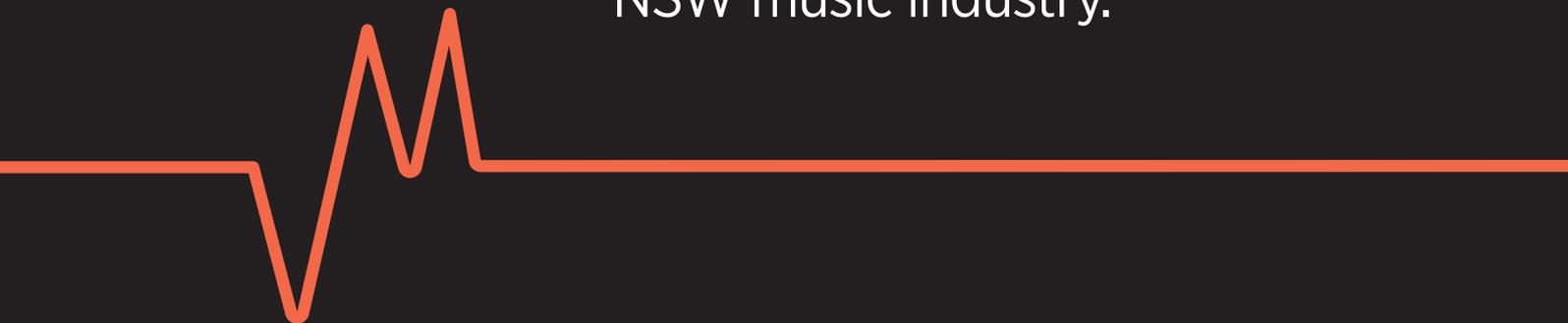




Vote Music.

Contemporary Music in NSW

Policy actions for a strong
NSW music industry.





Government-driven music development

NSW is the natural home for the Australian contemporary music industry injecting \$3.6 billion in economic, social and cultural value to the state. More artists and music industry businesses call NSW home than any other state or territory. But after a decade of challenges, music in NSW is not flourishing as it should.

This policy paper outlines the NSW music community's vision for a better NSW - one that celebrates, supports and invests in its music, artists and culture - and outlines a clear path to ensuring NSW is the premier music destination in Australia.

► ACTION ONE

Establish a Contemporary Music Office in the NSW Government to spearhead the development and delivery of a 10-year Contemporary Music Strategy.

Contemporary music is both an art form, and an industry. It straddles several portfolio areas including arts, screen, tourism, planning, jobs, technology, regional, and liquor and gaming. Because of this complexity, it regularly falls between ministerial responsibilities. There is no person employed in the NSW Government tasked with overseeing or supporting the development of this \$1.6B¹ national industry. And it shows.

After years of restrictive regulation, inadequate financial investment in live and recorded sectors, the 5-year delay of a promised contemporary music strategy, and ongoing COVID-19 impacts, coordinated government commitment and leadership are essential to position the industry as a global leader that benefits the health, wealth and wellbeing of NSW communities.



Significant investment in skills & industry development

► ACTION TWO

Invest in skills, industry and audience development through a suite of strategic initiatives.

To date, investment in the music industry has been ad hoc and primarily focused on not-for-profit organisations, COVID-19 crisis funding, major events and independent artists. While these investments have been crucial and appreciated, it is just a fraction of the support needed to adequately invest in an industry of this size and impact.

COVID-19 has led to extensive skills shortages across the industry, and diminished audience and business confidence. Strategic investment across the music ecosystem, with a focus on First Nations music, workforce and business capacity, audience development, regional NSW and Western Sydney, will be a necessary boost to revitalise and empower the music industry.

Rebuilding our creative, technical and production workforce, and a focus on the integration of connected sectors such as digital, screen, gaming and technology, will enable the music industry to be future proof and remain a significant employer and economic contributor.

Strengthen and build music infrastructure

► ACTION THREE

Cement NSW as a global destination by protecting and building music infrastructure and place-making through music.

Over the past decade, ongoing regulatory issues have made operating a live music business in NSW difficult. We lost close to 200 live music venues, festivals are considering moving to more amenable states, and Sydney's reputation as a music city was diminished locally and internationally. As a result, the industry dispersed and weakened, leading to a lack of business confidence in live music in NSW and reduced business opportunities and partnerships.

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The Stats.

