



PARLIAMENT OF AUSTRALIA

# **Am I Ever Gonna See You Live Again?**

**Yes way! You bet! Oh yeah!**

**House of Representatives**

**Standing Committee on Communications and the Arts**

March 2025

CANBERRA

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# Chair's foreword: Am I Ever Gonna See You Live Again?

“Am I Ever Gonna See Your Face Again?” by The Angels is an Aussie rock classic that is testament to the awesome power of live performance.

Originally written by Doc Neeson as a slow ballad exploring themes of grief and loss it was released as the band’s debut single in 1976 and sputtered to 58 on the charts.

But in the early 1980s, something strange happened. Neeson would sing the song at live shows and in the pause after the eponymous question was asked, an expletive-laden chorus would ring out from the audience: “No way, get beeped, beep off!” (good manners and parliamentary standards dictate that I replace the actual word with beep).

Reports are that Neeson wasn’t initially thrilled with the fans’ hijacking of his song, but the die was cast. Whenever and wherever it was sung, the chorus was taken up with gusto by the crowd and it soon became a staple.

“Am I Ever Gonna See Your Face Again?” may have been written by Doc Neeson but the audience took ownership in a way that could only have happened live. Theories abound as to the origins of the chorus – one suggests a Blue Light Disco DJ encouraged young teenagers in western Sydney to chant it, while others say it was a drunken reveller in a WA pub who first yelled it out – but the uncertainty only adds to the mystique.

A live version of the song – crowd chorus included – was released in 1988 and it reached 11 on the charts. In the decades since, the song has been added to Australia’s pantheon of legendary music, in no small part due to that audience chorus.

If the song had never been played live, it simply wouldn’t be the same.

The name of this report is an unashamed remix and resampling of Neeson’s iconic work, though we’ve included a chorus somewhat more positive and less likely to cause swooning amongst the delicate.

Our committee was tasked with exploring what’s going on in live music in Australia. What are the challenges and, importantly, what’s the path forward to ensure live music can enjoy a strong and sustainable future.

The challenges are many and varied, and were well articulated by the many witnesses who provided evidence. We’re undoubtedly seeing tectonic shifts in the economics of music and in the relationships between fans and musicians, largely driven by technological disruption.

For example, it used to be that bands would make their money from selling singles and albums. Tours were treated as loss-leaders: unprofitable ventures worth doing because they opened the bands up to new and bigger audiences, who would then buy more records.

Pubs would get musicians in to play because their audiences would buy beer.

But now we don't buy music, we pay a monthly subscription to stream it, and musicians only make fractions of a cent when their licensed songs are played. So tours and ticket sales are now vital to earning a quid and making a living.

There are fewer pubs willing to accommodate live acts and those who do make less money because drinking habits have changed.

Making money from playing music has always been hard but it's harder now than ever.

But there's also opportunity, and young, innovative artists are finding their way to make a living. Relationships with audiences are more direct and can be more authentic – traditional powerbrokers have less authority; the music executives, the producers, the FM DJs can't make or break artists in the way they used to (Spiderbait's Buy Me a Pony comes to mind). Artists can have more control over their art and – importantly – their own merchandising and image.

The big commercial festivals are falling over but many smaller, grassroots, community led festivals are flourishing. The challenge is how to encourage this, while ensuring the musicians who play at them do so in a way that allows them to pay their bills.

We've come up with a bunch of recommendations we think will help.

This was a long inquiry, longer than we expected it to be, but we went over a lot of ground. It's clear a lot of people are doing a lot of work in the live music space to ensure it has a strong future. State governments, some councils and advocacy organisations are doing really impressive work and are, by and large, on the same page.

We've recommended that more work be done to encourage an appreciation of music education, mainly because it's great for kids' brains, but also because it fosters a love of music that will remain into adulthood, creating a new generation of music appreciation. Of all the recommendations we've made, that to me is the most important: teach kids how to play music, not just how to stick airpods in their ears.

Finally, I'd like to thank the witnesses who gave evidence at hearings and who took the time to make thoughtful submissions, the committee secretariat who pulled this enormous amount of work together, and my committee colleagues for their constructive input.

As I'm not recontesting at the election, this will be my last report as Committee Chair and as a Member of the Federal Parliament. On that note: be excellent to each other, and party on, dudes.

Brian Mitchell MP

Chair

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# Members

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Mr Brian Mitchell MP

Lyons, TAS

## ***Deputy Chair***

Mrs Bridget Archer MP

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## ***Members***

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Corangamite, VIC

Hon Mark Coulton MP

Parkes, NSW

Ms Zoe Daniel MP

Goldstein, VIC

Mr Peter Khalil MP

Wills, VIC

Ms Zoe McKenzie MP

Flinders, VIC

Dr Gordon Reid MP

Robertson, NSW

Ms Susan Templeman MP

Macquarie, NSW

*This committee is supported by staff of the Department of the House of Representatives.*







# Terms of reference

The Standing Committee on Communications and the Arts inquire into and report on the challenges and opportunities within the Australian live music industry, pertaining to:

- Sustainability and growth of the industry
- Suitability and location of venues for organisers, participants, and attendees
- Artist development and career pathways
- Capacity building in facilitation and promotion of events and festivals
- Local economic benefits
- Grant and support programs
- Audience development and consumer behaviours
- Barriers to growing the Australian industry, both domestically and internationally, including those relating to export, and
- Building sustainability in the industry, domestically and internationally.



# List of recommendations

## Recommendation 1

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- 4.22 The Committee recommends the Australian Government investigate the potential benefits of a tax offset for the live music industry. The Treasury, the Office of the Arts and Creative Australia should be tasked with developing a policy proposal for the Australian Government to consider.
- 4.23 Such a tax offset might be considered in conjunction with proposals for a live performance offset that would benefit other artforms such as theatre.

## Recommendation 2

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- 4.24 The Committee recommends Australian consumer law be amended to better regulate the selling of tickets to live music, by:
- improving the transparency of fees and charges within the price of tickets
  - limiting extreme variability in ticket prices caused by ‘dynamic pricing’.

## Recommendation 3

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- 4.25 The Committee recommends the Australian Competition and Consumer Commission monitor the Australian music industry for anti-competitive conduct and take enforcement action as required.

## Recommendation 4

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- 4.26 The Committee recommends the Australian Government add a small levy to the price of tickets to large music events and direct the funds raised to support for small venues and grassroots live music (see Recommendation 5).

