2019 - 2021.

INTRODUCTION

Having just completed (July, 2022) research to quantify the value of live music presentations across regional Victoria’s 11 Regional Tourism Area, Music Victoria was keen to update information for the 12th Tourism Area - Greater Melbourne, last reported in the Melbourne Live Music Census 2017.

We were therefore delighted that a number of project partners – the cities of Darebin, Maribyrnong, Melbourne, Monash, Moreland, Stonnington, Yarra, the Australasian Performing Right Association and the Live Music Office approved a proposal to conduct this important research update.
With the exception of Monash, these municipalities form and inner-urban ‘music precinct’ ring around the CBD and are responsible for the vast majority of live music presentations at events and in venues in this city.

As was the case with the regional project, the focus of this research was on documenting activity in 2019, the last year of ‘normal’ operations and comparing that data with the devastation wrought across the entertainment and hospitality sectors by restrictions, shutdowns and cancellations resulting from two years of pandemic-related public health orders.
By providing what was sure to be a stark contrast, the report will hopefully help a variety of government and private sector decision-makers and investors to create more targeted and nuanced policies and support programs to restore the fortunes of the sector’s businesses, the livelihood of workers and practitioners and allow fans to once again gather and celebrate at performances in venues and at major events.

As we have previously done, we adopted the ‘census’ approach we developed in 2012 and refined in 2017, in order to accurately represent the extent and value of live music presentations, particularly at the small venue ‘grass roots’ level. This exhaustive (and exhausting!) process was the only reliable method to document activity in the hundreds of pubs, clubs, bars, band rooms across our city that, in a typical year, present 69% of gigs that produce 51% of revenue and patron spending and generate 64% of employment for performers, production and venue staff involved in presenting those gigs.
These are the venues most usually (minimally) ‘sampled’ in many research projects in order to produce sometimes questionable estimates of their activity.
They are obviously too important not to be subjected to detailed examination and analysis.

At the top end of the presentation pyramid – concerts and festivals, we have again relied on the detailed reporting of Live Performance Australia whose annual *Ticket and Revenue Survey* captures information reported by major event presenters and venues, industry organisations, ticketing agencies and a variety of local and state government agencies. Additionally, we have access to the database of event licences issued by APRA (Australasian Performing Right Association) and the PPCA (Phonographic Performance Company of Australia) for the live performance of works.

(songs) and the recordings of those works used at major events and in small venues.

We are grateful to event presenters, ticketing agencies and venue operators who shared information on their activities directly with us, and to the hundreds more venue operators, performers and live music attendees who completed our extensive online surveys.

Of course this comprehensive data gathering approach requires many months of work and could not have been achieved without the passionate commitment and diligence of the student research team from Collarts who joined us again for this project. They were allocated an area of Greater Melbourne and were responsible for identifying live music activities, creating the definitive venue and event lists which underpin this research and for following up venues and presenters.

Where appropriate, the report will compare data from this report with that from the 2017 census, although we note that since that earlier report, the physical boundaries of Greater Melbourne have expanded to include ‘urban growth areas’ that were previously considered part of regional areas.

Lastly, my thanks to the wonderful team at Music Victoria who made this important work possible and have been endlessly supportive.

The 2017 report was instrumental in helping to drive important policy and funding decisions. I hope this one is similarly useful.

Without the generosity of our industry and the willingness of so many to share their data, opinions and advice, the project could not have been completed.

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

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

I look forward to combining this metropolitan component with that already completed for regional Victoria to produce the first whole-of-state live music census report.
Then it’s time for a holiday !

Dobe Newton
Project Manager & Author - Music Victoria

PROCESS & MONASH BACKGROUND

PROCESS
As has been the case in previous live music research projects, the initial focus is on identifying major live music event (festival and concert) presentations in large venues and those in the hundreds of bars, clubs and pubs in the Greater Melbourne area.
Only by accurately identifying regular events and venues, recording their activities and creating profiles of the performers, sector workers and live music attendees can we hope to produce credible data.

MUSIC & THE CITY OF MONASH
Despite the fact that it is no longer regarded as a centre of popular music creativity and presentation, the city has played an important historic role in Melbourne's popular mujsic story.
In the 1970s and 80s, the area boasted two of Melbourne's legendary 'beer barns' - The Matthew Flinders and Village Green hotels, which regularly hosted iconic pub rock acts such as Cold Chisel, The Angels, Skyhooks, The Divynls, Midnight Oil, Jo Jo Zep, The Sports, Mi-Sex, Sherbert ... etc, in their large bandrooms. The venues also presented a number of touring acts including a legendary performance by ACDC in 1975 at the Matthew Flinders, which still attracts blogging comments.
It all began to change after Victoria introduced random breath testing in 1976, discouraging journeys by fans from the inner suburbs. Ironically, the venues now feature a range of tribute shows - many paying homage to those original iconic acts who performed there decades earlier.
Venues associated with Monash Univerity's performing arts complex continue to present major performances mostly associated with the classical music repertoire.

LIVE MUSIC IN GREATER MELBOURNE 2019 - 2021

FESTIVALS & CONCERTS - NATIONAL & VICTORIA

We are fortunate, year-on-year, to have access to data published by Live Performance Australia in their annual *Ticket & Revenue Survey.*
The data represents reporting to LPA by major event presenters, ticketing agencies, concert venues and organisations representing the major performing arts.
This is used to produce national and state breakdowns and profiles for each of the dozen or so performing arts categories. Among them contemporary music festivals (as distinct from multi-artform events) plus contemporary music, opera, classical music concerts and music theatre performances.

LPA NATIONAL 2019	$ Revenue (Millions)	Attendance
Live Music Categories		
Classical Music	$87.3	1,300,000
Opera	$40.2	400,000
Music Theatre	$337.3	3,500,000
Contemporary Music	$835.5	8,300,000
Contemporary Festivals	$180.8	1,500,000

LPA VICTORIA 2019	$ Revenue (Millions)	Attendance
Live Music Categories		
Classical Music	$27.1	425,000
Opera	$7.1	100,000
Music Theatre	$118.1	1,200,000
Contemporary Music	$253.1	2,400,000
Contemporary Festivals	$27.3	239,000

As the LPA survey authors (Ernst and Young) regularly report, the totals for attendance and box office revenue from ticket sales do not capture all genre activity. Nor do they break down activity into region activity – eg. metro Melbourne as opposed to regional Victoria. But they certainly provide a starting point.

What the LPA data doesn't provide of course is any information on the considerable on and off-site ancillary spending (food and beverage, merchandise, general retail, transport etc) which is generated by patron attendance.

FESTIVALS & CONCERTS - GREATER MELBOURNE

We know from past research and the recently completed *Regional Victoria Live Music Census & Audit 2022*, that 95% of all major concert presentations take place in Greater Melbourne – predominantly in the theatres, concert halls, stadia and arenas in, or adjacent to, the Melbourne CBD.
Festival presentations are more evenly split with a number of the state's major events hosted by regional communities.

Our festival and concert event lists are refined using –
1. Information directly shared with us by the major ticketing agencies (Moshtix, Ticketek, Ticketmaster, Oztix), major touring companies (Frontier, TEG, Live Nation), festival presenters, local councils and operators of performing arts venues who are members of the Victorian Association of Performing Arts Centres.
2. The Australian Performing Right Association (APRA) and the Phonographic Performance Company of Australia who are responsible for issuing event licences to presenters and venue operators for the presentation of live performances of songs and the recordings of those songs at their events.

This information is then used by the research team to create a definitive list of festivals and concerts in Greater Melbourne. Their job for this project was to use that information to develop definitive lists and then use their web search skills to identify which of those licenced events proceeded in 2019 and which were cancelled/postponed/re-scheduled during 2020 and 2021.

FESTIVALS & CONCERTS - REVENUE & SPENDING

We have used the ticket revenue reported by Live Performance Australia and augmented it – as appropriate, with information shared directly with us by major event presenters, promoters and venue operators.

Patron spending has been calculated based on the hundreds of responses (769) we received from attendees to our online survey. They were interrogated in detail re the festivals and concerts they attended in 2019 and any they were able to attend in 2020/21. Their information on ticket purchase was cross-referenced with that supplied by LPA and concert/festival presenters, promoters and venue operators.

We know from our previous census projects and a number of Australian and international reports that on and off-site ancillary spending (food and beverage, merchandise, transport, retail etc) is responsible to approximately 70% of event-related revenue generation.
The attendee surveys reveal that concert patrons spent an average of $91 per event while those attending festivals spent an average $109 per day. Audience numbers have been discounted to reflect the 10% of patrons who spend little or nothing.

