

2025 ▶ 2034



NSW CONTEMPORARY MUSIC STRATEGY



Sound NSW acknowledges NSW's First Nations peoples as the Traditional Custodians of the country on which we live, work, create, perform and listen, and the lands and waters which are an endless source of inspiration for our music community.

We pay respect to Elders past and present, and celebrate the music deeply embedded in First Nations culture through Songlines, dance and ritual.

Always was, always will be Aboriginal land.



BARKAA performing at Darwin Festival, Larrakia Country. Photo: Renae Saxby.

Minister's Foreword	2
Head of Sound NSW Foreword	2
NSW Contemporary Music Strategy pillars and priorities	3
Context and sizing the prize	4
The local and global markets for music	6
NSW music in numbers	7
Pillar one: Building a better, more viable music industry	8
1. Prioritise and protect First Nations music	8
2. Strengthen the live and recorded music ecosystem	9
3. Future-proof the industry through upskilling and enabling collaboration	10
4. Improve industry capacity, diversity, safety and standards	11
Pillar two: Growing audiences for NSW music	12
5. Champion NSW music	12
6. Build insights and knowledge	13
7. Expand international markets	14
Pillar three: Strengthening our communities with music	15
8. Support music communities including regional NSW	15
The NSW music ecosystem	16
How government partners with NSW music	17
Measuring success	18



Cover image: Polaris performing at Hordern Pavilion, Sydney.
Photo: Jordan Munns, courtesy of Hordern Pavilion.

This page: Harbourlife 2023, Sydney.
Photo: Ruby Boland, courtesy of Fuzzy.

Minister's Foreword

Music is important to our way of life. It has the power to spark joy and bring people together. Music is also an important part of the NSW economy, with the live sector generating \$5.5 billion in economic output and employing over 14,000 people.

The previous government declared war on the state's music sector, including its festivals. Over ten years we lost more than half of our music venues. We have come a long way since those days and the music sector now enjoys bi-partisan support in the parliament.

The NSW Government wants to bring music back across our state. We are working to wind back outdated laws, reduce costs and find new ways to support artists, venues and festivals. This is the first time a NSW government has stepped up with a plan to back the industry. With this 10-year strategy, we want to make a very clear statement: government is no longer standing in the way of music, it is standing shoulder-to-shoulder with the industry to face the challenges and embrace the opportunities ahead.

The objectives of this strategy cannot be met by government alone, they will be met by the industry itself - with government backing. Success will also require continuing support from local and federal governments. We also need international streamers, tech platforms and music labels working to make our music more discoverable in the global music market.

This is still a tough moment for music in NSW, with audiences under financial pressure. Many of the changes we are making will have their impact when our economy bounces back. At that moment, we want our artists, labels, managers, venues and festivals positioned to sell out more shows and take their sound to bigger and bigger audiences, and to the world.



John Graham MLC

NSW Minister for the Arts,
NSW Minister for Music and the Night-Time Economy,
NSW Minister for Jobs and Tourism

December 2024
Gadigal Country – Sydney

Head of Sound NSW Foreword

Contemporary music is a powerful contributor to the NSW economy and a vital part of the everyday lives of people living across the state. Whether you're in Broken Hill, Bega, Byron Bay or Bondi, music soundtracks our lives, gives voice to our stories and shapes our communities. It also generates thousands of jobs, strengthens local economies and serves as a major catalyst for economic growth.

The global music industry is projected to experience substantial growth over the next decade and NSW needs a robust plan to ensure the state is competitive in the global market, as both a music destination and exporter. This strategy outlines a staged approach for the next 10 years: to stabilise industry foundations, drive growth and improve safety, equity and diversity.

Through helping build sustainable, viable business models, the NSW Government commits to the music industry's continued growth. It will offer tools to create safer, more inclusive workplaces where experience fuses with fresh perspectives from a diverse new cohort of young artists and industry professionals.

With a supported and empowered music industry working collaboratively with proactive government partners, NSW is in a prime position to cement itself as a global music powerhouse and engine room for the Australian industry.

The next decade has the potential to be a golden age for music in our state, with artists and fans at the heart of a thriving industry filled with unprecedented opportunities. The NSW Government is uniquely positioned to play a pivotal role in this transformation, and this strategy provides a roadmap for making NSW a thriving home for great music.



Emily Collins

Head of Sound NSW
Department of Creative Industries, Tourism,
Hospitality and Sport

December 2024
Gadigal Country – Sydney

NSW Contemporary Music Strategy pillars and priorities

OUR VISION

NSW is a global music destination and thriving engine room for the national industry, celebrating more than 65,000 years of local stories, leading best practice and enriching the lives of communities across the state.

STRATEGIC PILLARS

Building a better, more viable music industry

Growing audiences for NSW music

Strengthening our communities with music

HOW WE ARE GOING TO GET THERE - TOGETHER

STRATEGIC PRIORITIES

- 1 Prioritise and protect First Nations music
- 2 Strengthen the live and recorded music ecosystem
- 3 Future-proof the industry through upskilling and enabling collaboration
- 4 Improve industry capacity, diversity, safety and standards
- 5 Champion NSW music
- 6 Build insights and knowledge
- 7 Expand international markets
- 8 Support music communities including regional NSW

MEASURES OF SUCCESS



Context and sizing the prize

A lot can change in ten years

Ten years ago, in 2014, Sydney's lockdown laws had just started, TikTok didn't exist and COVID-19 was six years away. Iggy Azalea won an ARIA for 'Breakthrough Artist of the Year', Sia's 'Chandelier' was a global hit, The Kid LAROI was still a kid and although we didn't know it at the time, the Big Day Out festival that year would be its last. The Annandale Hotel and Newcastle's Cambridge Hotel were bastions of live music, drill was mainly used in construction, 'the algorithm' was more likely to be a band name than a topic of conversation and streaming was yet to overtake physical sales as the largest source of revenue for recorded music. The global recording industry was valued at just AUD \$18.7 billion¹, 37.8% lower than it had been at the turn of the century.