## Recommendation 5

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- 4.27 The Committee recommends an extension and expansion of the Revive Live program. This expansion might be funded through a ticket levy (Recommendation 4) and funds could be disbursed by Music Australia. The funding could be offered in three streams:
- Live and local: a series of performances at a live music venue or non-traditional venue with mandated minimum performance fees.

- **Live ready:** funding for capital improvements to live music venues to improve the functionality and accessibility of venues. This could include costs like sound-proofing, equipment upgrades, disability access.
- **Live for all:** funding for music festivals with an emphasis on improving the accessibility, viability and diversity of live music, including regional festivals, all-ages events, First Nations festivals, community focussed events and not-for-profit based operations.

## **Recommendation 6**

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- 4.28** The Committee recommends state, territory and local governments consider designating ‘special entertainment precincts’ in recognition of the economic and cultural value of these places.
- 4.29** Special Entertainment Precincts should benefit from a regulatory regime more supportive to their ongoing viability. This may include exemptions to trading hour restrictions, concessional liquor excise rates and differentiated noise complaint processes.
- 4.30** Further, the Committee recommends the Australian Government gather information on best practice in this area, provide advice to jurisdictions on how to establish and support special entertainment precincts, and monitor the effectiveness of reforms across the jurisdictions that implement them.

## **Recommendation 7**

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- 4.31** The Committee recommends the Australian Government assess the viability of a rebate or voucher scheme to incentivise younger audiences to attend live music.
- 4.32** This may include offering event presenters a rebate to compensate them for income foregone by offering discounted tickets to young audiences and ‘two for one’ tickets for audience members required to attend with an adult or support person/carer.
- 4.33** An alternative approach may be to offer vouchers directly to prospective audience members.
- 4.34** The scheme should prioritise:
- young audiences, from under 18s to early 30s – the demographic in most significant decline amongst live music audiences
  - events, venues or festivals with Australian artists and original music in their programs
- 4.35** The Committee recommends the Australian Government partner with state and territory jurisdictions in funding a trial of any future rebate or voucher scheme.

## **Recommendation 8**

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- 4.36** The Committee recommends the Australian Government consider ways in which it could partner with state and territory governments to improve the standard of music education in primary schools.
- 4.37** This may include support for pilot projects to deliver quality music education in communities of socio-economic disadvantage and an evaluation of the impacts of this on student outcomes.
- 4.38** The Committee recommends the Australian Curriculum, Assessment and Reporting Authority work closely with state and territory governments to ensure better incorporation of music education into school curricula, with the aim of significantly increasing the number of children studying music at primary and high school.

## **Recommendation 9**

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- 4.39** The Committee recommends a minimum fee reflective of Award rates and conditions be established for the hiring of musicians and performers at public events that are run, sponsored or otherwise supported by the Australian Government, and that this fee be indexed yearly by CPI or average wages.

## **Recommendation 10**

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- 4.40** The Committee recommends the Australian Government partner with relevant stakeholders to undertake research into the viability of a self-insurance or mutual insurance model for the music industry and investigate other reforms and initiatives for insuring live music activities that could result in lower premiums for presenters.
- 4.41** Further, the Committee recommends the Australian Government provide information on best practice management of live music venues and events with a view to reducing both risk to insurers and premiums for presenters.
- 4.42** The Committee recommends Music Australia partner with the Live Music Business Council and the Insurance Council of Australia to develop a self-assessment app to provide a more accurate prediction of risk and a more customised insurance premium to reflect the main drivers of risk (outdoor events, multi-day events, late events, etc).

## **Recommendation 11**

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- 4.43** The Committee recommends the introduction of a new obligation for major international tours to include Australian support acts as a condition of approval – a proposal commonly referred to as ‘Michael’s Rule’.

## **Recommendation 12**

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- 4.44** The Committee recommends the Australian Government conduct comprehensive research into changes in audience behaviour and generational attitudes and behaviours that have affected demand for live music.

## **Recommendation 13**

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- 4.45** The Committee recommends the Australian Government develop a centralised source of information on compliance, age-based access, regulation, and training requirements across national, state, territory and municipal jurisdictions that can inform the planning and management of festivals and live music venues.

## **Recommendation 14**

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- 4.46** The Committee recommends state and territory governments consider a reduction or abolition of user-pays policing charges at music festivals.

## **Recommendation 15**

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- 4.47** The Committee recommends state and territory governments re-evaluate the need for large police presences at live music events and the use of sniffer dogs and strip-searches.

## **Recommendation 16**

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- 4.48** The Committee recommends Austrade expand its support for Australian music exports to support the global reach of Australian music.

## **Recommendation 17**

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- 4.49** The Committee recommends the Australian Government undertake research on business models for live music that do not require dependence on the sale of alcohol.

## **Recommendation 18**

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- 4.50** The Committee recommends state, territory and local governments support the development of dedicated and permanent outdoor live music spaces (such as sound shells and associated equipment and infrastructure) to reduce the marginal cost of staging events for presenters.
- 4.51** The Committee recommends state, territory and local governments support private sector efforts to establish permanent and dedicated festival sites in

regional settings that are resilient against extreme weather events and ensure these sites are served with appropriate amenities.

- 4.52** The Committee recommends state, territory and local governments re-evaluate their pricing regimes for government-operated venues and provide concessional fees to presenters fulfilling cultural imperatives.

#### **Recommendation 19**

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- 4.53** The Committee recommends the Australian Government consider supporting live music event-related training programs for young people.

#### **Recommendation 20**

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- 4.54** The Committee recommends the Australian Government work with music streaming services to increase the proportion of Australian content that algorithms or automated playlists generate for Australian users, and that if co-operation is not forthcoming that legislation be strongly considered to mandate and enforce higher proportions of Australian music on these services.







# 1. Australian live music

## About the inquiry

- 1.1 On 25 March 2024, the Minister for the Arts asked the Committee to inquire into the challenges and opportunities within the Australian live music industry.
- 1.2 The inquiry terms of reference included examining the industry's sustainability, barriers to growth and consumer behaviours.
- 1.3 The Committee received 129 submissions and several supplementary submissions. Public hearings were held from June to November 2024. Details of submissions received, public hearings and witnesses can be found in appendices A and B. During the inquiry, the Committee received evidence on live music from a range of perspectives and backgrounds. These included:
  - musicians, creators and artists
  - educators and researchers
  - business managers and owners
  - technology creators and owners, including streaming services
  - broadcasters
  - First Nations groups
  - Commonwealth, state, territory and local governments and policy makers.
- 1.4 The Committee wishes to thank everyone who contributed to the inquiry and note its appreciation to everyone who contributes to live music in Australia.

