

LIVE MUSIC AND PERFORMANCE VENUE IMPACTS FROM COVID-19 AUSTRALIA

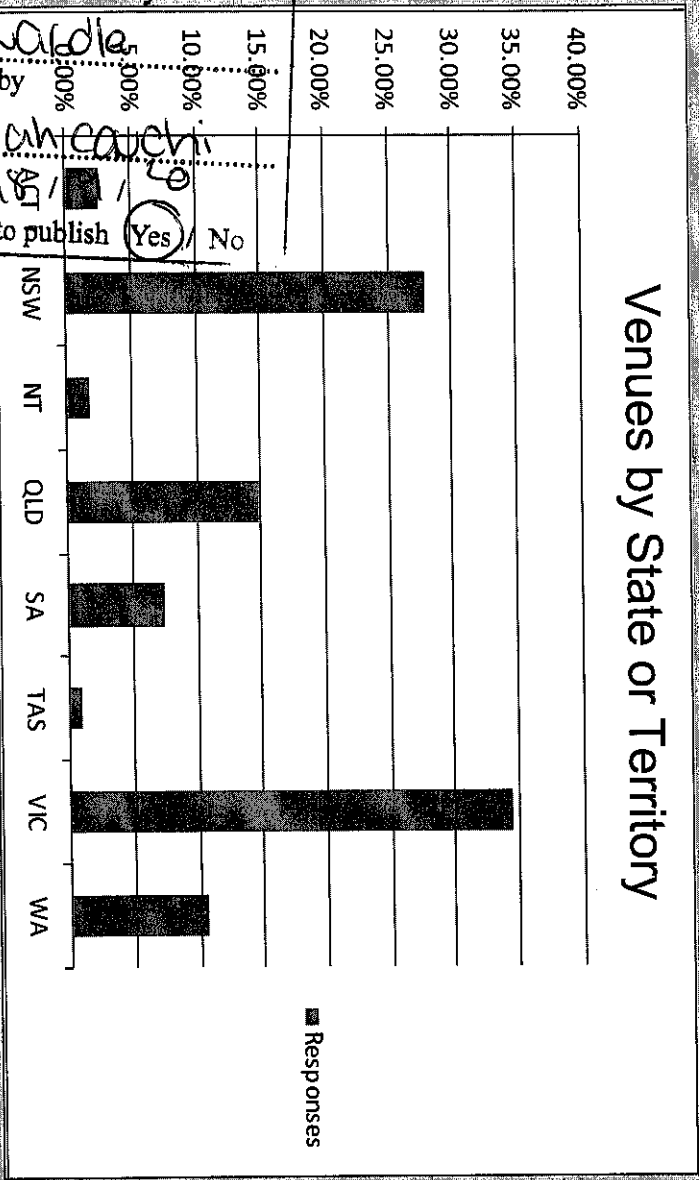
Across April and May 2020 the Live Music Office and the state and territory music industry organisations comprising the Australian Music Industry Network (AMIN) undertook a targeted venues survey to map the immediate and direct negative impacts as a result of the Government's necessary and important response to the COVID-19 crisis.

This survey was to collect non-attributable aggregate data that is now much needed to document the widespread impacts being experienced by venues across Australia, and to also respond to and inform immediate support and future recovery initiative.

Many venues are now facing critical circumstances and need urgent assistance to survive the pandemic.

To date 122 Venues have responded nationally comprising:

