VANISHING ACTS

An inquiry into the state of live popular music opportunities in New South Wales

Associate Professor Bruce Johnson
School of English
University of New South Wales

Dr Shane Homan
Cultural Industries & Practices Research Centre
School of Social Sciences
University of Newcastle

Research assistant: Jon Atkins

Jointly funded by the Music Board of the Australia Council and the NSW Ministry for the Arts

Report completed July 2002.

ISBN 1 920784 02 0

Associate Professor Bruce Johnson
School of English
University of New South Wales
Sydney NSW 2052 Australia
Tel +61 2 9385 2296
Fax +61 2 9385 1047
Email b.johnson@unsw.edu.au

Dr Shane Homan
Cultural Industries & Practices Research Centre
School of Social Sciences
University of Newcastle
Callaghan NSW 2308 Australia
Tel +61 2 4921 6787
Fax +61 2 4921 7402
Email Shane.Homan@newcastle.edu.au

Jointly published by the Australia Council and the NSW Ministry for the Arts

Australia Council
372 Elizabeth Street, Surry Hills
Sydney NSW 2010 Australia
PO Box 788
Strawberry Hills NSW 2012

Tel +61 2 9215 9000
Toll free: +61 1800 226 912
Fax +61 2 9215 9111
www.ozco.gov.au
This publication is available online at
<www.ozco.gov.au>.

NSW Ministry for the Arts
Level 9, St James Centre
111 Elizabeth Street
Sydney NSW 2000 Australia
PO Box A226
Sydney South NSW 1235

Tel +61 2 9228 5533
Toll free (in NSW): 1800 358 594
Fax +61 2 9228 4722
www.arts.nsw.gov.au
This publication is available online at
<www.arts.nsw.gov.au>.

Contents

Tables

Project team

Acting upon government and industry interest, Associate Professor Bruce Johnson (University of NSW) and Dr Shane Homan (University of Newcastle), obtained Ministry of Arts and Australia Council funding to examine the NSW live music sector. Mr Jon Atkins was recruited as research assistant.

The substantial research experience and industry knowledge of these investigators was consolidated by the establishment of an industry advisory panel to assist in conducting the surveys and to provide informed advice:

- Rose Pearce (musicNSW)
- Stephen Hinchley / Emily Perry (State policy officer, ClubsNSW)
- Michelle Hall (Local Government Association)
- Greg McFarland (Senior policy advisor, Australian Hotels Association)
- Richard Ruhle (State secretary, Musicians' Union of NSW)
- Millie Millgate and Robert Collings (International Managers' Forum, Australia)
- Eric Myers (NSW Jazz Co-Ordination)

Apart from *ad hoc* contacts, the investigators and the advisory committee met formally at three stages of the project to assess the draft survey questionnaire, the initial responses to the survey, and the final draft report.

1. Project objectives and key findings

Project objectives

- To provide a published study of the state of live popular music opportunities in NSW in order to stimulate critical debate concerning the continued viability of the state's live music environments. The report will be delivered to relevant government, music, arts and media bodies with an interest in live performance activity.
- To provide a unique forum for investigating industry concerns, as a detailed record of contemporary industry and government practices.
- To provide the materials for public and professional debate, conducted both through the media and in conference settings.
- To propose changes to commercial and legislative live venue practices designed to ensure live music remains a viable entertainment option for venue owners and musicians.

Key findings

There has been a significant reduction in live music venues in New South Wales over the last several years, and in a significant number of venue cases, live music operations have been displaced by gaming facilities.

The causes of the reduction, however, extend beyond the liberalisation of gaming legislation, and in fact gaming has proven to be a means of subsidising live music. The complicity of gaming in the contraction of live music to a large extent arises from the fact that new legislation made it a straightforward profitable alternative at a time when numerous incremental factors were making it increasingly difficult to sustain live music programs, most particularly in pubs.

Factors in the reduction of live music operations include changes in leisure culture, in popular music styles and formats, in financial and legislative frameworks, in the composition of audiences, and in community demographics.

If the community wishes to sustain a live music culture, the responsibility for doing so lies not in any single sector such as the music, hospitality or related leisure industries, but in a concerted response involving those sectors, the members of the community itself, and educational and government bodies.

2. Introduction

2.1 Origins of research project

2.1.1 Preamble: the importance of live performance venues

The importance of a healthy live venue environment can be summarised in the following key points:

- **Ongoing connections with audiences and peers**

  The sense of place within successful international careers of Australian bands is strong. The production of local sounds for a global market is tied to the pub/club circuit which nurtured performers. As Midnight Oil's Peter Garrett has stated: 'Every Australian band comes from a different pub, and it's there they define what they are about. Every band remembers that pub, and it's more than sentimental value; it's something much stronger' (cited in Fiske, Hodge and Turner, 1987). Live music scenes provide essential sites for jazz, blues and rock performers to maintain links with their audiences.

- **Live performance as marketing tool**

  Despite the proliferation of alternative marketing strategies and technologies (the Internet, do-it-yourself CD production and distribution), live performance remains crucial in the initial development of artists. The sites of live music (its halls, clubs, pubs and nightclubs) have provided a collective performance mythology of Australian-ness in an industry otherwise subject to global practices. Live performance remains an essential marketing device for artists seeking recording opportunities. For artists in the initial stages of career development, venues can also provide opportunities to 'market [self-financed CDs] directly to audiences at their live performances' (*Copyright Amendment Bill,* Senate Legal and Constitutional Legislation Committee Report, 1998: 3)

- **Live performance as primary means of income**

  In an industry where a limited number of artists recoup their recording costs in order to receive royalties, live performance remains the most significant form of income for artists. For non-composers in bands (those who perform, but don't contribute to songwriting efforts), venue income is crucial to survival within semi-professional and professional contexts. At the end of 1997, the Australian music business generated an income of $1.063b and contributed $255.4m to Gross Domestic Product. In 1991–2, the music industry contributed $697.6m to the nation's Gross Domestic Product (Guldberg 2001:11); live music was believed to comprise $212m of this total (Price Waterhouse 1993: 65)

- **Skills development**

  Within the last decade, aspiring musicians have witnessed a dramatic growth in the variety and number of TAFE, tertiary and private institution courses providing education and training. However, the decline in venues has reduced opportunities for musicians to experience contact with audiences, and to acquire the skills of stagecraft necessary for survival in commercial contexts. Live performance also provides invaluable contact with a musician's peers, and provides opportunities to bolster individual skills within group contexts. Initial contact with venues also provides musicians with grassroots training in business skills and creative strategies pertinent to long-term survival. The loss of many venues has also ensured a decline in the diversity of performance sites. Flexibility—the ability to perform in acoustic, electric, large and small, indoor and outdoor environments—is becoming harder to attain.

- **Precursor to export**

  The local live scene is widely regarded as an 'incubator' for artists seeking international success. Since the 1980s, the local music industry has contributed significantly as a significant exporter of live and recorded product. In 1991–2, the local music exports trade was estimated at $120.5m (Price Waterhouse, 1993: 56). Musicians, managers and recording companies share a belief in the value of the state's live circuit in preparing artists for regional / global success. A continuing decline in performance environments can only hamper the extent to which 'local apprenticeships' are conducted as smaller instances of broader marketing strategies. The cultural value of jazz, pop and rock exports—in ensuring Australian music is heard and performed overseas—is a further consideration in conjunction with economic indicators.

- **Qualitative measures**

  Among our various art forms, it is amply documented that the various forms of Australian popular music have achieved the most durable acclaim and influence internationally. Australian jazz since the forties and rock since the seventies, have been major cultural exports, and in the case of rock, a major economic export. The inner-city pub has played a central role in incubating this music, the performance skills of its practitioners, and the community of audiences. Popular music captured a 24% share of audience attendances in relation to other paid music attendances in 1996-7 (Guldberg, 2000: 14).

2.1.2 Decline in performance opportunities

Since the mid 1980s, musicians and audiences have experienced a decline in the number of music venues. Various studies have loosely identified the significant loss of opportunities for live performers. Ausmusic's *Stayin' alive* NSW report noted the financial difficulties involved in the regional touring of acts, while 'the suburban [rock] pub ha[d] all but disappeared' (1993: 14). Shane Homan's PhD thesis, *The Mayor's a square: A regulatory history of Sydney rock venues 1957–1997* also documented the decline in commercial performance sites, and examined the need for more substantial investigation of the effects of local and state governance of venue operations.

Both works commented upon very particularised developments behind industry shifts: the introduction of Random Breath Testing; the rising value of CBD real estate, which has made the small city pub cost-ineffective in relation to other land uses; and an increased rigour in enforcing various entertainment statutes (such as fire regulations, public entertainment licences and noise regulations).

NSW Jazz Co-Ordination Association / Musicians' Union Survey

Acting upon anecdotal evidence of an increasing number of jazz residency terminations, the Jazz Co-ordination Association, through the NSW Musicians' Union, circulated a questionnaire to its membership. Active membership on the union register amounted to 780, and 108 completed questionnaires were returned. Of those who responded, 33% (group A) reported no change, and 67% (group B) reported a reduction in performance opportunities and income over the 12 months leading up to the survey.

The majority of respondents (over 90%) were musicians in the popular music fields incorporating pop, rock, country, blues and jazz, which is significantly sustained by pub activity. This further suggested that the most serious attenuation of musical activity was in non-classical venues such as pubs. It appears that a higher proportion of professional musicians (those with no alternative income), had suffered work loss than the semi-professionals group.

Among Group B, the most frequently cited reasons for experiencing a loss of work included the use of piped music, or synthesisers; the use of taped backing in shows; karaoke in pubs; the DJ dance scene; and booking agency price undercutting. The excessive influence of agents in violating award rates was also noted.

In the JCA-initiated surveys the biggest single factor nominated in loss of employment was the installation of gambling facilities. Of Group B (the 'loss of work' group), 36% nominated the installation of gambling facilities as a factor in the loss of employment.

These preliminary extrapolations were communicated to the NSW Premier's Department as part of a sequence of correspondence with Associate Professor Bruce Johnson. This led to a meeting between representatives of the Jazz Co-ordination Association of NSW, musicNSW, the Australian Hotels Association and the Premier's Department. The outcome was a common expression of concern, and a commitment to pool resources to pursue the research further, including funding from the NSW Premier's Department and the Australia Council.

2.2 Background: NSW gaming history and legislation

Hotels and clubs have long been an influential part of NSW leisure and the accompanying politics of drinking and gambling in the state.

The establishment of the United Licensed Victuallers' Association of NSW in 1874 provided the origins of an organised pub industry collective. With a range of sporting, business and recreation venues existing across the state, clubs were first licensed for trading with the NSW Liquor Act of 1905, with the Registered Clubs Association formed in 1921. In recognition of the non-proprietary nature of club operations (club income cannot be distributed to members, corporations or individuals), the use of poker machines was legalised for the exclusive use of clubs in 1956. Poker machine profits were originally directed to public hospital funds. Club numbers (350 in 1950) expanded rapidly with poker machine rights, and the elimination of previous club-to-hotel ratios. In 1959 the hoteliers rebadged their organisation as the Australian Hotels Association (NSW).

Before the 1980s gambling in hotels was restricted to wagering products such as PubTab. In 1984 legislation permitting the use of Approved Amusement Devices (AADs) by hotels was passed by the Wran Labor government. Hotels were permitted a maximum of five machines, increasing to 10 after the election of the Greiner Coalition government in 1988. In the same year, the government endorsed the linking of club poker machines, with linked jackpots of up to $100,000. Keno was introduced in registered clubs in 1991; by 1999, 975 clubs were linked to the Keno network. The central body governing liquor and gaming activities in the state, the Chief Secretary's department, was abolished in 1995; its regulatory functions were incorporated within the new Department of Gaming and Racing.

The historic division between venues with poker machine rights (clubs) and those denied them (hotels) has generated bitter debate between clubs and pubs since the 1950s. According to the Australian Bureau of Statistics' 1996 *Clubs, pubs, taverns and bars* report, at June 1995 NSW had the highest concentration (40%) of coin-operated gaming machines in Australian pubs, taverns and bars. The report also revealed that NSW clubs accounted for 74% of the nation's 83,625 poker machines. At this time, poker / gaming machine revenue comprised 49% of the NSW club industry income. For hotels, gaming facilities provided 9% of industry income.

The long standing complaint that clubs could subsidise meals and entertainment through exploitation of their poker machine monopoly ended with the introduction of poker machines into hotels in April 1997. In February 1998, the NSW Labor Treasurer Michael Egan announced that hoteliers could extend their current limit of 15 machines to 30, through bidding for an additional 2,300 machine permits. According to the Department of Gaming and Racing's annual report, hotelier profits from gaming machines 'rose sharply' from 1997–8 to 1998–9, with an increase of 38.6%, to $847m. Club gaming machine profits increased by 7.9% over the same period.

In November 1998 the Independent Pricing and Regulatory Tribunal (IPART), commissioned to provide an overview of the state's gambling environment, tabled its findings (see below, 2.3.2). The state-commissioned inquiry complemented a broader Productivity Commission Report funded at the federal level (see below, 2.3.3). This inquiry was a reflection of community and media concerns about the locations, times and extent of gambling activity.

The Carr Labor government's *Gambling Legislation Amendment (Responsible Gambling) Act 1999* and associated regulations sought to ease public concerns through a variety of measures. It specified the removal of ATM cash machines from gaming areas; the installation of counselling and signage for problem gamblers, and self-exclusion programs; and signage listing the statistical chances of winning.

The *Gaming Machines Act 2001* enhanced the government's gambling harm minimisation objectives. It capped state poker machine numbers at 104,000; limited clubs to 450 machines each; requires clubs to relinquish machines exceeding the 450 machine limit over a five-year period; maintains the existing hotel cap at 30 machines per venue; requires social impact assessments by hotels and clubs prior to the granting of additional machines; prohibits gaming advertising; restricts player reward schemes; and limits club amalgamations to four.

According to the *Department of Gaming and Racing 2001 annual report*, hotel gaming profits for March 2000 to March 2001 were $1,250m—an increase of 12.5%. Registered club gaming profits for 2001 experienced a rise of 4.9%, to $2, 849m. The report also stated the 'average annual return' to the government from a gaming machine to be $12,706 for a hotel machine; and $5,431 for a club machine.

2.3 Related studies

2.3.1 Ausmusic Stayin' Alive Report (1994)

Ausmusic conducted survey-based state and national studies of the live music sector in 1994.

The NSW report recommended the deregulation of liquor licensing laws; the provision of additional FM music radio licences; the establishment of an under-18 yrs circuit; and that promotional programs be made available to emerging agents and promoters.

The national report, as an overview of the collective findings of all states, recommended, *inter alia*, tax benefits for musicians similar to older 10BA tax concessions for film; greater coordination of industry training / promotional schemes; the establishment of specific regional development programs; that contractual arrangements between bands and venues be examined; and that 'the multiplicity of local government regulations necessary for a venue to be open be removed for music venues other than those in respect of fire regulations'.

2.3.2 Independent Pricing and Regulatory Tribunal (IPART) Report 1998

IPART considered the establishment of a gaming commission to oversee all gambling activity and to co-ordinate problem gambling research and support services, and the introduction of consumer protection and harm minimisation measures. The Casino Community Benefit Fund provided the main source of funding for various problem gambling treatment programs, notably the 24-hour G-line telephone counselling service.