Since then, the global recording industry has more than doubled and in 2023 made AUD \$41.2 billion², growing 10.2% on 2022. Streaming now makes up 67% of global recorded revenues (AUD \$27.8 billion) while physical sales, after suffering a significant drop, climbed back to AUD \$7.3 billion in 2023, growing 13.5% on 2022³.

The global live music market made AUD \$59 billion in 2023, representing 32.5% of the total global music market⁴. The total music market, including digital streaming revenues (via both subscription and advertising), music radio, music podcasting and synchronisation/rights revenues, is forecast to grow 2.5% compounded annually to reach AUD \$207 billion by 2028⁵.

The live music market in Australia grew to AUD \$951 million in 2023, representing 32.5% of the total music market⁶. The total music market in Australia, including emerging revenues from digital streaming, music podcasting, and synchronisation/rights revenues, is forecast to grow 5% compounded annually to reach AUD \$3.6 billion by 2028⁷.



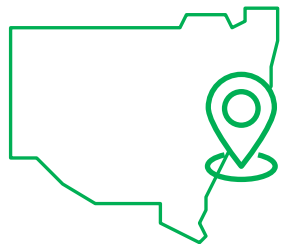
NSW

NSW is the epicentre of the Australian music industry, housing 50% of record labels nationally, including the three major labels, Universal Music Australia, Sony Music Australia and Warner Music Australia⁸. In 2023, four of Australia's top five most streamed local acts on Spotify were from NSW (The Wiggles, The Kid LAROI, Flume and AC/DC)⁹. While NSW makes up 31% of the Australian population, 40% of Australian artists featured in triple j's Hottest 100 in 2023 were from NSW. NSW has 48% of Australia's music publishers, 30% of all featured registered artists with PPCA¹⁰ and nearly 29,000 registered songwriters with APRA AMCOS¹¹.

NSW's live music ecosystem has an economic output of \$5.5 billion¹² and directly employs over 14,000 people full time, making up 36% of live music workers nationally¹³.

NSW has outstanding music venues, the backbone of the live music industry. There are 795 venues across the state that offer live music, including 55 dedicated live music spaces and 453 venues that regularly offer live music¹⁴. From beloved stalwart The Enmore Theatre in Sydney, to La La La's in Wollongong, to The Great Northern Hotel in Byron Bay and Moonshiners Bar in Tamworth – there are music venues across the state providing places for artists and music loving communities to come together and connect.

NSW is a home to a vibrant music festival industry, with over 140 music festivals¹⁵ offering a range of genres and experiences to delight regional and metro audiences. Major music festivals like Listen Out, Laneway, Bluesfest, Yours and Owls and Tamworth Country Music Festival populate a busy annual calendar along with unique festivals like Strawberry Fields, Harbourlife and Wingham Music Festival.



NSW is home to
over 140 music
festivals

Why now?

While the numbers are impressive, they hide an ecosystem experiencing challenges, some years in the making. Rapidly evolving technology, shifts in audience behaviour and external economic factors have changed how music is created, distributed, consumed and monetised.

Releases by Australian songwriters and creators are facing global headwinds – not just in engaging with international fans, but in connecting here at home. Of the top 10,000 artists streamed in Australia in 2023, just 9.2% were from Australia¹⁶. This presents an immense challenge not just for the viability of the domestic music industry, but for Australian culture and identity. But with every challenge comes opportunity.

Adapting to these changes is necessary to ensure the industry's viability and ongoing positive contributions to NSW. This is best achieved through a partnership approach, working closely with industry to deliver tailored initiatives and collaborating with governments at all levels, educational institutions, industry associations and communities.

This strategy, built on a theme of collaboration, is a 10-year plan for strengthening the NSW music industry through upskilling, improving conditions and infrastructure and championing its output. Its focus is to enable growth through reaching new audiences, locally and globally, while contributing to community cohesion and the NSW economy in ways only music can.