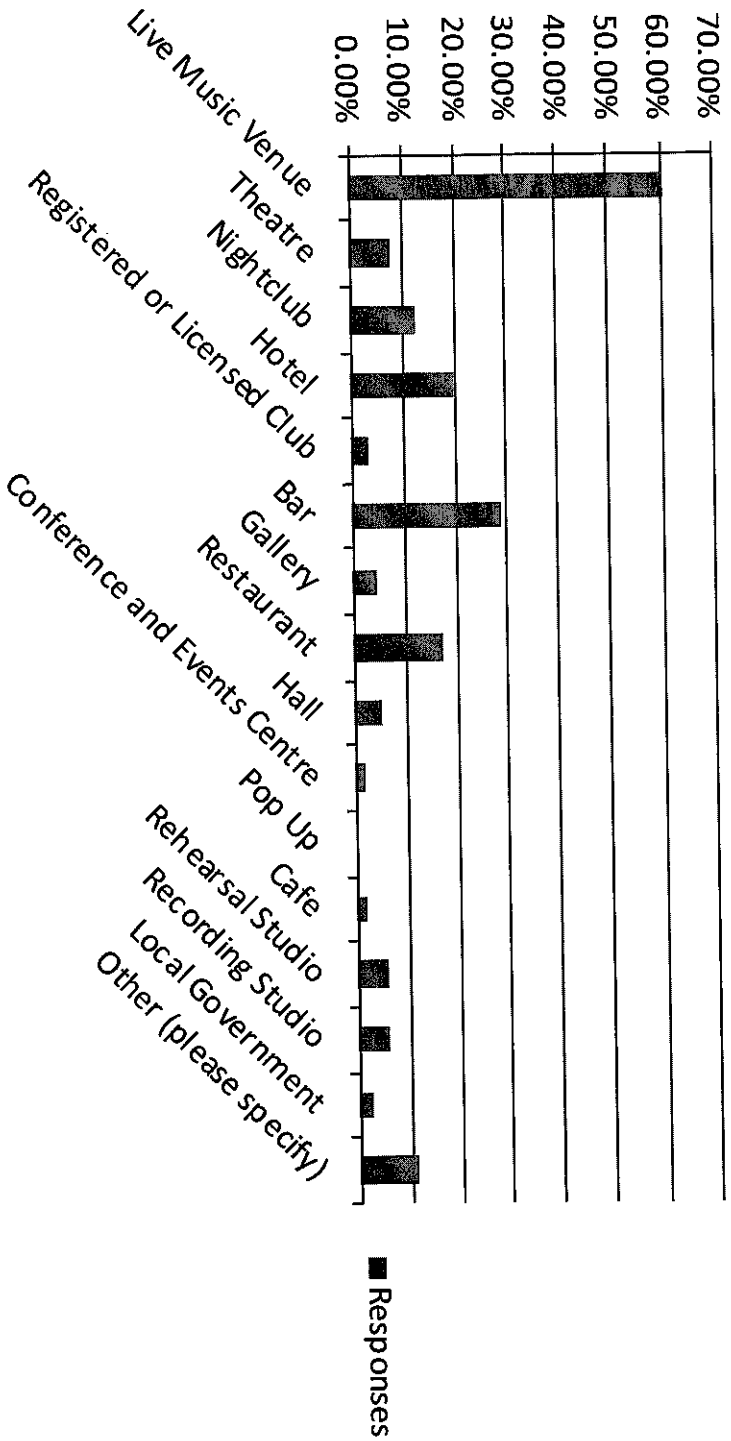
Venues by State or Territory



State / Territory	% Responses	Venues
ACT	2.46%	3
NSW	27.87%	34
NT	1.64%	2
QLD	14.75%	18
SA	7.38%	9
TAS	0.82%	1
VIC	34.43%	42
WA	10.66%	13
Total		122

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What type of venue are you?



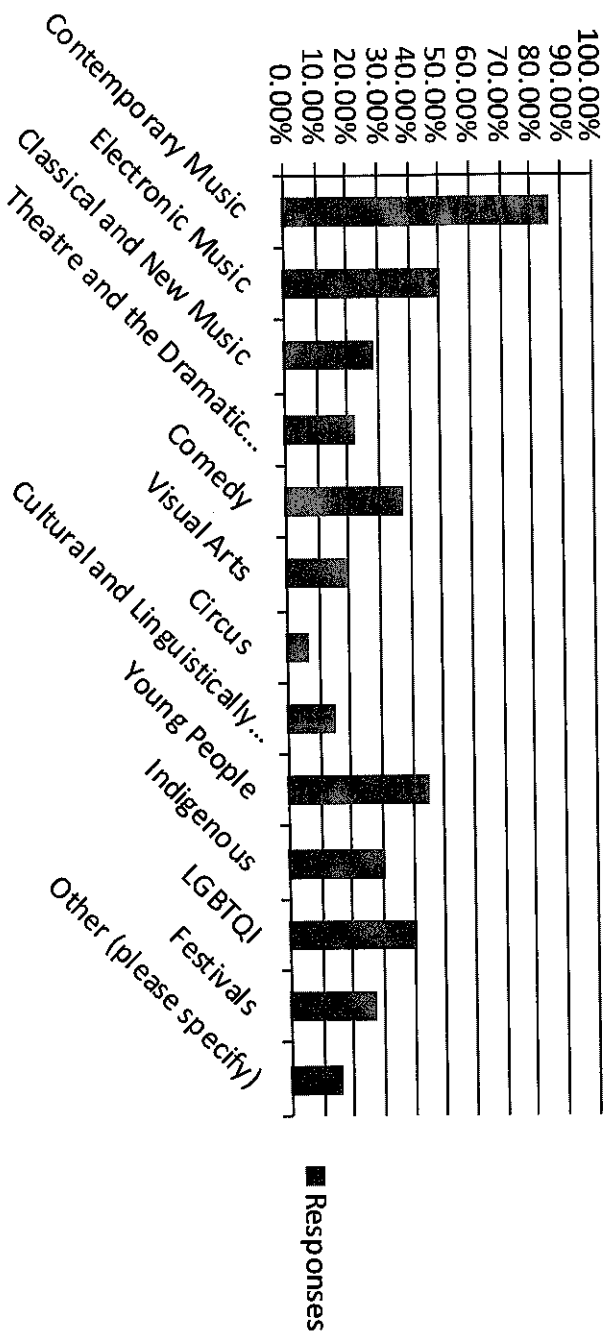
Venue Type	Percentage	Count
Live Music Venue	60.66%	74
Theatre	7.38%	9
Nightclub	12.30%	15
Hotel	19.67%	24
Registered or Licensed Club	3.28%	4
Bar	28.69%	35
Gallery	4.10%	5
Restaurant	17.21%	21
Hall	4.92%	6
Conference and Events Centre	1.64%	2
Pop Up	0.00%	0
Cafe	1.64%	2
Rehearsal Studio	5.74%	7
Recording Studio	5.74%	7
Local Government	2.46%	3
Other	10.66%	13
		122