## Live music in Australia

- 1.5 This section of the report provides some background and context on live music in Australia.
- 1.6 Creative Australia is the Australian Government's principal advisory body on the arts. In a submission, Creative Australia summarised the value of live music:

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 Product and employ nearly 500,000 people.<sup>1</sup>

1.7 Creative Australia surveyed Australian music festivals about their results during the period 2022-23. The reported findings included:

- 535 music festivals were held, mostly in Victoria and NSW
- four out of five music acts who played at music festivals were Australian
- most festivals attracted 1,000 to 10,000 attendees
- 18 to 24 year olds are purchasing fewer tickets now than before the COVID-19 pandemic
- half of festivals made a profit (median \$731,579) and around 35 per cent lost money (median \$470,000)
- one in ten music festivals have operated for 30 years or more. Most have operated for less than 13 years.<sup>2</sup>

1.8 In analysis published in 2023, the Bureau of Communications, Arts and Regional Research (BCARR) found:

- around 41,000 people work in live music. Most (63 per cent) are employed in NSW or Victoria. Most workers are male
- many people (around 78 per cent) work in roles that are supportive or indirectly related to live music
- those who work in live music earn less than average and sometimes have a second job.<sup>3</sup>

1.9 The BCARR's analysis included the following observation:

The live music sector was heavily disrupted by COVID-19 with an 80 per cent fall in the number of promoted events from 35,800 in 2019 to just 7,300 in 2020.<sup>4</sup>

1.10 In 2024 in NSW, the value of live music is estimated to be \$5.5 billion (direct and indirect) worth of economic activity in that state.<sup>5</sup> The same research included the following findings:

- 90.7 per cent of the NSW public who attend live music agree that live music contributes to the vibrancy of cities and communities

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<sup>1</sup> Creative Australia, Submission 74, p.1.

<sup>2</sup> Creative Australia, 'Soundcheck: insights into Australia's music festival sector', September 2024, p.5.

<sup>3</sup> Bureau of Communications, Arts and Regional Research, 'Australia's Live Music Sector: an occupation-based analysis', March 2023, pp.2-3.

<sup>4</sup> Bureau of Communications, Arts and Regional Research, 'Australia's Live Music Sector: an occupation-based analysis', March 2023, p.3.

<sup>5</sup> Sound NSW, 'State of the Scene 2024', p.4.

- 90.9 per cent 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.<sup>6</sup>
- 1.11 The Australian Music Association submitted that Australia is the world's tenth largest consumer of recorded music and the sixth largest consumer of music products.<sup>7</sup> The submission added that 'Australians value music making and there are economic benefits to participation in music for our industry and the live music industry'.<sup>8</sup>
- 1.12 The Media, Entertainment and Arts Alliance said that while live music is 'hugely profitable', their members, on average, earn less than \$6,000 per year.<sup>9</sup>
- 1.13 Other submissions noted the emotional, social and cultural value of live music. For example, Tim Hollo submitted:
- Music, as an artistic and cultural practice, has always been about sharing and borrowing; about free exchange; about something that appears and disappears; a gift of a brief moment of transcendence lifting out of the here and now into something bigger than ourselves.<sup>10</sup>
- 1.14 The University of Melbourne's School of Computing and Information Systems submitted that music's cultural value 'cannot be fully reproduced in recordings' and 'its emotional value is still intimately bound up with consumption in a live setting'.<sup>11</sup>
- 1.15 Live music was often described as being an ecosystem. For example, Ewen Craig from Cedar Mill Group (now renamed as Winarch Group) told the Committee:
- Taylor, Bruno Mars or Coldplay generate huge amounts of spends but then they feed down into Australian production companies... Within the venues or the event or the show itself, the ecosystem in there is all the casual labour—the security companies, the front of house companies, the loaders, the riggers—getting additional work.<sup>12</sup>
- 1.16 Adelaide Fringe, an arts festival, said in their submission:
- Live festivals and venues are integral to nurturing new talent. These platforms give musicians, artists, crew and technicians their start, enabling them to launch careers that can thrive both nationally and internationally. The health of this ecosystem directly influences the success of artists and the cultural richness of the music scene.<sup>13</sup>

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<sup>6</sup> Sound NSW, 'State of the Scene 2024', p.10.

<sup>7</sup> Australian Music Association, Submission 83, p.3.

<sup>8</sup> Australian Music Association, Submission 83, p.3.

<sup>9</sup> Paul Davies, Media, Entertainment and Arts Alliance, Committee Hansard, 26 July 2024, p.14.

<sup>10</sup> Tim Hollo, Submission 93, p.2.

<sup>11</sup> University of Melbourne School of Computing and Information Systems, Submission 89, p.4.

<sup>12</sup> Craig Ewen, Cedar Mill Group, Committee Hansard, 5 July 2024, p.40.

<sup>13</sup> Adelaide Fringe, Submission 2, p.1.

1.17 Bluesfest Byron Bay said:

We see so much investment in sport, and yet, with culture, unless it's investment primarily in government institutions or events, investment doesn't seem to occur at the levels that those people... who have contributed to our community for decades feel we should receive.<sup>14</sup>

1.18 Kicks Entertainment, whose events include the Spilt Milk festival, submitted that live music events could take 'decades to repair' if allowed to collapse.<sup>15</sup> The submission added:

A collapsed live music industry will result in billions of dollars in lost economic benefit, tens of thousands of jobs lost and unmeasurable hurt to the ecosystem that has created Australian icons such as Kylie Minogue, Powderfinger, AC/DC, Troye Sivan, Flume and countless others.<sup>16</sup>

1.19 The Australian Music Association submitted:

We think that there are economic benefits to widespread participation in music... There are plenty of other reasons to have more music making. It's great for human connection. It's great for cognitive development, audience development and mental health.<sup>17</sup>

## Challenges and possible solutions

1.20 During the inquiry, some issues were consistently cited as being challenges and barriers to live music in Australia. While witnesses each had their own unique experience, in general terms, issues discussed in the evidence included the following:

- increased costs – such as insurance and travel – and risks of doing business, as well as unpredictable ticket sales and low or declining earnings
- many artists, live music venues and festivals struggling to make money and attract audiences
- new technology (such as algorithms) changing how audiences access and consume music, which in turn has disrupted business models and impacted on how revenue is generated and shared.

