

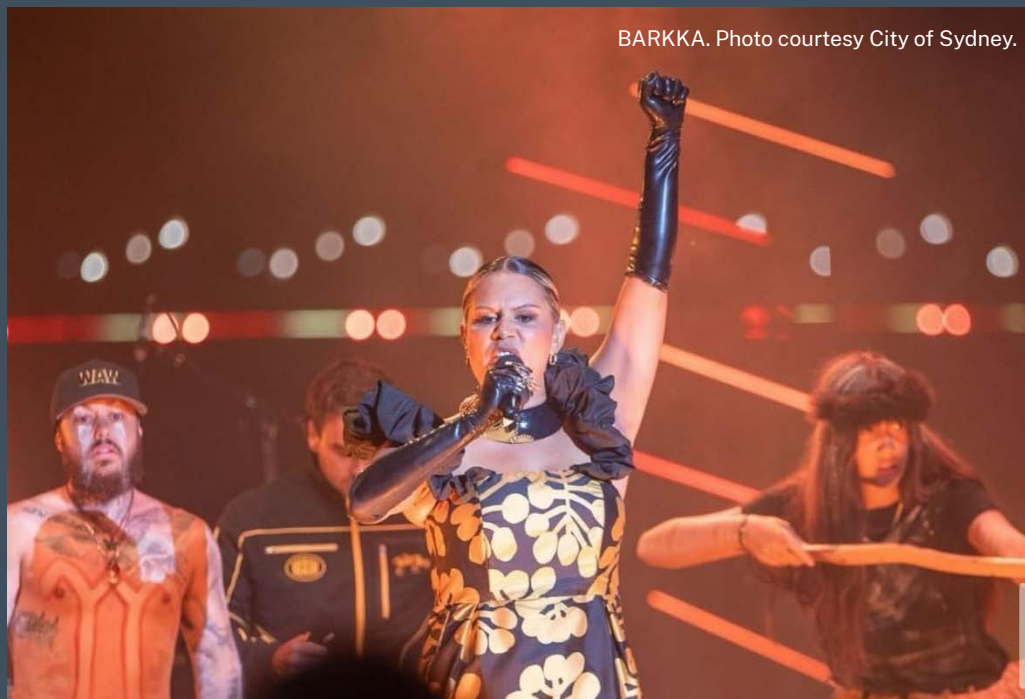
State of the Scene 2024

Review of the NSW live music industry



We acknowledge NSW's First Nations peoples as the Traditional Custodians of Country throughout NSW and recognise and respect their continuing connections to lands, waters and communities. We pay respect to Elders past and present, and to all First Nations peoples, and recognise the continuation of diverse cultural, spiritual and educational practices.

Cover image: L-FRESH The LION and mirrah, performing live at the annual 4Elements HipHop Festival (4ESydney). Photo by Christopher Woe, supplied by Vyva Entertainment



Dead Witch performing at The Weekly Series debut at Oxford Art Factory, 2021. Photo by Reilly Wilson.

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The NSW live music industry:

14,180

direct workers employed by the live music industry

\$5.5b

economic output (\$3b direct, \$2.5b indirect)

\$2.7b

value added (\$1.5b direct, \$1.2b indirect)

795

venues that offer live music

Annie Hamilton.
Photo by Ruby Boland.

Of the 795 venues that offer live music:

55 dedicated live music venues where live music is the key function of the business

453 live music venues with ongoing and regular performance programming, split across 43% metro and 57% regional NSW

56 large scale multipurpose venues that present live music as part of their broader offering

231 venues in NSW that offer some kind of music as an ancillary function

Introduction

Live music is integral to NSW. It entertains people, inspires artists, employs diverse and skilled professionals, and helps breathe life into our communities. As an industry, it is a pivotal thread in the creative and economic fabric of our society.

The NSW Government's vision is for the state to be known for its bold and exciting arts and culture, which engages the community and reflects the state's rich cultural diversity. This vision is supported by the NSW Government's commitment to contribute \$103 million over the next four years to the contemporary and live music sector.

The live music sector plays a critical role in the NSW economy; the liveability of Sydney and many other iconic live music cities and towns across the state; and attractiveness of Sydney and NSW as a destination to domestic and international tourists. The NSW Government wants to activate its 24-hour economy, to bring back the live music and entertainment sectors that were impacted by COVID-19; support night-oriented businesses; and improve perceptions of Sydney as a place to go out at night as well as during the day.

Create NSW is the NSW Government's driver of arts and culture. The newly established Sound NSW, a part of Create NSW, has been formed to lead the revival of the live music sector across the state, in response to the effects of the COVID-19 pandemic and former 'lockout laws', and to support an increasing number of live music venues across the state.

Sound NSW will carry out the objectives in *Creative Communities* (the NSW Arts, Culture and Creative Industries Policy 2024–2033), supporting artists, cultural organisations, and creative industries through an inclusive ten-year framework.