"Currently, I have stood down all employees. The lack of trade and the ongoing costs of leases, insurances and utilities will deplete what we have saved. The uncertainty in the town has people scared to a point, where they may not facilitate the Club if we continue some form of trading".

"We are closed. We have another venue in the mountains that only opens in winter - that is looking unlikely to open meaning the loss of a years income plus the flow on effects to staff, musicians etc"

"It has stopped us completely. Our business is non existent at the moment"

What types of entertainment do you present or host?



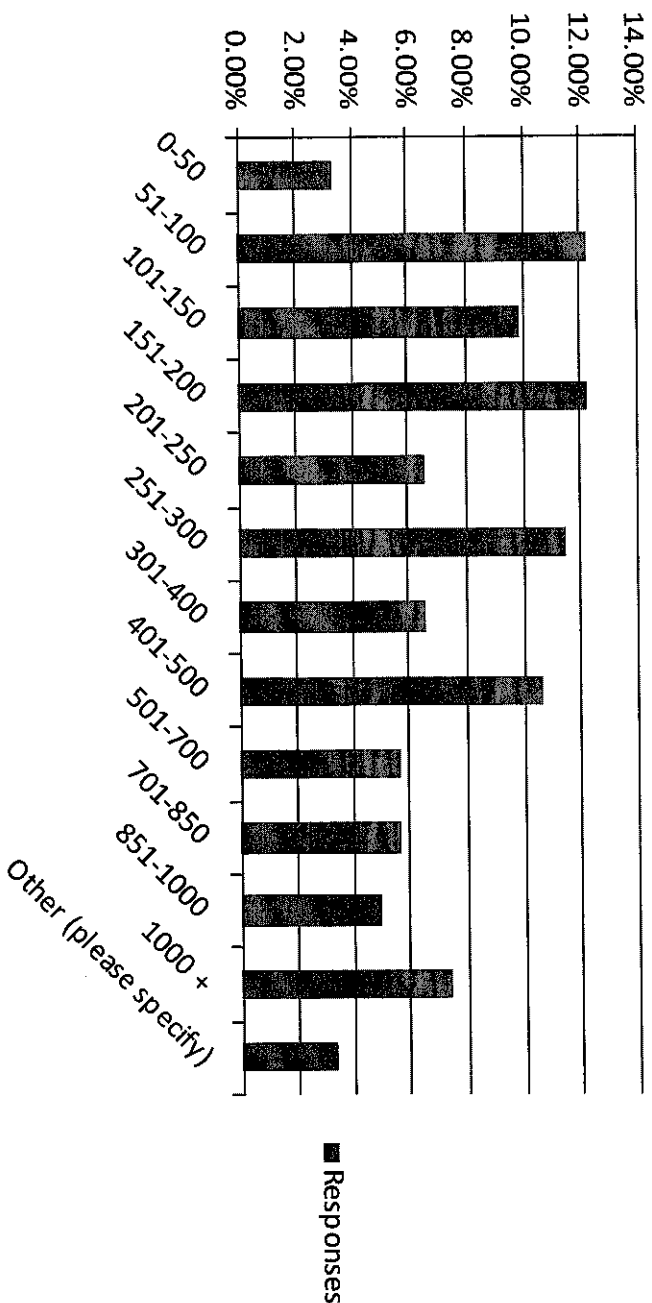
Contemporary Music	86.07%	105
Electronic Music	50.82%	62
Classical and New Music	28.69%	35
Theatre and the Dramatic Arts	22.13%	27
Comedy	37.70%	46
Visual Arts	18.85%	23
Circus	7.38%	9
Cultural and Linguistically Diverse (CALD)	14.75%	18
Young People	45.08%	55
Indigenous	30.33%	37
LGBTQI	40.16%	49
Festivals	27.05%	33
Other (please specify)	16.39%	20
		122

“Total shutdown for existing businesses including newly launched businesses and businesses in the development stage is catastrophic.”

“We have lost approx 90% in Gross Profit while retaining the majority of our overheads.”

“The impact has been immediate. We literally have gone from a great income to no income at all and still having to pay monthly outgoings. Our biggest concern is surviving this shutdown period. Our next concern is how heavy the restrictions will be once we can reopen, if it's a drip feed as to how many people we can have in the venue, we'll only break even until we can trade again at full capacity.”

What is your venues maximum capacity?