Note on Limitation

We note that information shared by ticketing agencies includes tickets sold for 'concerts' in smaller venue band rooms (eg. The Corner Hotel, Northcote Social Club, Memo Music Hall, Croxton, Brunswick Ballroom, Prince Band Room etc). In order to avoid double-counting, we have excluded these attendances, box office revenue and ancillary spending from the concert section.

SMALL VENUES - LIST MANAGEMENT

The census project is unique in that it recognises that live music performances in small venues across Greater Melbourne generate the majority of gigs, attendance, patron spending and employment.
Because there is no reporting 'mechanism' – as per festivals and concerts via the LPA, these performances go largely unreported in many other research projects. They are too important to ignore.

In order to construct a definitive list of small venue presenters in Greater Melbourne, we employ the following method –

1. An examination of 14,800 licences issued by The Victorian Commission for Gaming and Liquor Regulation in 2019. This licence information identifies all venue operators in municipal areas with a licence to supply alcohol. These include many venues/operators who have limited licences – eg. packaged/BYO. But it enables us to identify venues who can provide alcohol sales on-site. These include most venues providing live/recorded music, but of course many with no live presentations. An examination of the licences reduced the list to 3,600.

2. That information was cross-referenced with licences issued by APRA/PPCA required by small venues to provide live and featured recorded music to the public. There were 777 licences in 2019, compared to 610 in 2017. This allowed us to further refine the list to 736 venues.

3. That information formed the basis of the lists distributed to the Collarts research team each of whom was designated as an area coordinator and tasked with using gig listings (*Beat Magazine*), web sites and social media platforms to determine the level of presentations in each of the suburban music 'precincts' –

cities of Darebin, Maribyrnong, Melbourne, Moreland, Port Phillip, Stonnington, Yarra plus Monash and the outer suburbs of Greater Melbourne.

4. This accumulated information was used to identify venues which presented live music on a 'regular' basis – a minimum of once per week. These became the primary focus for our research.

5. This reduced our list from an original 736 to 506.

6. These venue operators were contacted by the research team and shared information on their operations directly and/or by completing online surveys.

City	Music Venues
Darebin	37
Maribyrnong	25
Melbourne	189
Monash	29
Moreland	49
Port Phillip	52
Stonnington	48
Yarra	77
Outer Suburbs	230

Note on Limitation

We are aware from Licensing information and the advertisement of gigs that there are many venues that present on an 'occasional' basis.
However, in the interests of erring on the conservative side of reporting, we have not included estimates of revenue/spending/attendance in calculations.

167 regular presenting venues were within the City of Melbourne's municipal boundary, 201 within the municipal boundaries of our project partners (as above). The remaining 137 were in 20 other local council areas in Greater Melbourne and the urban growth corridors in the shires of Mitchell, Mornington Peninsula, Nillumbik and Yarra Ranges.

Small Venue - Box Office

Our analysis of gig advertising (*Beat Magazine*, websites, social media) and survey responses from 150+ small venues confirms that when small venues present ticketed performances and/or have a door/entry charge, the average was $25 on premium (weekend) nights. Approximately 51% of gigs are free entry.

Small Venue - Ancillary Spending

Although half the gigs in small venues are free entry, the survey responses from venue operators and small venue attendees confirm that 90% of patrons spend an average of $51 per gig. The sheer volume of these attendances (12+ million) means that this ancillary revenue is a very significant component of the overall revenue generated by live performances.

GREATER MELBOURNE - KEY NUMBERS - 2019

141,000	**gigs**
20.7 million	**attendees**
$1.84 Billion	**event revenue ($536 million in box office, $1.18 billion in onsite ancillary patron spending, $111.1 million in off-site spending)**
4,271	**Full Time Equivalent jobs**
World No. 1	**Melbourne as the global leading live music city with 1 live venue per 8,875 inhabitants.**

All of these results represented double-digit growth on those reported in the *Melbourne Live Music Census 2017*.

THE COVID YEARS - GREATER MELBOURNE 2020-2021

Following the announcement of the public health State of Emergency in March 2020, live music presentations across the sector were variously disrupted by seven periods of official lockdown and restrictions affecting venue/event operations, limiting patron travel and therefore the ability to consume live music.

In terms of operation, there was considerable confusion across the sector with regard to how and when venues could operate. There was disquiet and indeed a deal of anger at the restrictions imposed on live music compared to those for major sporting events.
This resulted in the formation of a number of advocacy/lobbying initiatives – Save Our Scene and I Lost My Gig among them.

The situation was somewhat clarified in November 2020 when the state government released its Public Events Framework which basically classified live music events in a three-tiered system with each venue type required to create and operate in adherence with COVIDSafe plans.
Venues and events with fixed seating were able to operate at greater capacity than those without but, even in the former cases, the impact on revenue and the subsequent job loss was significant.

In summary, across the live events sector in 2020 and 2021 –

The number of annual gigs	**declined by 72%**
Audience numbers	**declined by 84%**
Ticket/entry revenue	**declined by 75%**
Patron ancillary spending	**declined by 76%**

Live Performance Australia
Annual Revenue & Ticket Survey.
National Figures

NATIONAL	**$ Revenue (Millions)**		**Variation**	**Attendance**		**Variation**
Live Music Categories	**2019**	**2020**		**2019**	**2020**	
Classical Music	$87.3	$18.1	-79%	1,300,000	300,000	-77%
Opera	$40.2	$11.3	-72%	400,000	100,000	-75%
Music Theatre	$337.3	$67.1	-80%	3,500,000	700,000	-80%
Contemporary Music	$835.5	$309.2	-63%	8,300,000	2,900,000	-65%
Contemporary Festivals	$180.8	$54.1	-70%	1,500,000	400,000	-74%

Live Performance Australia
Annual Revenue & Ticket Survey.
Victorian Figures

VICTORIA	**$ Revenue (Millions)**		**Variation**	**Attendance**		**Variation**
Live Music Categories	**2019**	**2020**		**2019**	**2020**	
Classical Music	$27.1	$6.4	-76%	425,000	96,000	-77%
Opera	$7.1	$0.4	-94%	100,000	7,000	-93%
Music Theatre	$118.1	$7.2	-94%	1,200,000	236,000	-80%
Contemporary Music	$253.1	$81.2	-68%	2,400,000	716,000	-65%
Contemporary Festivals	$27.3	$9.7	-65%	239,000	77,000	-68%

FESTIVALS & COVID

Approximately 35% festivals were able to proceed as they were scheduled between lockdowns but even then, 80% did so at reduced capacity even though - as outdoor events they were subject to less stringent density limits than other venues.

Nonetheless across the two years they reported a 75% decline in revenue and the loss of 76% employment for event staff and performers.

CONCERTS & COVID

Likewise, some concerts were able to proceed, but the number of APRA special event licences issued for 2020 declined by 42%.
Live Performance Australia reported a **69% decline in ticket revenue and an 85% decline in audience numbers for Victorian concerts.** The majority (95%) in Greater Melbourne.

The operation of Arts Centre Melbourne – one of our most prolific presenters (Hamer Hall, State Theatre, Fairfax Studio, Sidney Myer Music Bowl), provides dramatic evidence of the impact.
In 2019, there were 2,022 performance events across various performing arts in their venues, attracting an audience of 2.1 million patrons.
In 2020, there were 244 events (-81%) with an audience of 325,000 (-78%).
Even though the number of events doubled in 2021 (548), density limits meant that the audience (403,000) did not increase proportionately (24%).
The restriction requirements imposed on indoor presentations is underlined by the fact that the outdoor Myer Music Bowl which hosted 30 events in 2019 and 10 in 2021, featured 77 in 2021.

SMALL VENUES & COVID

Because of their smaller physical spaces and the fact that most of their live gigs are not presented as seated events, pubs, clubs and bars were the most severely impacted by restrictions.

Although there were periods throughout the lockdowns/restrictions when caps on venue capacity were eased, the requirement of one patron per two square metres, meant that many venues could not operate at financially viable levels.
According to our venue survey responders, the 77% of venues that were able to present 'some' music across the pandemic years could only do so for an average of 12 weeks, and then at 36% of normal capacity.

The impact is dramatically underlined by the operations during the period of two of our most prolific presenters – The Tote Hotel and Bar Open.
In 2019, between them they presented an average of 88 shows (220 gigs) per month. During 2020, they reported operating at 6% of that level.
From January to June 2021 that increased to 33%, but was back to 7% between July and October. By year's end, they had rebounded to 18% - but at reduced capacity.
Little wonder that small venue owners reported significant anxiety, distress and other COVID-related mental health impacts.

Music Victoria, in its submission to the Victorian parliament's inquiry (see below), estimated that during the two years of restrictions, the small venue sector operated at approximately 8% of its pre-COVID level.

