

MUSIC
VICTORIA

Victorian Live Music Census 2012



Executive Summary

Live Music - Melbourne'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 enthusiasm.

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, Northcote, 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 occasional '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 significant popular music components which have NOT been included due to lack of quality data. However, if we consider the ticket revenue, patron attendance and spending associated with live popular music performances 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 are 14.4 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 Australian 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 million) – 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 DeLoitteAccess 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.