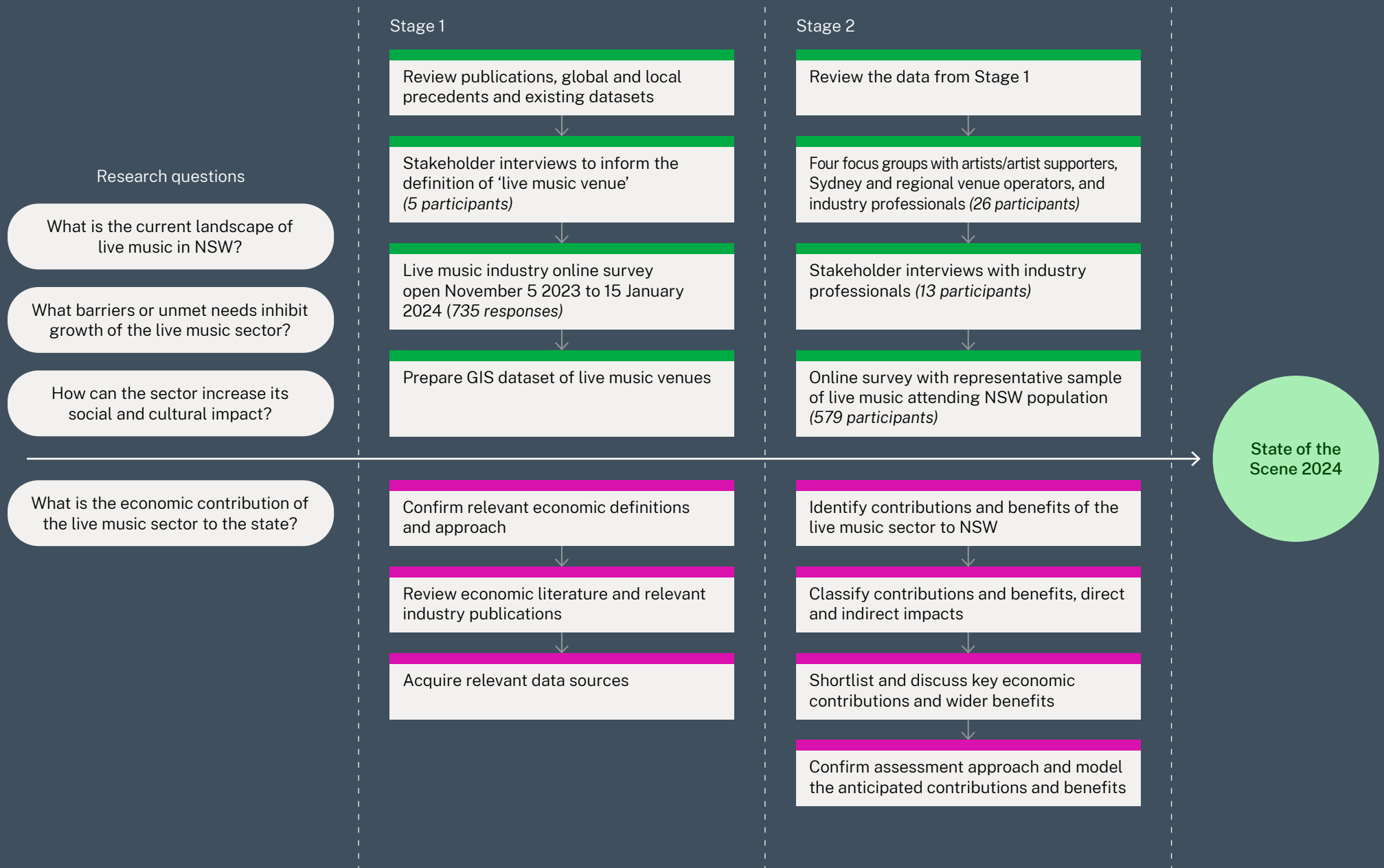
About this research

Within this context, Sound NSW commissioned Ethos Urban to undertake a first-of-its-kind piece of social and economic research – the State of the Scene. The purpose was to understand the current state of the live music industry and to provide guidance on how to support the industry to prosper in years to come. This research will inform NSW's first ever *Contemporary Music Strategy*, to be developed in 2024.

We undertook a large program of research, using surveys with the live music industry and members of the NSW population, developed a live music venue database, and undertook in-depth engagement with industry via interviews and focus groups. We also reviewed industry publications and economic data sources.

This report provides a snapshot of the research findings.

Methodology



■ Social research methods
■ Economic research methods



Who we spoke to as part of this research

As part of this research, we heard from over 750 people working in the live music industry via our industry survey, stakeholder interviews and focus groups.¹ Our engagement included representatives of the following organisations:

- The City of Sydney
- Cultural Arts Collective
- Frontier Touring
- Future Classic
- OneMusic Australia
- Select Music
- Secret Sounds
- VibeLab
- Live Music Office
- Liquor and Gaming NSW
- Hospitality and Racing, Department of Enterprise, Investment and Trade
- Numerous small businesses, venue operators and self-employed industry professionals.

¹ Participants are not named in this report as they were guaranteed anonymity as part of their participation. This commitment to anonymity provided a more open forum for stakeholders to provide frank and fearless feedback.



+750

We heard from over 750 people working in the live music industry via our industry survey, stakeholder interviews and focus groups.

+550

We also heard from a representative sample of over 550 members of the NSW live music attending public – people of all ages, from Sydney and across Regional NSW.

Key definitions

Budjerah at the National Indigenous Music Awards, 2023.
Photo by Paz Tassone.



Live music industry

Live music industry is the preferred term to describe the ecosystem of live music in NSW in this research.

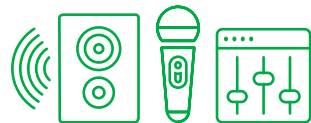
The live music industry represents the economic activities associated with the production and facilitation of live music. This includes the wide range of direct and indirect professional services, venues and facilities required to support and produce live music.