The local and global markets for music

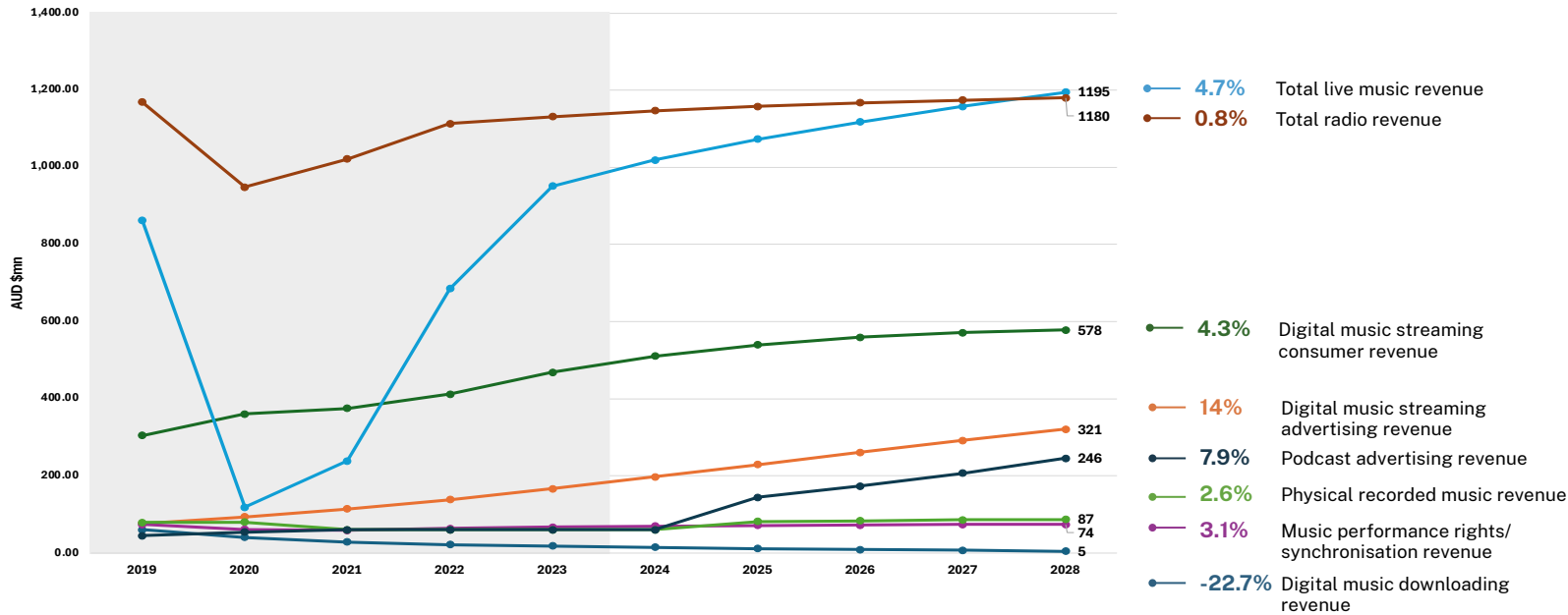


Figure 1 The Australian Music Market 2019 to 2028

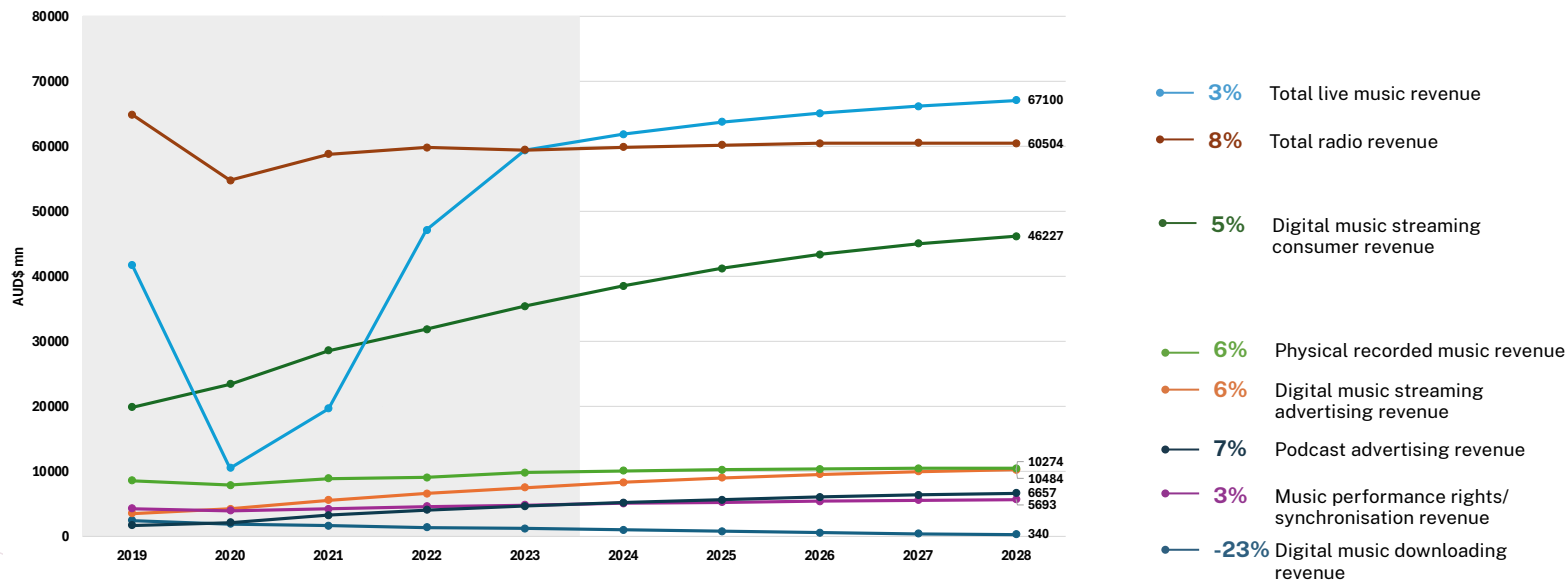


Figure 2 The Global Music Market 2019 to 2028¹⁷

Music's historical and forecast revenue data analysis:

- Radio revenue is expected to remain flat as competing distribution channels, such as streaming, take audience¹⁸
- Live music revenue is expected to grow well above pre-COVID levels with ticket price inflation driving growth for many large tours
- Digital music streaming revenue from subscribers is expected to grow at a healthy 4.3% compound annual growth rate (CAGR), as 70% of adult Australians report listening to streaming services in June 2023¹⁹
- Digital music streaming revenue from advertisers is expected to grow at a 14% CAGR, from a low base, as advertisers follow audiences online

NSW music in numbers



\$5.5 billion

in economic output generated by the live music industry²⁰



795

venues that offer live music including **55 dedicated** live music venues²³



Over

\$606 million

in ticketing revenue generated by contemporary music and music festivals in 2023, **58% of NSW's total** live performance revenue²⁶



14,180

direct workers employed in the live music industry²¹



Over

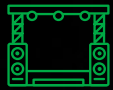
29,000

songwriters²⁴



4.5 million

attendees at contemporary music festivals and events in 2023, **49% of total** NSW attendance²⁷



Over

140

music festivals of all types and sizes held across the state each year²²



50%

of record labels including the three major labels²⁵

Tigerlily performing at Tomorrowland. Photo: Jessica McDonald.

Pillar one

Building a better, more viable music industry

1 Prioritise and protect First Nations music

NSW has a long history of music, with ancestral Songlines playing a vital role in helping us to understand the country we occupy and sharing stories of culture long before colonisation.

Music and storytelling are central to Aboriginal and Torres Strait Islander culture and its continued survival. In NSW we are privileged to share in that culture and have an obligation to nurture and protect it.

Prioritising First Nations music is our first strategic priority. Success relies upon collaboration and partnerships to build a strong First Nations music community in NSW, built on existing experience while empowering young voices.

What we want to see

- First Nations knowledge and best practice embedded in the NSW contemporary music industry
- Increased First Nations engagement and success with government investment strategies
- Equitable investment and support opportunities available to First Nations artists and organisations

What we will do

- **First Nations NSW Dedicated Support:** Deliver dedicated funding for First Nations NSW creators, artists, businesses and industry professionals to support career development, upskilling, audience and community building and business development. (Phase 1)
- **First Nations-specific Resources and Support:** Deliver First Nations-led support services (workshops, online videos and other resources) to navigate government opportunities. (Phase 1)
- **Elder in Residence:** Investigate opportunities to support First Nations organisations and communities to develop an Elder in Residence program for music industry events. (Phase 2)
- **Best Practice Engagement Guide for Industry:** Support the First Nations-led development of a best practice guide for working with First Nations artists and workers and protecting Indigenous Cultural and Intellectual Property (ICIP). (Phase 1)



Sound NSW Touring and Travel Fund Becca Hatch

Sound NSW has supported Western Sydney artist Becca Hatch via the Touring and Travel fund program. The Kamilaroi and Samoan artist has since been nominated for an ARIA Award for the Michael Gudinski Breakthrough Artist and released her debut EP 'Mayday', as well as appearing as the support act on tours with international artists like Tinashe and Mahalia and performing on-stage with Coldplay to an audience of 80,000.

CASE STUDY

2 Strengthen the live and recorded music ecosystem

The NSW music industry is a deeply interconnected ecosystem: artists, managers, producers, labels, booking agents, promoters, publishers, media, streaming services, live music venues, festivals and industry professionals all need each other to flourish.

When one part of the music industry struggles, the effects are felt widely. Currently, many parts are doing it tough as the industry responds to changing audience behaviour towards music discovery and live music experiences, against the backdrop of a fractured media landscape.

Over the coming decade, the NSW Government is committed to delivering policies and projects that strengthen areas of the industry that are at risk and help drive the whole industry's growth and expansion.

What we want to see

- NSW music business growth is stimulated and supported by relevant, coordinated and cohesive government policies and programs
- Artists and businesses in crucial stages of development and adaptation receive strategic investment and support
- Increased value of the NSW music industry

What we will do

- **World-Class Venues and Festivals:** Deliver programs and initiatives to nurture world-class NSW venues and festivals, including an accreditation scheme linked to reduced government costs, funding opportunities, licensing incentives and case-management style support. (Phase 1)
- **Support stronger relationships between NSW Police and the music community:** Initiate closer working relationships with NSW Police to support productive collaboration between live music operators and NSW Police. (Phase 1)
- **Recording, Touring and Travel Funds:** Connect NSW artists and industry professionals to the world through small grants that support recording, touring, business development and industry engagement. Provide additional investment for regional recipients and ring-fence funding for First Nations applicants. (Phase 1)
- **All-Ages Live Music Program:** Support the development of a venue-based all-ages live music program fund to deliver year-round shows for young people across NSW. (Phase 1)
- **Young Promoter Fund:** Support new and young promoters to develop and deliver events with guidance from industry mentors and partners. (Phase 1)



All-Ages Events and Best Practice Guide via The Push

Over three decades, The Push has given millions of young people access to contemporary music programs in regional and metropolitan areas, including all-ages tours across Victoria, QLD music trails, music career expos and music industry masterclasses. These events allow more young people to engage with the music industry, actively nurturing young music industry professionals and future audiences.

Sound NSW is supporting The Push to deliver a research paper detailing existing and perceived barriers to staging all-ages events in NSW. The research project will allow The Push to develop a best practice guide to assist venues, festivals, artists and producers in understanding and managing the barriers associated with all-ages events.