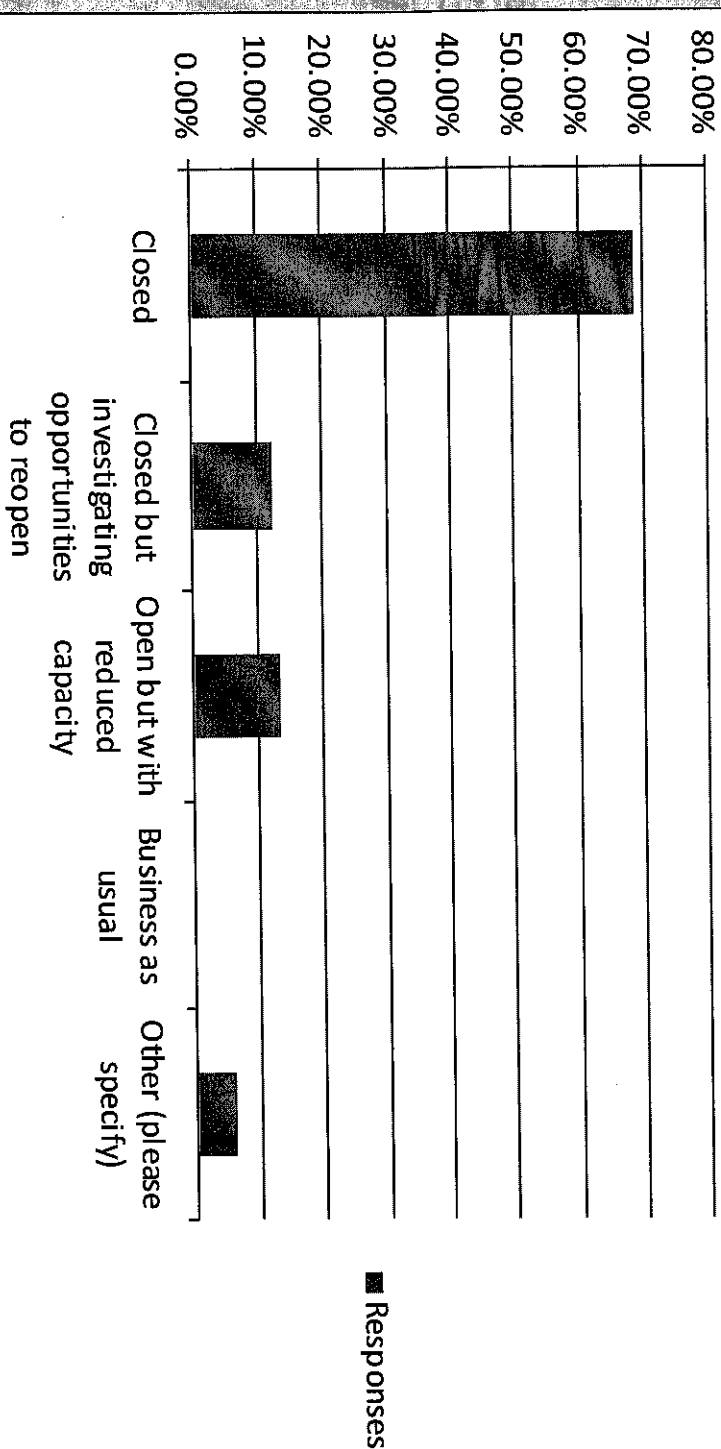
0-50	3.28%	4
51-100	12.30%	15
101-150	9.84%	12
151-200	12.30%	15
201-250	6.56%	8
251-300	11.48%	14
301-400	6.56%	8
401-500	10.66%	13
501-700	5.74%	7
701-850	5.74%	7
851-1000	4.92%	6
1000	7.38%	9
Other	3.28%	4
		122

"We have 7 rehearsal rooms, a recording studio, 2 live spaces just sitting there collecting dust. In January our calendar was booked solid with all original bands/artists including Tones and I, Eddy Current Suppression Ring, The Screaming Jets, The Belair Lip Bombs + lots more. All recording and rehearsal bookings have been cancelled. PA hire jobs + lots more"

"Completely shut us down with no income coming in whatsoever and no clear idea of when we can open again and what that would like in terms of capacity and capability of being able to run as we have"

"Obviously a forced closure. No date to re-open, a lack of future security, when will people feel confident to buy tickets or go to events again..... no cash flow equals no money to pay any outstanding bills"

What is your current trading status?