Close to 13 million Australians listen to music every week²

For every dollar spent on live music, an additional \$3 of benefit is returned to the wider community³

Before the pandemic, contemporary live music events in NSW generated more than \$835 million in revenue⁴

Despite the impacts of Covid 19 on the live music sector, contemporary music continued to be the top live performance category in Australia, generating 51% of national revenue and 37% of national attendance⁵

New South Wales is currently the leading state in Australia for live music, taking over Victoria's lead in 2019 in both revenue and attendance. This is largely due to the extended lockdowns in Victoria in 2020 and 2021. However, Victoria has a higher spend per capita (\$23.76) compared to New South Wales (\$22.33)⁶

Australians spend 16 hours each week listening to music.⁷

The industry contributes \$3.6B in economic, cultural & social value to NSW⁸

It employs an estimated 23,000 people directly, and supports indirect jobs across the tourism and hospitality sectors⁹

Live performance revenue in 2018 was \$340,686,456, making NSW the largest contributor to live performance revenue nationally

There are over 700 venues in NSW that offer live music¹⁰

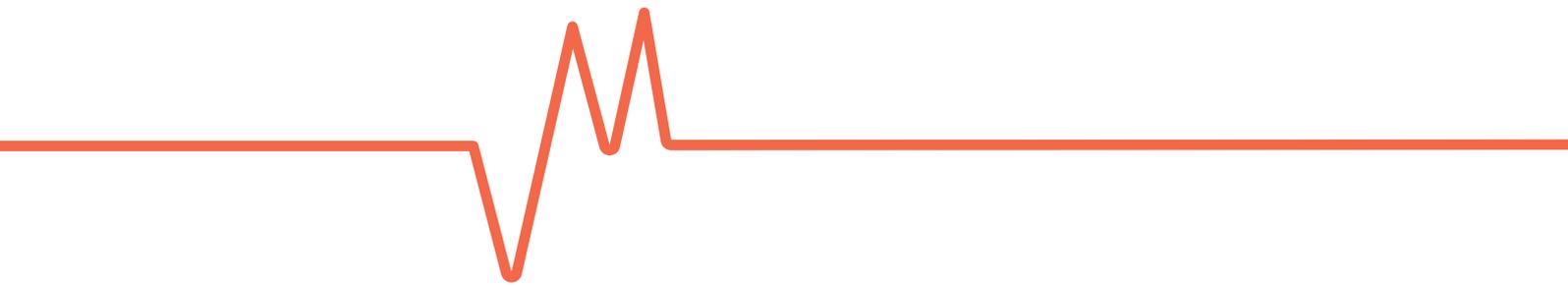
Contemporary music performances in NSW generated 3,200,941 tickets – more than double the next largest contributor¹¹

Audiences are prepared to travel significant distances to attend live music¹²

Tourism Australia research data shows music events are one of the highest value drivers of overnight trips and provide a competitive advantage to regional areas

The Australian music market is currently valued at \$1.6 billion and is forecast to grow to \$2.2 billion by 2025¹³

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Policy Detail.

▼ POLICY ACTION ONE

Establish a Contemporary Music Office in the NSW Government to spearhead the development and delivery of a 10-year Contemporary Music Strategy.

A Contemporary Music Office in the NSW Government will drive action and leadership on contemporary music development in NSW. A central portal to coordinate government portfolios and investment, the Office will develop and deliver a 10-year music strategy, and partner with industry to deliver strategic initiatives.

The Office will be tasked with developing a music business precinct, overseeing major music event acquisition and retainment, supporting music tech innovation, conducting research, providing a music business concierge service, reviewing and developing policies including procurement policies, and leveraging export opportunities for NSW artists, industry and music businesses. The Office will be guided by a paid industry advisory council comprised of representatives from live, recorded and screen music sectors including venues, labels, artists, managers, agents, First Nations representatives, regional people and other priority groups.

2. Roy Morgan music streaming services research data, Roy Morgan Helix Personas, June 16, 2020
 3. *The Economic and Cultural Value of Live Music in Australia*, University of Tasmania and Live Music Office, 2014
 4. 5. 6. *LPA 2019 and 2020 Ticket Attendance and Revenue Report*, Live Performance Australia, October 2021
 7. *Engaging With Music Report*[®], IFPI Consumer Study, 2021
 8. 9. *The Economic and Cultural Value of Live Music in Australia*, University of Tasmania and Live Music Office, 2014
 10. *About | OneMusic Australia*[®], OneMusic Australia provided licence figures, 2022
 11. *LPA 2018 Ticket Attendance and Revenue Report*, Live Performance Australia, December 2018
 12. *The Economic and Cultural Value of Live Music in Australia*, University of Tasmania and Live Music Office, 2014
 13. *PwC Australian Media and Entertainment Outlook 2021 - 2023*, PWC, 2021



▼ POLICY ACTION TWO

NSW Government to invest in skills, industry and audience development through a suite of strategic initiatives.

First Nations Strategy

In partnership with existing First Nations-led organisations and industry bodies, support the development of a specific strategy for First Nations music and music business development in NSW.

First Nations Funding

Ensure specific funding for First Nations-led artist and industry development programs, including seed funding for First Nations-run music businesses.