EMPLOYMENT & COVID

Again, the impact was not evenly spread.
Some venues were able to retain some part and full-time staff through the periods of shutdown through the federal government's JobKeeper subsidy scheme, while others – particularly council owned/operated performing arts centres were ineligible for the scheme.
However, the vast majority of live music gigs whether they were festival, concert or small venue events rely predominantly on a large, casualised workforce.
These 'gig economy' workers often failed to meet the eligibility requirements of JobKeeper/JobSeeker and lost their jobs.
Gig cancellations and postponements across the sector resulted in the loss of an estimated 76% of work by casual and part-time workers.

One of the most worrying trends was identified by a number of responders to the *Victorian Legislative Council inquiry into the Impact of COVID on the Tourism and Events Sector*, released in August 2021.
Concert and Festival presenters reported that a large number of the skilled technical and production staff essential to their events had already exited, or planned to exit the sector due to the uncertainty of employment. The suggestion being that even when things returned to 'normal' the sector would need to find ways to cope with a significant skills shortage.

Performers of course were not spared, with 67% reporting they had lost the majority of their music-related income. 50% reported that they were not eligible for any of the support/relief packages offered by state and/or federal governments.

MENTAL HEALTH & COVID

Unsurprisingly, all sector operatives and workers reported significant mental health impacts during the pandemic shutdowns, lockdowns and restrictions.

According to our survey responses, 80% of festival organisers were impacted with 48% having considered leaving the industry and 70% having considered closing down the event permanently. 62% of small venue owners reported significant mental health impact and, while only 20% considered leaving the industry, 60% considered ceasing live music presentations.

76% of surveyed performers reported significant mental health impact with 43% having considered leaving the industry.

Support Act, the non-profit agency set up to provide assistance to industry creatives and workers, reported a four-fold increase in requests for mental health assistance and a significant increase in anxiety, distress and depression and self-medication 'strategies' to address those issues.

GREEN SHOOTS & REVIVAL

As enthusiastic as we all are by announcements like the state-wide Always Live 'festival' with 150+ performances scheduled across 90 regions, and as optimistic as were the majority of our survey responders that activity levels would return to 'normal' in the next twelve months, a note of caution was issued by our leading ticketing agencies.

They identified the impact of a 'shadow' pandemic associated with an ongoing reticence among some patrons to resume their previous event/gig consumption patterns. They highlighted the highest 'no show' levels (25-30%) they had ever seen among ticket purchasers.
This was endorsed by 24% of our attendee survey responders who reported that they were not yet ready to return to live events – particularly those held in small, indoor venues.

MONASH - PROFILE & DATA

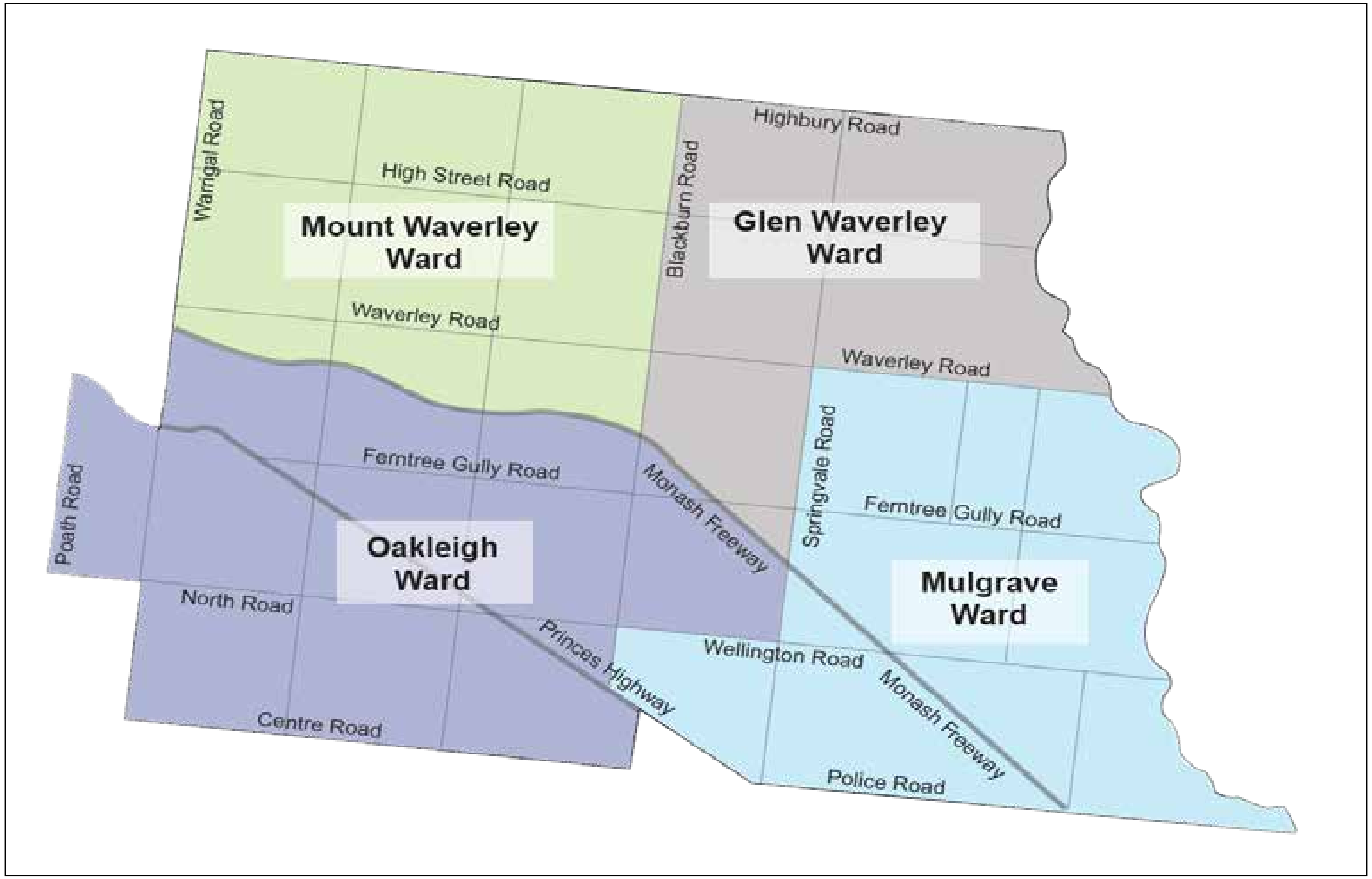
KEY FINDINGS 2019

3,930	Live music gigs in Monash
272,450	Attendance at live music events/venues
$4.7 million	Box Office revenue
$29.6 million	Ancillary (non-ticket) spending by attendees
411,900	Employment hours for casual live music performers/staff

COVID-19 IMPACT

On average in 2020/21 -

62%	Gigs cancelled/postponed
16%	Normal operations for small venues – at 35% capacity
65%	Decline in attendance
67%	Decline in box office and spending
74%	Casual work hours lost



The data reported for the city involves the collation and analysis of data for live music presentations across the following postcodes in the municipal boundary – Chadstone (3148), Mount Waverley (3149), Glen Waverley/Wheelers Hill (3150), Huntingdale/Oakleigh/Hughesdale (3166), Oakleigh South (3167), Clayton (3168) and Mulgrave (3170).

According to Census data compiled by the Department of Jobs, Precincts and Regions -

In 2019 it was home to 199,656 residents and generated $17.3 billion in Gross Regional Product.
In 2021, it recorded 193,051 residents and GRP of $18.2 billion.

FESTIVALS IN MONASH

The largest event in 2019 - the Clayton Festival, attracted 20,000. It did not proceed in 2020 and transitioned to online in 2021 with limited attendance.
The Oakleigh Festival attracted 2,000 in 2019. It proceeded in 2023 as 'Live at Warrawee' (1,000). Several new events - Emerge Festival (11,000) and a Winter Concert series took place in 2022. We also note that there are a number of small events such as the Chamber Music Festival hosted in Monash University venues.

CONCERTS - 2019

The major concert venue in the city is the 1600-seat Robert Blackwood Hall situated in the Monash University campus. In 2019, there were 22 live music events – 289 gigs – Audience – 29,700 – Box Office - $1,954,650 – Ancillary $1,930,500.

The major concert venue in the city is the Robert Blackwood Hall situated in the Monash University campus. In 2019, there were 22 live music events – 289 gigs – Audience – 29,700 – Box Office - $1,954,650 – Ancillary $1,930,500

Occasional performances also took place in several venues associated with the Ian Potter Performing Arts Centre at Monash Uni, including the 600-seat Alexander Theatre.