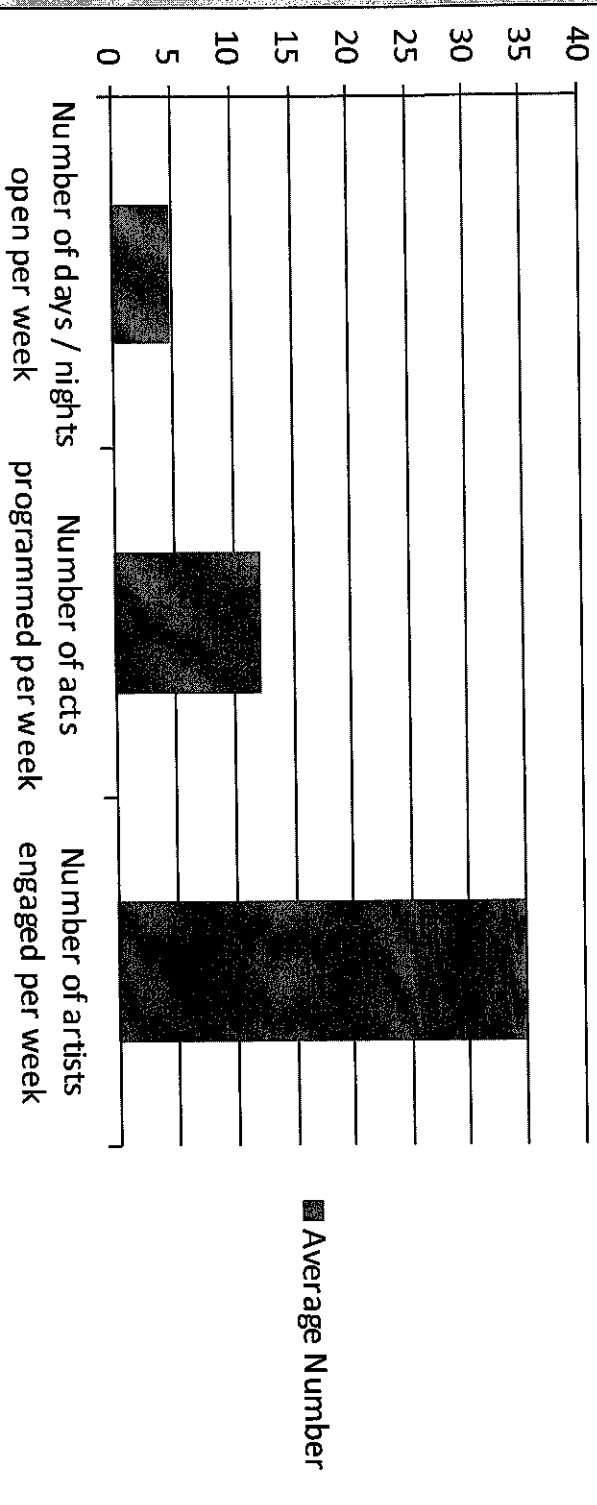
Closed	68.85%	84
Closed but investigating opportunities to reopen	12.30%	15
Open but with reduced capacity	13.11%	16
Business as usual	0.00%	0
Other (please specify)	5.74%	7
		122

"Generally we record bands so 4-10 people working together, and there are 3 operations under one roof so at times up to 25 people working within our premises. Impossible under social distancing guidelines"

"The loss of work for so many artists and in turn a vital platform that extends to technical and organisations in position that are vital to the fabric of the industry. The community strengthening that come with having a venue is vital to people's well being"

"We are unable to safely hold concerts for large numbers of people, or safely be able to sell drinks. It is financially unfeasible to hold concerts in our venue with the small amount of audience members that would meet social distancing measures, as performers make their income from ticket sales and we make our money from alcohol sales to concert attendees"

Before the COVID-19 outbreak, how much live entertainment did your venue present?



	Average Number	Total Number	Responses	
Number of days / nights open per week	4.915254237	580	99.16%	118
Number of acts programmed per week	12.3963964	1376	93.28%	111
Number of artists engaged per week	34.79279279	3862	93.28%	111
			Answered	119

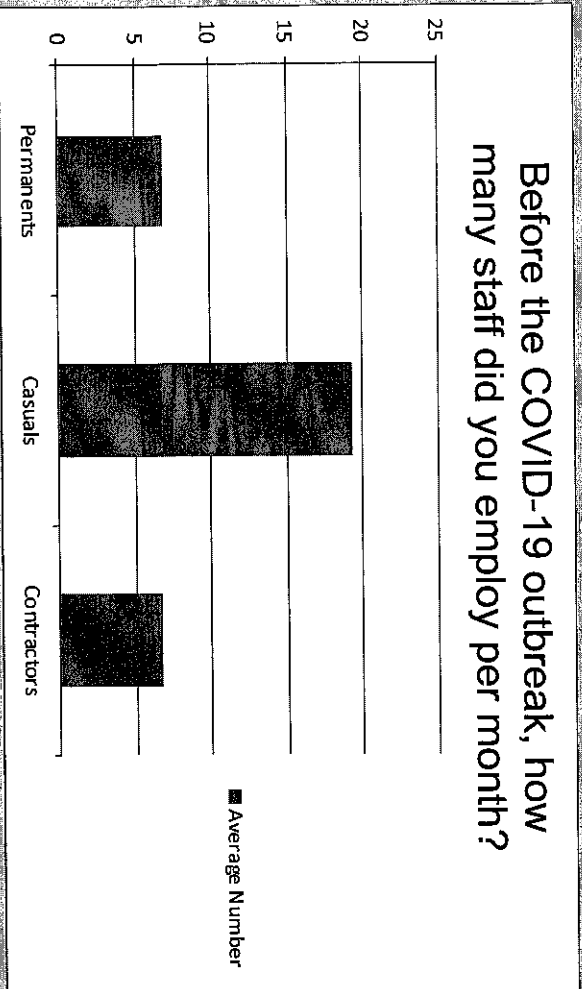
"We are a not for profit and run on a shoe string budget - without clients there is no income with no income there would be no business - of staff were not retained they would move on, which means we'd need to re hire re train and lose business and money in doing so"

