

Australia's live music industry

Creative Australia submission

21 May 2024

Creative Australia, the Australian Government's principal arts investment and advisory body, welcomes the Standing Committee on Communications and the Arts' inquiry into Australia's live music industry.

Australia's live music industry is essential to building Australia's vibrant national identity, fostering social cohesion and wellbeing and is vital to the creative economy. The live music industry forms a critical part of Australia's wider cultural and creative industries which contribute \$21.8 billion to Australia's Gross Domestic Product¹ and employ nearly 500,000 people.²

Creative Australia champions music through grants and multi-year investment, strategic initiatives and research and advocacy across a range of genres and types of engagement, including contemporary music, opera and orchestral and chamber music.

We recognise Australia's live music industry has been significantly impacted in recent years by the COVID-19 pandemic and challenges associated with the rising cost of living. Many popular music festivals have been cancelled or significantly downscaled and live music venues across the nation are facing closure. These disruptions are having flow on effects to other parts of the music ecosystem and are affecting the livelihoods of artists, creative workers and music organisations.

Established under the Australian Government's national cultural policy, *Revive: A place for every story, a story for every place*, Music Australia was launched in 2023 as a dedicated new body within Creative Australia to support and invest in the Australian contemporary music industry. Music Australia will receive \$69.4 million over four years to stimulate a vibrant and sustainable contemporary Australian music industry in which artists can thrive through a suite of strategic activity. The work of Music Australia is guided by the expertise of the Music Australia Council. Music Australia's remit includes the broad ecosystem of contemporary music, from creation and recording to live performance and market development.³

Informing Music Australia's investment and development strategies is Creative Australia's existing body of research on the music industry, including on its workforce, audiences, impacts and future needs. Additionally, there are a number of research projects underway that seek to address the scope of the Committee's review on challenges and opportunities within the Australian live music industry.

However, data gaps remain, and the limitations of current datasets are well-understood by researchers and were outlined in submissions to the national cultural policy consultation. These gaps were recognised in the national cultural policy, *Revive* with actions to update the methodology used to capture the contribution of the cultural and creative sector. Considered attention is needed to address the data needs of the cultural and creative industries to ensure effectiveness of government policy and investment.

This submission provides an overview of Creative Australia and Music Australia investment activity and highlights key research available and underway to inform strategic investment in Australia's live music industry. In addition, whole-of-government approaches, including cross-portfolio policy and collaborations with states and territories, are needed to maximise impacts and ensure the sustainability of Australia's music industry.

We trust this submission is useful to the Committee's inquiry to identify challenges, gaps and opportunities to drive a thriving music industry.

Creative Australia activity

Creative Australia has a longstanding commitment to championing music in Australia and contributing to a vibrant music sector. We support artists and organisations to develop skills, and create, present and tour their works nationally and internationally through grants and multi-year investment, strategic initiatives and research and advocacy.

In 2022–23 the Australia Council (now Creative Australia) invested \$11.1 million in music, representing 16% of grants and initiatives by area of practice.⁴

In addition to strategic partnerships, initiatives, and advocacy, Creative Australia's 2022–23 investment in music includes arts projects for individuals, groups and organisations, fellowships, residencies, the contemporary music touring program and multi-year investment through Four Year Funding and the National Performing Arts Partnership Framework.

Multi-year investments provide key music organisations long-term investment to build sector capacity, sustainability and contribute to thriving communities.

- **Ten music organisations** currently receive multi-year investment through the **National Performing Arts Partnership Framework**, a joint investment partnership with states and territories. Partnership Organisations currently funded through the framework are: Adelaide Symphony Orchestra, Australian Brandenburg Orchestra, Australian Chamber Orchestra, Melbourne Symphony Orchestra, Musica Viva Australia, Queensland Symphony Orchestra, Orchestra Victoria, Sydney Symphony Orchestra, Tasmanian Symphony Orchestra, and West Australian Symphony Orchestra.
- **15 music organisations** currently receive multi-year investment through our **Four Year Funding program**. Current recipients are: Sounds Australia, Australian Art Orchestra, Australian Music Centre Ltd, AMC, Australian String Quartet Inc, Canberra International Music Festival Ltd, Hayes Theatre Co, Melbourne Electronic Sound Studio LTD, Melbourne Jazz Limited, MusicNT Inc, Queensland Music Network Incorporated, Q Music, Skinnyfish Music, Speak Percussion, Tura New Music Ltd, Canberra Symphony Orchestra Limited and Darwin Symphony Orchestra Incorporated.