The municipality is unique among our project partners in that almost half of its identified venues are either council owned or operated –

Batesford Community Hub, Jordanville Community Centre, Clayton Community Centre – Theatrette, Clayton Hall - Main Hall, Fregon Hall - North Hall, Monash Community Inn, Brandon Park Community Centre, Glen Waverley Community Centre, Monash Civic Centre, Hughesdale Community Centre, Oakleigh Community Centre (Don Bosco), Alvie Hall, Mount Waverley Community Centre - Main Hall, Mount Waverley Youth Centre, Mulgrave Community Centre - Large Hall, Southern Community Centre, Notting Hill Community Hall, Monash Seminar & Training Centre, Oakleigh Hall / Mechanics Hall, Oakleigh Senior Citizens Centre – Hall, Huntingdale Community Hall.

Unfortunately, we have not been able to access any details of performances across the reporting period.

SMALL VENUES - 2019

In 2019, there were 79 liquor licences issued to premises in the city. Our examination of those licences has identifed the following live music presenters -

Number Venues	**29**
Number Gigs	**3,661**
Audience	**272,450**
Box Office	**$3,981,740**
Ancillary	**$21,719,460**

Although the city is not regarded as one of Melbourne's notable music 'precincts', the city's partnership in this project indicates its desire to develop policies and strategies to assist its creative community and restore the viability of live music venue operators.

Small venues which presented on a regular basis in 2019 invariably took advantage of the free weekly gig listings in '*Beat Magazine*' to promote their gigs.
Although the listings do not usually promote concerts and/or festivals (usually promoted through paid ads), nor document all those who present live music, they certainly represent the activities of the most prolific small venue presenters.

In 2019, 'Beat' advertised 16,597 individual shows which generated 44,800 gigs for performers in Greater Melbourne.
The iconic Caravan Music Club featured prominently in the listings with 168 shows generating 504 gigs.

SMALL VENUE PROFILE

We received a total of 215 responses to our online Small Venue survey. The majority were understandably from the most active live music areas (our project partners), but there was sufficient representation from all areas in order to construct a detailed and informative profile.

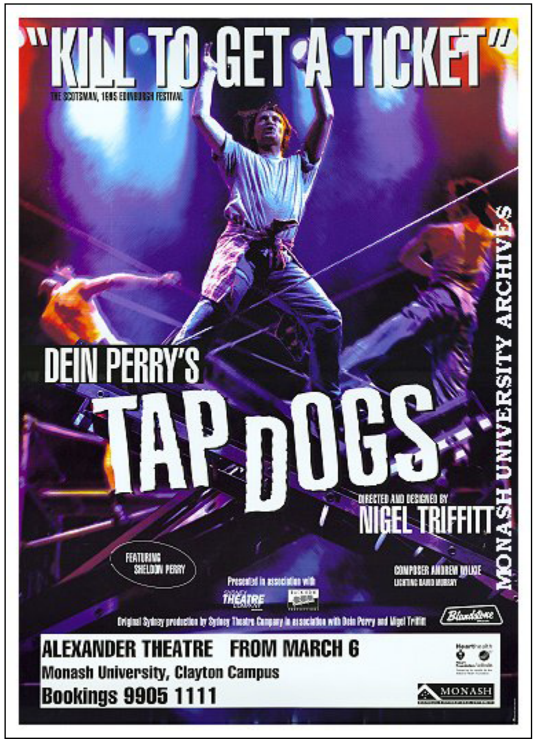
The responses were also representative of the range of live music presenters –

Monday	9%
Tuesday	11%
Wednesday	29%
Thursday	48%
Friday	79%
Saturday	88%
Sunday	54%

Operational Details

55% of small venues had been operating for 10+ years, with 30% establishing their business in the last three years.
28% have more than one performance space.
46% of those spaces are accessible by patrons with mobility issues.
59% have all-gender bathrooms with a further 13% adapting their configuration as required.
93% have an in-house PA.
61% employ their own sound engineer.
41% of regular presenters hosted more than 2 shows per week.

Venue Type	
Bar/Lounge	36%
Pub/Hotel	31%
Licenced Club	12%
Café/Restaurant	13%
Nightclub	8%



The Nature of Gigs 2019

Based on our research and venue listings, each advertised show creates on average 2.8 artist gig opportunities.
70% of the ‘regular’ (one show per week) reporting venues presented 6 gigs per week and the remaining 30% 13 shows per month.
51% of the presented gigs are free entry. Some venues charge entry for all gigs, some for none of their gigs and most a combination of both.
When they do charge, the midweek average is $17 and $25 on the weekend.

Unsurprisingly, online channels/platforms are identified as the most effective in the promotion of gigs – venue website (64%), Facebook (68%), Instagram (64%). However, as has been the case in all the previous projects, ‘traditional’ promotional tools were still identified as important - word of mouth (45%) and posters/flyers (45%).

What has changed significantly since 2017 is the fact that only 3% of venue operators identified the free gig listings in ‘*Beat Magazine*’ as important.
That result very likely reflects the fact that the hard-copy version available in most venues, tertiary institutions, cafes etc in 2019 was not printed during the pandemic years.

75% of venues presented bands playing original material, 62% solo/duos playing originals, 58% presented featured DJs and 30% presented artists playing covers.

As always, venues presented an eclectic mix of music.

Indie Rock	58%
Funk/Soul/R 'n B	54%
Dance/Electronic	48%
Blues	44%
Country	35%
Classic Rock	34%
Rap/Hip Hop	33%
Folk	31%
Jazz	26%

We note that since the last Live Music Census in 2017, Classic Rock has declined as a presented genre while Country has significantly increased its percentage.

The Audience

Under 20	7%
20 - 25 years	16%
26 - 35 years	28%
36 - 45 years	21%
46 - 55 years	16%
56 -70 years	12%

75% of venue responders identified their live music audience as increasing. 13% identified the audience as ‘the same’. Only 12% identified their audience as decreasing.

In terms of the general 'health' of the industry in 2019 (audience/gigs), **52% of small venue operators identified the live music sector as 'growing'. 37% identified it as static (the same) and only 12% reported it as 'declining'.**
Those reporting a decline identified increasing artist fees, staff and production costs and business expenses (licence, rates, insurance).

48% of venues did not apply for any grants to support their business or live music presentations in 2019.

Issues Affecting Venues

There were a number of issues affecting the operation of live music venues in the city in 2019 –

VENUE ISSUES 2019	Strong Impact	Moderate Impact	Slight Impact
Noise restrictions/complaints	4%	17%	43%
Zoning & Panning Issues	4%	9%	18%
Licencing Issues	3%	9%	27%
Building & Development Issues	4%	4%	18%
OH&S Issues	3%	5%	15%
Parking/Loading Issues	5%	15%	24%

72% reported that their issues had been successfully resolved. However, several operators anticipated that issues associated with noise emissions (especially) would likely increase once venues resumed 'normal' operations.

Small Venue Employment 2019

Performances in Monash's small venues created a total of 411,900 hours for casual workers. This equated to 256 Full Time Equivalent jobs – based on 1,610 annual hours as used by the Australian Bureau of Statistics/FairWork Australia.

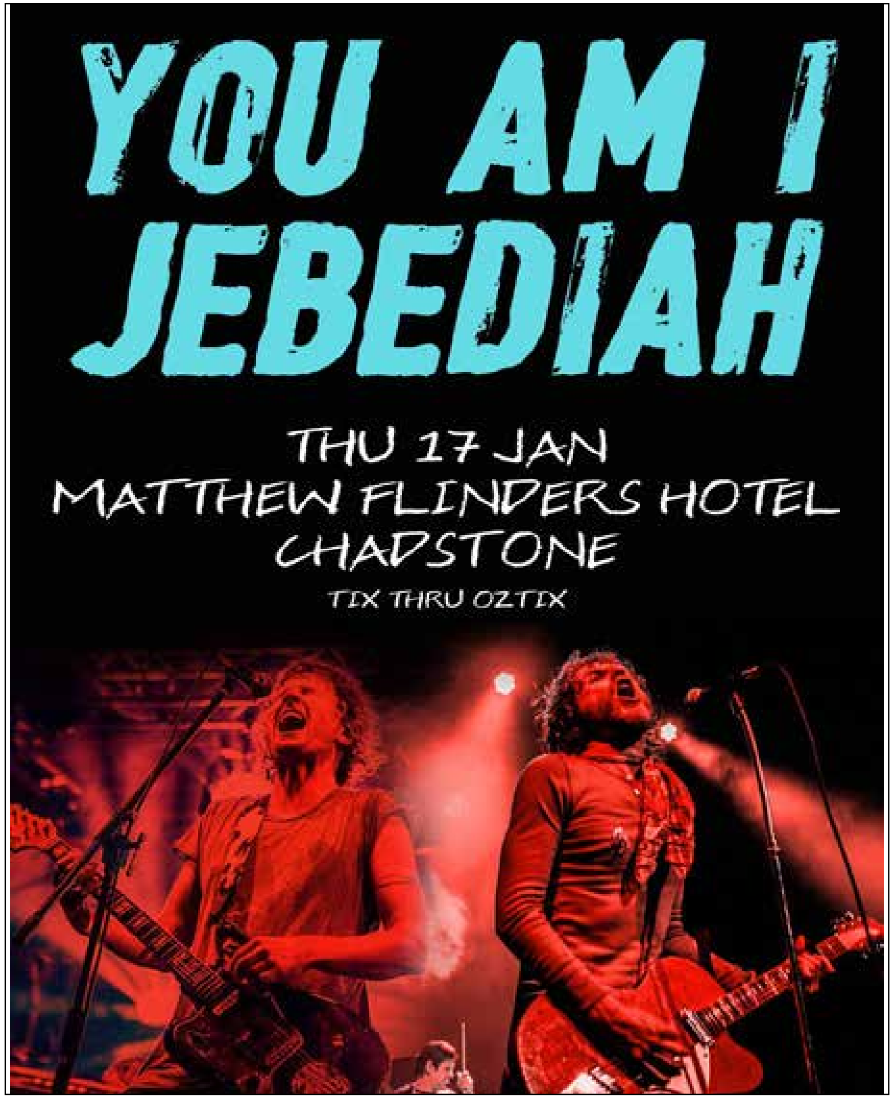
	Weekly Employment	Annual Employment	Annual Hours
Performers	421	21,050	126,300
Venue Staff	512	25,600	204,800
Production Staff	92	4,600	46,000
Security	87	4,350	34,800