CASE STUDY

3 Future-proof the industry through upskilling and enabling collaboration

Over the coming decade, leveraging technological innovation will be key to maintaining the NSW music industry's resilience and competitive edge.

Sound NSW will support professional development programs that strengthen the capabilities of the NSW music industry, empowering it to make the most of new business models, emerging technologies and Artificial Intelligence.

What we want to see

- The NSW contemporary music industry is at the forefront of innovation and technology
- Artists' intellectual and creative properties are protected by robust policies and frameworks
- The creative industries are a collaborative ecosystem with professional development pathways and viable outcomes
- Local government is engaged in the continued development of a robust and sustainable music ecosystem, working closely with industry to lead in best practice and innovation

What we will do

- **Upskilling programs for music industry workers and businesses:** Support industry-led programs to upskill industry professionals in best practice and emerging trends and technologies including AI, marketing and promotion, cultural literacy and safety. (Phase 1)
- **Regulatory Reforms:** Improve regulation to support the protection and growth of live music in NSW, including Special Entertainment Precincts, Single Venue Overlays and streamlined conditions for venues and festivals. NSW Government will introduce the NSW Music Act to cement regulatory improvements. (Phase 1)
- **Home for Music:** Develop a business case for a world-class Music Business Hub with office spaces, co-working and collaboration spaces, and studios. (Phase 1)
- **Elite Music Education and Training:** Advocate to Australian Government for the establishment of a national elite tertiary education institution for contemporary music artists and industry professionals in NSW. (Phase 1)



Professional and Skills Development via MusicNSW

As the state's peak body for representing, promoting and developing the contemporary music sector, MusicNSW delivers programs on professional skills development across NSW. Its Sound Advice program aims to give artists, managers, and emerging industry professionals a leg up into the industry through providing free access to stellar guest speakers. With recent sessions taking place in areas including Western Sydney, Newcastle and Wollongong, Sound Advice sessions cover a range of topics to help identify career pathways for artists, share advice from industry professionals, and offer survival tips for coping as a contemporary artist.

CASE STUDY

4 Improve industry capacity, diversity, safety and standards

While always demanding, music careers offer opportunities to work collaboratively and creatively, developing critical thinking, project management and countless other specialist skills.

However, opportunities to access music education, training and pathways to music industry roles are reduced for those who live regionally and/or come from First Nations or Culturally and Linguistically Diverse backgrounds, identify as gender diverse or live with disabilities.

Audiences are also affected, with work still to do to make music venues and events more safe, welcoming and accessible. This is especially critical in regional areas with fewer venues, where resources, especially for young people, are already stretched.

The NSW Government is committed to supporting programs to make the music industry a fairer, more diverse and inclusive place to work, while increasing the safety and accessibility of live music experiences for all audiences to enjoy.

What we want to see

- The NSW contemporary music industry offers safe, inclusive and diverse workplaces with equitable opportunities for all workers
- Audiences are assured of a safe, inclusive and accessible environment when engaging with the NSW music industry
- The NSW contemporary music industry is empowered to act and make improvements to ensure the sector sets a world-class example of safety and inclusivity

What we will do

- **Best Practice Programs and Resources:** Support the development of industry-led programs and resources including a venue and audience safety toolkit, accessibility guide, working with young people guide and guide for working with First Nations artists and communities, as well as advocating for a Federal Code of Conduct. (Phase 1)
- **Fair Pay for Artists:** Implement a \$250 minimum fee for musicians performing at government-funded commercial events. (Phase 1)



Conscious Connects via Campbelltown Arts Centre

Sound NSW is supporting Campbelltown Arts Centre's Conscious Connects. Facilitated by local artist L-FRESH The LION, the program offers mentoring and skills development to socially-minded Western Sydney hip hop artists through a residency designed to meet individual career goals—including writing, recording, video creation and PR support.

Also a part of the Conscious program is a First Nations Music Development program: a three-month residency for mid-career First Nations artists; and Conscious Youth—a series of workshops for local youth focusing on developing musical and other industry-related skills to inform post-school career pathways.

Pillar two

Growing audiences for NSW music

5 Champion NSW music

NSW artists are facing new challenges in building fanbases as they compete for audience discovery and attention in an algorithm-driven music consumption environment that prioritises high profile, globally recognised artists and familiarity over new local artists' work.

Cost of living pressures are driving more conservative spending, with many music lovers choosing to see artists they know well over newer acts. It has also been harder for young people to build live music attendance habits, due to the pandemic and a reduction in all-ages shows and festivals over the past decade.

The NSW Government will support policies and initiatives that help drive music discovery, both locally and internationally.

What we want to see

- NSW artists and acts experience sustained increases in audiences, opportunities and pathways
- NSW music is celebrated and amplified across the state, country and world
- Artists, venues and audiences are supported to make NSW the home of a thriving music industry

What we will do

- **NSW Music Prize:** Deliver an annual prize consisting of NSW Music Prize (\$80k), First Nations Artist of the Year (\$40k) and Breakthrough Act of the Year (\$40k). (Phase 1)
- **Use NSW Music:** Champion NSW music through the use of NSW music in Government campaigns and initiatives. (Phase 1)
- **Build the profile of the NSW music industry:** Support industry-led marketing campaigns to promote music in NSW. (Phase 1)
- **Celebrate our music history:** Deliver research into NSW's contemporary music history. (Phase 1)



Sound NSW Touring and Travel Fund SPEED

Sound NSW contributed funding for Sydney band SPEED's American tour which saw them support hardcore band Knocked Loose. This provided SPEED with the opportunity to play large capacity venues and gain exposure to international audiences from all corners of the heavy music industry, helping establish the outfit's global presence. Since then, the group has released their debut album winning them an ARIA Award for Best Hard Rock or Heavy Metal album, toured extensively across Europe/UK and played their biggest Australian headline shows to date.