2.3.3 Australia's Gambling Industries—Productivity Commission (1999)

The Federal Government instituted a Productivity Commission inquiry into the nation's gambling industries. The scope of the inquiry included the participation profile of gambling; its economic impacts upon other leisure / tourism industries and state economies; the effects of its regulatory structures; and its social impacts upon community development.

Among its list of key findings, the Commission advocated stronger measures to reduce the costs of problem gambling; found that problem gamblers constituted 2.1% of the population; gambling provided employment for over 100,000, contributing to 1.5% of GDP; and that community consultation about the impacts of policy decisions had been 'deficient'. The inquiry recommended against 'earmarking' a proportion of gambling revenue for purposes other than activities related to problem gambling (harm minimisation practices, research). In NSW, the report noted the emergence of 'super clubs' which have benefited from 'preferential tax treatment based largely on the presumption of community benefits from clubs' operations', which have enabled the 'cross-subsidisation of restaurant, hotel and other services'.

Note that this report incorporates the most comprehensive public account of the legislative framework for gambling as at the time of publication in November 1999.

2.3.4 Other local studies

The significance and viability of contemporary live entertainment has been examined within other local contexts. The relationships between gaming, entertainment and the hotel/club industries have been subjected to increasing scrutiny nationally, exemplified in the following state government reports and legislation:

NSW

In response to community concern, Marrickville Council established a Live Music Task Force in June 1999. The Task Force facilitates ongoing meetings between venue managers, council staff, musicians and local youth groups. It has examined the marketing and promotional strategies of musicians, amenity issues of live venues, and local tourism strategies highlighting Newtown's live music sites. The viability of inner city venues was highlighted by the Ministry of Arts' *Brackets & jam activity report* (2001), which stated that, after several disrupted events at hotels, 'a decision was made to cease developing shows in venues where alcohol and gambling were the principal activities [which are] … less conducive to creativity'.

The NSW Department of Racing and Gaming also released in June 2002 its *National competition policy review discussion paper* of both the NSW Liquor and Registered Club acts. The paper contains a range of proposed liquor licensing changes for industry discussion, to 'encourage diversity and flexibility in the industry and streamline the administrative processes associated with liquor licensing'. It canvasses a reduction in the number of liquor licence categories, a simplified licence application process, and the removal of the existing 'needs test' for new premises. The paper suggests the reinforcement of public interest criteria that considers local amenity issues in new applications ('including noise and other disturbance problems').

Queensland

The Queensland University of Technology/City Council report, M*usic industry development and Brisbane's future as a creative city* (August 2001) examined the place of live music within city infrastructures. The report recommended, *inter alia*, a greater linkage of government sectors involved in planning, zoning, liquor licensing and noise regulation; the development of business skills in the local music sector; the provision of an all ages music circuit; greater use of public spaces for emerging performers; and greater recognition of the contribution of music to the city's culture and economy. The report argued for Fortitude Valley to be recognised as a 'popular music cluster' that makes distinctive contributions to the locality.

South Australia

The *Gambling Industry Regulation Act 1999* established a Gambling Impact Fund to divert a portion of gaming profits to gambling effects research; live music infrastructure; and the provision of public information about gaming effects and advice. The Live Music Working Group was formed to examine planning, licensing, building and local government issues pertaining to live music. Their October 2001 report recommended, *inter alia*, the provision of 'buyer beware' information for those intending to purchase homes near operating live music venues; an increased consideration for existing venues in regard to venue complaints; more voluntary accords between local stakeholders; and a live music fund to assist in venue and new residential development soundproofing.

Victoria

Since the introduction of poker machines in 1992, the extent and nature of Victorian leisure and gambling was examined in T*he impact of the expansion of gaming on the tourism, entertainment and leisure industries* report of March 2000. The report noted that the introduction of EGMs (Electronic Gaming Machines) and 'more broadly inclusive gaming venues, appears to have come at the expense of other market segments, notably young people aged between 18–24 … who prefer venues without EGMs which cater to alternative entertainment … such as live music or other live performances'. The report also noted musicians' belief that live performance opportunities in pubs and clubs had decreased as a result of EGMs, with an increase for some club performers in upgraded facilities.

United Kingdom

The 2000 British report, *Nice work—if you can get it! A survey of musicians' employment 1978–98*, is noted here as evidence that the above reports reflect an international concern regarding the situation of live music performance. An All Party Music Group has been established by the English Parliament to consider declining live music opportunities in British venues.

2.4 Project brief and methodology

2.4.1 Description of project

Survey development and methodology

Stage 1: Pilot study

During October and November 2000, the project team devised a questionnaire and set of interview questions. A draft of the survey form was submitted to Professor Michael Pusey (School of Sociology, UNSW) in November 2000 for appraisal. Following a satisfactory appraisal, the questionnaire was trialled in conjunction with in-depth interviews during December 2000.

During December 2000, the project team conducted five in-depth pilot interviews with representatives of three hotels and two clubs located in Sydney. These interviews provided an opportunity for a number of survey questions and key music industry issues to be explored more fully. In addition, the information received from the interviews greatly assisted the project team's task of evaluating the pilot questionnaire.

After reviewing the results of the pilot study, the project team prepared a second draft of the questionnaire and formulated a modified set of interview questions. The revised questionnaire, in particular, was discussed in detail at a meeting of the Advisory Committee in early February 2001. Numerous amendments were agreed upon at this meeting and subsequently incorporated in the final draft of the questionnaire.

Statistics regarding the nature of performance, the frequency of performance, the audience capacity of the venue, other entertainment options provided by the venue, and the stature of performers hired, can be gauged from a number of 'closed' questions about venue operations. These provided an overview of the mix of live music with other entertainments, the number of venues offering the performance of original compositions (as opposed to 'cover' bands), and the size of existing venues. The questionnaire also included a number of 'open' questions allowing the opportunity for venue owners to nominate current difficulties in hosting live music. (The questionnaire and interview questions are reproduced in Appendices 7.1 and 7.2 respectively).

Stage 2: Questionnaire

Hotels and clubs surveyed

With the assistance of the Australian Hotels Association and ClubsNSW, the questionnaire was distributed to 3584 hotels and clubs registered with these two industry organisations within New South Wales between March and August 2001. To maximise response rate and reliability, publicity campaigns (advertisements in hotel and club industry journals) before the mailout heightened awareness of the aims of the project and the value of the co-operation of industry groups. Questionnaires were personally addressed to owners/managers, with reply-paid stationery and reminder letters. Confidentiality was stressed at all times, and the process was also subject to broader university ethics guidelines pertaining to such projects. Tables A and B below provide a breakdown by region of all hotels and clubs surveyed.

Table A: NSW hotels surveyed by region

Hotels	Total
Metro	460
Non-metropolitan	1554
Total	2014

Table B: NSW clubs surveyed by region

Clubs	Total
Metro	619
Non-metropolitan	951
Total	1570

Geographical regions

For analytical purposes, the state was divided into metropolitan and non-metropolitan regions. The metropolitan region of NSW was defined as the set of local government areas (LGAs) contained within the Sydney Inner and

Sydney Outer regions. The non-metropolitan region of NSW was defined as the region containing all LGAs outside of the Sydney Inner and Sydney Outer areas. (Refer to Appendix 7.3 for the maps of these regions).

Survey response rate

The overall response rate represented 12% of all hotels and clubs surveyed. Table C provides a breakdown of the response rate achieved by metropolitan and non-metropolitan region.

Table C: Survey response rate of hotels and clubs by region

	Metro	**%**	Non-Metro	**%**	Region unknown	**Total**
Hotels	65	**14%**	106	**7%**	3	**174**
Clubs	76	**12%**	189	**20%**	5	**270**
Total	141	**13%**	295	**12%**	8	**444**

Types of establishment surveyed

See Table D for the types of establishment that responded to the questionnaire.

Table D: Types of participating establishments

Types of establishment	Metro	Non-Metro	Region unknown	**Total**
AFL Club		1		**1**
Aquatic Club		1		**1**
Bowling & Golf Club		1		**1**
Bowling Club	14	55		**69**
Catholic Club	1	2		**3**
Club	7	20	5	**32**
Cultural & Sports Club	1			**1**
Fishing Club	1	2		**3**
Golf Club	10	26		**36**
Hotel	65	101	3	**169**
Hotel/Motel		5		**5**
Lithuanian Club	1			**1**
Masonic Club	3			**3**
Musicians Club		1		**1**
Recreation Club	1	1		**2**
River Motor Boat Club	1			**1**
RSL Club	19	55		**74**
RSL/Bowling Club	1	2		**3**
Rugby Club	1			**1**
Rugby League Club	5	7		**12**
Sailing Club	1			**1**
Soccer Club	1			**1**
Social & Recreation Club	1			**1**
Sports Club	3	12		**15**
Tennis Club	1			**1**
Trotting & Recreation Club	1			**1**
Workers Club	2	3		**5**
Total	**141**	**295**	**8**	**444**

Stage 3: Final interviews

Between February and April 2002, a total of 12 taped in-depth interviews were conducted by the project team. Representatives from six hotels and six clubs participated in this phase of the study. Of these, four hotels and four clubs were located in Sydney while two hotels and two clubs were located in Newcastle. The views of those involved in the daily operations of venue management provided an important overview of the commercial and legislative factors influencing live performance culture. The interview process was also important in investigating in greater depth key issues revealed in the venue survey, and would be informed by the pilot interview and survey results. (For discussion of the themes and issues canvassed in these interviews, refer to Sections 4 and 5).

3. Survey findings

The survey form was divided into the following sections:

1. Venue details
2. Kinds of entertainment
3. Live band details
4. Patron profile and entertainment categories
5. Booking arrangements and publicity
6. Entertainment licence assessment
7. Live entertainment costs
8. Expanding live music

This report provides summaries of the data obtained from survey participants for each of the eight sections above. The report also offers an analysis of the data collected by geographical region, namely (i) NSW as a whole, (ii) metropolitan NSW, and (iii) non-metropolitan NSW.

3.1 Venue details

The first section of the questionnaire focused on several aspects of venue operations including:

- duration of venue managements (Q1.2)
- number of patrons (Q1.3)
- employment profiles (Q1.5 and Q1.6)
- modes of transport used by patrons (Q1.7).

Duration of venue managements

Of all hotel managements surveyed, the majority (37%) began operating in the period 1996–99. The largest number of club managements surveyed (45%) also began during the same period.

As Table 1.1 shows, the bulk of both hotel and club managements began operations between 1980 and 2001 (88% for hotels and 87% for clubs). Of all establishments surveyed, slightly more club managements began operations during the period 1996–2001 (61%) compared to hotel managements (53%).

Table 1.1: Duration of venue managements

Period	Hotels	Clubs
1980–89	17%	11%
1990–95	18%	15%
1996–99	37%	45%
2000–01	16%	16%

A similar pattern emerges when metropolitan responses are compared to non-metropolitan responses. Of all metropolitan hotels surveyed, 91% of the managements started operations during the period 1996–2001. The corresponding figure for non-metropolitan hotel managements was 96%. Of all metropolitan clubs surveyed, 96% of managements began operations between 1996 and 2001. The corresponding figure for non-metropolitan clubs was 95%.

Number of patrons

The number of patrons catered for by all hotels surveyed in NSW ranged from 65 to 2000. Of all clubs surveyed, the number of patrons catered for ranged from 100 to 6000. The median number of patrons accommodated by all hotels and all clubs surveyed was 260 and 500 respectively.

Metropolitan hotels catered for a range of 65 to 2000 patrons while their non-metropolitan counterparts catered for a range of 80 to 1600 patrons. The median number of patrons catered for by metropolitan hotels was 330 while the corresponding figure for non-metropolitan hotels was 500.

In comparison, metropolitan clubs accommodated a range of 130 to 6000 patrons while non-metropolitan clubs accommodated a range of 100 to 5000 patrons. The median number of patrons accommodated by both metropolitan and non-metropolitan clubs was 500.

Employment profiles

Tables 1.2a and 1.2b provide an average number for staff by gender and employment status, across hotels and clubs statewide. Of all establishments surveyed, clubs tended to employ more staff on average. In particular, both hotels and clubs tended to employ more females than males. Casual employment was significant in both workforces, comprising, on average, 61% of all hotel employees and 40% of all club employees.

Table 1.2a: Hotel staff

	Full-time	Part-time	Casual	**Total**
Male	6	<1	7	**13**
Females	4	<1	10	**15**

Table 1.2b: Club staff

	Full-time	Part-time	Casual	**Total**
Male	8	2	6	**17**
Females	5	5	8	**18**

On average, metropolitan hotels employed over 3.5 times as many staff compared to their non-metropolitan counterparts. While the employment patterns of hotels by region were similar to the statewide pattern, non-metropolitan hotels tended to rely more heavily on casual staff, especially female casual staff. Refer to Tables 1.3a and 1.3b.

Table 1.3a: Hotel staff, metropolitan

	Full-time	Part-time	Casual	**Total**
Male	12	<1	14	**26**
Females	9	<1	16	**27**

Table 1.3b: Hotel staff, non-metropolitan

	Full-time	Part-time	Casual	**Total**
Male	2	<1	3	**5**
Females	1	<1	7	**9**

As with the clubs' statewide employment pattern, casual staff made up a significant portion of both the metropolitan and non-metropolitan club workforces. This was especially so among non-metropolitan clubs where casual staff, on average, accounted for over 70% of all staff. See Tables 1.3c and 1.3d.

Table 1.3c: Club staff, metropolitan

	Full-time	Part-time	Casual	**Total**
Male	13	4	9	**26**
Females	8	6	11	**24**

Table 1.3d: Club staff, non-metropolitan

	Full-time	Part-time	Casual	**Total**
Male	2	<1	3	**5**
Females	1	<1	7	**9**

Modes of transport used by patrons

For hotels statewide, the most popular modes of transport used by patrons were walking (37%), cars (34%) and buses (13%). The corresponding figures for club patrons statewide were walking (29%), cars (41%) and buses (16%) indicating a greater reliance upon both car and bus travel compared to hotel patrons. Refer to Table 1.4.

Table 1.4: Modes of transport used by patrons

	Hotels	Clubs
Walking	37%	29%
Bus	13%	16%
Train	7%	4%
Car	34%	41%
Taxi	6%	4%

Table 1.5 shows a regional breakdown of transport usage.

Table 1.5: Modes of transport used by patrons, by region

	Hotels		Clubs	
	Metro	Non-Metro	Metro	Non-Metro
Walking	32%	41%	26%	30%
Bus	17%	9%	22%	13%
Train	15%	2%	9%	1%
Car	27%	39%	37%	44%

Not surprisingly, patrons visiting metropolitan hotels and clubs surveyed tended to use trains more frequently while patrons visiting non-metropolitan hotels and clubs tended to rely upon the motor car to a greater extent than their metropolitan counterparts.

3.2 Kinds of entertainment

The second section of the questionnaire focused on the kinds of entertainment provided in hotels and clubs. These included:

- kinds of entertainment (Q2.1)
- poker machines (Q2.2 to 2.4)
- expansion of gaming areas (Q2.5).

Kinds of entertainment

Table 2.1 below provides a breakdown of the kinds of entertainment featured in all hotels and clubs surveyed.