The economic assessment completed as part of this research adopts the Bureau of Communications, Arts and Regional Research (2023) definition of occupations and industries that form the live music industry, as outlined in *Australia's live music sector: an occupation-based analysis working paper*. This paper presents the following types of live music worker categories:

- **Primary:** Music professionals and other workers related to the direct performance of the live music event.
- **Supporting:** Supporting professions including managing, production professions, and ticket collectors.
- **Auxiliary:** Other supporting professions such as designers, event organisers, ticket sellers, cleaners, advertising and hotel managers, licensees, bar and food staff, and teachers.

Live Music Venue

As part of developing a database of every live music venue in NSW, we defined different live music venue categories.



Dedicated Live Music Venue

- May be a licensed or unlicensed venue
- Has a room or space dedicated to live music performances that is a significant part of the venue, and contains appropriate infrastructure to support the regular performances (e.g. separate auditorium, lighting, sound desk)
- Has formal arrangements in place establishing payment for artist performance
- Has ongoing and regular performance programming, identifying live music as a defining feature of the business
- Live music is the key function of the business
- Live music offering is predominantly original music
- Is essential to the live music ecosystem (touring or local)
- Original live music programming is prominent in the business marketing

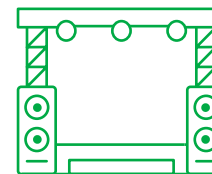
*(Does **not** include nightclubs with DJ performances)*



Live Music Venue

- May be a licensed, unlicensed, or nightclub style venue
- Typically has a room or space dedicated to live music performances and contains appropriate infrastructure to support the regular performances (Infrastructure e.g. separate auditorium, lighting, sound desk)
- Has formal arrangements in place establishing payment for artist performance
- Has ongoing and regular performance programming

(Includes nightclubs with DJ performances)



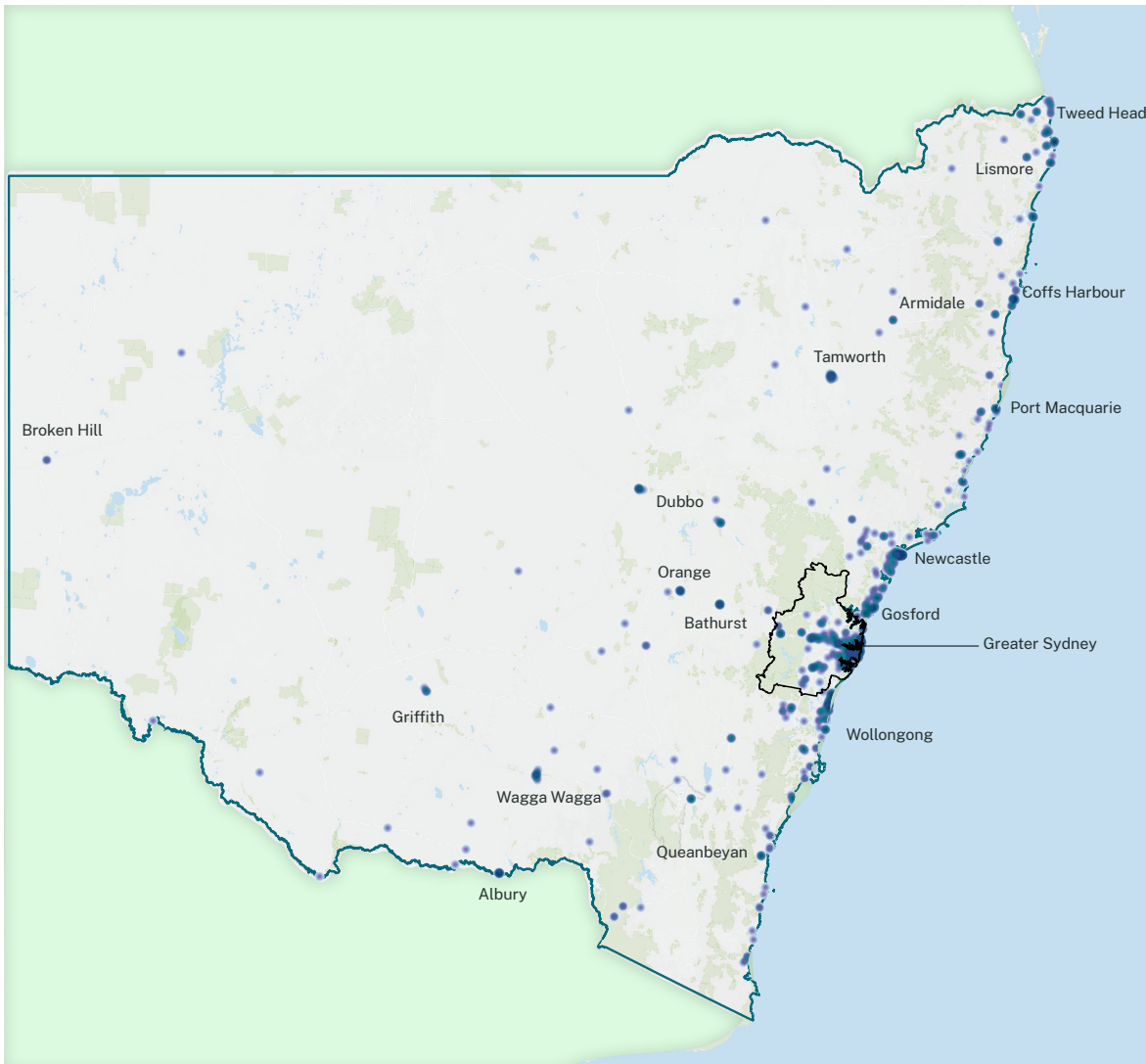
Large Scale Multipurpose Venue

- Multipurpose venues that present live music as part of a broader offering
- May include sports stadiums, convention centres, large performing arts centres, or cultural institutions

(Stadiums, Cultural Institutions, major performing arts spaces)

Key findings

NSW venues



90.7%

of the NSW public who attend live music agree that live music contributes to the vibrancy of cities and communities.