1.21 Other themes and issues in the evidence included:

- economic conditions, global competition and market dynamics potentially displacing or impacting on Australian artists, businesses and live music events

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<sup>14</sup> Peter Noble, Bluesfest Byron Bay, Proof Committee Hansard, 17 October 2024, p.22.

<sup>15</sup> Kicks Entertainment, Submission 23, p.1.

<sup>16</sup> Kicks Entertainment, Submission 23, p.1.

<sup>17</sup> Alexander Masso, Australian Music Association, Committee Hansard, 25 July 2024, p.37.

- adverse weather – such as big storms or heatwaves – deterring ticket sales, raising insurance risks and adding extra complexity to event planning
- the live music industry was severely impacted during the COVID-19 pandemic, when events could not be held due to restrictions on large gatherings
- during the pandemic, younger audiences missed the chance to experience live music now have limited money for discretionary spending on entertainment
- experiences relating to live music in regional communities, First Nations musicians, government grants, gender equality, attracting skilled staff, music education, teaching, careers in music and research and data collection
- workplace conditions and culture
- access to music education and skills.

1.22 The Australian Festival Association submitted:

The success of songwriters, record labels, artist managers, booking agents, promoters, and festivals is interconnected. ...despite the recorded music sector growing in Australia, the benefits and earnings are not being spread equally amongst local and international artists. Opportunities for local artists to perform on festival stages is therefore even more important for an Australian artist to build their own audience... with the current challenges they are facing there is a risk that further opportunities for local artists will disappear.<sup>18</sup>

1.23 Annabelle Herd from the Australian Record Industry Association (ARIA) summarised the challenges and opportunities in Australia. She said:

Live performance is an absolutely critical means for recording artists to connect with fans and grow their audiences; small venues are a critical starting point for new artists; big venues, arena stages and festival stages featuring major local and international artists are critical discovery platforms... and touring and live performers drive streaming and vice versa.<sup>19</sup>

1.24 She said that ‘the biggest challenge... is that fewer Australians are listening to local music, whether live or recorded, via streaming, radio or physical formats’.<sup>20</sup> Ms Herd discussed a range of other challenges:

...the COVID hangover, the sheer volume of music available on streaming platforms, the dominance of catalogue music or older music, the rise of foreign-language music, media fragmentation, cost increases, skill shortages in touring,

<sup>18</sup> Australian Festival Association, Submission 75, p.2.

<sup>19</sup> Annabelle Herd, Australian Record Industry Association and Phonographic Performance Company of Australia, Committee Hansard, 27 July 2024, p.47.

<sup>20</sup> Annabelle Herd, Australian Record Industry Association and Phonographic Performance Company of Australia, Committee Hansard, 27 July 2024, p.47.

the rental crisis and cost of living, and even societal impacts on young audiences from lockdowns in COVID, as well as climate change.<sup>21</sup>

- 1.25 However, the evidence included many positive reflections on live music in Australia, its future potential and value to Australian society.
- 1.26 During the inquiry, a range of possible strategies (or measures) aimed at improving live music sustainability in Australia were suggested. This included:
- more government grants and financial support
  - support for Australian artists, such as a voucher scheme
  - reserving time for local support acts when international tours are in Australia
  - support for live music venues and festivals to help make events viable
  - support for audiences and communities, which could include creating new spaces or finding ways to reduce costs
  - possible policy or legislative changes.
- 1.27 In terms of opportunities, ARIA said:
- ...what makes me feel positive and confident that we can turn this around is the incredible talent that we have in this country across so many genres of music. From indie to country, hip hop and R&B, our talent is diverse. We have seen some incredible success... Australians need to know that our music is world class and celebrated... when we talk about artists, we're not just talking about those individual artists but we're talking about the whole teams around them.<sup>22</sup>
- 1.28 A second Creative Australia survey considered festival operations and found:
- ...measures to address rising insurance and user pays policing costs would be especially beneficial for commercial festivals. The report also shows that changing ticket-buying behaviour is not only creating uncertainty for festival organisers regarding whether they will sell enough tickets to break even; it is also creating additional costs and risks. These include additional marketing costs, the ability to secure insurance against cancellation and impacts on other income streams such as food, beverages and merchandise.<sup>23</sup>

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<sup>21</sup> Annabelle Herd, Australian Record Industry Association and Phonographic Performance Company of Australia, Committee Hansard, 27 July 2024, p.47.

<sup>22</sup> Annabelle Herd, Australian Record Industry Association and Phonographic Performance Company of Australia, Committee Hansard, 27 July 2024, pp.47-48.

<sup>23</sup> Creative Australia, 'Soundcheck 2: analysis of Australian music festival models and operations, September 2024, p.5.

- 1.29 Furthermore, the report said that it is ‘critical... to gain a deeper understanding of how ticket-buying behaviour is likely to continue to develop’.<sup>24</sup>
- 1.30 Challenges and barriers relating to live music are discussed in more detail in Chapter 2. Possible strategies (or actions) to improve live music’s sustainability in Australia is discussed in Chapter 3.

## Case study: triple j’s One Night Stand and the 2024 More Than a One Night Stand Sessions

- 1.31 In April 2024, the Australian Broadcasting Corporation (ABC) announced the return of triple j’s festival event, One Night Stand. The festival previously occurred annually from 2004–2019, with COVID-19 regulations leading to its cancellation in 2020 and a subsequent 4-year hiatus.<sup>25</sup>
- 1.32 Regarding the festival series, the ABC submitted:
- ...this event gave regional communities the chance to enjoy a free, all-ages concert featuring some of Australia’s biggest music acts, and encouraged Australians – in particular young people – to travel to, explore and support some of the country’s more remote regional areas.<sup>26</sup>
- 1.33 One Night Stand has been hosted by various regional communities including Alice Springs, Northern Territory in 2010, Mount Isa, Queensland in 2017 and St Helens, Tasmania in 2018.<sup>27</sup> When discussing the impact of the event in regional areas, Emily Copeland from the Australian Broadcasting Corporation told the Committee that ‘it’s an incredibly important way for triple j to continue to engage with young audiences, particularly in regional Australia’.<sup>28</sup> The event has often amassed large crowds in attendance and generated economic benefits for the hosting communities. The ABC reported to the Committee that the 2017 event in Mount Isa ‘was estimated to have generated a \$3 million economic boost to the local economy’.<sup>29</sup>
- 1.34 Furthermore, One Night Stand festivals platform local Australian performers to a wider audience. The event has often included winners of triple j’s Unearthed competitions in its lineup. These competitions are hosted by the ABC’s all-Australian radio station, triple j Unearthed, and act as a music discovery program for small, local artists.<sup>30</sup> In 2017, local Launceston artists and winners of a triple j Unearthed competition, The Sleepyheads, opened the St Helens’ event which garnered a

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<sup>24</sup> Creative Australia, ‘Soundcheck 2: analysis of Australian music festival models and operations, September 2024, p.5.