Table 2.1: Kinds of entertainment

	Hotels	Clubs
Jukebox	31%	11%
Karaoke	9%	10%
Bands	28%	38%
Disco	11%	13%
Comedy	3%	6%
Trivia	10%	12%
Adult	2%	3%
Other	5%	7%

The jukebox, karaoke, live bands, discos and trivia proved to be the most popular forms of entertainment featured in the hotels and clubs surveyed. In particular, live bands featured prominently in both hotels (28% of responses) and clubs (38% of responses) while the jukebox featured more prominently in hotels compared to clubs statewide.

Table 2.2: Kinds of entertainment, by region

	Hotels		Clubs	
	Metro	Non-Metro	Metro	Non-Metro
Jukebox	23%	32%	9%	10%
Karaoke	11%	8%	11%	11%
Bands	25%	34%	38%	40%
Disco	10%	11%	9%	14%
Comedy	4%	3%	6%	6%
Trivia	17%	7%	15%	10%
Adult	2%	3%	2%	3%
Other	7%	3%	11%	6%

As with the statewide provision of entertainment, the jukebox, karaoke, live bands, disco and trivia were the most popular forms of entertainment in both metropolitan and non-metropolitan hotels and clubs. While live bands featured prominently in both metropolitan and non-metropolitan venues, non-metropolitan clubs, in particular, tended to favour live band performances over other forms of entertainment. These results are presented in Table 2.2.

Table 2.3 summarises the findings on live band performances in hotels and clubs. The data revealed that a greater percentage of hotels (70% of hotel responses) regularly featured live bands compared to clubs (61% of club responses) on a statewide basis.

Table 2.3: Venues regularly featuring bands

	Hotels	Clubs
Yes	70%	61%
No	30%	39%

Poker machines

Statewide, 93% of hotels operated poker machines yielding an average of 13 machines per hotel. While only 84% of metropolitan hotels operated poker machines (compared to 99% for non-metropolitan hotels), this group had a higher than statewide average number of machines (19 machines).

99% per cent of all clubs surveyed operated poker machines, yielding a statewide average of 67 machines per club. Again, the average number of machines was higher in metropolitan areas (98 machines).

Statewide, 20% of hotels and 29% of clubs reported that their venues contained areas in which gaming and entertainment activities were shared. This figure dropped to 9% for metropolitan hotels, but rose to 44% for metropolitan clubs.

11% of all hotels and 16% of all clubs surveyed affirmed that gaming areas had displaced areas formerly dedicated to live entertainment. For metropolitan clubs, this figure rose somewhat to 23%, yet remained stable across both hotel categories. These results are summarised in Table 2.4.

Table 2.4: Poker machines

	Hotels		Clubs	
	Metro	Non-Metro	Metro	Non-Metro
Venues with poker machines	84%	99%	97%	99%
Average number of poker machines	19	11	98	57
Share space with entertainment areas	9%	26%	44%	23%
Live entertainment areas displaced by gaming areas	11%	12%	23%	13%

3.3 Live band details

The third section of the questionnaire related to the duration and operation of live bands. Examined in this section were:

- duration of live music venues (Q3.1)
- weekly performance times (Q3.2)
- styles of music (Q3.3)
- kinds of musical content (Q3.4)
- income derived directly from live music performances (Q3.5)
- income derived indirectly from live music performances (Q3.6)
- payment in kind received by band members (Q3.7).

Duration of live music venues

Statewide, the average number of years that hotels had operated as a live music venue was 9.8 years. For clubs, this figure was a significantly higher 24.2 years. Regional figures in this regard only varied slightly from the statewide figures. Refer to Table 3.1.

Table 3.1: Duration of live music venues

	Metro (Years)	Non-Metro (Years)
Hotels	8.2	10.6
Clubs	25.9	24.1

Weekly performance times

The live band performance times were predictable. Both hotels and clubs cited the ‘Friday & Saturday night’ category most often. This was followed by the ‘Saturday night only’, ‘Friday night only’, and ‘Friday & Saturday nights & Sunday afternoon’ categories.

Regional responses yielded a relatively similar pattern, however it is interesting to note that ‘Friday & Saturday & Sunday night’ emerged as the second most cited category for metropolitan hotels and clubs, behind ‘Friday & Saturday nights’. This, no doubt, reflected the greater patronage enjoyed by metropolitan venues compared to their non-metropolitan counterparts.

Styles of music

For hotels statewide, the most frequently cited styles of music performed were Rock / Blues (36% of responses), Jazz (19% of responses) and Country (19% of responses). For clubs statewide, the corresponding figures were Rock / Blues (32% of responses), Country (30% of responses) and Jazz (14% of responses).

Two variations from the statewide figures are worth noting. Firstly, Jazz was cited more often in both metropolitan hotels (23%) and clubs (18%). On the other hand, Country was cited more often in non-metropolitan hotels (22%) and clubs (33%). These results are shown in Table 3.2.

Table 3.2: Styles of music

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Rock/Blues	36%	38%	35%	32%	34%	32%
Jazz	19%	23%	18%	14%	18%	14%
Country	19%	13%	22%	30%	22%	33%
Heavy Metal	5%	5%	6%	3%	3%	4%
Folk	9%	10%	10%	8%	7%	8%
Alternative	8%	7%	9%	6%	10%	6%

Kinds of musical content

Variation in the kinds of musical content was mainly confined to comparison between metropolitan and non-metropolitan areas.

Compared with the statewide figure, Cover material was less popular in metropolitan hotels and more popular in non-metropolitan hotels. However, the reverse was true for Original and Tribute material.

For clubs, the largest variation in kinds of musical content occurred in relation to Covers and Originals. Compared to their non-metropolitan counterparts, metropolitan clubs cited more Original, and less Cover material being performed. These results are presented in Table 3.3.

Table 3.3: Kinds of musical content

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Covers	46%	36%	51%	30%	27%	31%
Originals	34%	39%	32%	43%	49%	41%
Tributes	20%	26%	16%	27%	25%	28%

Income derived directly from live music performances

Income derived directly from live music performances refers mainly to door charges or entrance fees paid by patrons to see bands perform. Results showed that only a minority of hotels (17% of those surveyed) and clubs (26% of those surveyed) derived income directly from live bands.

Significant variation between metropolitan and non-metropolitan areas was observed only for hotels. While 18% of non-metropolitan hotels reported deriving 'up to 5%' of their income directly from live music, only 10% of their metropolitan counterparts could match this claim.

Additionally, a small number of metropolitan hotels claimed they derived between 6% and 20% of their income from live music performance. No metropolitan hotels were able to report such claims. These results are presented in Table 3.4.

Table 3.4: Income derived directly from live music

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Up to 5%	17%	10%	18%	26%	26%	26%
6 to 10%	>1	2%	0%	>1	0%	1%
11 to 15%	>1	2%	0%	0%	0%	0%
20% +	>1	2%	0%	0%	0%	0%
None	81%	83%	82%	73%	74%	73%

Income derived indirectly from live music performances

Indirect income refers to income derived from increased drink and food sales (and the like) as well as increased income from poker machines, as a consequence of staging live music performances.

While statewide, almost half of the hotels surveyed reported that 'up to 10%' of their income was generated indirectly from staging live music, 19% of hotels reported that between '51 and 75%' of their income was indirectly derived in this manner. Interestingly for clubs, this figure only reached 6%.

For clubs statewide, 73% reported that 'up to 10%' of their income was indirectly generated from live music, while only 6% reported being able to derive indirect income in the '51 to 75%' range.

Overall, the breakdown of these figures across metropolitan and non-metropolitan areas mirrored the statewide results. The results are presented in Table 3.5.

Table 3.5: Income derived indirectly from live music

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Up to10%	48%	41%	49%	73%	79%	70%
11 to 20%	14%	15%	16%	14%	13%	15%
21 to 30%	12%	15%	11%	5%	2%	6%
31 to 50%	5%	6%	6%	1%	0%	2%
51 to 75%	19%	21%	18%	6%	6%	6%
75% +	<1	3	0	<1	0	1

Payment in kind received by band members

Statewide, free drinks and accommodation were favoured as 'payment in kind' for hotels, whereas there was a slight tendency for clubs to favour free meals in this regard. Significant regional differences, however, were present for both groups.

Free drinks were provided by 74% of metropolitan hotels compared to only 47% of metropolitan clubs. However, the percentage of metropolitan clubs that provided free meals and free accommodation was double that of metropolitan hotels.

Table 3.6: Payment in kind received by band members

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Free drinks	43%	74%	35%	37%	47%	36%
Free meals	21%	21%	22%	31%	42%	28%
Free accommodation	36%	5%	43%	32%	11%	36%

For venues in non-metropolitan areas, free accommodation was more frequently offered by hotels than clubs (43% and 36% of these venues respectively). These results are presented in Table 3.6.

3.4 Patron profile and entertainment categories

The fourth section of the survey form focused on the profile of patrons and the forms of entertainment. The specific aspects examined included:

- main age categories of patrons (Q4.1)
- awareness of technical assistance provided by the DGR (Q4.2)
- entertainment provided to those under 18 years of age (Q4.3)
- reasons for not providing all age entertainment (Q4.4)
- changes in the forms of entertainment during the last five years (Q4.5, 4.6 and 4.7).

Main age categories of patrons

According to the statewide figures on patron profiles, hotels tended to attract a higher average percentage of younger patrons between 18 and 40 years, while clubs tended to attract a higher average percentage of older people over 40 years of age. In particular, an average of 31% of people attending clubs were reported to be over 55 years of age while the corresponding figure for hotels was 11%.

The regional data revealed a similar pattern. The largest variations from the statewide figures occurred in metropolitan hotels and clubs. In particular, the average percentage of patrons 18–24 years visiting both metropolitan hotels and clubs tended to be lower than the state average while the reverse was the case for patrons 25–40 years visiting the same establishments. These results are presented in Table 4.1.

Table 4.1: Main age categories of patrons

	Hotels (average %)			Clubs (average %)		
Years	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
18-24	33%	27%	36%	20%	17%	21%
25-40	46%	50%	44%	35%	45%	30%
41-54	21%	20%	22%	33%	32%	33%
Over 55	11%	12%	11%	31%	30%	31%

The data received on the age categories of patrons visiting hotels and clubs corresponded to the information obtained from the in-depth interviews. Clubs, especially, indicated an interest in attracting a higher proportion of young people as members.

Awareness of technical assistance provided by the DGR

Survey participants were asked if they were aware of assistance about the different trading, service of liquor and security requirements from the Department of Gaming and Racing (DGR), in regard to the regulations concerning the operation of all age entertainment.

Roughly, 50% of hotel and club respondents were unaware of any regulatory assistance available from DGR. The main variation from this figure occurred among hotel respondents in the metropolitan region where 63% indicated no awareness of assistance that could be provided by the DGR. These results are presented in Table 4.2.

Table 4.2: Awareness of DGR technical assistance

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Yes	46%	37%	50%	50%	52%	49%
No	54%	63%	50%	50%	48%	51%

Entertainment provided to those under 18 years of age

A marked difference was shown to exist between hotels and clubs in relation to the provision of entertainment for under 18 year olds. On a statewide basis, 32% of clubs compared to 7% of hotels provided under age entertainment. The regional figures mirrored the statewide pattern. The regional responses also showed that both non-metropolitan hotels and clubs tended to provide more entertainment for under 18 year olds than their metropolitan counterparts. These results are presented in Table 4.3.

Table 4.3: Entertainment for under 18 year olds

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Yes	7%	3%	10%	32%	24%	35%
No	93%	97%	90%	68%	76%	65%

Reasons for not providing all-age entertainment

The reasons given for not providing all-age entertainment by hotel respondents were uniform at both the statewide and regional levels. Hotel respondents identified the main reasons for the lack of all-age entertainment as (a) commercially unviable (40%), (b) difficulty with regulations (27%) and (c) policing difficulties (29%).

The responses from clubs were also very uniform across regions. Club respondents gave the following rankings to the same reasons for not having all age entertainment: (a) commercially unviable (39%), (b) difficulty with regulations (17%) and (c) policing difficulties (38%). These results are presented in Table 4.4.

Table 4.4: Reasons for no all age entertainment

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Not commercially viable	40%	42%	39%	39%	41%	39%
Regulations too difficult	27%	27%	28%	17%	16%	18%
Policing too difficult	29%	28%	29%	38%	37%	37%
Other	4%	4%	4%	6%	6%	7%

Changes in the forms of entertainment during the last five years

A total of 20% of hotels and 18% of club statewide underwent changes to their forms of entertainment over the last five years. The regional figures for changes to entertainment forms closely followed the state trends. These results are presented in Table 4.5.

Table 4.5: Entertainment changes in the last five years

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Yes	20%	21%	20%	18%	20%	17%
No	80%	79%	80%	82%	80%	83%

3.5 Booking arrangements and publicity

The fifth section of the questionnaire focused on booking practices and the publicising of live music. The specific aspects examined included:

- the use of booking agencies (Q5.1)
- reasons for not using booking agencies (Q5.2)
- main venue representative dealing with performers (Q5.3)
- degree of liaison between venue representatives and musicians over publicity, promotion, etc. (Q5.4)
- responsibility for entertainment publicity (Q5.5)
- forms of publicity used (Q5.6).

The use of booking agencies

According to the statewide data received, 49% of hotels and 57% of clubs used booking agencies. In non-metropolitan areas, clubs utilised booking agencies more than hotels when planning their entertainment programs. These results are shown in Table 5.1.

Table 5.1: Use of booking agencies

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Yes	49%	58%	45%	57%	64%	54%
No	51%	42%	55%	53%	36%	46%

Reasons for not using booking agencies

Both hotels and clubs on a statewide basis ranked the reasons for not using booking agencies as follows: (a) ‘commissions too high’ (b) ‘inappropriate acts provided’ and (c) ‘not required’.

At a regional level, the only deviation from this ranking was recorded by respondents from metropolitan hotels who placed ‘inappropriate acts provided’ (35%) ahead of ‘commissions too high’ (30%) as the main reason for not using booking agencies. The lower ranking given to high agency commissions (30%) by metropolitan hotels compared to metropolitan clubs (43%) probably reflects the existing nexus between bands, ‘pub culture’ and the younger age profile of metropolitan hotels. These results are presented in Table 5.2.

Table 5.2: Reasons for not using booking agencies

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Commissions too high	42%	30%	45%	39%	43%	38%
Inappropriate acts provided	27%	35%	25%	35%	40%	31%
Not required	22%	25%	20%	15%	13%	16%
Other	10%	10%	11%	12%	5%	15%

Main venue representative dealing with performers

The survey data revealed that ‘venue bookers’ and venue managers were mainly responsible for dealing with performers.

Table 5.3: Venue representatives dealing with performers

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Venue booker	30%	23%	18%	20%	30%	20%
Venue manager	54%	57%	64%	51%	54%	51%
Bar staff	6%	9%	4%	12%	6%	12%
Owner	1%	2%	12%	0%	1%	0%
Operations manager	3%	9%	0%	6%	3%	6%
Other	6%	0%	2%	12%	6%	12%

In particular, venue managers were responsible for dealing with performers in over 50% of hotels and clubs at both a state and regional level.

The more significant role assumed by 'venue bookers' in metropolitan hotels (23%) and clubs (30%) as opposed to their non-metropolitan counterparts indicates the prevalence of larger establishments in metropolitan areas with a greater division of labour among staff. These results are presented in Table 5.3.

Liaison between venue representatives and musicians over publicity, promotion, etc.