"We have no trade at all, we've completely shut down with no choice"

"We had to cease trading as a licensed venue and all volunteers have been turned away until we trade again. This has impacted work-for-the-dole volunteers as well. No income is being generated but we still have bills for electricity, phone, rent & our bank balance is not looking healthy. The community impact has been huge as we are also a great venue for functions, so income from these has been lost. We provide support for members of our community at the venue & this too has ceased"

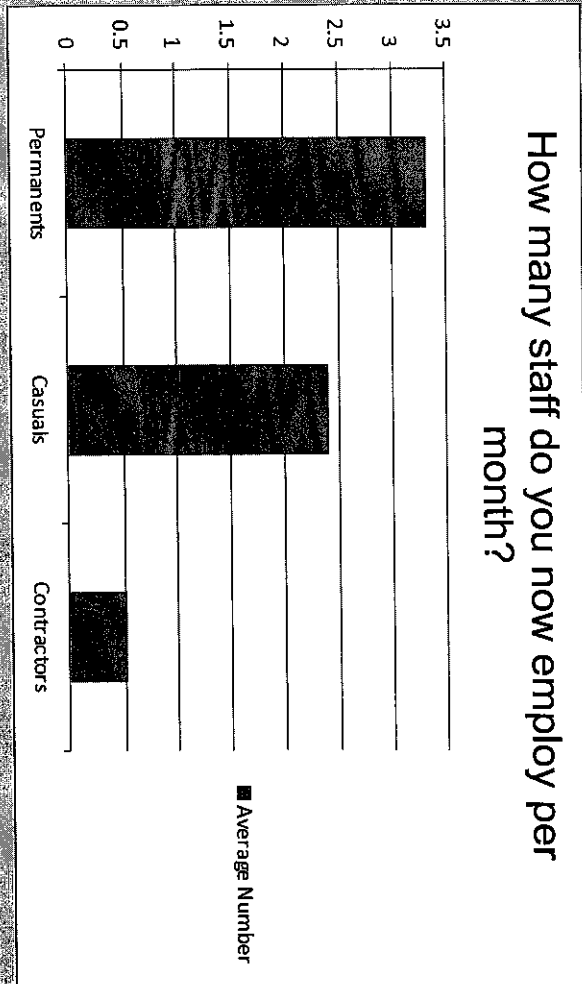
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Before the COVID-19 outbreak, how many staff did you employ per month?



Permanents	7	756	91.53%	108
Casuals	19,29464286	2161	94.92%	112
Contractors	6,891304348	634	77.97%	92
				118

How many staff do you now employ per month?



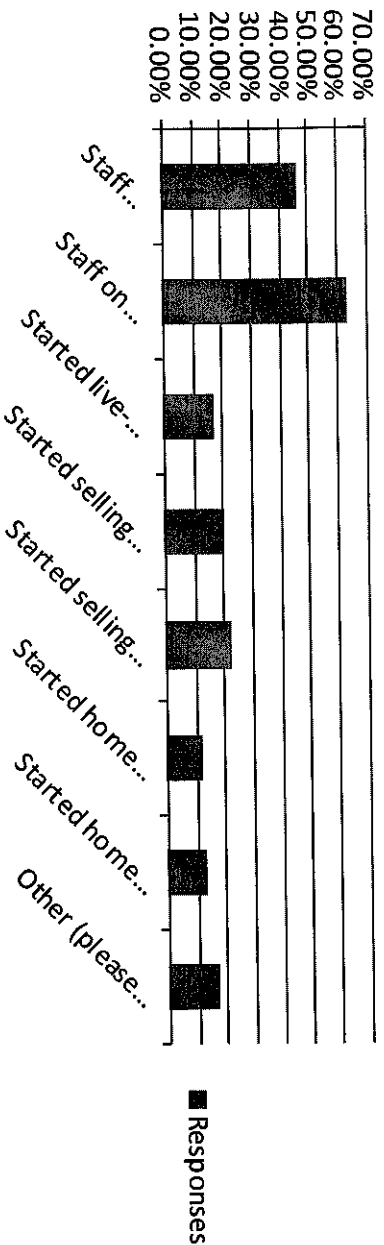
Permanents	3,318181818	365	91.67%	110
Casuals	2,41	241	83.33%	100
Contractors	0,525	42	66.67%	80
				120

“We now have 8 casual staff stood down who regularly worked with our theatre. The longer the pandemic goes on and theatre can't reopen the more likely permanent staff will be stood down. The difficulty of reopening the venue and selling tickets again particularly if we go into a recession. Will people have the money to buy tickets. Having no definitive reopening date makes it almost impossible to contract artists and performers and work out a future work plan and resources required for the business. You can't make announcements about reopening and you can't sell tickets to future shows.”