Details on key Creative Australia research on music is outlined from page 4 of this submission.

Music Australia activity

Since the establishment of Music Australia in 2023, the body has provided direct support to the music industry through a suite of initiatives, including:

- **Music Australia Export Development Fund:** A dedicated funding scheme for Australian music export to support international performance and touring activity, international professional and artistic development, and international market and audience development. As part of this fund, the Music Australia Conference Contribution will support Australian music industry professionals to attend international conference events. This funding stream is aimed at strengthening global networks, growing market knowledge, and building capacity for Australian managers, publishers and record labels. Successful grants will be announced in June 2024.
- **Service delivery partners pilot programs:**

- The Push: \$250,000 investment to develop programs aimed at young people entering the music industry, focusing on creative skills, small business practices, and increased sector capacity.
- The Association of Artist Managers: \$250,000 investment, which will provide support and resources for Australian music managers, enhancing skills and business practices to thrive in the evolving industry landscape.
- Australian Independent Record Labels Association (AIR): \$200,000 investment to support independent record labels and distributors, emphasising skills development, digital marketing, and the provision of an annual Awards show and industry conference.
- The Live Music Office (Live + Local Program): A \$200,000 grant to partner with local councils to build the capacity of local live music communities, supporting grassroots live music ecologies as the foundation of the industry.
- **Arts Projects:** \$1.05 million in funding to 32 contemporary music projects through the September Creative Australia's 2023 round of Arts Projects for Individuals and Groups and Arts Projects for Organisations. Projects funded include new artwork creation, the recording, mixing and mastering of Australian music, artistic and professional skills development, and the presentation of works locally and globally.
- **International Funds:** \$750,000 in funding to 33 additional music projects for international activity across three rounds of Creative Australia's International Engagement Fund; International Touring and Presentation Fund, and International Travel Fund.
- **Contemporary Music Touring Program:** \$500,000 in additional funding from Music Australia to the Contemporary Music Touring Program, an Australian Government initiative delivered by Creative Australia to support Australian musicians performing original Australian contemporary music to tour nationally.
- **Convening sector sessions on key topics:** One of the main roles of Music Australia is to bring a coordinated approach to sector wide issues. For example, sector sessions have been held with industry and with state and territory governments to directly discuss issues facing contemporary music festivals. This national coordinating role provides a key connector for industry to government and will continue to be an important function of the entity.

Music Australia is developing further targeted initiatives to foster music industry career development, support service delivery organisations, increase discoverability of contemporary Australian music, and specifically support First Nations musicians to create, record and promote work. These targeted initiatives will be announced later in 2024.

Working with all levels of government and across portfolios

There is an opportunity to maximise the success of Australia's live music industry through whole-of-government and cross-portfolio strategies and partnerships. Australia's music industry provides benefits for our health, wellbeing, community-building and education. It helps to strengthens Australia's global reputation, boosts local tourism and builds our nation's economic prosperity.

Cross-portfolio strategies, for example in tourism, foreign affairs and trade, health and education, as well as collaborations and strategic initiatives with state and territory and local governments, will be vital to achieving shared outcomes for our live music industry.

Relevant research

Published

- [*Soundcheck: Insights into Australia's music festival sector*](#) (2024) provides a comprehensive overview of the scope and scale of the Australian music festival industry, as well as insights into the social, cultural and economic impacts of music festivals and the challenges that festival organisers currently face.
- [*Artists as Workers: An economic study of professional artists in Australia*](#) (2024) is the seventh study in a landmark series by David Throsby and colleagues at Macquarie University tracking the working conditions of artists. This research provides information on the artistic practice, income, career development and pathways, and broader working lives of Australian musicians and composers. Creative Australia has published a summary and response to this research: [*Artists as Workers: A summary and response by Creative Australia*](#).
- [*Creating Value: Results of the National Arts Participation Survey*](#) (2023) explores Australians' engagement with arts and creativity and provides a comprehensive overview of Australians' engagement with music, including listening to recorded music, attending live music events and festivals and music creation.
- [*Making Music Work: Sustainable portfolio careers for Australian musicians*](#) (2020), led by Griffith University, explores the conditions and strategies needed for musicians to sustain successful portfolio careers.
- [*Survey of First Nations Music Artists*](#) (2020) provides insights into the strengths, challenges and needs of the sector and informs the First Nations music industry as it recovers, rebuilds and looks to the future following the impacts of COVID-19.
- [*Born Global: Australian music exports*](#) (2019) investigates the cultural and economic value of Australian music exports. Assessing the effects of globalisation and digitisation in the creation of Australian music exports, the project aims to identify strategies for improving exposure in the changing international landscape.
- [*The Australian Music and Games 2023 Benchmark*](#) (2023), conducted by Brendan Keogh (QUT) and Dan Golding (Swinburne University), documents the new and innovative ways in which Australian composers and musicians are working within and alongside the digital games sector – from licensing music for use in digital games, composing new dynamic soundtracks for specific games, and conducting live performances of game music.