The statewide and regional figures on the degree to which venue representatives regularly liaise with musicians over the promotion of performances proved to be uniformly high. Not surprisingly, metropolitan hotels (85%) tended to liaise to a greater extent than hotels in non-metropolitan areas (79%). The figures for clubs, however, was reversed (74% and 79% respectively). These results are presented in Table 5.4.

Table 5.4: Liaison over entertainment publicity, promotion, etc.

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Yes	81%	85%	79%	78%	74%	79%
No	19%	15%	21%	22%	26%	21%

Information obtained from the in-depth interviews indicated that, unlike hotels, clubs are able to appeal to their members when publicising live music. In addition, relatively larger pools of members attached to metropolitan clubs suggests less of a reliance upon promotional exercises compared to non-metropolitan clubs.

Responsibility for entertainment publicity

The data relating to responsibility for publicising entertainment is relatively uniform among both hotels and clubs. The figures show that venue management rather than bands take most of the responsibility for promoting entertainment. These results are presented in Table 5.5.

This finding corresponded to information obtained in the in-depth interviews. Some venue representatives interviewed criticised bands for not taking more responsibility to publicise their performances. Some venue representatives interviewed also remarked upon the high cost of promotional campaigns.

Table 5.5: Responsibility for entertainment publicity

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Bands	1%	2%	1%	<1%	0%	<1%
Venue management	50%	47%	51%	48%	53%	46%
Both bands & venue management	48%	51%	48%	51%	47%	53%

Forms of publicity

The print media and signage were equally important forms of publicity for both hotels and clubs. Combined, print media and signage constituted about two-thirds of all forms of publicity used by hotels and clubs.

The figures also show radio was used to a greater extent by non-metropolitan hotels and clubs compared to their metropolitan counterparts. The reverse was the case with respect to mail-outs.

Of interest, also, were the figures on Internet publicity. Both metropolitan hotels (14%) and clubs (13%) relied upon web-sites to publicise their entertainment programs. Their non-metropolitan counterparts, however, relied only to a very small extent on Internet publicity. This discrepancy reflects the current metropolitan-non metropolitan divide in relation to accessing Internet services. These results are presented in Table 5.6.

Table 5.6: Forms of publicity

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Print media	30%	30%	32%	31%	30%	32%
Signage	34%	34%	37%	31%	33%	31%
Radio	13%	7%	17%	16%	7%	19%
Mail-outs	11%	15%	7%	11%	16%	10%
Internet	11%	14%	4%	7%	13%	4%
Other	2%	0%	3%	3%	1%	3%

3.6 Entertainment licence assessment

The sixth section of the questionnaire asked survey participants to evaluate the process of obtaining an entertainment licence. Specifically, participants were asked the following questions:

Do you think the existing process of obtaining an entertainment licence is satisfactory? (Q6.1)

Respondents who answered the above question negatively, were then asked:

What do you think is unsatisfactory about the entertainment licence process? (Q6.2)

Around 40% of hotel respondents reported dissatisfaction with the process of obtaining an entertainment licence. In comparison, about 20% of club respondents indicated dissatisfaction with the acquisition process. As Table 6.1 shows, regional levels of dissatisfaction were relatively uniform across regions.

'Too much red tape' was identified as the most unsatisfactory aspect of acquiring an entertainment licence by both hotels (38%) and clubs (32%) statewide. For hotels, other unsatisfactory aspects included licence conditions such as noise regulations (35%) and council processing time (13%). In comparison, clubs nominated licence conditions such as noise regulations (25%) and the high cost of licences as also being of concern.

Table 6.1: Process of obtaining an entertainment licence satisfactory

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Yes	61%	61%	60%	83%	81%	84%
No	39%	39%	40%	17%	19%	16%

Noteworthy deviations from the statewide figures included non-metropolitan hotels and clubs which identified high licence costs (14%) and council processing time (31%) respectively as being unsatisfactory aspects of the licence acquisition process. Additional deviations from the statewide figures concerned metropolitan hotels (20%) and clubs (13%). Both considered council differences relating to the enforcement of regulations as being unsatisfactory. These results are presented in Table 6.2.

Table 6.2: Unsatisfactory aspects of the licence process

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
'Too much red tape'	38%	25%	30%	32%	32%	32%
'Council processing time too long'	13%	17%	17%	14%	8%	31%
'Licence costs too high'	8%	9%	14%	18%	21%	19%
'Licence conditions e.g. noise regulations, too harsh'	35%	28%	22%	25%	24%	10%
'Enforcement of regulations varies too much between different councils'	6%	20%	16%	7%	13%	4%
Other	0%	0%	1%	4%	1%	3%

3.7 Live entertainment costs

The seventh section of the survey form concentrated on costs related to live entertainment. Aspects investigated included:

- changes to costs over the last five years
- costs or factors making live entertainment less attractive
- ways in which live music costs are subsidised.

Changes to costs over the last five years

Nearly 90% of all hotels and clubs reported higher costs relating to the provision of live music over the last five years. No substantial variation from this trend was recorded regionally. The results are presented in Table 7.1.

Table 7.1: Increased live entertainment costs over the last five years

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Yes	87%	87%	87%	90%	87%	92%
No	13%	13%	13%	10%	13%	8%

Costs or factors making live entertainment less attractive

On a statewide basis both hotels and clubs identified the ‘increase in band fees’ (33% and 48% respectively) as the most significant factor in making live entertainment less attractive.

For hotels, this factor was followed by the ‘new tax system’ (20%), ‘ancillary staff costs too high’ (16%) and ‘complying with entertainment licence regulations has become too costly’ (16%). In comparison, clubs nominated ‘ancillary staff costs too high’ (17%) as the second most significant factor, followed by ‘new tax system’ (11%) and ‘complying with entertainment licence regulations has become too costly’ (11%).

As the table below indicates, regionally the ‘new tax system (including the GST)’ was identified as the second most important factor adversely affecting live entertainment by metropolitan clubs and by non-metropolitan hotels and clubs. These results are presented in Table 7.2.

Table 7.2: Costs or factors making live entertainment less attractive

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
'Increase in band fees'	33%	30%	33%	48%	40%	47%
'Ancillary staff costs too high'	16%	18%	16%	17%	15%	16%
'Income from other activities (e.g. gaming) too profitable'	5%	7%	4%	4%	6%	3%
'The new tax system (including the GST)'	20%	15%	23%	11%	20%	18%
'Complying with entertainment licence regulations has become too costly'	16%	22%	14%	11%	11%	10%
'Live band performances are incompatible with other venue functions'	9%	9%	10%	8%	9%	6%
Other	2%	3%	2%	3%	4%	2%

Ways of subsiding live music costs

Regionally, both hotels and clubs identified poker machines as the most important way in which live music costs were subsidised. For metropolitan and non-metropolitan clubs, this factor accounted for approximately 50% of all responses. For both metropolitan and non-metropolitan hotels, it accounted for just under 40% of all responses.

Metropolitan hotels noted that higher drink charges and the provision of meals were also used to subsidise live entertainment (in 33% and 27% of responses, respectively). Among non-metropolitan hotels, these frequencies were reversed (20% and 27% of responses respectively).

Metropolitan and non-metropolitan clubs cited the provision of meals and door charges more as ways to subsidise live entertainment, at more or less equal rates. These results are presented in Table 7.3.

Table 7.3: Subsidising live music costs

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Meals	38%	21%	27%	40%	16%	17%
Door charges	13%	8%	8%	13%	17%	19%
Higher drink charges	8%	33%	20%	5%	7%	6%
Poker machines	35%	38%	39%	35%	53%	48%
Other	6%	0%	4%	7%	7%	11%

3.8 Expanding live music

The final section of the survey form focused mainly on the prospects of expanding live music performances. The specific aspects examined included:

- responses to increasing the amount of live music (Q8.1)
- main factors preventing an increase in live music (Q8.2)
- most important reasons for providing live music (Q8.3)
- considerations making the provision of live music difficult (Q8.4)
- significant groups connected with noise complaints (Q8.5).

Increasing the amount of live music

Table 8.1: Responses to increasing the amount of live music

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Yes	70%	66%	72%	65%	61%	67%
No	30%	34%	28%	35%	39%	33%

A substantial percentage of hotels (70%) and clubs (65%) statewide indicated an interest in increasing the amount of live music. Regionally, non-metropolitan hotels and clubs expressed a keener interest in expanding live music compared to their metropolitan counterparts. These results are presented in Table 8.1.

Main factors preventing an increase in live music

Overall, hotels and clubs tended to blame the same factors for preventing an increase in live music. As indicated in Table 8.2, the three most important factors in this regard were ranked as: (a) lack of public interest, followed by (b) lack of proper facilities and (c) inappropriateness of increasing live music for clientele. On a statewide basis, these three factors tended to have greater significance for hotels than clubs.

There were a number of noteworthy deviations from the statewide figures among the regions. For metropolitan clubs, a lack of public interest accounted for 23% of responses compared to the statewide figure of 34%. For these clubs, ‘inappropriate for clientele’ accounted for almost one third of all responses, thus being their most significant factor.

In addition, in contrast to hotels, both metropolitan and non-metropolitan clubs identified inadequate financial returns as an impediment to expanding live music.

Table 8.2: Factors preventing an increase in live music

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Lack of public interest	35%	39%	31%	34%	23%	38%
Lack of proper facilities	29%	29%	29%	22%	23%	22%
Inappropriate for clientele	25%	26%	25%	18%	30%	13%
Lack of experience	3%	0%	5%	5%	2%	7%
Financial returns inadequate	0%	0%	0%	13%	17%	12%
Expenses	9%	5%	11%	8%	4%	9%
Other	13%	16%	11%	7%	2%	10%

Most important reasons for providing live music

Both hotels and clubs tended to cite the same reasons for providing live music. Table 8.3 shows that four reasons predominated; of these, the reasons (a) ‘patrons simply demand live music’ and (b) live music ‘helps make other venue functions more profitable’ were clearly cited as the two main reason for providing live music. Of slightly less importance were: (c) ‘live performances deserve to be supported’ and (d) ‘live music is vital to the economic health of the establishment’.

Table 8.3: Reasons for providing live music

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
‘Live performances deserves to be supported’	22%	22%	22%	21%	23%	22%
‘Live music is vital to the economic health of the establishment’	19%	22%	17%	15%	15%	14%
‘Patrons simply demand live music’	27%	24%	31%	26%	20%	30%
‘Helps make other venue functions more profitable’	26%	26%	27%	29%	30%	29%
Other	5%	7%	3%	9%	12%	5%

Considerations making the provision of live music difficult

Both hotels and clubs identified two considerations as being mainly responsible for making the provision of live music difficult. These were noise complaints and security requirements.

For hotels, trading hours and building / fire regulations were next in rank. Clubs, in comparison, listed booking agencies, bands and trading hours as the next in rank behind noise complaints and security requirements.

One significant deviation from the statewide figures was recorded by metropolitan clubs. While the figure for security requirements was 33%

among clubs generally, only 26% of metropolitan clubs identified security requirements as a problem. These results are presented in Table 8.4

Table 8.4: Considerations making live music difficult

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Noise complaints	31%	36%	28%	33%	37%	32%
Trading hours	13%	11%	13%	8%	11%	6%
Dealing with bands	9%	9%	9%	9%	9%	9%
Building/fire regulations	13%	13%	13%	7%	6%	7%
Security requirements	26%	22%	29%	33%	26%	36%
Dealing with booking agencies	8%	8%	8%	10%	10%	9%
Other	3%	3%	3%	10%	6%	13%
None	1%	2%	1%	7%	7%	8%

Significant groups connected with noise complaints

For hotels statewide, the most frequently cited groups connected with noise complaints by were longer term residents (31%), newer residents (30%) and local council (20%). Statewide, clubs cited the same three groups but weighted them in the following manner: longer term residents (42%), newer residents (33%) and local council (17%).

One significant deviation from the statewide figure was recorded by metropolitan hotels. For this group, 'local council' accounted for 27% of all responses, compared to the statewide figure of 20%.

Interestingly, for metropolitan clubs, 17% of responses indicated that 'no group' was be identified with noise complaints, rising to 35% for non-metropolitan clubs. However, the 'no group' option accounted for only 6% and 15% of the responses for metropolitan and non-metropolitan hotels, respectively.

These figures indicate that hotels tend to have a closer involvement with noise issues than do clubs. These results are presented in Table 8.5.

Table 8.5: Groups connected with noise complaints

	Hotels			Clubs		
	NSW	Metro	Non-Metro	NSW	Metro	Non-Metro
Newer residents	30%	38%	33%	33%	36%	31%
Longer term residents	31%	32%	37%	42%	39%	44%
Local businesses	4%	1%	7%	3%	2%	3%
Local council	20%	27%	20%	17%	20%	15%
Patrons	14%	1%	0%	4%	3%	5%
Other	2%	0%	3%	2%	0%	2%
None	0%	6%	15%	28%	17%	35%

4. Interviews

The questions formulated for the interviews were intended to develop and explore lines of inquiry which were suggested by the surveys. The choice of venues as subjects for further investigation was based on particular aspects of their profiles in relation to live music.

The interviews were structured around a set of particular questions but were not limited to them (interview questions are listed in Appendix 7.2). Interviewees were encouraged to develop lines of thought that were distinctive to their particular experience and their venue. The interviews were tape recorded, and summaries transcribed by the interviewers.

4.1 Interviewee profiles

The investigators interviewed representatives of twelve venues: four hotels in Sydney, two in Newcastle, four clubs in Sydney and two in Newcastle. Interviewees were guaranteed anonymity. Each venue is therefore represented by a code:

S = Sydney
N = Newcastle
H = Hotel
C = Club

Sydney hotels

	SH1	**SH2**	**SH3**	**SH4**
Venue	Sydney eastern suburbs hotel near beach; >20 staff; >20 poker machines	Sydney inner city hotel; <10 staff; between 10 and 20 poker machines	Sydney CBD hotel; >230 staff; no poker machines	Sydney inner west hotel; around 20 staff; between 10 and 20 poker machines
Clientele	18–24 y.o.: 35% 25–40 y.o.: 50% 41–54 y.o.: 10% 55+ y.o.: 5%	18–24 y.o.: 35% 25–40 y.o.: 50% 41–54 y.o.: 15% 55+ y.o.: 0%	18–24 y.o.: 20% 25–40 y.o.: 50% 41–54 y.o.: 20% 55+ y.o.: 10%	18–24 y.o.: 30% 25–40 y.o.: 50% 41–54 y.o.: 15% 55+ y.o.: 5%
Live Music	Rock/blues; original compositions and covers	Rock/blues, jazz, country, heavy metal, folk, alternative; original compositions	Although presenting live music at the time of survey, all regular presentations discontinued by the time of interview; now bands are for special occasions only (e.g. New Year's Eve, Valentines Day). At such times, usually present a 3–4 piece band, usually jazz or middle-of-the-road, that 'will appeal to 30 to 50 year-olds'	Rock/blues; covers; duo and acoustic (Thursday nights), Bands and DJs (Saturday nights)

Sydney clubs

	SC1	SC2	SC3	SC4
Venue	Sydney inner suburban club; >100 staff; around 300 poker machines	Sydney inner north-west suburban club; <30 staff; around 90 poker machines	Sydney eastern suburbs club near beach; around 50 staff >70 poker machines	Sydney CBD club; >90 staff; >140 poker machines
Clientele	18–24 y.o.: 40% 25–40 y.o.: 40% 41–54 y.o.: 15% 55+ y.o.: 5%	Even mix of ages	18–24 y.o.: 1% 25–40 y.o.: 50% 41–54 y.o.: 40% 55+ y.o.: 9%	18–24 y.o.: 20% 25–40 y.o.: 40% 41–54 y.o.: 30% 55+ y.o.: 10%
Live Music	Rock/blues, jazz, country, alternative; original compositions, covers, tribute/concept	Middle-of-the road; covers	Rock/blues, country, folk; covers, tribute/concept	Rock/blues, jazz; covers

Newcastle hotels

	NH1	NH2
Venue	Newcastle CBD hotel; around 10 staff; 10 poker machines	Hotel in gentrified area of Newcastle CBD; around 40 staff; <20 poker machines
Clientele	18–24 y.o.: 70% 25–40 y.o.: 30% 41–54 y.o.: 0% 55+ y.o.: 0%	18–24 y.o.: 45% 25–40 y.o.: 50% 41–54 y.o.: 5% 55+ y.o.: 0%
Live Music	Rock/blues, heavy metal; original compositions, covers, tribute/concept	Rock/blues, jazz; original compositions, covers

Newcastle clubs

	NC1	NC2
Venue	Newcastle CBD club; around 240 staff; around 220 poker machines	Club in working class area in Newcastle environs; around 80 staff; >110 poker machines
Clientele	18–24 y.o.: 0% 25–40 y.o.: 30% 41–54 y.o.: 60% 55+ y.o.: 10%	18–24 y.o.: 60% 25–40 y.o.: 20% 41–54 y.o.: 10% 55+ y.o.: 10%
Live Music	Rock/blues, jazz, country, heavy metal, folk, alternative; original compositions, covers, tribute/concept	Rock/blues, jazz, country; original compositions, covers, tribute/concept

4.2 Interviews: themes and issues

Section 3 incorporates extrapolations from the survey data, and these are not repeated here unless the interviews yielded significant further information.