90.9%

of respondents who work in the live music industry agree that live music can be a powerful form of cultural expression, particularly for marginalised groups.

\$372.7m

of ticket revenue generated by live music events in NSW for 2023.

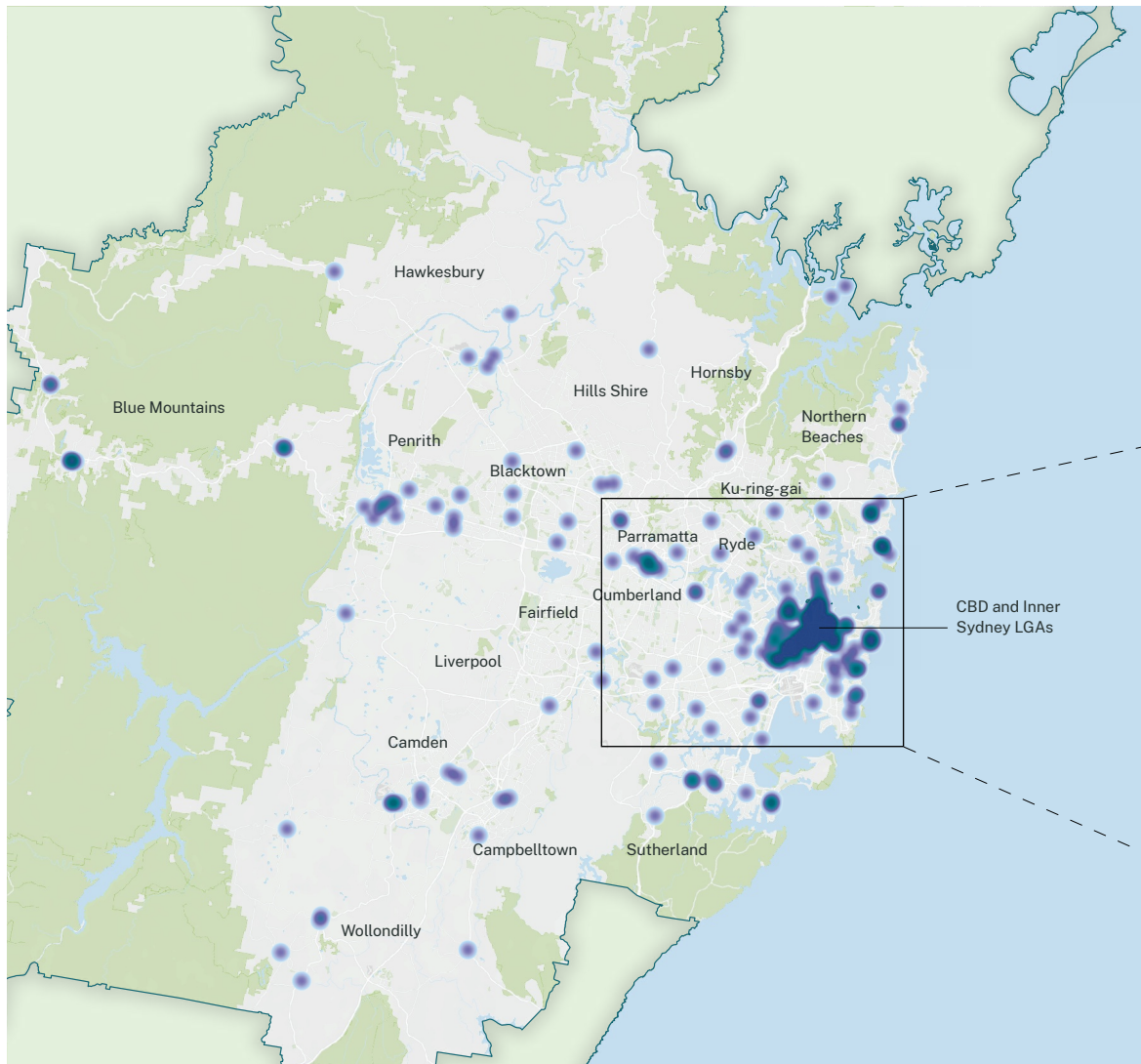


“What’s so good about live music events in NSW? A good mix of international, interstate and local acts are visiting!”