CASE STUDY

6 Build insights and knowledge

Robust data about audience behaviours, trends and preferences is essential for music industry professionals to make informed decisions about where to allocate their time and resources.

Unlike other creative industry sectors, music has limited publicly available information about its audiences and its industry, putting it at a disadvantage, especially when negotiating commercial terms with larger, global organisations.

The NSW Government is committed to building insights and knowledge in the sector, through collaborations with established state and federal research bodies, such as the Australian Bureau of Statistics.



Committed to building insights through research and data collection

State of the Scene cover image: L-FRESH The LION and Mirrah performing at 4Elements HipHop Festival (4ESydney). Photo: Christopher Woe, supplied by Vyva Entertainment.

What we want to see

- NSW artists and businesses have access to reliable, free data and insights about audience behaviour and industry trends

What we will do

- **Research and Data Collection:** Collaborate with State and Federal partners to invest in research and data collection focused on key industry issues. Utilise data to deliver insights into audience behaviour, industry trends and opportunities for music industry knowledge expansion. (Phase 1)

Sound NSW



State of the Scene 2024

Review of the NSW live music industry



Live music industry insights via State of the Scene

Sound NSW commissioned the State of the Scene 2024 Report, a first-of-its-kind piece of social and economic research to understand the current NSW live music industry and to provide guidance on how to support the industry to thrive in years to come.

The report provides baseline data on employment and live music venues, gives insight into the opportunities and challenges facing audiences and workers, and confirms that the live music industry plays a critical role to the state's economic and social wellbeing.

CASE STUDY

7 Expand international markets

NSW boasts a rich history of artists who have found worldwide success from AC/DC, The Divinyls and INXS to Iggy Azalea, Flume and The Kid LAROI.

The NSW Government's vision for NSW to be a global music destination sees the state as a hothouse of creativity, with infrastructure and opportunities that draw artists from across the country and throughout the world to collaborate with local artists in making and promoting music.

While efforts must be made to increase incoming economic growth, investments into pathways to international markets must also be made. This will allow more NSW artists and industry professionals to seize new opportunities globally, expanding the reach of the NSW music industry.

What we want to see

- NSW is recognised as a global music destination
- NSW artists and businesses have a significant global footprint
- Successful inbound and outbound export are integral aspects of the NSW music industry

What we will do

- **International Partnerships and Trade Missions:** Identify opportunities for national and international collaboration and partnership including international music trade missions (inbound and outbound). (Phase 2)
- **Music Made in NSW:** To build the profile of NSW globally, investigate opportunities for attracting international artists and producers to record in NSW. (Phase 3)
- **Advocacy for increased representation of NSW and Australian content:** Collaborate with State and Federal partners to review and advocate for increased representation of NSW and Australian content featured via radio, music streaming services and other digital service providers (DSPs). Advocate to Federal Government for regulatory settings that increase representation of NSW and Australian content across music distribution channels. (Phase 1)



Inbound Exchange Program via Sounds Australia

Sound NSW supported Sounds Australia's Inbound Exchange Program in 2024, bringing key music industry partners from India to NSW for tailored networking events, meetings, workshops and showcases. This program allowed participants to forge valuable partnerships and promote international growth in one of the world's fastest growing music markets.

Deepa and Nausheen performing at Ante, Newtown. Photo: Vasili Papathanasopoulos, courtesy of Sounds Australia.

Pillar three

Strengthening our communities with music

8 Support music communities including regional NSW

Music is a powerful tool for good: it adds meaning to people's lives and contributes significantly to mental and emotional wellbeing, facilitating self-expression and fostering deep social connections.

Contemporary music's superpower is its ability to give voices to communities who often feel unheard.

Music binds communities together, reinforcing culture and connection, contributing to a healthy and thriving society.

These communities also breathe new life into the wider music ecosystem, growing artists, audiences and delivering the next generation of industry workers.

Specific focus will be placed on initiatives that empower women, young people, First Nations people, those living regionally, people from Culturally and Linguistically Diverse backgrounds and those living with disabilities.

What we want to see

- Community focused and led programs and initiatives across NSW including regional NSW and Western Sydney are supported by the NSW Government
- Music is acknowledged as beneficial to the mental and social wellbeing of individuals and communities

- Access to music as a form of culture is encouraged and barriers to access are significantly reduced
- NSW is home to a thriving grassroots ecosystem which contributes to the ongoing viability of the music industry

What we will do

- **Grow NSW Music Tourism:** Develop music tourism projects and campaigns to promote music across the state and drive increased visitation. (Phase 1)
- **Contemporary Music in Schools:** Support programs and initiatives that increase the presence of contemporary music education in schools. (Phase 1)
- **Social Impact Partnerships:** Support programs that improve well being, safety, mental health, and cultural development, with a focus on young people, people living with disabilities, First Nations people, women, LGBTIQ+, regional NSW and Western Sydney. (Phase 1)
- **Music Community Collaboration:** Support communities to collaboratively market and deliver local music events. (Phase 1)

Ricky Cash performing at the CMAA Academy of Country Music Graduation Concert, Wests Tamworth. Photo: Tracy Beveridge.