The distinctive features of the venues which were the subject of interview, and the flexible interview format, often extended and refined the data produced by the survey questionnaire. On occasions the discussion also opened up new issues. Some of these referred to pre-existing conditions, but which had not been clearly disclosed in earlier enquiries. Others, such as problems with GST and public liability insurance, had only become issues after the initial stages of data-gathering.

When a particular question seems to have been highlighted by a particular venue, the venue is identified against the profiles above. Many of the interviewees had thought through some of the issues to the point where their responses fitted into Section 5, Conclusions.

4.2.1 Venue profiles

The range of recreational facilities provided by both pubs and clubs is extremely broad, a fact which is often obscured by the publicity surrounding gaming facilities.

Apart from gambling, these include: dining rooms and bistros, pool tables, trivia nights, comedy, Keno, bingo and TV, particularly big-screen sporting events. The surveys indicated that among those which are more strictly recreational activities, music is the most popular. In both metropolitan and non-metropolitan venues, live bands came first in clubs and second in pubs.

Interviews confirmed that music is represented in many forms. These include recorded / piped music and juke-boxes, also combinations of pre-recorded and live, such as DJs, traditional disco (that is, someone just playing records), karaoke, and acts with taped backing. Live music is represented by jazz, blues, rock, country and pop, from middle-of-the road to alternative genres. Formats range from 5–6 piece bands to solo or duos with synthesiser. While the surveys suggested that original material was bigger than cover / tribute bands in metropolitan hotels and all clubs, the interviewees reported that cover bands were in the overall majority, because the familiar material is in greatest demand.

While not evenly distributed, there is virtually no form of popular music which cannot be found in pubs and clubs. All popular music forms invariably operate in conjunction with other forms of socialisation and recreation, such as eating and dancing, apart from just alcohol consumption.

While the media have oversimplified the negative impact of gaming, nonetheless the surveys and the interviews incontrovertibly indicate that the proliferation of poker machines has in many venues displaced live music. The appeal of the 'pokies' to venue management is straightforward: profits. Along with bar sales, gambling is the biggest source of revenue (SC4, SC2). Some venue managers expressed anxiety at the possibility that music might threaten gaming (NC2: 'We have to be careful of music levels near the poker machines —you don't want the pokie players to leave.' See similarly NC1). But the opposite was never heard, that is: 'We don't want the music audiences to leave because of the pokies'. The recent proliferation of poker machines has thus impacted negatively on the presentation of live music unless the music presented also catered to likely pokie players (NC1: rock audiences are the biggest drinkers and are also likely to play the pokies).

4.2.2 Patron profiles

This datum turns our attention to patron profiles, and it is clear that these have a major impact on the range of live performance opportunities. Audience profiles (age, socioeconomic background, gender) vary with place (CBD, backpacker, beach, university, sports grounds, etc.), and with the particular night, time of day or night and, if applicable, the rooms and levels in which music is presented. For live music, different age-groups were reported, but these also varied from pubs to clubs.

Broadly speaking, younger patrons respond to live music in pubs. Pubs with older patrons (for example, after-work business people) find that live music brings no extra business and attracts little notice. In clubs, the profile changes with a range of music that attracts older people. This is perhaps also related to the comfort of the amenities, the ancillary services (bistros, etc.) and the auditorium. Audience ages vary with all these factors; for example, pool table areas are dominated by younger clientele; public bars by males.

A general shift is evident according to venue type and demographic—clubs remain tied to older clientele and club practices, while pubs, through legislative encouragement and a new income stream, have adapted to changing consumption patterns, retaining a youth market (SC2: 'Pubs are killing us' in attracting the young). Venues realise that changes in youth clientele are not always responsive to music (SC4, SH3). Young urban professionals don't want live music, or if they do they prefer dance music or familiar covers. In general, live repertoire tends to favour covers (as in both cover and tribute bands) rather than original material.

The decline of interest in live music in general appears to represent a shift to more refined consumption practices, with an emphasis upon improved food, internal décor—places to talk and relax, with music more as 'something in the background' (SH3) than a focused entertainment. Interviewees who have been in the business for several decades report the sense of an era having passed. Attempts to present live music come up against a lack of public interest, and the need to acknowledge a historical shift away from the largely unregulated 'golden period' from 1978–85. Music seems to be no longer the dominant youth activity ancillary to alcohol-fuelled recreation.

4.2.3 Expanding live music

Lack of public interest is only one of the main impediments to the competitiveness of music with gaming facilities.

Virtually all interviewees reported recent attempts to inaugurate or increase live music presentation, as something which 'expands the options' available to patrons (NC1). On the whole, venue operators are very keen to have live music, recognising that it serves a significant if not always quantifiable social purpose, compared with the introverted and atomised modality of the pokies (SC3). They spoke of it bringing a 'party atmosphere' (NH1; see similarly SC1, SC4). The interactivity between musicians and crowd energised the ambience, producing 'a buzz, it's electric' (SH1). It also broadens cultural awareness and helps to construct collective identity, where ‘people drift into their different tribes’ (SH2).

In spite of the almost unanimous desire of venue operators to increase live music, the level is at best static; at worst, diminished. At the time of the surveys, all the venues interviewed had substantial live music policies (one of the reasons they were chosen). By the time of the interviews, virtually all of them were reducing or reviewing their live music policies. SC4 reported that about one year ago they revived live entertainment for the first time in 15 years, but it failed to be cost-effective and all live music was cancelled just before Christmas. The contraction is most evident in pubs, and some of the reasons given suggest the range and complexity of factors that are involved:

- **SH1** has cut live music early in the week because there were not enough clients to justify the expense.
- **SH2** patronage is falling partly because of declining performance standards, and also because of increasingly sophisticated domestic entertainment.
- **SH3** ceased all live music as from December 2001—not enough clients to justify expense.
- **SH4** has cut all live music to duos and acoustic nights because of noise problems.
- **NH1** has cut from seven nights back to three; with the introduction of 24 hour licences, young people are not coming out until midnight, raising payroll costs for staff and security (see also NC1).
- **NH2** presenting six nights a week, but reviewing policy because of imminent non-smoking legislation and public liability insurance problems.

An emerging pattern is that the cost of presenting live music reduces its competitiveness with gaming facilities, though of course that competitiveness is itself a function of the advent of liberalised gambling policies.

Income from music is primarily indirect, from other venue facilities used by audience members. These include dining and gaming facilities, but the primary income source is from bar sales, which means that under those conditions it is only solid drinking clientele that are catered to. Where there are door charges, they are usually levied by the band in lieu of payment from the venue. In other cases, however, the music is free, in the sense that patrons don’t pay to enter the venue/auditorium.

Where management pays the band (rather than a ‘door’ deal), the recent introduction of the GST has been a factor in the reduction or review of live music policies (SC2, SC4). Furthermore, the costs involved in presenting live music are not confined to the payment a venue might make to the band itself (in some cases, such as door deals, this is zero). There are also ‘in kind’ payments, such as free drinks or meals, which can compensate musicians for rates that are otherwise static.

In addition, if a venue goes through an agent, the cost is further increased. The surveys indicated that slightly more than 50% of venues have dispensed with agents. Interviewees reported that this produced a closer and more synergistic relationship between band and venue, particularly as the points of contact go beyond just the staging of performances (NH1). In addition, their experience with agencies varied from adequate to highly unsatisfactory, with service compromised by conflicts of interest and various underhand practices (SC1).

The cost of presenting live music has also been driven up by other ancillary factors which do not all work to the detriment of gaming income. Extended trading reflects and encourages the social trend to later hours (SH4). This entails extra costs for a number of reasons, so that servicing an audience after midnight is much more expensive than it is in normal business hours: payroll for bar staff is increased and the employment of security personnel is a standard condition of increased trading hours (SH4). The introduction of later hours also exacerbates noise problems. Some of these are internal to the venue, as for example the case mentioned above of the danger of pokie players being driven out. There is also the risk of hearing impairment to bar staff (NC1, NC2), which in turn is connected with increasing public liability insurance problems and other contractual grey areas (NH2).

The noise problem, however, is more frequently represented as an issue of friction between the venue and its immediate community. Many venues have had to choose between live music programs and extremely expensive soundproofing renovations. In many cases, this problem has arisen not because of changes in venue policy, but because of changes in the physical and socioeconomic character of the community.

Particularly in the case of inner city pubs, which have long been significant ‘training’ sites for emerging bands, a gentrification process has accompanied the property boom. This has led to very unevenly regulated high-density development, occupied by groups which often manifest conceptions of visual and acoustic privacy that are scarcely consistent with the pre-existing community they have moved into. In the case of live music venues, these tensions go beyond the noise of the band itself. They include indiscriminate postering (NH1), parking congestion, post-gig noise and drunken street conduct.

Late night licenses have put many venues out of rhythm with the community in less obvious ways, as for example the disharmony between music recreation and local business hours, such as for local takeaway food outlets and public transport facilities (NH1). It was reported that when licensing hours are in harmony with local businesses and residences, this lowers tensions (NH2). Such tensions may also be addressed by more effective lines of communication between venues and local residents (SH4).

5. Conclusions

5.1 Introduction

The appeal of gambling in contemporary society arises from deeply rooted historical and cultural factors. These include the aspirational imperatives of consumerism, and the spectacle of public reward without apparent merit. Participation in live music may have a corrective effect on such self-disempowerment, but that is an argument to be made in another forum. The following comments therefore do not enter into the broader social welfare implications of gambling, but confine themselves to its immediate connection with live music presentation.

One of the revelations of the research was the articulate awareness of the issues on the part of those who participated. This counters a widespread perception, especially among musicians, that all venue operators manage ancillary recreations like music in an *ad hoc* way, driven by short-term profit motives. At the same time, of course, any sample such as the one from which the survey and interview information was derived, is unrepresentative in the sense that only those who have thought through larger policy implications will take the trouble to respond.

The data disclose a number of anomalies which may reflect something of the dilemmas of the sector canvassed, and the larger complexities of the situation of live music. That is, our research sources were representatives of venue management whose agenda are distinct from a range of other stakeholders such as musicians, casual venue staff, clientele, local community representatives and business interests, et al.

It appears that management generally support the idea of live music in principle, but are naturally also committed to sustained profitability. Section 3.8 reported survey responses which were puzzling, and even internally conflicting. No pubs identified inadequate financial return as an impediment to the expansion of live music, while 13% of clubs did—a curious contrast. Yet at the same time all categories of venue at other points claimed that poor financial returns discouraged the presentation of live music and linked this with lack of public support. At the same time, a significant percentage of venues reported that music was vital to the economic health of the venue. If nothing else, these anomalies disclose the heterogeneity of the field, and suggest that if live music sometimes fails it can also be made to succeed.

Part of the anomaly may also be explicable in terms of what has been called the 'curve of deference' among informants (Rowse 1985). Exacerbated by media and public bias against the adverse impact of gambling, venue managements may in some cases 'defer' to in-principle support for socially therapeutic recreations that are threatened by gaming activities.

While this must be kept in mind in assessing the data, the fact remains that even in the least propitious circumstances, venue managements have often attempted to sustain live music policies for clearly articulated reasons that go beyond direct profit to matters of community cohesion.

5.2 Poker machines

Media coverage, and the public perceptions it generates, would tend not to support the above observation. The reports listed in the bibliography (Section 8.2) incline to a simplistic demonisation of publicans, and to a lesser extent club managements, as sweeping all considerations aside in ruthless pursuit of pokie profits. Headlines like ‘Blowing up the pokies’ or ‘Poker machines to take $50m from poor’, and articles which simplistically identify gambling as the sole cause of social dysfunction rather than one of its symptoms, are counterproductive to any attempt to untangle the convergence of the complex issues which threaten the local music culture.

The negative impact of pokies on music is most particularly apparent in pubs which were originally designed for more homogeneous leisure activities, and which became the major site for the incubation of a range of popular music styles. These venues find it difficult physically to accommodate multiplex recreation. Apart from visual and acoustic ‘leakage’ between leisure modes, legislation relating to the use of leisure space frequently requires a choice to be made between live music and gaming activity. The latter brings in incomparably more revenue, and even if not currently in heavy use, gaming space and equipment nonetheless have added enormously to the value of the venue (SH2).

However, where the will exists on the part of management, and the space is available, gambling income can in fact help to subsidise live music (SC3). Among other factors, it was the licensing of poker machines in clubs in NSW in 1956 which made the state, and Sydney in particular, a magnet for popular musicians throughout the country, as gambling revenue subsidised the presentation of music. This is now the pattern in some pubs, but the inequity in poker machine installations at the time of the cap on the number of machines (see Section 2.1) has made it impossible for some pubs with a strong commitment to music to offset the expenses that prevent them from presenting music free of charge.

Ironically, then, restraint in poker machine investment because of that commitment is now threatening the venue’s competitiveness as a music venue (NH1). For this reason, most interviewees expressed the wish to expand pokie facilities from the point of view of profits and competitiveness, even when they opposed them in principle.

Gambling activity is a contradictory and complex process. While the importance of poker machines as a profit source is borne out in both interviews and survey, it is also fairly clear that poker machines have provided venues with further options in subsidising other activities. Together with related studies listed in this report, these and other findings of our research indicate that the issues affecting performance opportunities include, but are much broader than, the gaming environment.