We further note that there were an additional 133 jobs created for part and full-time management staff.

Council Relations – 2019

70% of small venues reported having a relationship with the city's council who provided them with –

Business Advice	8%
Networking Opportunities	25%
Promotion (venue & gigs)	42%
Financial Support	40%
Advice on Grants & Funding	58%
Permit Advice/Assistance	41%



COVID-19 IMPACT

FESTIVALS & CONCERTS
Whether or not festivals and concerts proceeded in 2020/2021 largely depended on the event window.

SMALL VENUES GIGS
Although 82% of venues in the city reported being able to present live gigs in 2020/2021, their operations were dramatically curtailed –

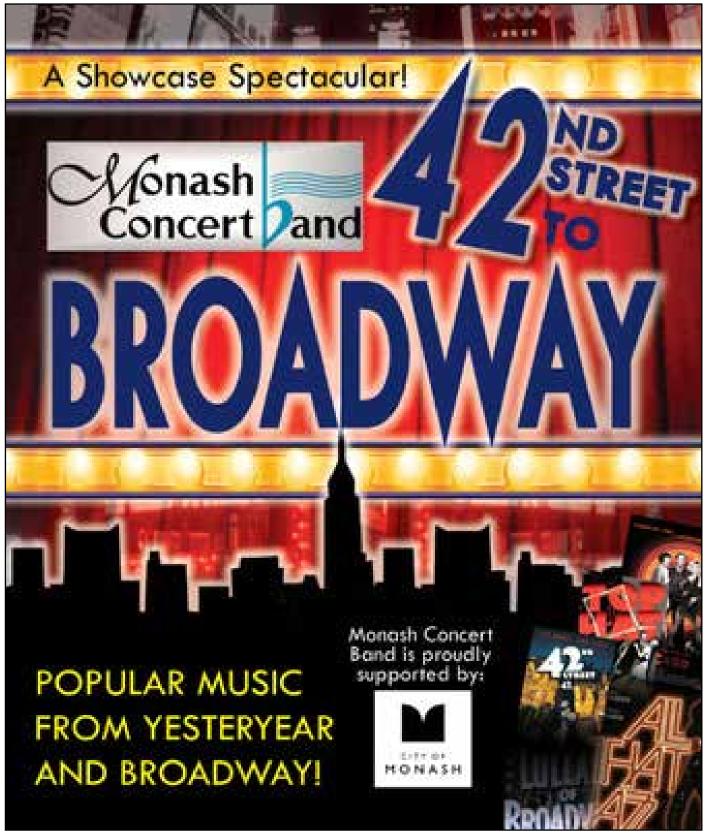
59% of planned gigs were cancelled
30% were postponed
26% that did proceed did so at reduced capacity.

Venues reported that on average they were able to operate in some capacity for 9 weeks in 2020 and 16 weeks in 2021. **They estimated that the number of gigs they were able to present represented 13% of 2019 gig activity in 2020 and 18% in 2021.**

However, when they could operate, density limits based on two square metres per patron in non-seated venues, meant that audiences were approximately 30% of pre-COVID levels. This was clearly not a viable model for the majority of venue businesses who were faced with a fixed level of business costs.

Postcode purchase data shared by one of the major ticketing agencies underlined the impact of the pandemic on ticket sales. **In 2019, the agency sold 33,000 tickets for small venue performances in Oakleigh (3166). In 2020, that figure was 9,300. In 2021, 11,250.**

COVID-RELATED SUPPORT
As the impact of public-health related restrictions became obvious – especially with regard to the events and hospitality sectors, local, federal and state governments reacted to lobbying and advocacy by the sector with a range of grants and initiatives.



FEDERAL & STATE GOVERNMENT

Small Business

Launched in March 2020, grants worth $10,000 were provided to small businesses which either closed or were highly impacted by the lockdown restrictions. It is estimated that over 129,000 businesses were supported through three rounds of the Business Support Fund, sharing in over $2.6 billion worth of grants.

The Victoria Tourism Industry Council noted that, according to their surveys, many people within the industry found the Business Support Fund to be 'incredibly helpful in sustaining their business, in conjunction with JobKeeper (see below).

In August 2020, following the announcement of stricter lockdown measures, the Victorian Government announced the Business Support Fund Expansion Program.

This program provided access to one-off grants of $10,000 for impacted businesses located in Metropolitan Melbourne and Mitchell Shire, and one-off grants of $5,000 for impacted businesses in other regional areas. The fund closed for applications on 14 September 2020.

On 13 September 2020, the Victorian Government announced $822 million for the third round of the Business Support Fund. Depending on payroll size, eligible businesses could receive grants of $10,000, $15,000 or $20,000. The fund closed for applications on 23 November 2020.

Venue Support

In July 2020, the government announced a $15 million package to help alleviate 'immediate business costs caused by the shutdowns and help businesses reopen in a COVID-safe way'. It provided employment opportunities for music industry workers ranging from musicians and crew to bookers, promoters and more'. Funding was based on capacity and available to small and medium-sized venues with a capacity from 50 to 1,200. A maximum of $130,000 was available to cover operating costs not covered by other initiatives.

Sole Traders

On 14 September 2020, the Victorian Government announced the $100 million Sole Trader Support Fund. The Fund was put in place to help businesses survive the continued lockdown restrictions, with around 30,000 eligible businesses set to receive a grant of $3,000 to be used towards overhead costs and their transition to COVID Normal. In order to be eligible, applicants were required to work within specific sectors and operate from a commercial premises as a tenant. The fund closed for applications on 30 December 2020.
Obviously many creative practitioners failed the commercial premises tenant test.

Business Costs

On 12 February 2021, in a bid to curb the state's growing COVID-19 outbreak, Victoria entered a five-day 'circuit breaker' lockdown. To help businesses with costs incurred as a result of the public health restrictions, the Government announced the first round of the Business Costs Assistance Program.

The $92 million program, delivered as part of the Victorian Government's $143 million Circuit Breaker Action Business Support Package, offered grants of $2,000 to small businesses, including sole traders. The first round closed for applications on 16 March 2021.

Licensed Hospitality Venue Fund

In June 2021, the state government announced that $7,000 would be available to metropolitan and inner suburban hospitality (food and drink) venues, and $3,500 for outer suburban and regional venues. Regional venues offering accommodation were eligible to claim an additional $3,500 'tourism' component.
The state government also announced they would waive liquor licensing fees.

In July 2021, following a number of roundtable discussions with industry stakeholders, the Victorian state government announced a $20 million package aimed at supporting the events sector following restrictions introduced in May and June.

A component of a broader Circuit Breaker Business Support Package, it provided grants to support eligible small- to medium-sized businesses and sole traders, including restaurants and cafes, event suppliers, accommodation and non-essential retailers.

- Sustainable Event Business Program—payments of up to $250,000 for the organisers, hosts and suppliers of major events, who have had their financial viability significantly affected by the restrictions.
- Impacted Public Events Support Program—grants of $25,000 to event organisers and $10,000 to suppliers of Tier 1 and Tier 2 events that have incurred costs as a direct result of the recent public health restrictions.
- Live Performance Support Program – Presenters—payments of up to $7,000 for producers.
- Live Performance Support Program – Suppliers—payments of up to $500 per event for suppliers of live performance events, up to a maximum of four events.