Upcoming

- To inform future priorities and strategies, Music Australia is seeking updated economic data from festival organisers on the current pressures playing out across the music festival sector.
- *Revive* includes an action to undertake a scoping study to understand current and emerging workforce challenges and skills needs for arts workers across the cultural and creative sector, and inform the development of industry-driven solutions by the Arts, Personal Services, Retail, Tourism and Hospitality Jobs and Skills Council, to address identified issues. This study is expected to be completed by the end of 2024.
- Research exploring music audiences, including music discovery, consumption, engagement, and live participation and behaviours of Australian audiences.

- An economic analysis of the Australian music industry that will measure the value the Australian music industry contributes to the economy. This piece of research, currently seeking proposals, will aim to define the economic activities that make up the core Australian music industry; identify relevant statistical, financial and employment information for the defined activities; and identify, measure and analyse the music industry's contribution to the Australian economy and employment and the value of Australian music exports.
- [*Community Music Radio: Building the music-media ecosystem*](#), a 3-year project funded by the Australian Research Council and based at Monash University, conducted in partnership with the Community Broadcasting Association of Australia (CBA), Community Broadcasting Foundation (CBF) and APRA AMCOS (staged delivery 2023–26).

Data issues and knowledge gaps

It is difficult to capture data on Australia's music industry as there is no single definition of the music industry in Australia and data is not captured consistently or comprehensively through statistical vehicles.

For example, as core data is drawn from Census results, updates to the Australian Bureau of Statistics' (ABS) Australian and New Zealand Standard Classification of Occupations (ANZSCO) and Australian and New Zealand Standard Industrial Classification (ANZSIC) are necessary due to the evolution and digitisation of our industries and jobs, and to help future-proof occupation tracking.

In late 2023, Creative Australia provided a substantial submission to the ABS' [*comprehensive review of ANZSCO to better reflect the contemporary labour market*](#). There are a number of music occupations that require updates to reflect modern employment and a number omitted from the current classification list. Music occupations not included in the current ANZSCO codes include Artist Manager, Artist Agent, Audio Producer – including specialisations of Music Producer and Record Producer.

These issues present challenges to track and measure the music industry and were recognised in the final report for the Committee's inquiry into Australia's creative and cultural industries and institutions: *Sculpting a National Cultural Plan: Igniting a post-COVID economy for the arts (2021)*.

There is a need to address structural barriers to comprehensively measuring music industry data.

To help ensure these issues are addressed, Creative Australia will continue to work with the ABS on the ANZSCO and ANZSIC classifications and with the Bureau of Communications, Arts and Regional Research (BCARR) on the [*Cultural and Creative Activity Satellite Accounts Methodology Refresh, an action under Revive*](#).

Additionally, there is work underway to compensate for gaps in statistical vehicles by working with the sector to leverage existing datasets from sector stakeholders. These datasets may be beneficial to better understand the size, scale and economic contribution of music, including exports. Related research work includes the economic analysis of the Australian music industry and the scoping study of current and emerging creative workforce challenges and skills mentioned above.

Endnotes

¹ Australian Bureau of Statistics 2023, [*Australian Industry, 2021–22 financial year*](#). This figure includes the following industry subdivisions: creative and performing arts; heritage activities; motion picture and sound recording; broadcasting; publishing; internet publishing and broadcasting; libraries; printing and recorded media.

² Based on creative occupations within the creative industries and other occupations within creative industries, 2021 Census. Cunningham S and McCutcheon M 2022, [*The Creative Economy in Australia: What Census 2021 Tells Us*](#).

³ See Creative Australia website, [*About Music Australia*](#).

⁴ See Australia Council 2023, [*Annual Report 2022–23*](#).