5.3 The changing popular music culture

The interviews amplified some of the less quantifiable benefits of live music performance which were alluded to in surveys. Venue managers emphasised the importance of such sites in constructing local community networks that cut across professional, ethnic, geographical and class divisions in our society. The experience of locally generated live music was regarded as significant to the psychological welfare of the community. Music draws people together through the reclamation of memories (SC3), particularly so in an urban environment where anonymity and alienation are prevailing modes of experience. Interviewees saw music as a way of bringing people together to socialise (SC3). In particular it provides a social space for the lonely, as in the case of a recently widowed woman who was drawn into a new social circle through club music events (NC2).

However, the particular character and context of the music scene have changed. The boom of the 1970s and 1980s is over, and leisure habits have entered a new phase. Survey responses indicate that 30% of responding hotels and 39% of responding clubs do not include live music in their entertainment programs. It was frequently reported that ‘kids are not educated to watch / want live musicians’ (NC1). Thus, if live music opportunities are faltering, it is partly because the kinds of live music being presented are not very much in demand. The reasons go well beyond the particularities of the pub / club profile, and include:

- **Changing leisure technologies.** These are reflected partly in the range of music presentation formats, which incorporate increasing levels of pre-recorded material. Audiences often feel ‘cheated’ by, for example, lip-synching acts (SC3).
- **Changing leisure environments.** In particular, the increasing sophistication of home entertainment provides an alternative to ‘the night out’, with its attendant problems of transport, parking and more enlightened attitudes to public alcohol consumption.
- **The ‘distraction’ factor.** This is deeply pervasive in the changing culture. Both visually and acoustically we are becoming accustomed to excessive and diversified stimulation. There is more leisure stimulation now available in any given venue, and people are habituated to higher levels of noise and distraction which actually have to be filtered out in order to socialise. The audiences whose modality of more or less focused listening sustained the traditional pub / club gig are ‘greying’ and are not being replaced by younger patrons, who are increasingly drawn to dance club cultures.

The effects of these sea-changes are aggravated by other factors addressed in this section, such as the cost and complexity of obtaining public entertainment licences and the intrusion of gaming machines. While larger venues can accommodate such factors, they can be critical in the smaller venues at which original material is traditionally ‘workshopped’ before new audiences. The dominance of cover / tribute bands perpetuating and even homogenising established internationalist styles, is a response to general client demand. But it also reflects the gradual disappearance of small to mid-size pub venues for young music followers of proliferating sub-genres of popular music with a specialist appeal.

Several interviewees reported that auditoriums built over a decade ago are now too big to operate as ‘seeding’ venues (NH1, SH2, NC1), while those that were the right size have been invaded by poker machine space. This accords with a general feeling that it is established styles such as vintage rock, whose musicians emerged in an earlier environment, which do best and can survive the new conditions (SC1). On the other hand, the evidence seems to be that recent developments such as pub poker machines are suppressing the development of new young musical and compositional talent and its audience base, so that the field is increasingly dominated by cover and tribute material derivative of other spaces and times, for which an (older) audience has already been established.

5.4 Responses and responsibilities

The changes in gaming legislation are not the cause of the decline in live music opportunities, but in many cases they are the critical factor in a scenario that has been developing over some years, to which a number of circumstances have cumulatively contributed.

Especially in pubs, poker machines have provided a sudden, spectacularly profitable and relatively straightforward alternative to a recreational activity which has become increasingly cost-ineffective for a range of reasons. However, it is clear that clubs are not the only sites building forms of ‘community’—pubs are also forums for performer–audience communities based upon cultural and genre preferences.

Responsiveness to client demand for a wide range of entertainment does not divide along venue category lines. Pubs as well as clubs cater to very diverse as well as place-specific community leisure needs. In some cases they enter into broader community activities, including participation in local politics and sponsoring philanthropic causes. Where venue representatives participate in such activities, the conditions under which live music is presented are more favourable (SC3, SC4, NH1, NC1).

A simplistic demonisation of pokies and pub venue management fails to identify and address the full range of factors responsible for the decline of live music. Some of these are so deeply embedded in fundamental cultural change that it is probably necessary to revise our understanding of how popular music functions in the community. Others, however, may be ameliorated if all stakeholders recognise their own complicity in the problem. It is no longer enough for a venue to just book a band, nor for a band just to get a gig, and assume that the rest will take care of itself.

Venue management

Survey and interview data indicated clearly that for music to work, venue managements must articulate a sense of their larger social function, within which they develop strategic entertainment policies.

One thing that emerges very clearly is that the style of entertainment has to be geared to the specific character of the place and occasion (SC1). Careful planning of live music formats and times does pay off. SH1 reported that bar takings increase tenfold on Friday night, making music about 25% of weekly revenue. SH2 had achieved a balance of income streams in which the ratio of music / pokies / other trade is roughly 40 / 40 / 20, thus making live music viable. Some venues imaginatively explore the possibilities of diversification of live music formats and scheduling in order to cater to a range of audiences (e.g., SC3 presents lunchtime ‘singalong’ sessions for older clientele, a sort of senior citizen karaoke; others have revived a version of the afternoon ‘teadance' and of old-style dance nights which in many cases is what jazz performances in clubs have virtually become).

In light of reports from venue managements that increases in band fees have become an impediment to live music presentation, it is important to record the following observations made by Richard Ruhle, state secretary of the Musicians' Union of NSW and member of the advisory committee to this inquiry. He notes that award rates have remained linked to national and state wage cases, and market rates have barely moved over the last decade. Where venue managements are experiencing increased band rates, these are likely to be linked to other factors, including venue consultancy fees and agency fees; that is, a significant proportion of this increase is likely to be related to third parties. He reports that many venues, particularly hotels, continue to engage musicians at below award rates.

Musicians

It is also useful for musicians to reflect more carefully beyond the moment of performance. It was frequently noted (including by venue operators with extensive experience as musicians) that professionalism seemed to be in decline for a range of reasons. Many groups disdain stagecraft. Given the significance of noise problems, one of the key factors here is something as straightforward as volume, and matching it to place and occasion. SC2 is one of a number of venues that won't rebook a band that is too loud.

It was also frequently suggested that the musicians could also take a more active role in promoting themselves (SC2). The manager of SH2 attributes some of the decline to a failure of some bands to present a style of popular music that is appropriate to the venue and the local community of music audiences. If patronage is falling off, part of the reason evidently lies with the musicians themselves.

The music industry

The future of live music is not decided by venues and performers alone. It was frequently suggested that other sectors of the music industry could also do more to assist in the development of young musicians, notably the record companies and the agencies.

'Record companies should help promote live bands' (SC1). A case could be made that, in comparison with other business sectors, record companies contribute little to local research and development, yet benefit from live venues where musicians serve their apprenticeships and where recording companies still scout their potential signings. Likewise, there was a high level of dissatisfaction with agents who gave little thought to the appropriateness of acts to the venue.

Regulatory bodies

The costs and the complexity of the processes associated with gaining public entertainment licenses are often a sufficient disincentive to the presentation of live music. The various and sometimes apparently arbitrary terms of compliance; the time taken by local authorities to process applications; and the difficulty of negotiations were all cited as obstacles. Even the selective definitions of various leisure activities as forms of entertainment requiring licensing are very erratic, and therefore often circumvented, generally to the disadvantage of live music (NH1).

The community

Live music produces noise, and this was cited as the most difficult and expensive problem in the relationship between live music venues and the local community.

Since the 1970s there has been increasing documentation of the physical and psychological damage inflicted on communities by local noise, including music (see for example Schafer 1977: 181–202, and most recently Cloonan and Johnson 2002). It is a problem which cannot be addressed without reference to the profound cultural changes referred to above (Section 5.3).

The World Health Organisation regards noise pollution as one of the two greatest threats to public health, and it is estimated that in the European Union alone environmental noise is the cause of between 13 and 38 billion euros worth of damage each year (Frayne 2000). The government-funded National Acoustic Laboratories (Australian Hearing) has documented hearing impairment among young Australians of a level usually associated with senility. The inexorable rise in noise levels in contemporary Australian society is a problem that goes beyond music performance, but live music is one of the everyday sites at which noise attenuates such socialising skills as conversation.

The problem is not insoluble and many countries have evolved intelligent acoustic ecology policies. While that is well beyond the scope of this report, the sensitivity of the issue of noise in the relationship between live music and local communities is a major consideration, and becomes more so as the volume of bands increases at the same time as does the density of urban populations. It is significant that the decline of live music is highest in metropolitan pubs, formerly the most significant ‘seeding’ sites for popular music. In this respect there has been a gradual but steady erosion of venue rights, since the 1982 ‘quiet and good order of the neighbourhood’ changes to the NSW *Liquor Act*. Venue managers have borne the primary expenses associated with noise, but it is suggested here that the responsibility is not theirs alone. Musicians themselves should consider the relationship between volume, place and occasion—what is the function of that dimension of music?

It is also a community matter—communities also make noise. Noise becomes a problem not simply because a band is playing, but also because of choices people make about where and how they live. The gentrification problem referred to above impacts not just upon entertainment venues but upon the existing community, and is more of a disruption of that community than an established music venue. High-density residential development, particularly in the inner city, increases strain on existing infrastructure (parking, pollution: SH2), intrudes visually, disturbs the social ecology, and tends to drive up the cost of living.

Yet it is frequently the ‘intruder’ who demands the rules be changed, and who has leverage because of increased council revenue (rates, land values, etc.). In attempting to resolve this tension, it is by no means a given that the gentrification process should be privileged at the expense (literally) of the pre-existing local culture, and this extends to its relationship with existing music venues. This has relevance to local council attitudes to development applications. It is anomalous that a pre-existing music venue be required to conduct extensive sound-proofing renovations because a new adjacent townhouse development was not required to incorporate its own acoustic insulation (SC3).

As with other factors reviewed in these concluding remarks, in proposing some recommendations we will suggest that music is a community resource and therefore a community responsibility.

6. Recommendations

6.1 Consultation

6.1.1 Recognising that music is a community resource, closer liaison is required between venues, musicians, community groups, local councils and media, and licensing authorities. To this end, a working committee is proposed of relevant government bodies and industry stakeholders to explore more coherent policy mechanisms involving venue regulations (planning, noise issues, policing, building codes, council relationships). The committee would also be required to liaise with other music industry sectors, such as ARIA and the Musicians' Union. Its deliberations should include an inquiry into music booking agency practice, with a view to setting up effective regulatory mechanisms.

6.2 Facilitation

6.2.1 The expansion of arts funding policies to build programs for the fostering of live popular music performance venues, with emphasis on original material and on building performance environments and infrastructures.

6.2.2 Financial encouragements to the fostering of live music by venue managements, such as tax incentives, particularly to give competitive leverage to venues who regard live music as a primary activity.

6.2.3 Investigation of the implications of musicians as self-employed, in respect to taxation and insurance responsibilities / expenses.

6.2.4 The legislative structure of the NSW Casino Community Benefit Fund amended to devote a portion of the fund to live music infrastructure.

6.2.5 Investigation of factors prohibiting greater provision of all-age entertainment, and discouraging youth from attending club performances. Also the potential for council-venue partnerships in this regard.

6.3 Rationalisation

6.3.1 'Existing rights' legislation; that is, the strengthening of 'existing [non-conforming] use' rights to be explored where the extent of music activity clearly precedes changing retail and residential environments. In relation to this, more enlightened planning of proximate residential development, recognising that, as with music sites, there is an obligation upon development to adapt to the existing local culture.

6.3.2 Further, the 'public benefit' criteria employed in assessing new premises or the extension of existing premises acknowledge the provision of live music as an important criterion of community benefit. Investigation of amendment of the noise complaints process, to enforce compulsory mediation between complainant and venue in the first instance. There is also a need to formalise appeal procedures.

6.3.3 Recognition of a venue's regulatory history in the consideration of complaints against the premises; a venue with long-standing credentials in working effectively with council, residents and police should be a factor in such considerations.

6.3.4 Investigation of the means to rationalise and simplify the Place of Public Entertainment licensing process, as for example, clarifying the definition of 'live entertainment' to make clear distinctions between 'background' and recorded music settings. Examination of interstate public entertainment licensing structures as possible models.

6.3.5 Investigation of the potential to identify 'popular music clusters' of use, where it is evident that live venues exist within similar cultural activity. This recognises the important contribution of live music as an industry to urban leisure contexts (Surry Hills, Newtown, George Street, The Rocks, all in Sydney; Beaumont Street, Newcastle).

6.4 Education

6.4.1 Marketing and promotional strategies highlighting venues which provide new, original writers and musicians and their role in wider industry growth.

6.4.2 An information campaign that outlines contemporary noise regulations and the obligations of venues in respect to this issue, circulated to residents, musicians and road crews.

6.4.3 The examination of suitable regulatory measures that make clear the responsibilities of patrons' behaviour in instances where problems have occurred outside the agreed zone of venue security and responsibility.

6.4.4 Education programs regarding local music cultures and their social role, as part of 'community awareness' components of school curricula.

7. Appendices

7.1 Survey questionnaire

<table><tr><td>

Live Music Venues Survey

A survey of the commercial & regulatory environments of live music venues

</td></tr></table>

Conducted in conjunction with the

Australian Hotels Association NSW and ClubsNSW

PLEASE ENTER YOUR NAME AND ADDRESS DETAILS BELOW:

Proprietor / Manager: ....

Venue Name: ....

Address: ....

....Postcode....................

Tel: .... Fax: ....

PLEASE FOLD YOUR COMPLETED SURVEY, ENCLOSE IT IN THE ENVELOPE PROVIDED AND RETURN TO:

Dr Shane Homan

PO Box 24
WESTGATE NSW 2048

(Completion time approx. 15 minutes)

SURVEY CONTACT NUMBER:

Dr Shane Homan - Ph: (02) 4921 6787 or e-mail:Shane.Homan@newcastle.edu.au

<table><tr><td>

All information collected in this survey will remain totally confidential and will be used for the sole purpose of the live music venues inquiry.

</td></tr></table>

Survey contents

Survey Form Sections:

1. Venue / establishment details

1.1 What **type of establishment** are you currently managing?

- *The establishment may incorporate one or more of the following:*

Type of establishment	*Tick where appropriate*
Hotel	o
Registered club	o
Registered bar	o
Restaurant	o
Concert venue	o
Night club / bar	o
Other type of venue - *please specify:* ………………………………………………………… …………………………………………………………	

1.2 In what **month and year** did you first begin managing the establishment?

Month	**Year**

1.3 If applicable, indicate the **type of liquor licence** that the establishment holds? For example Hotelier's Licence, On-Licence (Restaurant), Nightclub Licence etc.

………………………………………………………..	
Not applicable	o

1.4 What is the **maximum number of patrons** that your establishment is permitted to accommodate at any one time?

Total capacity permitted	

1.5 How many **employees** does your establishment currently employ?

No. of employees	

1.6 Record the number of **males** and **female employees** working in the establishment.

Employee category	Male employees	Female employees
Full-time		
Part-time		
Casual		
Total no. employees		

1.7 What modes of **transport** and **transport facilities** do patrons most **commonly** use to gain access to your establishment?

Transport / transport facilities	*Tick boxes where appropriate*
Walking	o
Bus	o
Train	o
Car	o
Car park provided by establishment	o
Other types of transport / transport facilities - *please specify:*	

2. Kinds of entertainment

2.1 *W*hat **kinds of entertainment** does your establishment currently provide?