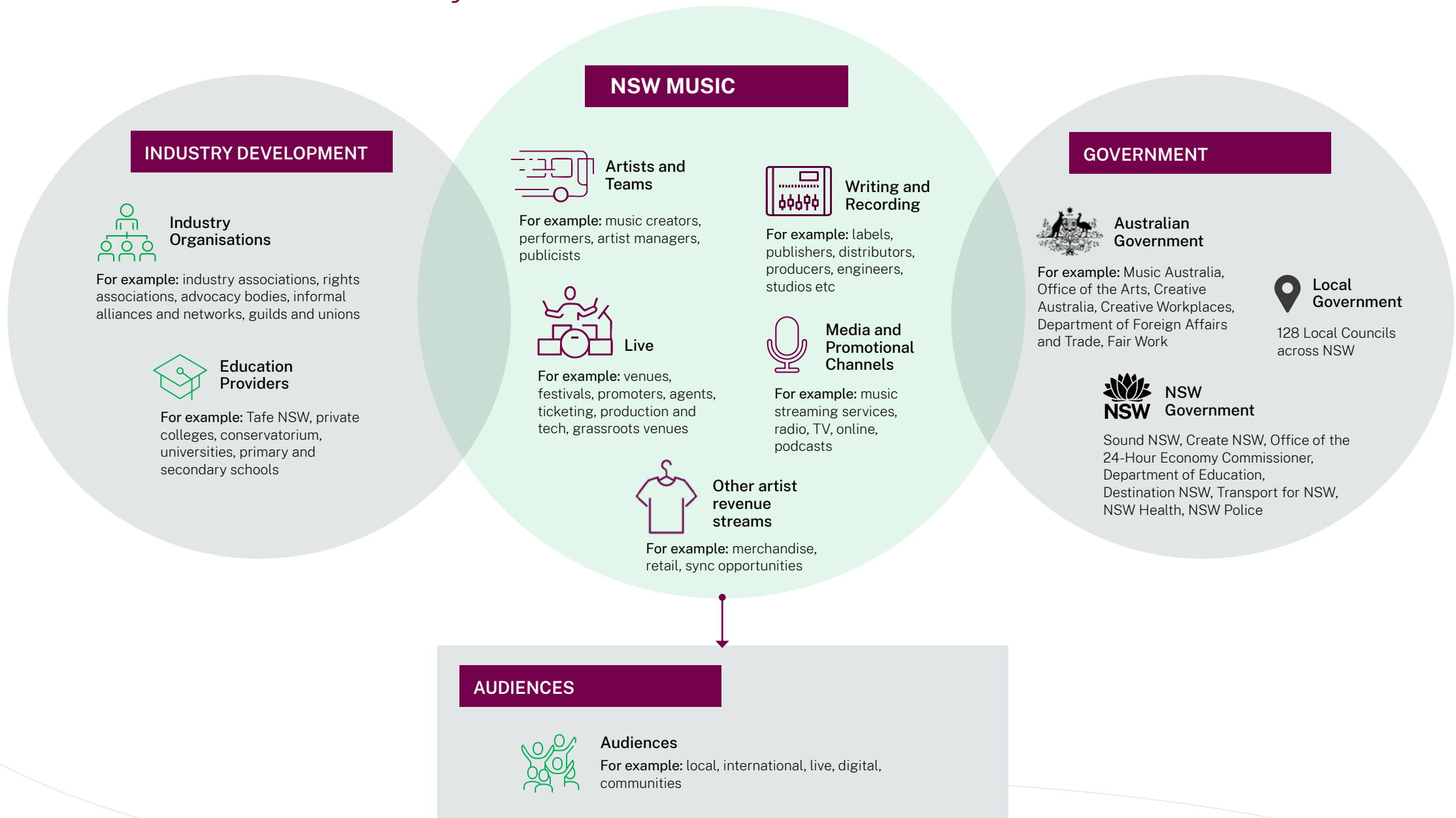


Regional community support via Country Music Association of Australia









The Country Music Association of Australia (CMAA) undertakes professional development in the country music industry and promotes the knowledge of Australian country music to the world. Sound NSW is supporting CMAA to invest in additional staffing resources, deliver senior scholarship programs and support export opportunities in Nashville, USA. These programs complement the ongoing work CMAA undertakes to support regional communities and artists including being an industry partner to the annual Golden Guitar Awards, a celebration of recorded excellence held during the Tamworth Country Music Festival, the largest country music festival in the southern hemisphere, which attracts hundreds of the world's top country music acts and thousands of fans to Tamworth each year.