<sup>25</sup> Australian Broadcasting Corporation, Submission 22, p.5.

<sup>26</sup> Australian Broadcasting Corporation, Submission 22, p.5.

<sup>27</sup> Australian Broadcasting Corporation, 9 April 2024, *triple j’s One Night Stand returns*, <https://www.abc.net.au/about/media-centre/press-releases/triple-js-one-night-stand-returns/103715174>.

<sup>28</sup> Emily Copeland, Australian Broadcasting Corporation, Committee Hansard, 26 July 2024, p.42.

<sup>29</sup> Australian Broadcasting Corporation, Submission 22, p.5.

<sup>30</sup> Australian Broadcasting Corporation, Submission 22, p.2.

record-breaking attendance of 20,000.<sup>31</sup> Since this performance, The Sleepyheads have gone onto tour nationally and release their debut album.<sup>32</sup>

- 1.35 The 2024 return of One Night Stand was in partnership with Australian music industry peak bodies, Music Australia and Support Act. Tickets for the event went on sale in September 2024 at a cost of \$10 each. Ms Copeland said 'over 15,000 [tickets] were purchased in less than a day, leading to it being a sell-out event. This really demonstrates the appetite for live music by local artists in regional areas at an accessible price point.'<sup>33</sup> This appetite was also evident through the 2,057 entries made to triple j by participants requesting the event be held in their communities.<sup>34</sup>
- 1.36 In conjunction with the return of the event, Music Australia facilitated a series of capacity building and skills development programs called the More Than A One Night Stand Sessions. These sessions included training programs, information panels, forums and workshops delivered by a variety of industry organisations including APRA AMCOS, youth music organisation The Push, and First Nations consultants Kennell&Co.<sup>35</sup>
- 1.37 The success of the 2024 One Night Stand and the associated More Than A One Night Stand Sessions was in contrast to a number of festival cancellations in the recent years. According to Music Australia, recent data trends are showing that Australian music content accounts for 9.2 per cent of what Australian audiences are listening to. Furthermore, ticket-purchasing behaviour has changed, and consumers are purchasing tickets closer to events.<sup>36</sup>
- 1.38 The anticipated return of One Night Stand, accessible ticket pricing and positive reputation of the event may have contributed to the event's success. However, the success of this event is likely unattainable for commercial festivals. The Australian Broadcasting Corporation reported that they carried the cost of the 2024 festival and the revenue generated from ticket sales went to music charity Support Act.<sup>37</sup> One Night Stand's successful return has indicated that despite a pause in live music events due to COVID-19 and multiple recent festival cancellations, Australian audiences, especially young people, still have an appetite for Australian music festivals.

## Case study: Teen Jesus and the Jean Teasers

- 1.39 Teen Jesus and the Jean Teasers are a four-person punk-rock band based in Canberra. The group began performing together in 2016 and have performed at major festivals like Groovin' The Moo and Laneway, opened for large artists such as

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<sup>31</sup> Australian Broadcasting Corporation, 1 September 2018, *Watch the highlights from our biggest One Night Stand ever!*, <https://www.abc.net.au/triplej/news/one-night-stand-highlights/10174526>.

<sup>32</sup> Music Tasmania, *The Sleepyheads*, <https://musictasmania.org/connect/artists/sleepyheads>.

<sup>33</sup> Emily Copeland, Australian Broadcasting Corporation, Committee Hansard, 26 July 2024, p.42.

<sup>34</sup> Millie Millgate, Music Australia, Committee Hansard, 8 November 2024, p.27.

<sup>35</sup> Millie Millgate, Music Australia, Committee Hansard, 8 November 2024, p.26.

<sup>36</sup> Dr Christen Cornell, Creative Australia, Committee Hansard, 8 November 2024, p.22.

<sup>37</sup> Emily Copeland, Australian Broadcasting Corporation, Committee Hansard, 26 July 2024, p.43.



the Foo Fighters and Pearl Jam, toured internationally, and won an ARIA award in 2024.<sup>38</sup>

- 1.40 Jaida Stephenson and Scarlett McKahey from Teen Jesus and the Jean Teasers discussed the challenges facing Australian musicians. Ms Stephenson said:

'I think we averaged about 50 or 60 shows last year, which is quite a lot... we're still having to work other jobs on the side of our music careers.'<sup>39</sup>

- 1.41 The band found that touring domestically can be particularly costly, given the large distances between major cities. This is a sentiment shared by many in the music industry including Evan Saunders from Artback NT, a touring company based in the Northern Territory. Mr Saunders told the Committee:

...accommodation costs are a lot more. The travel costs, the airfares, are extremely expensive in the NT. Qantas, Airnorth and Virgin all have exceedingly high prices. It's sometimes cheaper to go overseas than fly to Alice Springs from Darwin. That's not an exaggeration.<sup>40</sup>

- 1.42 Teen Jesus and the Jean Teasers have found financial support through government grants that have allowed them to tour domestically and internationally. However, the group noted that these grants can be inaccessible for musicians. Many emerging artists are unaware of the grants available to them, and if they are, do not have the experience writing grant applications or do not have funds to hire grant writers.