This package provided much-needed support to the events sector. Event organisers and suppliers of Tier 3 events were not eligible to apply for this program, even though restrictions likely affected small businesses and sole traders in their significant supply chain.

Live Music Restart

In November 2021, a $17 million package was announced to support the events sector in metro and regional areas. $8 million was available to festival and concert presenters, $4 million targeted Melbourne CBD and inner suburban venues and $5 million provided for outer suburban and regional venues.

JobKeeper

This wage subsidy program was introduced in March 2020 with the intention of allowing eligible businesses to apply (initially for $1500 per fortnight) to maintain their employed workforce. The amount was progressively wound back until the scheme ended in March 2021 with the fortnightly payment at $750.

There were many workers in events and hospitality who were unsupported due to gaps in eligibility such as their residential status in Australia or non-GST registration as freelance/contract workers.

76% of small venue operators reported it as 'essential' in maintaining an average 67% of their full and part-time workforce while it operated. 22% of venues were ineligible.

It should also be noted that venues operated/owned by councils (eg. performing arts centres) did not qualify for JobKeeper.

The importance of these various initiatives is underlined by the fact that only 5% of small venue operators did not apply for business/live music support across the two years of pandemic restrictions. 95% applied state support, 65% for federal support and 40% for local government support.
64% were successful in their applications.

Venue Employment Impact

Despite these valuable and sustaining initiatives, the impact on the 'gig economy' workforce is obvious from the lost employment reported by venue operators across 2020 and 2021.

Role	% Work Lost
Casual F&B Staff	77%
Casual Venue Staff	76%
Part Time F&B Staff	82%
Part Time Venue Staff	84%
Part Time Management	76%
Full Time F&B Staff	73%
Full Time Venue Staff	68%
Full Time Management	69%

Mental Health & Confidence

The effects of attempting to keep a small business viable in one of the most adversely impacted areas of the economy – 'first to shut down, last to open up', has taken a considerable toll on owners and operators.

Considered leaving the music industry	65%
Considered closing the venue or ceasing live music gigs	76%
Reported a significant impact on mental heath	71%
In next 12 months expect a return to pre-COVID level of activity	32%

Given the low level of confidence re the restoration of former activity levels in the next 12 months, it was surprising that only 35% of survey responders reported having engaged with the city council to discuss the ongoing viability of live music in the area.

Adapting to COVID

Patron density limits impacted particularly on small venues where the majority of live music gigs are presented in spaces with limited or no fixed seating.
25% of venues reported that they had installed a new outdoor space or adapted an existing one to increase their ability to present in line with COVIDSafe Plan requirements.
Their initiatives included establishing performance spaces in existing courtyards and beer gardens, creating new kerbside/car park spaces and installing new furniture to enhance their seated capacity.

The Way Forward - Engaging For The Future

We asked small venue owners to provide input and make recommendations as to how local and state government could help them restore their live music business.

The overwhelming response from venue operators highlighted the impact on their financial bottom line due to increased business costs (rent/lease, insurance, licences) and cost of living pressures at a time when their major income source - food and beverage sales, had all but disappeared.
Local and state governments need to continue operational support.
Other suggestions included -

Council

Formalise a regular consultative process between council and local venue operators, presenters and creative workers to follow through on goals and strategies outlined in the Live Music Action Plan. Work with other councils to share information, policy initiatives and best practice.

Pursue discussions with relevant stakeholders to create a music precinct with simplified regulatory/operating requirements and enhanced protection for venues.

Consider continuing the usage of temporary spaces that were available to hospitality/music venues during the pandemic until patrons return in full confidence to indoor eating/entertainment.

Ensure that post-pandemic, principles such at the Agent of Change are strictly enforced when live music returns in full force.

Consider a rate reduction until businesses can resume normal operations. Reduce permit costs.

Assist venue owners and operators to adapt their premises (healthier/safer) by providing access to council planning expertise.

Prioritise the inclusion of music performances in all council events and compile a register of interest where local artists can record their availability.

State Government

Continue to offer the Live Music Venue Fund until the sector regains viability.

Create a dedicated marketing campaign to highlight the economic and cultural value of Melbourne's live music scene – based on the 'live music capital' data.

Consider a live music voucher scheme similar to the rebates offered to diners in hospitality venues.

.

MONASH - PERFORMER PROFILE

We received 493 responses to our online Performer survey with 59% identifying as male and 37% as female. 82% were in the age range 25-54 years, with an even spread across decade age groups.

The majority of performers identified as residents of Melbourne's music 'precincts' - our project partners in this research.
From our analysis, we are confident in presenting the following profile as representative of performers residing in the City of Monash.

45% identified as self-employed, having operated in the live music industry for an average of 14 years.
They are most likely to perform original material (70%) across a broad range of genres, most usually (66%) as members of a band/ensemble.
82% have an ABN but only 20% are registered for GST. 82% have works registered with the Australasian Performing Right Association.

In 2019 –
They spent an average of 36 hours per week on music-related activities (writing, rehearsing, gigging) which generated on average 34% of their total income. 63% of their music income was generated from live performance.
They supplemented their music income with casual (25%), part time (19%) or full time work (11%). 32% of that work was in music industry-related businesses.

92% played gigs in metro Melbourne in 2019, the annual average being 5 festivals, 8.5 concerts and 45 small venue gigs.
20% applied from a government grant to support/further their creative practice. Of those, 10% were successful.

COVID Impact

Responders reported that only 18% of their 'normal' (2019) gigs went ahead in 2020 and 27% in 2021, resulting in the loss of critical live performance income.

As we have noted elsewhere, the casual/freelance nature of their gig work and the fact that so few were GST registered, meant that the majority were ineligible for many of the assistance programs on offer from local, state and federal government.
Only 35% reported being eligible for JobKeeper/JobSeeker and 30% were not eligible for 'anything'. 20% did not apply to any program.

The loss of income and creative opportunities obviously impacted the mental health of the creative community, as has been documented by a number of agencies including Support Act, the industry's major agency for financial and wellbeing support.
Our performer responders reported the following -

Mental Health Impacted	80%
Self-managed symptoms/issues	46%
Sought Professional advice/assistance	34%

One of the 'positives' to emerge from the significant periods of lockdown and restrictions was the fact that 75% of performers reported acquiring new/enhanced skills.

Audio Production - Software/Hardware	61%
Songwriting/Composition	49%
Video Production - Software/Hardware	39%
Performance Streaming	40%
Social Media	44%

Those performers reporting enhancement of social media skills reported a 40% increase on their 2019 level of engagement with fans across the pandemic period.

Infrastructure

Several of our project partners were keen to seek feedback from performers re gaps in city infrastructure and/or the potential to engage the creative community in the use of additional spaces.

Performers were asked to identify gaps in infrastructure in their local areas.

INFRASTRUCTURE NEEDS	
Lack of small venues (under 150)	53%
Lack of medium venues (300-500)	46%
Lack of rehearsal facilities	31%
Lack of recording facilities	18%
Lack of outdoor performance spaces	57%
Lack of collaboration spaces	32%
Lack of pop-up performance spaces	42%

If council is considering re-purposing spaces/buildings for utilisation by creative practitioners. Would you be interested in –

RE-PURPOSED SPACES	
Casual usage (free)	75%
Casual usage (small fee)	58%
3 month lease (free)	33%
3 month lease (small fee)	24%
6 month lease (free)	31%
6 month lease (small fee)	26%
Negotiate longer lease	27%
Not interested	11%

Recommendations - Council & State Government

Unsurprisingly, performers were focused on the financial impact of two years of restrictions, cancellations and lost opportunities. When asked to identify what local councils and state government could/should do to restore the health of the sector, the most significant number of responses identified –

Council

- Funding for more outdoor stages - covered, equipped with audio,lighting.
- Schedule more outdoor events – ensure local live music performers are featured in all council event activations.
- Activate unused/vacant spaces in the municipality for pop-up performances.
- Market and promote the city's live music events to local residents.
- Council to acknowledge the value of its creative community in a more 'meaningful' way.
- Reduce bureaucracy re event presentations – assist venues re permits etc.
- Work with venues to facilitate/provide enhanced ventilation in existing indoor spaces.
- Provide increased support to venues/events to promote and market their gigs.
- Provide financial support to venues to specifically present gigs featuring local performers.

State Government

- Progress discussions re a ‘sustainable wage’ for professional practitioners.
- Regard the music/arts as equally important as sport.
- Substantially increase the government funding allo allocation (through Creative Victoria) to music writers and performers. Don’t rely solely on a ‘trickle-down’ effect by simply supporting presenters/venues.
- Continue funding to venues to assist them in re-establishing their live music presentations.
- Create a representative industry body/task force to investigate the increasing business costs associate with live music presentations in small venues – and make recommendations.
- Work more closely with local government to formalise music precincts as part of live music action plans.

.