Best places to go out:
Metropolitan – Sydney CBD
Regional – Newcastle

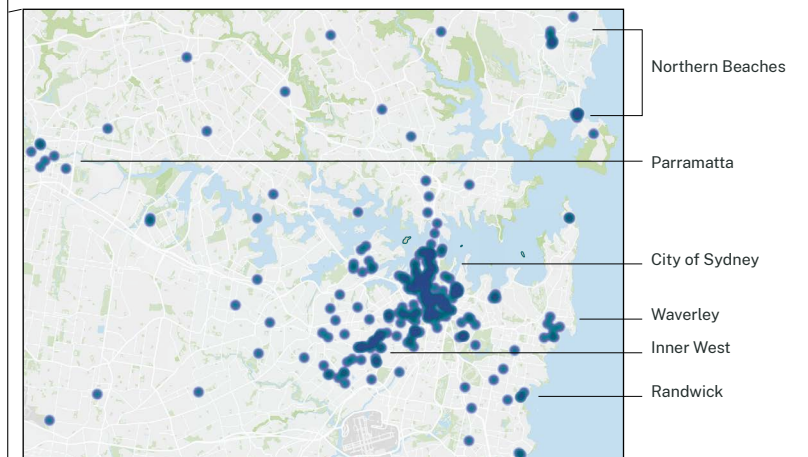
Sydney venues



\$\$\$

The high-cost operating environment is creating barriers to growth for the live music industry.

The high cost of living has made it difficult for people to attend live music events in recent years, and people are being more selective with their ticket purchases or choosing to stay in.



Midnight Oil perform at Qudos Bank Arena, Sydney, 2022.
Photo by Kane Hibberd.



Current state of the live music industry

Our research into the NSW live music industry shows that live music contributes significantly to the State's vibrancy and sense of wellbeing.

Live music attendance is reinvigorating precincts and communities across the State. Audiences are responding with enthusiasm to the variety of large concerts with a strong mix of international acts, and also enjoy going out locally where there are also other hospitality options. Sydney, the Inner West and Newcastle were identified as the most accommodating areas for live music, with the Sydney CBD and Newtown identified as the best places for patrons to go out in our capital.

Survey findings highlighted a split in views on the strength of the live music industry, with the public generally seeing NSW live music as being in a stronger position than industry professionals. This split likely reflects the high-quality patron experience we all enjoy, while behind the scenes, professionals struggle with broader challenges that inhibit growth and make business difficult. However, the wealth of talent and the passion of people working in NSW live music is a key strength, underscored by the industry's resilience in the post-pandemic environment.

Planning and legislative frameworks are mostly viewed as restrictive by industry professionals, but improvements being made to help support the industry are being recognised. These improvements, including the Vibrancy Reforms and the significant investment commitment of the NSW Government, are having a positive impact on industry outlook and the relationship between industry and the NSW Government.

People in the live music industry undertake a wide range of occupations. The industry is estimated to directly employ 14,180 workers across NSW. Many people working in the industry count it as their primary profession, and either work full-time or as contractors or sole traders.

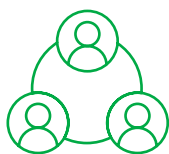
14,180

workers in NSW live music industry



The Buoys performing at Crowbar, Sydney.
Photo by Niko Bonfrere.

The strengths of the NSW live music industry



Strong talent pool

The wealth of talent across NSW live music scenes is a key strength that supports the industry. Almost a quarter (22%) of industry survey respondents noted the strong talent pool as an industry strength.

There is an abundance of talented artists, both established and emerging, in NSW. Apart from the degree of talent, the breadth of music genres and artist types represented – from original solo artists to cover bands – has grown post-pandemic, with young and upcoming artists full of eagerness and passion for live music.



Dedication and resilience of the industry

NSW has an energetic and supportive music community, with a depth of industry expertise. In the NSW population survey, 40% of the live music attending public highlighted ‘a passionate and creative live music scene’ as one of these good things about live music in NSW. In the industry survey, 14% of respondents noted the dedication and resilience as a current strength of the NSW live music community.

This community’s passion for live music is matched by their innovative attitude. It has provided the industry with long term resilience that has enabled it to withstand the shocks and volatility in recent years. Despite the struggles the industry has faced, hardworking artists and professionals keep the live music scene alive.



Growth and resurgence post-COVID-19

The NSW live music industry is beginning to grow again after the real challenges presented by the COVID-19 pandemic. New venues have started to appear, and audiences are getting back out to see shows. 2023 was the biggest year for live music in Australia since 2018, with over 24 million people spending \$2 billion on live music tickets.¹ APRA AMCOS data also shows an 11.4% increase in net distributive revenues to writers and publishers over 2023 from the previous year.²

International touring artists have returned in force, along with vibrant shows stacked with local talent. Programs such as Great Southern Nights have brought energy to local scenes, attracting support from stakeholders across the industry.



A supportive government context

Reinvigorated government support for live music is having a positive effect on industry outlook. The NSW Government’s commitment to contribute \$103 million over the next four years to the contemporary and live music sector was welcomed.³ The change was widely recognised and appreciated across the industry cohort. Industry also welcomed efforts to engage them and the wider community to understand the current challenges experienced.

Policy reforms like Vibrancy Reforms and changes to noise complaints processes have demonstrated Government’s willingness to listen and act in the interests of the live music industry. This is prompting optimistic outlooks amongst those who have had to deal with a hostile regulatory environment in past years.⁴

¹ Linda Morris, ‘Live music has biggest year since 2018, but it’s come at a cost’, *Sydney Morning Herald*, 14 December 2023
² APRA AMCOS Annual Report 2023, published December 2023. Annual reporting data shows net distributive revenue as \$595.2 Million (11.4% on 2022).