“Completely crippled. Total zero business. Stood down 40 casuals, guards and techs. Most of these people have nothing. The psychological cost is immense on all people involved in the industry. The uncertainty makes for inability to even think.”

“We used to be a live music pub. Now we are a takeaway shop.”

Have you made any of the below changes to your business since Thursday 12 March as restrictions on public gatherings were introduced? (COVID-19 related only). Choose 1 or more.



Staff redundancies	46.43%	52
Staff on paid/unpaid leave	63.39%	71
Started live-streaming performances	16.96%	19
Started selling takeaway food	19.64%	22
Started selling takeaway alcohol	22.32%	25
Started home delivery food alcohol	11.61%	13
Started home delivery alcohol	13.39%	15
Other (please specify)	16.96%	19
Answered		112
Skipped		10

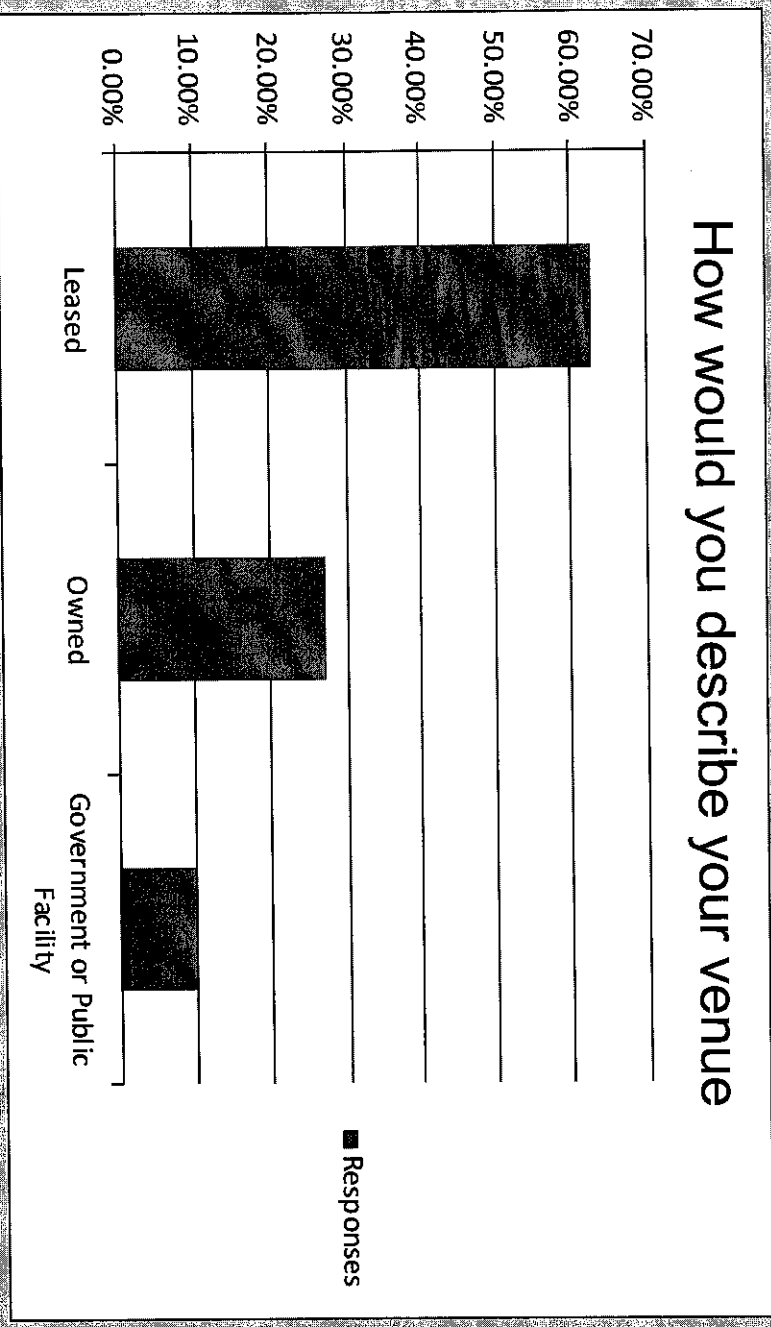
"We need to operate at minimum 50% capacity to be financially viable. We are presented with many hurdles if social distancing is enforced, as we typically operate with people shoulder to shoulder"

"It has shut us down, and the journey out of shut down will be long and expensive. The risk is that reduced turnover from lack of touring artists gigs will bleed our cash reserves dry"