- 1.43 Alongside advocating for more accessible grants, Teen Jesus and the Jean Teasers also voiced their support for the enforcement of Michael's Rule. This rule requires international artists include an Australian artist among their opening acts to provide valuable opportunities for local musicians.<sup>41</sup> Ms Stephenson elaborated:

Last year, we had the privilege of opening for the Foo Fighters. That did really amazing things for us royalty wise and exposure wise. We gained a lot of new fans and got a lot of opportunities from that.<sup>42</sup>

- 1.44 Despite achieving many successes as young, emerging artists, Teen Jesus and the Jean Teasers highlighted the difficulty of maintaining a viable music career. Factors such as small streaming royalties, and the recent cancellations of festivals and venue closures have only made it more difficult for musicians to stay afloat. Ms Stephenson elaborated: 'I also feel that even the music industry views it as not a proper profession a lot of the time.'<sup>43</sup> However, the group asserted that music can be a

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<sup>38</sup> The Sydney Morning Herald, 13 October 2023, *Inspired by School of Rock, these Aussie punks are making music their way*, <https://www.smh.com.au/culture/music/inspired-by-school-of-rock-these-aussie-punks-are-making-music-their-way-20231009-p5eavx.html>. <https://www.smh.com.au/culture/music/inspired-by-school-of-rock-these-aussie-punks-are-making-music-their-way-20231009-p5eavx.html>

<sup>39</sup> Jaida Stephenson, Teen Jesus and the Jean Teasers, Committee Hansard, 25 July 2024, p.11.

<sup>40</sup> Evan Saunders, Artback NT, Committee Hansard, 8 November 2024, p.18.

<sup>41</sup> ARIA, 10 May 2024, *ARIA welcomes Michael's Rule*, <https://www.aria.com.au/industry/news/aria-welcomes-michaels-rule>.

<sup>42</sup> Jaida Stephenson, Teen Jesus and the Jean Teasers, Committee Hansard, 25 July 2024, p.12.

<sup>43</sup> Jaida Stephenson, Teen Jesus and the Jean Teasers, Committee Hansard, 25 July 2024, p.14.

career and discussed the importance of representation of and exposure to the live music industry. Ms McKahey concluded:

The whole reason we started was that we were looking at people such as Courtney Barnett and bands like L7 and stuff. We were like, "Wow, if they can do it, we can do it." Definitely just slip them in front of it and be like, "Look, you can do it."<sup>44</sup>

## Case study: The Zoo

1.45 The Zoo is a popular live music venue located in Brisbane. It is a 500-capacity venue that has been operating since 1992, making it one of the longest standing live music venues in Brisbane.<sup>45</sup> During its 32 years of operation, The Zoo hosted a variety of sold-out shows and provided a space for many grassroots musicians.

1.46 In early 2024, The Zoo announced it would be closing its doors due to rising operational costs. This announcement followed a rising trend of festival cancellations and closures of small to medium venues. Shane Chidgzey, owner of the venue since 2020, told the Committee:

Being the custodian of The Zoo since end of December 2020 has been both the most fulfilling and enjoyable and the most sad and difficult times of my life. Venues aren't run for profit. We don't even have any chance whatsoever of getting anywhere near towards a profit... I have personally funded over \$3 million out of my own pocket of loss since I bought the place.<sup>46</sup>

1.47 Mr Chidgzey emphasised that the current model based on food and beverage consumption is no longer viable for smaller live music venues. Despite reaching its highest ever year of ticket sales in 2024, costs of licences, equipment and staffing were too high for The Zoo to make profit, much less break even. Furthermore, the decline in alcohol consumption at venues like The Zoo has caused a decline in total income. Mr Chidgzey discussed how many other small venues are experiencing the same struggles. He said:

We get eight days of poor trade right now for venues. There are going to be another 20 or 30 [venues] that close. We're not months away; we're literally minutes away from closing every day.<sup>47</sup>

1.48 In late 2024, it was announced that The Zoo would be re-opening as The Crowbar. Once another live music venue in Brisbane, The Crowbar had to close in 2020 due to COVID-19. One of the new owners discussed his hopes for the future of the venue.

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<sup>44</sup> Scarlett McKahey, Teen Jesus and the Jean Teasers, Committee Hansard, 25 July 2024, p.17.

<sup>45</sup> ABC News, 1 May 2024, *The Zoo, one of Australia's most revered live music venues, to close down in July*, <https://www.abc.net.au/news/2024-05-01/the-zoo-closing-down-brisbane-music-venue-valley-stranded-bar/103789330>.

<sup>46</sup> Shane Chidgzey, The Zoo, Committee Hansard, 24 July 2024, p.37.

<sup>47</sup> Shane Chidgzey, The Zoo, Committee Hansard, 24 July 2024, p.42.

He told ABC News: 'Crowbar intends to honour the amazing path laid before us and continue offering great events for years to come.'<sup>48</sup>

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<sup>48</sup> ABC News, 8 October 2024, *Brisbane music venue The Zoo to reopen as The Crowbar after takeover*, <https://www.abc.net.au/news/2024-10-08/the-crowbar-takes-over-the-zoo-brisbane-music-venue/104434852>.





## 2. Challenges and barriers

### Overview

- 2.1 This chapter provides a summary of challenges and barriers to live music in Australia. During the inquiry, witnesses and submissions commonly drew the Committee's attention to the same types of challenges.
- 2.2 Broadly, these challenges included:
- ensuring fair competition
  - increased costs and risks, especially increased insurance costs
  - audiences buying tickets late and spending less
  - fewer suitable places to perform live music
  - workplace conditions and culture
  - accessing music education and skills.

### Concerns about market conditions

- 2.3 The Committee heard that competition has increased following the COVID-19 pandemic. In addition, as discussed later in the chapter, witnesses said that the costs of hosting live music have increased, potential earnings for artists and workers are too low and increased cost of living expenses may deter audiences from spending money on live music.

### Changes since the COVID-19 pandemic

- 2.4 Evidence received during the inquiry often reflected on the impacts of the COVID-19 pandemic (around December 2019 to May 2023) on live music in Australia. During that period, governments restricted large social gatherings.
- 2.5 The Australian Performing Rights Association Limited (APRA) and the Australian Mechanical Copyright Owners Society (AMCOS) submitted that since the COVID-19 pandemic, 'there has been a loss of 1,300 venues hosting live music across the country. Crowds at nightclubs have almost halved'.<sup>1</sup>

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<sup>1</sup> APRA AMCOS, Submission 95, p.4.