³ Chelsea Howard, ‘NSW Musos Rejoice: The new Labor Government is pledging \$103 to the music industry’, *Happy Mag*, 28 March 2023.
⁴ Michael Koziol, ‘Later and louder: NSW rips up regulations in pursuit of vibrant summer’, *Sydney Morning Herald*, 19 October 2023.

“The talent of our local musicians is phenomenal, with impressive new artists emerging on the scene all the time.”

— Promoter

“Audiences are back and are craving joyful experiences.”

— Artist

“It is super exciting that the NSW Government has so much focus and so much dedication to these issues.”

— Industry professional

“People like myself will do everything in their power to save live music.”

— Promoter



Touch Sensitive for the Future
Classic Studio Party at Vivid
Live, Sydney Opera House.
Photo by Jordan Munns.

Government priorities

The NSW Government is committed to the development and promotion of the contemporary and live music sectors and has established Sound NSW as the dedicated government office to deliver on this commitment.

\$103 million will be invested in the sector to deliver positive outcomes for industry and audiences. A ten-year *Contemporary Music Strategy*, developed by Sound NSW, will guide investment in targeted policies and funding programs. Prior to the release of the strategy, work is already underway on key commitments including:

- doubling the number of live music venues in NSW
- investing in organisations that support strategic objectives, including skills, training and capacity building and business and career sustainability
- delivering funding to support soundproofing, ventilation and video screen technology for eligible live music venues.

Economic contribution of live music

The NSW live music industry makes a significant contribution to the NSW economy. This contribution is more than just the operation of venues and the wages of performers. The breadth of the live music industry and the many economic touch points of live music attendees generate significant economic contribution to our state. This benefits communities across the state.

Our research has assessed the value of the live music industry and its contribution to the state of NSW, both economically and in terms of wider benefits.

There are a range of methods used to quantify economic contribution of the live music industry in NSW. Economic contributions are classified in terms of:

- **‘direct’**: economic activity immediately connected to the NSW live music industry
- **‘indirect’**: subsequent economic activity that occurs as a result of direct economic contribution of the NSW live music industry

A key contribution is the employment generated, with an estimated **14,180 workers** directly employed in 2023. They work across a variety of occupations, including artists, ticket collectors, stage managers and accountants, which all enable the industry to operate.

Another key contribution is the direct economic output generated within a single year -estimated at **\$3.0 billion** in 2023 for NSW.

Value add measures the difference between the total cost of production and the final value of the industry’s production in the economy. The greater the difference, the more ‘value’ the industry adds to the economy. This direct value add of the live music industry to NSW is estimated at **\$1.5 billion** in 2023.



Economic Contributions in Greater Sydney and Regional NSW

Indicator	Greater Sydney	Regional NSW	NSW Total
Employment (direct) (ANZSCO and ANZSIC)	10,040 direct workers	4,150 direct workers	14,180 direct workers
Economic Output	\$2.2 billion direct \$1.9 billion indirect \$4.1 billion total economic output	\$0.8 billion direct \$0.7 billion indirect \$1.5 billion total economic output	\$3.0 billion direct \$2.5 billion indirect \$5.5 billion total economic output
Value-add	\$1.1 billion direct value add \$0.9 billion indirect value add \$1.9 billion total value add	\$0.4 billion direct value add \$0.3 billion indirect value add \$0.7 billion total value add	\$1.5 billion direct value add \$1.2 billion indirect value add \$2.7 billion total value add
Employment (indirect)	8,070 indirect FTE jobs	2,850 indirect FTE jobs	10,920 indirect FTE jobs

Note: Estimates of Greater Sydney and Regional NSW workers have been derived from the 2021 Census. Figures are rounded and estimates for Greater Sydney and Regional NSW may not sum to NSW estimates.

Wider benefits

Live music across NSW generates benefits beyond just those reflected in key economic indicators. Many of these benefits are often intangible and can be difficult to quantify. However, these are still important to consider in order to truly understand the benefits of live music, and the industry which supports it within NSW.



Attracting and retaining industry professionals and talent: the scale, scope, calendar of events, diversity of venues and range of programs helps attract and retain live music industry professionals to NSW from other places in Australia and overseas. A proxy indicator values this wider benefit in the order of \$85 million.



Increased tourism and visitors to NSW: Live music events and performances attract a range of visitors to NSW from domestic and international locations. Tourism statistics indicate that for the financial year 2022/23, an estimated 4.1 million domestic based visitors, or 4% of all visitors to NSW, cited their main reason for travel was to attend an event, sport, cultural activity or festival. The potential tourism benefits generated by the NSW live music industry is approximately \$319 million.



Increased vibrancy and activation of local areas: A common benefit associated with the attendance of live music events is the vibrancy and activation of local areas and businesses surrounding a live music venue. An indicator of the potential benefits to local areas and businesses because of live music is the \$314 million captured by local businesses surrounding music venues in NSW for 2023.

Other wider benefits that are more difficult to quantify include



Providing professional talent pathways: The vast variety of events and diversity of venues in NSW provides a pathway and opportunity for career development for professionals in the live music industry. As one of the largest live music industries in Australia, NSW provides the ability for professionals to enter the industry and the capacity to develop their career all the way to the international stage.



Attracting major live music events and acts: An indirect benefit of NSW's live music industry is its ability, and capacity, to attract and host major live music events and acts. Examination of case studies such as Taylor Swift's Eras tour provide a way to indicate the contribution of these major events. A single major live music event can generate approximately \$20 million in economic activity to NSW.