- *The establishment may feature one or more of the following*:

Kinds of entertainment	*Tick where appropriate*
Jukebox	o

Karaoke	o
Bands	o
Disco	o
Comedy	o
Trivia	o
Adult entertainment	o
Other type of entertainment - *please specify:*	

2.2 Does your establishment contain poker machines?

Yes	o
No	o

- ***If 'Yes' go to Q 2.3 below***
- ***If 'No' go to Section 3***

2.3 How many **poker machines** does your establishment currently contain?

No. poker machines	

2.4 Does the poker machine area **share space** with other entertainment uses?

Yes	o
No	o

2.5 Have gaming areas **previously been used** as live entertainment areas?

Yes	o

No	o

3. Live band details

- ***If the establishment <u>does</u> feature bands, proceed to Q 3.1 below***.
- ***If the establishment <u>does not</u> feature bands, proceed to Q 4.1***.

3.1 For **how many years** has your establishment continually operated as a live music venue?

Duration as a live music venue	Years & months
Duration (in years & months)	Yrs Mths

3.2 At what **times of the week** do live bands usually perform in your venue?

Nights featuring live bands	*Tick where appropriate*	
	Day-time	*Night-time*
Monday	o	o
Tuesday	o	o
Wednesday	o	o
Thursday	o	o
Friday	o	o
Saturday	o	o
Sunday	o	o

3.3 What **styles of band** have performed in your establishment?

- *The types of band may include one or more of the following*:

Kinds of band	*Tick where appropriate*
Rock/Blues	o
Jazz	o
Country	o
Heavy Metal	o

Folk	o
Alternative	o
Other - *please specify:*	

3.4 What **kinds of musical content** have the bands included in their performances?

- The band content may include one or more of the following:

Kinds of content	*Tick where appropriate*
Original compositions	o
Covers	o
Tribute / Concept	o
Other - *please specify:*	

3.5 What **percentage** of the establishment's **income** is *directly* derived from live music? For example, from door charges.

Percentage of income	*Tick one box only*
Up to 10%	o
11 to 15%	o
16 to 20%	o
21 to 25%	o
More than 25%	o
No direct income from door or entry charges	o

3.6 What **percentage** of the establishment's **income** is *indirectly* derived from live music? For example, from liquor & drink sales.

Percentage of income	*Tick one box only*
Up to 10%	O
11 to 15%	O
16 to 20%	O
21 to 25%	O
More than 25%	O

3.7 Apart from wages, what **other forms of payment** do performers regularly receive?

Non-wage payments	*Tick where appropriate*
Free drinks	O
Free meals	O
Free accommodation	O
Other - *please specify:*	

4. Profile of live music patrons & entertainment categories

4.1 Record the **main age categories** of patrons attending live music performances in percentage terms (*approximately*):

Age category	**Percentage of patrons**
Between 18 & 24 years	
Between 25 & 40 years	
Between 41 & 54 years	
Mainly 55 years & over	
Even mix of ages	

TOTAL	

4.2 Are you aware of the technical **assistance** available from the Department of Gaming and Racing in providing suitable licensing arrangements for all age entertainment?

Yes	o
No	o

4.3 Do you provide entertainment for those under **18 years of age**?

Yes	o
No	o

- ***If 'Yes' go to Q. 4.5***
- ***If 'No' go to Q. 4.4***

4.4 List the main reasons for <u>**not**</u> providing **all age entertainment**.

Main reasons for not offering all age entertainment	*Tick where appropriate*
1 'Not commercially viable.'	o
2 'Regulations too difficult to comply with.'	o
3 'Policing behaviour too difficult.'	o
Other - *please specify:*	

4.5 Have the **forms of entertainment**, listed in Question **2.1** previously, changed in the last five years?

Yes	o
No	o

- ***If 'Yes' go to Q. 4.6***
- ***If 'No' go to Q. 4.7***

4.6 Record the previous category of entertainment:

....

4.7 Record the current category of entertainment:

....

5. Booking arrangements and publicity

5.1 Do you employ a **booking agency** or **venue consultant** to book your entertainment?

Yes	o
No	o

- ***If 'Yes' go to Q. 5.3***
- ***If 'No' go to Q. 5.2***

5.2 What are the **main reasons** for **not using** a booking agency or venue consultant?

Main reasons for not using a booking agency	*Tick where appropriate*
1 'Agency commissions too high.'	o
2 'Too many inappropriate acts provided.'	o
Other - *please specify:*	

5.3 Who is the **main venue representative** dealing with performers?

Main venue representative	*Tick where appropriate*

Venue booker	o
Venue manager	o
Member of bar staff	o
Other - *please specify:*	

5.4 Do representatives of the venue **liaise** with musicians with respect to entertainment provision eg. publicity, promotion?

Yes	o
No	o

5.5 Who is responsible for **entertainment publicity**?

Person responsible for publicity	*Tick where appropriate*
Bands	o
Venue management	o
Both bands & venue management	o

5.6 What **forms of publicity** do you use when promoting live entertainment?

Forms of publicity	*Tick where appropriate*
Print media	o
Signage (venue ads, posters etc.)	o
Radio	o
Mail-outs	o
Internet	o

Other - *please specify:* ....

6. Entertainment licence assessment

6.1 Do you think the existing process of **obtaining an entertainment licence** is **satisfactory**?

Yes	o
No	o

- ***If 'Yes' go to Q. 7.1***
- ***If 'No' go to Q. 6.2***

6.2 What do you think is **unsatisfactory** about the entertainment licence process?

Licence problems	*Tick where appropriate*
1. 'Too much red tape.'	o
2. 'Council processing time too long.'	o
3. 'Licence costs too high.'	o
4. 'Licence conditions eg. noise regulations, too harsh.'	o
5. 'Enforcement of regulations varies too much between different councils.'	o

Other - *please specify:*
....
....
....
....
....
....
....

7. Live entertainment costs

7.1 Do you believe the **costs** in providing live entertainment have **increased in the past five years**?

Yes	o
No	o

- ***If 'Yes' go to Q. 7.2***
- ***If 'No' go to Q. 7.3***

7.2 What **costs** or **factors** have contributed to making live entertainment less attractive?

Increased costs	*Tick where appropriate*
1. 'Increase in band fees.'	o
2. 'Ancillary staff costs too high.'	o
3. 'Income from other activities eg. gaming, too profitable'	o
4. 'The new tax system (including the GST).'	o
5. 'Complying with entertainment licence regulations has become too costly.'	o
6. 'Live band performances are incompatible with other venue functions.'	o

Other - *please specify:* ....

7.3 In what ways do you **subsidise** live music costs?

Ways of subsidising costs	*Tick where appropriate*
1. 'By providing meals.'	o
2. 'From door charges.'	o
3. 'From higher drink charges.'	o
4. 'Poker machines.'	o
Other activities e.g. Kino, lotteries, raffles - *please specify:*	

8. Expanding live music

8.1 If it were feasible, would you like to either introduce or **increase** the amount of live music?

Yes	o
No	o

- ***If 'Yes' go to Q. 8.3***

- ***If 'No' go to Q. 8.2*** ***<u>(Proceed directly to 'Notes & Feedback' after answering this question.)</u>***

8.2 What are the main factors **preventing** you from introducing or increasing live band performances**?**

Factors preventing live band performances	*Tick where appropriate*
1. 'Lack of public interest.'	O
2. 'Lack proper facilities.'	O
3. 'Inappropriate for clientele.'	O
4. 'Lack of experience in dealing with bands, booking agencies etc.'	O
Other - *please specify:*	

8.3 In your opinion, what are the **most important reasons** for providing live music?

Reasons for providing live music	*Tick where appropriate*
1. 'Live performances deserve to be supported.'	O
2. 'Live music is vital to the economic health of the establishment.'	O
3. 'Patrons simply demand live music.'	O
4. 'Helps make other venue functions more profitable.'	O
Other - *please specify:*	

8.4 What considerations make the **provision of live music difficult**?

Considerations making live music difficult	*Tick where appropriate*
Noise complaints	o
Trading hours	o
Dealing with bands	o
Building / Fire regulations	o
Security requirements	o
Dealing with booking agencies	o
Other - *please specify:*	

8.5 What **groups** are the most significant when dealing with noise complaints?

Most significant groups	*Tick where appropriate*
Newer residents in area	o
Longer term residents in area	o
Local businesses	o
Local Council	o
Other - *please specify:*	

Your Notes and Feedback

Comments on the survey form or qualifications with respect to the information provided by your establishment should be entered below using numbered cross-references.

Evaluation of Survey

Please tell us what you thought about survey form.

e.1 How would you rate the clarity of survey form? (*Tick one*):

Very easy to understand	o
Clear	o
Acceptable	o
Unclear	o
Very difficult to understand	o

e.2 How would you rate the time and effort required to complete this survey form? (*Tick one*):

Very quick and easy to complete	o
Quick and easy	o
Acceptable	o
Demanding	o
Very demanding to complete	o

e.4 Please state your organisation's **contact person** for this survey form:

Name: ....

....

Title: ....

Tel: ....

Fax: ....

THANK YOU FOR YOUR SUPPORT AND PARTICIPATION.

7.2 Interview questions

Live Music Venues Survey

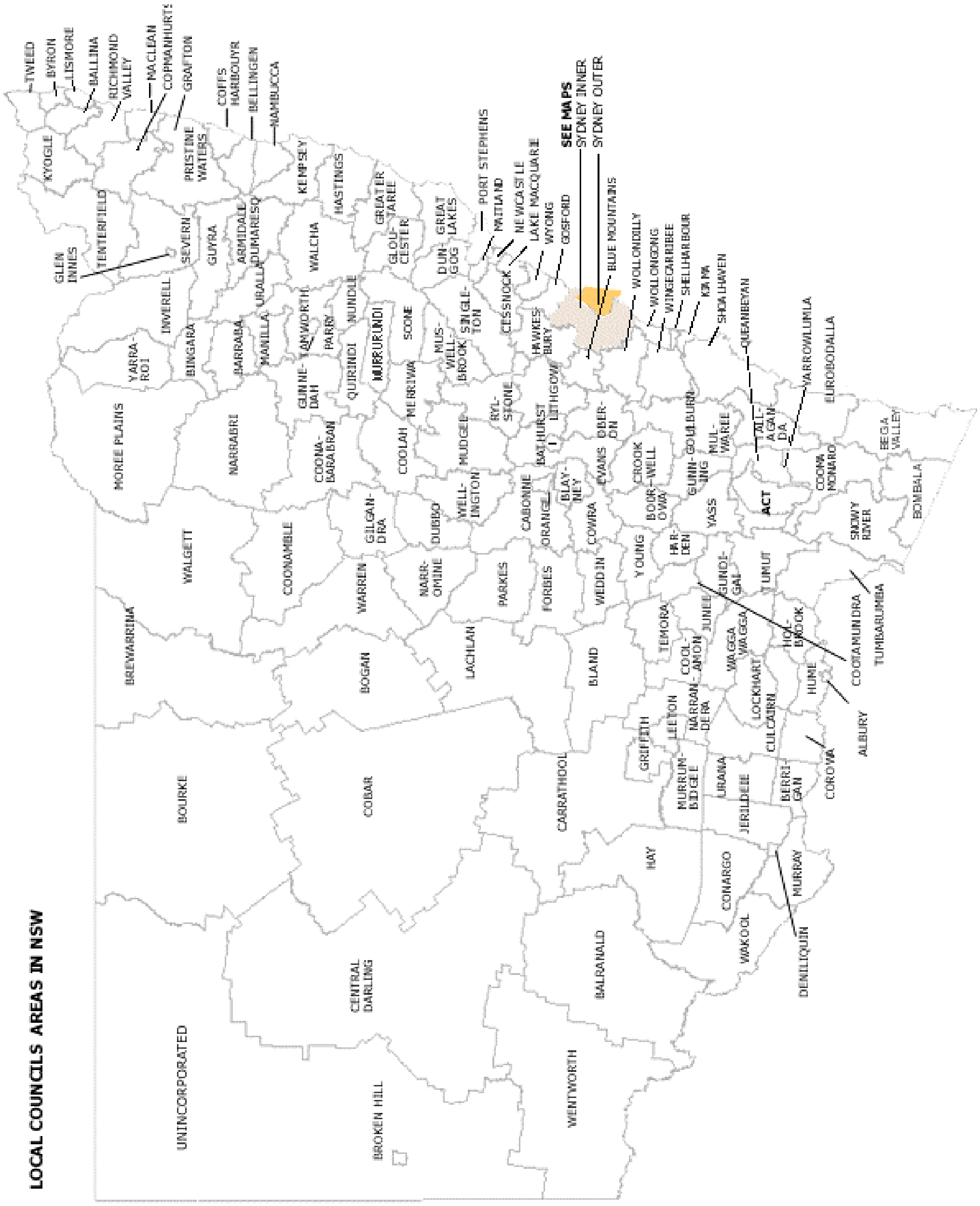
A survey of the commercial & regulatory environments of live music venues

Interview Questions

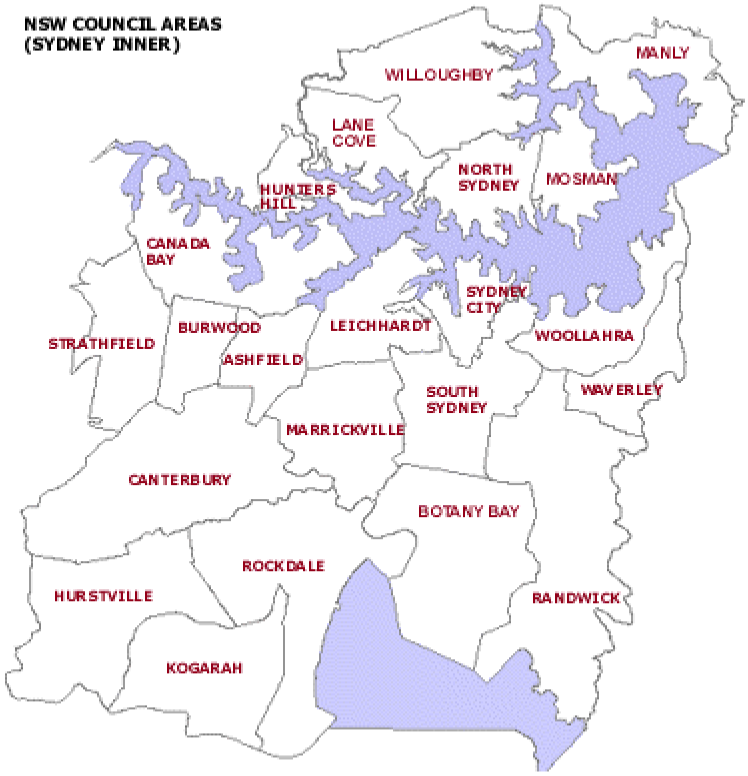
1. How would you describe the **gender and age profiles** of patrons attending your premises?
2. What **kinds of live music/bands** do you regularly feature in the hotel/club?
3. Have **structural adjustments** been made to the premises to accommodate live music? If so, describe these adjustments.
4. How would you describe your **relationship with regulatory authorities** (the local police, council and residents)?
5. Who has the job of **liaising with performers**?
6. How would you describe the **relationship with the performers** you book?
7. How do you **promote/publicise** live entertainment?
8. From the point of view of profits, would you like to **expand** gaming or entertainment facilities or both?
9. If feasible, would you like to see the amount of **live music increased**?
10. What are the **economic benefits** of live music to the venue and how might these economic benefits be increased?
11. What regulatory or other **changes** would need to occur in order for **more live music** to be possible in your establishment?
12. How do you think your **patrons** benefit from live music?
13. What do you think are the **major social benefits** of live music?
14. What do you consider to be the **main strengths of your establishment** compared with other venues in the local area?
15. Apart from what you have mentioned so far, what additional issues or processes - *commercial, regulatory, political or social etc* - have a **significant impact** on the provision of live entertainment?
16. What **changes** more generally - *commercial, regulatory, political or social etc* - do you think are necessary in order to increase the availability of musical venues in hotels/clubs.