"We had just started our own programming last year and starting to grow awareness of our venue and a positive brand. This is important to ensure council can continue to fund local live and original music. The cancellation of significant hires events as well as having to cancel/postpone/and shift to digital some of our own events has affected our ability to build on the momentum we had started to create"

"We are closed. We have had to cancel \$1.6M of business over the next 90 days"

How would you describe your venue



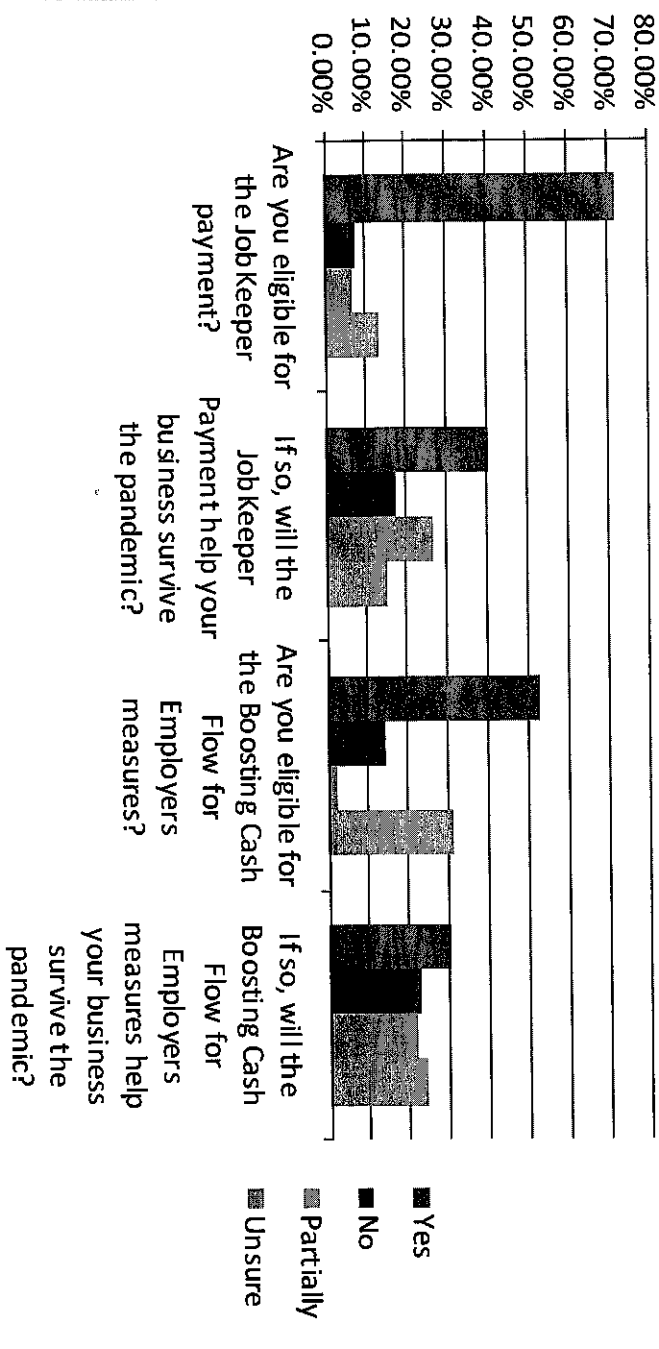
Leased	62.81%	76
Owned	27.27%	33
Government or Public Facility	9.92%	12
Answered		121

"2 festivals of the 3 I program have been cancelled for 2020. The impact to the regional economies is substantial - maybe a couple of hundred thousand dollars in multiplier effects"

"We can not trade and due to the nature of our events the restrictions effects will continue to damage the business up to 18 months after they are lifted"

"Our entire on premise revenue has ceased, the main profit of the hotel, it has decimated our business, gaining, food & bar trade. Revenue has reduced from \$200,000 @ 65% gross profit per week to \$70,000 @ 18% gross profit. Current Trading wages are \$10,000 per week, previously \$32,000"

Q1



"To be honest, it's hard to see my business being viable in the post COVID world. I fear that capacity restrictions for up to 6 months on re-opening could make it impossible for us to meet our rental, rates, staff and insurance obligations. The closure of venues also has a huge (unaccounted) impact on the mental health of those who rely on the sector including musicians and extended family members"

"We have had to close down. We had massive losses from the bushfires shock depleted most of our cash reserves. We will only be able to sustain ongoing costs for so long"

	Yes	No	Partially	Unsure	Total
Are you eligible for the JobKeeper payment?	71.79%	7.69%	6.84%	13.68%	117
If so, will the JobKeeper Payment help your business survive the pandemic?	40.71%	17.70%	26.55%	15.04%	113
Are you eligible for the Boosting Cash Flow for Employers measures?	52.59%	14.66%	1.72%	31.03%	116
If so, will the Boosting Cash Flow for Employers measures help your business survive the pandemic?	30.91%	22.73%	21.82%	24.55%	110
	84	9	8	16	
	46	20	30	17	
	61	17	2	36	
	34	25	24	27	