MONASH - EVENT/VENUE ATTENDEES

It goes without saying that the spending by attendees on event/venue tickets and door entry and their ancillary spending (food & beverage, transport, merchandise, transport) on and off-site is at the core of revenue generation in the live music sector.

The 770+ attendee responses to our online survey were spread across the identified music precincts and outer suburbs.
We are therefore confident in presenting their information as representative of residents in, or visitors to Maribyrnong events.

Across the 2019 year, responders reported attending an average 1.8 metro festivals, 16 concerts and 74 small venue gigs.
With regard to small venues gigs – 32% were in pubs/hotels, 32% were in bars, 26% in cafes/restaurants and 10% in licenced clubs/ nightclubs.

In terms of small venue attendance, they reported that 42% of events had no ticket/entry fee. The 58% of gigs they attended had an average charge of $24.50.
Whether or not there was a ticket/entry charge, their average ancillary spending was - $44 in small venues per gig, $91 at concert events and $109 per day at festivals.

COVID IMPACT

Across 2020/2021, 85% of responders reported not being able to attend planned events/gigs.
Cancelled/postponed events in 2020 impacted 75% of planned attendances. The figure for 2021 was 67%.
The majority were in small venues.

Despite the fact that restrictions and density limits have been progressively eased, a number of industry commentators have identified an ongoing 'shadow' pandemic associated with a reticence among fans in resuming their previous live music consumption patterns.
Asked to identify their current intentions –

Attendee Preferences	Festivals/Concerts	Small Venues
Do not intend to attend in the near future	21%	33%
Would prefer masks to be worn indoors	32%	34%
Would prefer density limits to continue	23%	27%
Would prefer vaccine status of patrons to be known	24%	27%
Would prefer to attend outdoor performances	35%	39%

THE FINAL WORD - IT STARTS WITH THE SONG

As we have discovered in our other live music census projects, a significant indicator of the health of the live music scene at any particular time, in any particular area, is the number of active songwriters who have registered their works with the Australasian Performing Right Association (APRA) for the purpose of receiving royalties for the live performance of their works in venues or at concert/festival events.

We know from the responses of performers in this – and prior projects, that in the Australian music marketplace, the vast majority of songwriters rely on live performances for approximately 63% of their music-related income and that there are very few writers/composers that are able to make a living solely from writing royalties.

The growth (or otherwise) in APRA membership provides a valuable insight.

Victorian APRA members

In 2022, there were 29,378 registered writers in Victoria. This represented the largest number per capita (31%) of any state or territory. 82% of those writers are resident in Greater Melbourne.
APRA membership in Victoria increased in 2017 by 16% from the 2014 total (18,688) and by a further 35% between 2017 and 2022.

An analysis of writer residence by postcode shows that in 2022 Greater Melbourne had 10 of the Top 20 most active suburbs including the Top 5. All of them were within the municipal boundaries of the ‘music precincts’.

City of Monash APRA members

In 2017, there were 471 APRA writers in the municipality.

By 2022, that had grown to 695 – a 47% increase.
The overall national growth rate during the period was 30%.

My thanks to all the project partners whose financial support enabled Music Victoria to undertake this research.
They have also shared their data, as have a vast number of industry operatives, businesses and organisations.

Special thanks to all those festival and concert presenters, venue operators, performers and event attendees who completed our online surveys in such significant numbers.

Lastly, to the research team from Collarts - Tara Suri, Benjamin Chidgey, Veronica Skarbek, Hope Cumming, Jae Dromgold, Olivia Gomatos, Grace Treloar, Karen Whitney, Ami Sullivan Rowe, Nicole Klinck, April Atteridge, Jessica Maio and Coordinator Penny Weber..
Couldn't have possibly done it without you and your diligence, skill and patience indicates a bright future in our industry.

APPENDIX 1 - MONASH VENUES

The venue list below represents those that were operating in 2019. We note that while every attempt has been made to ascertain the level of operation - if any, during the lockdowns of 2020 and 2021, many were unavailable during the rersearch window or, in some cases, too busy trying to prepare for re-opening. It remains to be seen whether all will reestablish full operations.

Venue Name	Address	Suburb	Postcode
Power Neighbourhood House	54 Power Ave, Ashwood	Ashwood	3147
Amaroo Neighbourhood Centre Inc	34 Amaroo St, Chadstone	Chadstone	3148
Matthew Flinders Hotel	667 Warrigal Rd, Chadstone	Chadstone	3148
Century City Tavern	289 Springvale Rd, Glen Waverley	Glen Waverley	3150
Kerrie Neighbourhood House	36 Kincumber Dr, Glen Waverley	Glen Waverley	3150
Mountain View Hotel	186 Springvale Rd, Glen Waverley	Glen Waverley	3150
Rogue Squire	Cnr Ferntree Gully &, Jells Rd, Wheelers Hill	Wheelers Hill	3150
Wheelers Hill Hotel	871-881 Ferntree Gully Rd, Wheelers Hil	Wheelers Hill	3150
Kentro Oakleigh	27-29 Eaton Mall, Oakleigh	Oakleigh	3166
Mykonos Restaurant Bar	58 Portman St, Oakleigh VIC 3166	Oakleigh	3166
Number Ninety	90 Atherton Rd, Oakleigh	Oakleigh	3166
Oakleigh Carnegie RSL	95-97 Drummond St, Oakleigh VIC	Oakleigh	3166
Oakleigh Junction Hotel	1 Portman St, Oakleigh	Oakleigh	3166
Risk Bar	10 Eaton Mall, Oakleigh	Oakleigh	3166
Alexander Theatre - Monash University	48 Exhibition Walk, Clayton	Clayton	3168
B4 Food and Wine	Suite 21, 195 Wellington Road, Clayton	Clayton	3168
Clayton RSL	171 Carinish Rd, Clayton	Clayton	3168
David Li Sound Gallery - Monash University	48 Exhibition Walk, Clayton	Clayton	3168

Monash Hotel	2077 Dandenong Rd, Clayton	Clayton	3168
Notting Hill Hotel (The Nott)	260-262 Ferntree Gully Rd, Notting Hil	Notting Hill	3168
Notting Hill Neighbourhood House	37 Westerfield Dr, Notting Hill V	Notting Hill	3168
Robert Blackwood Hall - Monash University	49 Scenic Boulevard, Clayton	Clayton	3168
Roc's Social - M-City	Level 1/2107-2125 Dandenong Rd, Clayton	Clayton	3168
The Clayton Hotel	319 Clayton Rd, Clayton	Clayton	3168
The Count's - Monash University	48 Exhibition Walk, Clayton	Clayton	3168
Mackie Road Neighbourhoood House	36-42 Mackie Rd, Mulgrave	Mulgrave	3170
The Grand on Princes Reception Centre	2251 Princes Hwy Service Rd	Mulgrave	3170
Vale Hotel	2277 Dandenong Rd, Mulgrave	Mulgrave	3170
Village Green Hotel	Springvale Rd &, Ferntree Gully Rd, Mulgrave	Mulgrave	3170

Monash Council Venues			
Ashwood Hall	21A Electra Ave	Ashwood	3147
Batesford Community Hub	94 Batesford Rd	Chadstone	3148
Jordanville Community Centre	90 Power Ave	Chadstone	3148
Alvie Hall	High St Rd & Alvie Rd	Mount Waverley	3149
Mount Waverley Community Centre - Main Hall	47 Miller Crescent	Mount Waverley	3149
Brandon Park Community Centre	649 Ferntree Gully Rd	Glen Waverley	3150
Glen Waverley Community Centre	700 Waverley Rd	Glen Waverley	3150
Monash Civic Centre	293 Springvale Rd	Glen Waverley	3150
Monash Gallery of Art	860 Ferntree Rd	Wheelers Hill	3150
Mount Street Neighbourhood House	6 Mount St	Glen Waverley	3150
Hughesdale Community Centre	160 Poath Rd	Hughesdale	3163
Monash Seminar & Training Centre	1A Atherton Rd	Oakleigh	3166
Oakleigh Community Centre (Don Bosco)	185 Warrigal Rd	Hughesdale	3166
Oakleigh Hall / Mechanics Hall	142-144 Drummond St	Oakleigh	3166
Huntingdale Community Hall	Germain St	South Oakleigh	3167
Clayton Community Centre - Theatrette	9-15 Cooke St	Clayton	3168
Clayton Hall - Main Hall	264 Clayton Rd	Clayton	3168
Clayton Senior Citizens Centre	19 Mary St	Clayton	3168
Dixon House Neighbourhood Centre	2 Dixon St	Clayton	3168
Fregon Hall - North Hall	4 Fregon Rd	Clayton	3168
Monash Community Inn	Carlson Reserve, 72 Clayton Rd	Clayton	3168
Notting Hill Community Hall	386 Ferntree Gully Rd	Notting Hill	3168
Mulgrave Community Centre - Large Hall	355 Wellington Rd	Mulgrave	3170
Southern Community Centre	27 Rupert Dr	Mulgrave	3170