Skills, training and career pathways

Rebuild live music industry capacity by providing support for a traineeship program in NSW for Live Production and Technical services; provide grants for industry-led skills development initiatives that develop and attract new creative industry workers; and provide grants for venues and companies to retrain and reskill workers via short courses.

Pathways for Young People

Fund industry organisations to deliver programs for young people, both at school and in early career, as both audience members, artists and future industry workers.

New Live Music Opportunities and Spaces

Fund a business-focused live music skills program to encourage and support more businesses to deliver world-class live music experiences on small and large scales. Fast-track the establishment of entertainment precincts across the state to support existing venues and foster the creation of new venues.

Regional Renaissance

Increase funding for regional touring and regional music development programs to support local music community opportunities and improve access to live music.

Core Funding for Leading Industry Organisations

Provide sustainable core funding for vital music development organisations including those that cater to specific priority areas such as professional development, export, regional development, Western Sydney and accessibility.

Attracting Audiences

Rebuild audience confidence in live music through funding government, industry and artist-led programs and initiatives focusing on the promotion of live music and NSW's vibrant music cultures.

New Music Fund

Provide a dedicated fund for NSW artists to write, record, release and tour new and original contemporary music.

Accessibility and Inclusion

Provide capital works funding for live music venues and festivals to improve their on-site accessibility.

Support Act

Provide annual funding for Support Act to deliver targeted crisis funding and industry development initiatives for NSW artists and businesses.

Music Industry Review

Contribute funding and resources to address recommendations of the Raising Their Voices Report, including the development of policies to support Codes of Conduct, funding criteria and industry standards.

NSW Content

Develop a procurement policy ensuring NSW artists are used for all NSW Government funded campaigns and uses of music. Additionally, ensure existing screen and digital games industry are incentivised to commission work from local screen composers and artists.

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▼ POLICY ACTION THREE

Cement NSW as a global destination by protecting and building music infrastructure, and place-making through music.

Music Business Hub in Tech Central

Build a music business precinct in Tech Central to enhance partnership and collaboration across the industry, providing much-needed subsidised spaces for small businesses, organisations and community radio. It should also consider the development of event, performance and rehearsal spaces both within and in proximity to the Hub, and on-going soft-infrastructure costs of operation and management.

Dedicated Venue Strategy

Conduct a state-wide live music venue audit and regulatory review to improve the ease of doing business for music venues. Ensure the 10-year Contemporary Music Strategy includes a plan for protecting and supporting existing music venues, as well as initiatives, regulatory reform and funding to stimulate the development of new live music spaces and places. This should include the fast-tracking of entertainment precincts and a new Sydney Entertainment Centre in the inner city and options for subsidising operational, licensing, insurance, training, and programming costs for live music venues.

Sustainability & Climate

Work with industry to address the impacts of climate change on future sustainability, particularly festivals and outdoor events.

Sound Improvements

Develop a suite of policies and regulation to solve ongoing noise issues for live music and festival operators including the consideration of Special Entertainment Precincts, Agent of Change, neighbourhood and resident education programs and an update of the EPA Act to create Entertainment Sound regulation.

Licensing & DAs

Introduce more late-night and 24hr licences for music venues and work with local government to support venues to amend their DAs for later trading.

Positive Police Relationships

Establish a music industry liaison team within the police force to build better relationships with industry and develop music-friendly policies including under-18s and all-ages music events and conducting a review of User-Pays policing for music events.

Festival Greenfield Sites

Work in partnership with festival promoters, local councils, private landholders and state government departments to investigate new greenfield festival sites and permanent infrastructure at critical locations to retain and attract major events.

NSW Festival Viability

Repeal the Music Festivals Act and work with industry to deliver sustainable and safe festivals.

Vibrant Streets

Ensure the 10-year strategy includes a plan for improving the ease of putting on outdoor music events in high streets, parks and urban centres.

Vote Music.



This paper has been developed over the course of 12 months and involved collaboration and consultation with key music organisations, businesses, industry leaders, artists, managers, agents, venues, music technology specialists, production personnel, promoters, festival organisers and radio representatives.

Participants and Supporters include:

Alberts, APRA AMCOS, ARIA, Aslice, Association of Artist Managers, Australasian Music Publishers' Association, Australian Festival Association, Australian Live Music Business Council, Century Venues, Community Broadcasting Association of Australia, CrowBar Sydney, Double Drummer Music, Eleven: a music company, FBi Radio, Gadigal Information Services, Gallery Recordings, John Watson Management, Live Music Office, Live Nation, Live Performance Australia, Mark Poston, MusicNSW, National Aboriginal and Torres Strait Islander Music Office, Phoenix Central Park, PCCA, Sally Coleman, Select Music, Sonic Lawyers, Sounds Australia, Sue Carson - University of Newcastle, Sweat it Out, TAFE NSW, Undr CTRL, VibeLab, Warner Chappell Music Australia.