7.3 Maps

7.3.1 Local council areas in NSW



7.3.2 NSW council areas: Sydney Inner and Sydney Outer



8. Bibliography

8.1 Policy documents, reports and studies

Apart from reports from, for example, the Australia Council and the Australian Bureau of Statistics on the culture industries, the following have particular relevance to attempts to assess the place of live music in society. The listing includes those sources referred to in the body of this report.

Ausmusic (1993) *Stayin' alive* NSW. September–December 1993.

Australian Bureau of Statistics (1996) *Clubs, pubs, taverns and bars: Australia 1994–95*. Commonwealth of Australia.

Australia Council (1998) *The world is your audience: Case studies in audience development and cultural diversity*. Australia Council, Sydney.

Australia Council (1999) *Selling the performing arts*. Australia Council, Sydney.

Australian Hotels Association (1988) *A history of the Australian Hotels Association in New South Wales 1873–1988*

Cloonan, Martin, and Bruce Johnson (2002) 'Killing me softly with his song: an initial investigation into the use of popular music as a tool of oppression', *Popular Music*, 21 / 1, pp27–39.

Contemporary Music Round Table Meeting. 30.11.2001, Adelaide, SA.

Copyright Amendment Bill (1998) Senate Legal and Constitutional Legislation Committee, April 1998, p3.

Cross, Warren (1991) 'An end to ARIA's position of power in the music industry', *Video & Music Business*. 16.09.91, pp5–7.

Fiske, John, Bob Hodge, Graeme Turner (1987) *Myths of Oz: Reading Australian popular culture*. Allen & Unwin, Sydney.

Flew, T, Ching G, Stafford, A, Tacchi, J (2001) *Music industry development and Brisbane's future as a creative city*. Creative Industries and Research Centre, Queensland University of Technology and Brisbane City Council.

Frayne, N. (ed) (2000) *Soundscapes: the journal of acoustic ecology*, 1 / 2 Winter 2000.

Guldberg, Hans (2000) *The arts economy 1968–98: Three decades of growth in Australia*. Australia Council, Sydney.

Homan, Shane (1998) *The Mayor's a square: The cultural and regulatory history of popular music venues in NSW 1957–1997*, unpublished dissertation, School of English, Linguistics and Media, Macquarie University.

Independent Pricing and Regulatory Tribunal (1998) *Enquiry into the impact of gaming*, published on line at <www.ipart.nsw.gov.au>.

Johnson, Bruce (1995) 'The production and consumption of jazz in live performance in Australia', *Jazzchord* (Jun / Jul), pp5-6.

Live Music—*NSW Issues* (undated).

Live Music Task Force (1999) *Opening and operating a live music venue: Some tips for dealing with local councils and state government agencies*. Marrickville Council.

Live Music Working Group (2001) *Live music in South Australia*, prepared for the South Australian Minister for Transport and Urban Planning.

London, Juliet, and Jenny Hearder (1997) *Youth and music in Australia—a review*. Australian Broadcasting Authority, Australia Council, Australian Record Industry Association, Sydney, Monograph 8, Part 1.

Marrickville Council (2000) *Live Music Task Force Progress Report*. 9th May.

Ministry of Arts (2001) *Brackets and Jam*

McClennan, W (1999) *Australian Social Trends 1999*. Australian Bureau of Statistics, cat no 4102.0

NSW Dept of Gaming & Racing. *Annual Report 1998-99, Annual Report 2000-2001, Annual Report 2001-2002.*

NSW Government (2001) *Gaming Machines Bill 2001* (Explanatory Note)

Price Waterhouse (1993) *The Australian music industry: An economic profile*. April / May 1993

Productivity Commission (1999) *Australia's gambling industries: Inquiry report*. 3 vols. Commonwealth of Australia.

Ramsay, Gillian (1998) *Headbanging or dancing? Youth and music in Australia, part 2*. Australian Broadcasting Authority, Australia Council, Australian Record Industry Association, Sydney, Monograph 8, Part 2.

Registered Clubs Association (1991) *Submission to the inquiry into the effect of poker machines in a casino on the operation and viability of registered clubs*

Rowse, Tim (1985) *Arguing the arts : the funding of the arts in Australia.* Ringwood, Vic: Penguin.

Saatchi & Saatchi (2000) *Australians and the arts: What do the arts mean to Australians?* Australia Council, Sydney.

Schafer, R. Murray (1977) *The tuning of the world*. Toronto, McClelland and Stewart.

Tonkin, Jane (2002) *Threats to live music NT report*.

Victorian Casino and Gaming Authority (2000) *The impact of the extension of gaming on the tourism, entertainment and leisure industries.*

York Norton, and Dave Laing (2000) *Nice work—if you can get it! A survey of musicians' employment 1978–98*. Musicians' Union UK, London.

8.2. Sample press coverage in chronological order

* Explicit reference to music.

17.2.1999	Vincent Blake, 'The rise of the north', *The Australian*, p14
* 27–28.2.1999	John Ellicott , 'One-armed bandits gun down live music', *The Australian*
17.3.1999	Heather Gilmore, 'Poker machines to take $50m from poor', *Daily Telegraph*
* 18.3.1999	Alister Mcmillan, 'The artful rogers', *Daily Telegraph*, p19
* 3.4.1999	Editorial, 'Out of tune', *Daily Telegraph*, p10
* 3.4.1999	Julietta Jameson, 'Pokies sound off key at jazz club', *Daily Telegraph*
18.4.1999	Alex Mitchell, 'Pokie crackdown', *Sun-Herald*
* 16–22.4.1999	SM [Sacha Molitorisz?], 'Urban somebodies', Metro, *The Sydney Morning Herald*, p5
* 16–22.4.1999	Sacha Molitorisz, 'Rock in a hard place', Metro, *The Sydney Morning Herald*, pp4–5
* 11.5.1999	Unattributed. 'Ralph report rorts artists', *City Hub*, p7
* 16.8.1999	Bruce Johnson, 'Music loses, gaming wins', *Daily Telegraph*, p14
* 17.8.1999	Stuart Davis, 'Pokies' effects', Letters to the Editor, *The Sydney Morning Herald*
* 23.8.1999	Noula Tsavdaridis, 'Pokies killing sound of music', *Daily Telegraph*
28.8.1999	David Humphries and Linda Doherty, 'Bet your life', *The Sydney Morning Herald*, p41
* 8.10.1999	Noel Mengel, 'Tropical rock', [Brisbane] *The Courier-Mail*, p19
* 2.12.99	Dion Scatena, 'How the Luna Park fire hit Sydney's music scene', *Daily Telegraph*, p11
9.1.2000	Matthew Horan, 'Publicans in pokies jam scam', *Sunday Telegraph*
10.1.2000	Mark Robinson, 'Gambling curbs at risk', *Sydney Morning Herald*, p1.
10.1.2000	Philip Cornford, 'Desperate gamblers swell state's coffers', *The Sydney Morning Herald*, p4.
10.1.2000	Mark Robinson, 'Profits soar as hotels rush to install ever more pokies', *The Sydney Morning Herald*, p4.
4.3.2000	Malcolm Knox, 'Bet your life', *The Sydney Morning Herald*, pp4041
4.3.2000	Malcolm Knox, 'Lucky valley', *The Sydney Morning Herald*, p41
12.3.2000	Frank Walker, 'This pokie earns eight times as much as the woman playing it', *Sun Herald*, p25
29.3.2000	David Humphries, 'Clubs cry poor as Carr halts pokie growth', *The Sydney Morning Herald*, p3
1.4.2000	Tony Stephens, 'Their number's up', *The Sydney Morning Herald*, p45
2.4.2000	Alex Mitchell, 'Why The Parrot loves the pokies', *Sun-Herald*, p61
13.4.2000	Sam Strutt, 'QLD moves to freeze pokie numbers', *The Australian Financial Review*, p4
***** 27.4.2000	Kelly Burke, 'Groove move for classical concerts', *The Sydney Morning Herald*, p15
28.4.2000	Linda Doherty and Matt Wade, 'Casino watchdog's role stripped back', *The Sydney Morning Herald*, p5
28.4.2000	Richard Basham, 'Country clubs for high-rolling crooks? You can bet on it', *The Sydney Morning Herald*
7.5.2000	Alex Mitchell, 'Premier acts: Brakes put on pokies', *Sun-Herald*, pp1,6
7.5.2000	Frank Walker, 'Casino's elite bet millions, but lived in squats'. *Sun-Herald*, p6
15.5.2000	Geesche Jacobsen, 'Gambling lessons backed', *The Sydney Morning Herald,* p6
* 22.5.2000	Raymond Gill, 'Art in a cask is everyman's tipple', *The Sydney Morning Herald,* p15
24.5.2000	Damien Murphy, 'More to come from gambling on pokies', *The Sydney Morning Herald*
30.5.2000	Matt Coleman, 'Musicians blame pokies for lack of venues', *PM* (ABC radio)
* 3.6.2000	Sophie Morris, 'Power of one can stop the music', *The Weekend Australian*, pp2–3
16.6.2000	Ross Gittins, 'Place your bets, everyone else is', *The Sydney Morning Herald*, p15
* 23.7.2000	Christine Sams, 'Club crazy ... or pub happy?', *Sun-Herald*, pp6–7
1.8.2000	Sarah Longhurst, 'A comment, to load or not to load?', *Drum Media*
September 2000	Nicola Lipman, 'Blowing up the pokies', *Blitz*, pp6–7
20.9.2000	Tim Costello, 'Winning a bumper payout of social disaster', *The Sydney Morning Herald*
5.11.2000	Mathew Rogers, 'How pokies trap poor', *Sunday Telegraph*, p25

9.11.2000	Royce Millar and Tim Costello, 'Spin doctors dance with great Aussie gambler', *The Sydney Morning Herald*
21.11.2000	Mark Skelsey, 'Powerless: Council couldn't stop pub pokies transfer', *Daily Telegraph*, pp1, 8
27.11.2000	Linda Morris, 'Hotels add 2,000 poker machines after freeze on numbers', *The Sydney Morning Herald*, p3
28.11.2000	Darren Goodsir, 'Force of change', *The Sydney Morning Herald*, p16
9.12.2000	Teresa Ooi, 'Shakeup on cocktail circuit', *The Weekend Australian*, p10
15.12.2000	Les Kennedy, 'Casino patrons desert card tables for pokies', *The Sydney Morning Herald*, p5
27.12.2000	Geesche Jacobsen, 'State pockets $146m windfall in pokies rush', *The Sydney Morning Herald*, p3
28.12.2000	Mark Robinson, 'Push for strict limits if cyber-gambling ban fails', *The Sydney Morning Herald*, p6
29.12.2000	David Humphries, 'Why the wheels fell off a barmaid's livelihood in the tyre trade', *The Sydney Morning Herald*, p16
29.12.2000	Geesche Jacobsen, 'Redfern loses a bank and gains a pokie palace', *The Sydney Morning Herald*, p2
20.1.2001	Geesche Jacobsen, 'Crackdown on illegal pokies: still 1,800 left', *The Sydney Morning Herald*, p7
22.1.2001	Geesche Jacobsen, 'Bigger pokie bets feared if machines altered to reject $5 note', *The Sydney Morning Herald*, p4
6.2.2001	Nadia Jamal, 'Green light for $700m entertainment oasis', *The Sydney Morning Herald*, p3
7.2.2001	Linda Doherty, 'Carr shocks clubs with new freeze on pokies', *The Sydney Morning Herald*, p1
9.2.2001	Mark Skelsey, 'Pokie farce', *Daily Telegraph*, pp1, 4.
9.2.2001	Kelvin Bisset, 'Families can plead for ban on addicts', *Daily Telegraph*, p4
9.2.2001	Editorial, 'Carr pokies policy has a social cost', *Daily Telegraph*, p24
10.2.2001	Matthew Moore, 'Midnight at the oasis', *The Sydney Morning Herald*, p32
11.2.2001	Alex Mitchell, '$3bn losers in the pokie state', *Sun-Herald*, p33
24.2.2001	Adele Horin, 'Bet a life', *The Sydney Morning Herald*, News Review, p31
24.2.2001	Linda Doherty, 'Larkin lifts the stakes in gaming row, *The Sydney Morning Herald*, p14
11.4.2001	Ian Verrender, 'The tide of pokie money that threatens to engulf Joe Tripodi', *The Sydney Morning Herald*, pp1, 11
28-29.4.2001	Andrew Darby and Linda Doherty, 'Pokies raise the stakes as a nation spends up', *The Sydney Morning Herald*, p3
25.5.2001	Steve Gee, 'Dead man's $200,000 pokie debt', *Daily Telegraph,* p3
10.6.2001	Alex Mitchell, 'Easier way to lose money on pokies', *Sun-Herald*, p29
12.6.2001	Robert Wainwright, 'Bush pubs plead hardship over ban on more pokies', *The Sydney Morning Herald*, p8
26.7.2001	Robert Wainwright, 'New laws will let clubs cash in on pokie trade', *The Sydney Morning Herald*, p7
26.7.2001	Robert Wainwright, 'Curbs to fight gambling misery, *The Sydney Morning Herald*, p1
27.7.2001	Geesche Jacobsen, 'Ban on 24 hour betting thrills activists, angers clubs', *The Sydney Morning Herald*, p8
27.7.2001	Brigid Delaney and Geesche Jacobsen, 'Souths cry foul: it's the community who'll suffer', *The Sydney Morning Herald*, p8
27.7.2001	Allison Jackson 'Suicide over $125,000 leads to fine of $5,000', *The Sydney Morning Herald*, p8
27.7.2001	Robert Wainwright, 'Clubs get in on the game as pokies slot into new markets', *The Sydney Morning Herald*, p8
27.7.2001	Robert Wainwright, 'Taking a chance on open slather for permits', *The Sydney Morning Herald*, p8
28–29.7.2001	Robert Wainwright and Peter Gotting, 'Clubs gamble on gaming law compromise', *The Sydney Morning Herald*, p7
1–2.12.2001	Joseph Kerr, 'About-face on new gaming machine laws', *The Sydney Morning Herald*, p6
* 6.4.2002	Freya Petersen, 'Pub rages against the machine with rock set to roll', *The Sydney Morning Herald*, p3
* 13–14.4.2002	Nick Leys, 'Lost Vegas', *The Sydney Morning Herald*, Metropolitan, pp1, 4.
22.4.2002	Geesche Jacobsen, 'Pokies law easy meat for loan sharks', *The Sydney Morning Herald*, p3
June/July 2002	Dick Letts, 'Junking the pokies', *Music Forum* 8/5, p6

There have also been numerous political cartoon comments, as for example by:

23.2.2001, Moir, *The Sydney Morning Herald*, p13

And blocks of Letters to the Editor, as in:

22.2.2001, Four letters under 'Hotel, casino, it doesn't matter—the house wins', *The Sydney Morning Herald*, p15