CASE STUDY

The NSW music ecosystem



How government partners with NSW music

	 AUSTRALIAN GOVERNMENT			 NSW GOVERNMENT				 LOCAL GOVERNMENT	
 Funding	Music Australia	Office of the Arts		Sound NSW	Create NSW	Office of the 24-Hour Economy Commissioner	Destination NSW	Local festivals & events	Artist grants Artist residency programs
 Legislation & Regulation	National workplace laws and fair work pay & conditions	Australian Copyright Act	Tax incentives	Vibrancy Reforms legislation	Music Festivals Act	Entertainment Industry Act	Destination NSW Act, Centennial Park and Moore Park Trust Act	Planning/development controls	Noise regulation (unlicensed venues)
 Skills, Education & Training	Tertiary Education			Primary and Secondary Education	TAFE NSW	Private Colleges	Conservatoriums		
 Infrastructure	Development of music hubs	Investment in nationally significant venues		State-owned venues	Stadiums	Cultural Institutions	Parklands	Special Entertainment Precincts	Planning/development controls Special Entertainment Precincts
 Policy & Research	Revive National Cultural Policy	Industry research & data collection		Creative Communities policy & NSW sector strategy	State of the Scene Report, Sound NSW	Industry research & data collection			

Measuring success

A roadmap

The music industry in NSW, Australia and globally has been through significant shifts in the last ten years and will continue to grow and evolve with each new opportunity and challenge.

This means any 10-year strategy needs a vision that is both strong enough to remain relevant and priorities that are flexible to adapt to a range of unknowns.

This 10-year strategy will have three cycles of implementation, with a framework of evaluation for each phase and initiative.



Each implementation phase will include:

- Assessment of current context
- Evaluation of previous plan
- Accountability measures for deliverables
- Specific actions, programs, initiatives and targets

Measures of Success

By 2034, NSW will:

- **Increase** the number of NSW First Nations recipients of Sound NSW funding by an average of 5% per year
- **Increase** the total number of artists supported by government funding to record and tour by an average of 10% per year
- **Increase** the number of community-based music events supported by government funding by an average of 5% per year
- **Increase** the number of direct FTE live music industry workers from 14,000 to 20,000, a 43% increase
- **Increase** the number of dedicated live music venues from 55 to 110, a 100% increase
- **Increase** NSW's market share of national ticket revenue from 33.7% to 35%
- **Increase** the contribution of contemporary music to the NSW economy from \$2.7 billion to \$3.5 billion
- **Invest** \$103m in contemporary music (by 2027)
- **Embed** support for contemporary music in government

Accountability

To ensure accountability for the delivery of this strategy, NSW Government will publish annual updates on Sound NSW programs, funding, activities and performance against success measures in line with the 10-year Strategy's priorities and initiatives.



Vv Pete performing at Sydney Opera House, Sydney. Photo: Daniel Boud.

Notes

- 1 *Global Music Report*, International Federation of the Phonographic Industry (IFPI), 2024
- 2 *Global Music Report*, International Federation of the Phonographic Industry (IFPI), 2024
- 3 *Global Music Report*, International Federation of the Phonographic Industry (IFPI), 2024
- 4 PwC Entertainment and Media Outlook 2024-2028
- 5 PwC Entertainment and Media Outlook 2024-2028
- 6 PwC Entertainment and Media Outlook 2024-2028
- 7 PwC Entertainment and Media Outlook 2024-2028-Global data sources for music vary in how they define the music market. IFPI addresses recorded music only and includes five revenue streams: streaming, downloads, physical sales, performance rights and synchronisation. PwC, as forecasters of emerging and future revenues, takes a broad view and includes eight revenue streams: live, streaming advertising revenues, streaming consumer revenues, downloads, performance rights/synchronisation, physical sales, music radio revenues and music podcasting. See the graphs in this document to understand the relative sizes and forecast growth of each revenue stream.
- 8 Registered NSW labels, provided by ARIA
- 9 The stats are in *On How Australians listened in 2023*, with end-of-year lists out, including Spotify Wrapped, ABC News, 2023
- 10 Registered Artists, provided by PPCA
- 11 Registered NSW songwriters and publishers, provided by APRA AMCOS
- 12 *State of the Scene, Review of the NSW live music industry*, commissioned by Sound NSW, 2024
- 13 *Australia's live music sector: an occupation-based analysis, Working Paper*, Bureau of Communications, Arts and Regional Research, 2023
- 14 *State of the Scene, Review of the NSW live music industry*, commissioned by Sound NSW, 2024
- 15 *Soundcheck: Insights into Australia's music festival sector*, Creative Australia, 2024
- 16 *Insights Matter: Music Insights for the Global and Asia Pacific Markets*, All That Matters, Luminare, 2024
- 17 The graphs show the sizes of the global and Australian music market from 2019 to 2023 (five years historical) and how each segment is expected to grow (or shrink) from 2024 to 2028. 'CAGR' (compound annual growth rate) is the annualised average growth rate for each segment expected in the next five years. Source: PwC Entertainment and Media Outlook 2024-2028
- 18 The Australian Communications and Media Authority (ACMA) 2023 listenership survey (one week's listening) showed that 56% of Australian adults listened to FM radio in 2023, a decline from 60% in 2022. Source: *Communications and media in Australia: Trends and developments in viewing and listening 2022-2023*
- 19 Ibid.
- 20 *State of the Scene Report*, Sound NSW, 2024
- 21 *State of the Scene Report*, Sound NSW, 2024
- 22 *Soundcheck: Insights into Australia's music festival sector*, Creative Australia, 2024
- 23 *State of the Scene Report*, Sound NSW, 2024
- 24 Registered NSW songwriters, provided by APRA AMCOS
- 25 Registered NSW labels, provided by ARIA
- 26 *Live Performance Australia, 2023 Ticket Attendance and Revenue Report*, 2024
- 27 *Live Performance Australia, 2023 Ticket Attendance and Revenue Report*, 2024

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