Winston Surfshirt.
Photo by Astral People Press.

"It brings people together, no matter what they are going through or how bad everything is, it's an escape, a coping mechanism, it makes you feel all the feels."

—Live music patron

Quality of Life

One significant indirect benefit of NSW's live music industry is the ability for people to engage and participate in live music. Attendance at live music events provides a number of social benefits that collectively result in improved quality of life. These range from benefits to individuals, certain demographic cohorts and the broader community and include:

- improved social cohesion and inclusion
- improved engagement and participation
- improved rates of youth engagement and social participation
- opportunities for social expression and to be heard
- improved social consciousness
- increased acceptance and reduced social ostracism.

Other quality of life benefits attributed to live music highlighted in our research were:

- it allows for a high degree of self-expression
- it can be a powerful form of cultural expression, particularly for marginalised communities
- people can have fun.

Zeadala ft. Sarah Connor and Lushess, performing live at the annual 4Elements HipHop Festival (4ESydney).
Photo by Christopher Woe, supplied by Vyva Entertainment



Barriers to growth

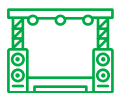
As with any industry with tremendous strengths and achievements, there are also a range of social, regulatory and economic challenges.

Live music industry stakeholders have told us loud and clear that recent years have been challenging. They report that growth is hampered by barriers that are preventing the full social and cultural benefits of live music from reaching wider audiences. Until we solve these barriers, the long-term viability of the industry will continue to be undermined.

Live music industry stakeholders identified these major barriers to growth:

“Insurance is insane. Our insurance has gone up \$40,000 a year over two years, for a pub venue it’s nearly twice as expensive per year since pre-COVID.”

— Regional venue operator



A high-cost environment: Impacting the financial viability of live music venues, the viability of domestic tours for up-and-coming artists, and cost of living are pressures undermining the audience’s capacity to regularly attend live music events.



Regulation: Red tape is constraining live music venues and larger events by reducing their operating capacity, particularly in late night contexts. This is being magnified by regulatory red tape in the planning system. It is noted that recent changes through the Vibrancy Reforms have started to make an impact on these points.



An expensive policing and security environment: Live music event user-pays police costs substantially outweigh those in other Australian states, and sometimes prohibitive security requirements are misaligned with the risk level of live music events, which creates challenges for venues and festivals.



Policy and grant schemes: Past government approaches to supporting live music have, at times, had negative side effects due to the short-term nature of investment. In conjunction, the contemporary grant system has been less accessible to creatives without strong grant literacy skills, potentially overlooking innovative artists who would benefit the NSW live music scene.



The music media landscape: Finding out about gigs has been complicated by a fragmented media landscape and trying to cut through all the noise on social media, making it harder for local acts and venues to promote themselves to potential audiences.



The industry ecosystem: Artist and industry career development pathways have been constrained by a lack of mid-career growth opportunities, due to a lack of mid-size venue touring opportunities. This is compounded by a reduction in youth live music spaces and all ages events.



Changing audience behaviours: The current generation of young people have been disconnected from local live music experiences, shifting behaviour patterns. New preferences, such as young people choosing to drink less and creating their own informal live music spaces outside the traditional ecosystem have also affected live music attendance.



Public transport: Night-time transportation is currently not meeting the needs of many live music patrons in the metropolitan context, deterring audiences from attending live music events. Regional areas are worse affected by a limited public transport offering, with little to no options across a range of contexts.



Access and inclusivity: A lack of outreach to NSW’s culturally diverse groups engaging in live music is impeding positive industry representation outcomes. Women and gender diverse people’s safety remains a barrier, impacting the decision-making process on whether to go out to gigs. Further, not all venues are accessible, preventing people with mobility impairments from engaging with live music spaces.



Lights off, doors closed

There has been a loss of more than 1,300 small and medium live music venues in Australia since the start of the pandemic, which amounts to a third of the sector. Almost a third (32%) of those venues have been lost from NSW.¹ Just to name one, mid-2023 saw the closure of the iconic live music venue the Cambridge Hotel in Newcastle, which had been trading for more than six decades.



Where are the all-ages events?

All-ages music spaces have become less common across NSW. Live music spaces that are accessible to underage audiences are an essential part of the wider live music ecosystem. Underage spaces are not necessarily traditional venues, but places where teenagers can experience live music, sparking an early passion for live music. These spaces may include community centres, festivals, or youth education programs. Many industry professionals described their love for live music forming in youth music spaces, and as a motivating factor behind some professionals' pursuit of a career in the industry. Professionals highlighted the key connections between a decreased culture of youth music exposure and the contraction of live music scenes.

“I was hooked on live music at an all-ages centre that put on an all-ages show. There was not that much to do as a kid in Newcastle. All ages programs taught kids to fall in love with live music. This is no longer around.”

— Regional venue operator

¹ APRA AMCOS Annual Report 2023, released December 2023

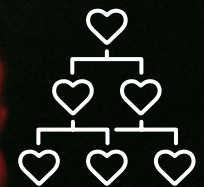


Supporting the industry going forward

Even though we face some significant challenges, the NSW live music industry can increase its social and cultural impact in the future through making key changes.

These recommendations fall under three major categories:

1. Sustainable industry support
2. Facilitating change and cutting 'red tape'
3. Growing the culture of live music

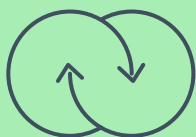




Groove Terminator and Sound of the Shire Choir performing at main stage of Byron Music Festival, 2023. Photo by Greggio.