APPENDIX 2 - REFERENCES

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

Australia Council for the Arts 2020, Domestic Arts Tourism: Connecting the Country, Australia Council for the Arts. https://australiacouncil.gov.au/advocacy-and-research/domestic-arts-tourism-connecting-the-country/

Australia Council for the Arts 2017, Connecting Australians: Results of the National Arts Participation Survey. https://australiacouncil.gov.au/advocacy-and-research/connecting-australians/

Australia Council for the Arts 2020, Creating Our Future: Results of the National Arts Participation Survey. https://australiacouncil.gov.au/advocacy-and-research/creating-our-future/

Australia Council for the Arts 2018 (Jordan Gibbs & Merryn Carter), National Performing Arts Touring Scan: Final Report. https://australiacouncil.gov.au/investment-and-development/protocols-and-resources/national-performing-arts-touring-scan/

Australia Council for the Arts 2020, Annual Report. https://australiacouncil.gov.au/wp-content/uploads/2021/07/australia-council-annual-repor-5bd8e5e63c2c6.pdf

Australian Tourism Data Warehouse, Tourism Operators and Product Listings. https://atdw.com.au/

Bennett, Andy, Green, Ben, Cashman, David & Lewandowski, Natalie (2020). Researching Regional and Rural Music Scenes: Toward a Critical Understanding of an Undertheorized Issue, Popular Music and Society, 43:4, 367-377, DOI: 10.1080/03007766.2020.1730647

Business Victoria 2021, Victorian Regional Tourism Areas map, https://business.vic.gov.au/__data/assets/pdf_file/0003/2002638/Victorias_Tourism_Regions_map_2021.pdf

Business Victoria/Visit Victoria 2021, Regional Tourism Summary Fact Sheets (Satellite Tourism Accounts) for Victoria's 11 Regional Tourism Areas.

Creative Victoria, Performing Arts Centre Data 2019/2020. https://creative.vic.gov.au/research/data/funded-investments-data/performing-arts-centres

Creative Victoria 2019, Audience Atlas Victoria. https://creative.vic.gov.au/research/reports/audience-atlas-2019

Creative Victoria 2018, Regional Consultation 2017-2018. https://creative.vic.gov.au/research/reports/creative-victoria-regional-consultation-2017-18

Department of Jobs, Precincts and Regions, Annual Reports 2019/2020 and 2020/2021, Appendix 13 Grants and Other Assistance.

Department of Jobs, Precincts and Regions 2021, Visitor Economy Recovery and Reform Plan.
https://djpr.vic.gov.au/priorities-and-initiatives/visitor-economy-recovery-and-reform-plan

Department of Jobs, Precincts and Regions 2019, Regional Tourism Review Consultation Findings. https://djpr.vic.gov.au/__data/assets/pdf_file/0005/1987367/Regional-Tourism-Review-Consultation-Findings.pdf

Donoughue, Paul 2020. Coronavirus restrictions have put music festivals on hold. When might they come back? ABC News online.
https://www.abc.net.au/news/2020-05-07/coronavirus-restrictions-how-soon-will-music-festivals-return/12223026

Eliezer, Christie 2021. Aussie festivals reboot promising millions of tourism dollars. The Music Network. https://themusicnetwork.com/australian-festivals-reboot/

I Lost My Gig, Various Survey Findings 2019-2021. https://ilostmygig.net.au/

Kruger, Simone, Branding The City: Music Tourism. undistributed manuscript (2017)

L.E.K. Consulting, Victoria's Creative Industry Festivals Review (Creative Victoria, 2018)

Live Performance Australia (Ernst & Young), Annual Ticketing and Revenue Survey 2019 and 2020 (October, 2021)

Lonergan Research, Enriching Communities: National Arts Participation Survey 2019-Victoria. (Creative Victoria, 2020)

Music Victoria, Melbourne Live Music Census 2017 (February, 2018)

Parliament of Victoria (Legislative Council Economy and Infrastructure Committee). Inquiry Into The Impact Of The COVID-19 Pandemic On The Tourism And Events Sectors – Report and submissions from Crew Care, Arts Industry Council of Victoria, Save Victorian Events, Australian Festival Association, Gig Power, Jon Perring, Music Victoria and numerous regional municipality representatives. (August, 2021)

Robertson, Hugh The Big Picture 2: Public Expenditure on Artistic, Cultural and Creative activity in Australia in 2007/2008 and 2019/2020 (Limelight, 17 February 2022)

Save Victorian Events, 2021. Securing The Future Of Victoria's Event Industry: For The Benefit of All Victorians. https://www.parliament.vic.gov.au/images/stories/committees/SCEI/COVID-19_Tourism/Submissions/S007B_Save_Victorian_Events_redacted.pdf / Save Victorian Events 2021, www.facebook.com/savevicevents/

Shapiro, Shane 2021. Here's Proof That Music Will Speed Up Recovery. Medium. https://shainshapiro. medium.com/heres-proof-music-will-speed-up-recovery-part-1-198c76e7d0aa

Sound Diplomacy & ProColombia 2018, Music Is The New Gastronomy: White Paper on Music Tourism. https://www.sounddiplomacy.com/music-is-the-new-gastronomy.

Triscari, Caleb 2021. Revealed: The cold, hard data on just how much the arts has suffered in lockdown & the jobs that have been lost. The Music Network. https://themusicnetwork.com/arts-sector-lockdown-data/

Tourism Research Australia (Australian Trade and Investment Comission), Tourism businesses in Australia: June 2015 to 2020. https://www.tra.gov.au/data-and-research/reports/tourism-businesses-in-australia-june-2015-to-2020/tourism-businesses-in-australia-june-2015-to-2020

Tourism Research Australia (Australian Trade and Investment Comission), Satellite Tourism Accounts (various) STSA 2019-20.https://www.tra.gov.au/data-and-research/reports/state-tourism-satellite-account-2019-20/about-this-report

Tourism Research Australia (Australian Trade and Investment Comission), Satellite Tourism Accounts (various) STSA 2019-20.

https://www.tra.gov.au/data-and-research/reports/state-tourism-satellite-account-2019-20/about-this-report

Tourism Research Australia (Australian Trade and Investment Comission), Tourism regions 2021. https://www.tra.gov.au/regional/tourism-regions

Tourism Research Australia (Australian Trade and Investment Comission), National Visitor Survey monthly snapshot. https://www.tra.gov.au/domestic/monthly-snapshot/monthly-snapshot (November, 2021)

Tourism Research Australia (Austrade), Events: Regional Tourism Drivers. https://www.tra.gov.au/tra/2016/documents/DVS_Events_-_Drivers__of__Regional_Tourism_FINAL_04082014.pdf (August, 2014)

Tourism Research Australia (Austrade), Travel By Australians 2019-2020 (March, 2021)

Wolf Brown (Patternmakers), Audience Outlook Monitor (various) 2019 – 2021. www.patternmakers.com.au

LIQUOR LICENCES

The vast majority of live performances in small venues take place in businesses that are licenced by the Victoria Liquor and Gaming Authority.

An initial consideration of the liquor licences issued for metropolitan Melbourne venues in the pre-pandemic year of 2019 (14,882), and those issued in 2021 (7,293), seems to suggest a significant decline in activity due to restrictions imposed on the hosiptality sector.

However, closer examination shows that the decline in issued licences occurred mainly in business categories not generally associated with the presentation of live music - BYO, packaged sales, limited licences and cafes and restaurants.

When the licences associated with live music - full club, general, on-premises and on-premises (late night), are analysed, we note that there has been no noteable decline in the areas under specific study.

Liquor Licences	2019	2021
Darebin	111	127
Maribyrnong	78	86
Melbourne	725	639
Monash	78	78
Moreland	126	144
Port Phillip	221	254
Stonnington	173	193
Yarra	188	220

APRA MUSIC LICENCES

Further confirmation of the small venue sectors resilience is provided by an examination of the licences issued by APRA (Australasian Performing Right Association) to hospitality and entertainment businesses for the live and recorded presentation of copyright works (songs) owned by the organisation's members.

Concentrating on those licences most commonly associated with gigs in small venues - Live Performance, Featured Recorded Music and Featured Recorded Music (Dance), reveals that 876 licences were issued in metropolitan Melbourne in 2019 and 746 in 2021.

Interestingly, the decline hardly registered in the municipalities we examined in detail.

APRA Licences	2019	2021
Darebin	32	37
Maribyrnong	20	25
Melbourne	178	189
Monash	33	29
Moreland	48	49
Port Phillip	53	52
Stonnington	47	48
Yarra	91	83