- 2.6 The Committee heard that margins and earnings are low, while costs are rising and risks increasing. For example, Live Performance Australia said:

For a concert tour coming into Australia... the profit margins are pretty low. ... So if you've... sold a lot of tickets—it might be \$100 million turnover tour—out of that, if the promoter's lucky, they might pick up \$3 million.<sup>2</sup>

- 2.7 Century Venues said:

Part of the problem we've got in the live music sector is that it was built in the heyday of pubs. You'd go to the pub, you'd have live music, there were no pokies and you would engage; it was your social event, it was your cultural event, it was identity driven. All these factors meant live music was part of the fabric of culture. That's now changed... and COVID sped up that change dramatically.<sup>3</sup>

- 2.8 For example, MusicSA discussed these changes:

Live music audiences have fundamentally changed, and technology and consumer trends have fundamentally changed artists' discoverability and career pathways. Audiences and consumers will not revert to previous patterns of behaviour, and venues and festivals will need to continue to adapt to changing market conditions.<sup>4</sup>

- 2.9 Furthermore, MusicSA said:

That does not negate the very real need for increased audience development, creating young music audiences for the future, or the critical need for grassroots venues and performance platforms for developing live artists and audiences, but it is time to acknowledge that new audiences are demanding new environments and new ways to experience music, and the live music industry needs to recalibrate to consumer trends and tastes.<sup>5</sup>

- 2.10 Laneway Festival discussed events open to people of all ages:

Having those all-ages crowds, I believe, is so important to building new audiences and supporting new audiences as they grow and learn and understand how to be in bigger crowds, which, post COVID, is something that the younger generation are still grappling with. They're trying to understand how to be in crowds again.<sup>6</sup>

- 2.11 Phoenix Central Park, a venue in Sydney, submitted that post-pandemic, costs for tours and concerts have increased from 30 to 50 per cent, including costs relating to transport and freight.<sup>7</sup> The submission observed:

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<sup>2</sup> Evelyn Richardson, Live Performance Australia, Committee Hansard, 6 August 2024, p.4.

<sup>3</sup> Sam Nardo, Century Venues, Proof Committee Hansard, 17 October 2024, p.10.

<sup>4</sup> Christine Schloithe, MusicSA, Committee Hansard, 7 August 2024, p.2.

<sup>5</sup> Christine Schloithe, MusicSA, Committee Hansard, 7 August 2024, p.2.

<sup>6</sup> Jessie Parker, Laneway Festival, Committee Hansard, 5 July 2024, p.5.

<sup>7</sup> Phoenix Central Park, Submission 46, p.5.

This has seen ticket prices increase markedly across the globe, with the average Australian ticket price increasing by nearly \$38 between 2004 to 2019. ... Touring has long been recognised as a key avenue for artists to make money and garner new fans. In the streaming age, profits made on tours and merchandise are even more crucial to an artist's survival than previously.<sup>8</sup>

- 2.12 The submission added that domestic artists are 'often not finding it viable to tour in the same way they did pre-pandemic' and regional touring 'in particular is seeing slimmer profit margins'.<sup>9</sup>

## Competition and market dynamics

- 2.13 During the inquiry, some witnesses attributed present challenges to market dynamics. These dynamics included concerns that the market is dominated by a few companies with power over artists and audiences.

- 2.14 Live Nation, a company based in the United States, owns Ticketmaster. Their main competitors are TEG Live – which owns Ticketek – and AEG Frontier, which each control about 30 per cent of the major concert market in Australia.<sup>10</sup> Other ticket companies in the Australian market include Oztix, Humanitix and Moshtix.<sup>11</sup>

- 2.15 Untitled Group, an Australia festival and event promotor, said:

Escalating costs and competitive bidding wars for international talent have added further strain to our resources. ... The global live music landscape is increasingly dominated by a few multinational corporations. These companies, with billions of dollars of backing, aim to control talent pipelines, making it more difficult and expensive to secure diverse and appealing line-ups.<sup>12</sup>

- 2.16 The Media, Entertainment and Arts Alliance said that 'musicians are struggling to make a living in Australia'<sup>13</sup> and attributed this to competition:

...a group of just three major companies has come to control an estimated 85 per cent of the Australian live music market. For those companies, as opposed to musicians, live music is a very lucrative business model.<sup>14</sup>

- 2.17 The Media, Entertainment and Arts Alliance discussed what they described as the 'Amazonification'<sup>15</sup> of live music:

One example of this is Live Nation, which has... vertically integrated the market so not only controls ticketing but also festivals, music agencies and—

<sup>8</sup> Phoenix Central Park, Submission 46, p.5.

<sup>9</sup> Phoenix Central Park, Submission 46, p.5.

<sup>10</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.5.

<sup>11</sup> Tim McGregor, TEG Live, Proof Committee Hansard, 22 November 2024, p.15.

<sup>12</sup> Michael Christidis, Untitled Group, Committee Hansard, 26 July 2024, p.21.

<sup>13</sup> Lilia Anderson, Media, Entertainment and Arts Alliance, Committee Hansard, 26 July 2024, p.15.

<sup>14</sup> Lilia Anderson, Media, Entertainment and Arts Alliance, Committee Hansard, 26 July 2024, p.15.

<sup>15</sup> Lilia Anderson, Media, Entertainment and Arts Alliance, Committee Hansard, 26 July 2024, p.15.

increasingly—music venues. That gives them unprecedented power over musicians and their audiences.<sup>16</sup>

- 2.18 Humanitix, a ticketing company that gives profits to charity, said that their strategy was to avoid competing with Ticketek and Ticketmaster:

The reason we were able to thrive was because we intentionally ignored the large stadium category. Now, can a business do what we did in today's landscape... Yes. So long as they adopt the same strategy as we did, which is to ignore competing with Ticketek and Ticketmaster because you'll get crushed.<sup>17</sup>

- 2.19 Supersonic Australasia, an independent promotor, discussed the commissions and fees made on ticket sales:

On most tours, if I do the average, it's around 20 per cent if it's Ticketek or Ticketmaster. The two vertically integrated promoter businesses own those big ticket companies. If I'm doing a show with Oztix, the largest independent, they're charging nine to 10 per cent on average.<sup>18</sup>

- 2.20 Supersonic Australasia said that Live Nation 'did \$18 billion worth of concerts last year globally... and is able to lose money'.<sup>19</sup> In addition:

That is potentially catastrophic for audiences and emerging artists as well. It has become a non-arts-based approach. It is not people interested in the arts presenting art; it's corporates trying to treat it like any old business.<sup>20</sup>

- 2.21 The Association of Artist Managers discussed contracts that included exclusivity clauses:

The offer will say, 'From the date of this agreement until the end of our festival, you cannot play any show'—sometimes even in Australia and New Zealand—'without our approval in advance.'<sup>21</sup>

- 2.22 In addition, the clause may state that an artist cannot announce a tour during the exclusivity period.<sup>22</sup> Artists or bands could sign contracts without understanding the implications:

...a contract template, which is circulated to individuals who potentially don't have representation... You're talking about bands that are doing it themselves, that have day job, and they'll say, 'Yeah, the contract's fine,' and they'll sign it.<sup>23</sup>

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<sup>16</sup> Lilia Anderson, Media, Entertainment and Arts Alliance, Committee Hansard, 26 July 2024, p.15.