Sustainable industry support

Long-term strategies for government, support of the live music industry and for advocacy and reform to meet the needs of the live music industry.



Supporting venues:

- Explore opportunities for live music venue tax relief
- Support local governments to decrease processing time for occasional extended trading conditions for live music venues
- Investigate the viability of supporting venues to become fully accessible for people with mobility impairments

Improving grants:

- Consider grant reforms (such as grants without application windows, apply and assess concurrently)
- Support the improvement of grant accessibility (increase grant literacy)
- Continue to support and encourage grant peer reviewing

Strategic support and investment:

- Outline the NSW Government's role and strategic intentions in relation to live music (develop a long-term strategy for strategic and sustainable investment in live music)
- Support the creation of a 'source of truth' for what's on in NSW live music
- Advocate for a permanent outdoor venue for Sydney (operated by a State-owned body)
- Support increased engagement with the live music industry peak body, Music NSW

Improving career development pathways:

- Create a strategy and work with industry to support the opening of new medium-size venues and new venues in areas identified as lacking in live music venues
- Improve career development pathways by investigating opportunities to develop mentorship programs



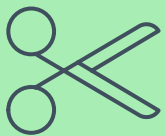
Temgazi & Carolina Gasolina at The Landsdowne.
Photo by Yeah Sure, courtesy of
Electronic Music Conference Pty Ltd.

“Let’s become a haven for live music for both local and international artists.”

— Policy-maker

Facilitating change and cutting ‘red tape’

Regulatory reform and cutting ‘red tape’ to enable the live music industry to grow its social and cultural impact across NSW.

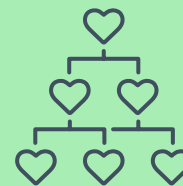


Areas for regulatory reform and cutting ‘red tape’ to enable the industry to grow:

- Engage with Transport for NSW to advocate for improved public transportation
- Review efficacy of noise complaint regulation change
- Conduct a review of the security requirements for venues to reflect the real-world risk levels
- Liaise with NSW Police to review user-pays police costs in NSW and approaches to policing live music events
- Work with planning authorities and agencies to facilitate a more conducive approvals and regulatory environment for live music

Growing the culture of live music

Improving outcomes by growing the culture of live music, emphasising the importance of collaboration and education in generating live music culture.



Key areas for improving outcomes by growing the culture of live music, and emphasising the importance of collaboration and education:

- Collaborate with diverse grass roots music communities
- Work with the industry and stakeholders to expand the program of low cost and free events
- Work with industry and stakeholders to promote all ages events, spaces and festivals
- Work with industry and stakeholders to increase the alcohol-free live music event offering

Vision for the future

In ten years, industry stakeholders hope for a thriving music scene woven into the social and cultural fabric of NSW. An industry that draws on the past success of NSW live music and builds on the talent of today's live music scene. A well-supported industry that reflects NSW's diversity and a strong grass roots scene that we can proudly export to the world.

Industry's blue-sky vision for NSW's live music industry in 10 years included:

- A venue ecosystem that supports all genres and levels of artists
- Stable and well-paid career paths for all people working in the music industry
- Sustainable and transparent frameworks that guide long-term government support and investment
- A supportive regulatory environment that fosters growth
- A robust tour circuit across regional centres
- International recognition of NSW's rich live music culture
- An emphasis on innovative cross-cultural music
- Strong recognition of the social and cultural values of contemporary live music
- A sense of pride in the NSW music scene.



Emma Donovan at Giiyong Festival 2023
Photo by David Rogers.

Conclusion

Live music is an integral part of NSW's social and economic landscape. Recent years have been challenging for the live music industry, yet live music professionals remain as passionate as ever about their industry and have been enormously resilient in keeping live music available for people across NSW to enjoy. NSW is home to talented artists and deeply committed industry professionals who are invested in the future of their scenes. Audiences are returning to gigs, making the most of international and local acts across the state, and they are generally positive about the overall strength of live music.

This positivity, paired with the ambition and dedication of its stakeholders, signals a bright future for the live music sector. The NSW Government is committed to the continued strengthening of the industry and will work in partnership with the sector to see this vision come to fruition. The development and implementation of tailored investment programs, strategies and reforms will help to rebuild and support the ongoing growth of the industry. It is the hope of the NSW Government that the next iteration of this report will reflect a bigger, more viable and thriving live music sector in NSW.

Next Steps

The research has provided valuable insight to the current state of the live music industry. It has also unearthed further avenues of research and action for the NSW Government to consider to foster strong relationships with the industry and achieve positive outcomes for industry and audiences:

- Develop a live music event register to capture the number of events, size of the venue, characteristics of the performance and number of attendees.
- Source live music ticket data from an operator or operators to assist with the estimate of ticket sales and expenditure profile, including by venue and type.
- Continue ongoing engagement with the NSW contemporary music sector, and with venue owners and operators to maintain open lines of communication.
- Seek out case studies across various live music venue types and locations that explore utilisation, patronage and expenditure over time.
- Continue live music research to capture live music venue data and the economic contribution of live music.
- Incorporate the findings of this research into the development and implementation of the *NSW Contemporary Music Strategy*.

Sound NSW is a dedicated office within the NSW Government committed to the growth, development and promotion of contemporary music in NSW.