<sup>17</sup> Adam McCurdie, Humanitix, Proof Committee Hansard, 22 November 2024, p.4.

<sup>18</sup> Paul Sloan, Supersonic Australasia, Committee Hansard, 8 August 2024, p.37.

<sup>19</sup> Paul Sloan, Supersonic Australasia, Committee Hansard, 8 August 2024, p.37.

<sup>20</sup> Paul Sloan, Supersonic Australasia, Committee Hansard, 8 August 2024, p.36.

<sup>21</sup> Alastair Burns, Association of Artist Managers, Committee Hansard, 26 July 2024, p.11.

<sup>22</sup> Maggie Collins, Association of Artist Managers, Committee Hansard, 26 July 2024, p.11.

<sup>23</sup> Alastair Burns, Association of Artist Managers, Committee Hansard, 26 July 2024, p.11.



- 2.23 Century Venues, for example, said that the challenges are wider than issues relating to market competition:

We agree, but we see this not as a threat from one single corporation but rather as a threat of eroding our business from a range of areas. ...the changing circumstances from lockdowns, lockouts and cost of living, and we're seeing the erosion from government infrastructure and funded programs.<sup>24</sup>

- 2.24 Not all witnesses agreed that market conditions are necessarily a concern. For example, Live Performance Australia said:

...we don't believe there's a problem with vertical integration of our major companies in Australia. ... Consolidation occurred because the market... is global, it's highly competitive and it's highly capital intensive. If Australia wanted to retain its place in a growing global market, companies had to consolidate in order to compete at that level.<sup>25</sup>

- 2.25 In October 2024, the ABC program *Four Corners* reported on issues including ticket prices, dynamic pricing and monopoly powers. *Four Corners* said that 'Live Nation's scale globally is helping it edge out Australian promoters'.<sup>26</sup>

## Response from TEG Live and Live Nation

- 2.26 During the inquiry, *Four Corners* investigated these themes in a report that characterised Live Nation as 'tearing the Australian music scene apart'.<sup>27</sup> The Committee invited TEG Live and Live Nation to respond to evidence on market dynamics and the *Four Corners* report.

- 2.27 TEG Live noted that most large venues are owned by state governments and said that 'new entrants to the Australian industry face no systemic barriers to entry in our view'.<sup>28</sup> TEG Live discussed risk and who sets prices:

...the ticketing and live promotion sectors are highly competitive. Pricing and other aspects of live music events are largely driven by the artists and the venues... Promoters enter into contracts with the artist which typically involve a minimum financial guarantee and typically an additional 85 to 90 per cent share of the profit going to the artist. Sometimes there is even a greater share that is going to the artist. ... We carry all of the risk and we typically receive between, say, 10 to 15 per cent of the profit.<sup>29</sup>

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<sup>24</sup> Sam Nardo, Century Venues, Proof Committee Hansard, 17 October 2024, p.8.

<sup>25</sup> Evelyn Richardson, Live Performance Australia, Committee Hansard, 6 August 2024, p.3.

<sup>26</sup> Four Corners, 'Live Nation's industry takeover tearing the Australian music scene apart', 14 October 2024, <https://www.abc.net.au/news/2024-10-14/live-nation-hidden-fees-in-tickets-four-corners/104357146>.

<sup>27</sup> Four Corners, 'Live Nation's industry takeover tearing the Australian music scene apart', 14 October 2024, <https://www.abc.net.au/news/2024-10-14/live-nation-hidden-fees-in-tickets-four-corners/104357146>.

<sup>28</sup> Tim McGregor, TEG Live, Proof Committee Hansard, 22 November 2024, p.15.

<sup>29</sup> Tim McGregor, TEG Live, Proof Committee Hansard, 22 November 2024, pp.15-16.

- 2.28 Live Nation said that Ticketmaster Australia's ticketing business and Live Nation's Australian concert businesses are 'completely separate entities'.<sup>30</sup> Further, Live Nation said that venues determine who will sell tickets, 'not the promoters who hire those venues, and Live Nation, as promoter, typically has no ability to support Ticketmaster to the detriment of competitors'.<sup>31</sup> Live Nation added:

Our paramount operating principle is that it is the artists who make all the key decisions about their performances. It's also the artists who retain the vast majority of a show's revenue, as they should, because they're the ones who have attracted the ticket-buying audience.<sup>32</sup>

- 2.29 Live Nation also said that 'every artist' has potential bargaining power:

If you haven't got a sizeable audience, you struggle to have bargaining power; if you have a sizeable audience, you have very substantial bargaining power. That's the nature of a commercial, capitalist industry. The more appeal you have, the higher your price.<sup>33</sup>

- 2.30 Live Nation described event promotion as a risky business, which encourages diversification of business activity:

...for a promoter operating in this market, there are only 27 million people in total. We are in a very high-risk business. We are guessing the level of an audience. Our break-even points on larger tours are 80 per cent or higher. If we get it wrong, we incur a very substantial loss. So we look to diversifying our business into areas like venues to reduce our risk and to better support our concert promotion activities.<sup>34</sup>

- 2.31 TEG Live added that exclusivity clauses are 'standard practice' in contracts. The specific exclusivities 'will vary from tour to tour but typically would require no other shows to be announced in the territory until the guaranteed shows have been completed'. TEG live said that this is 'primarily for the promoter's benefit, because we have 100 per cent downside risk'.<sup>35</sup>

## Increased costs and risks

- 2.32 The Committee consistently heard that live music venues, festivals and events are being challenged with rising costs since the COVID-19 pandemic. At the same time, attendance has reduced or become unpredictable.

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<sup>30</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.1.

<sup>31</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.1.

<sup>32</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.5.

<sup>33</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.5.

<sup>34</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.9.

<sup>35</sup> Tim McGregor, TEG Live, Committee Hansard, 22 November 2024, p.16.

2.33 Untitled Group told the Committee that operating expenses have increased 30 to 60 per cent, which sometimes means that a festival can break-even on its costs only 'at complete sell-out or not at all'.<sup>36</sup>

2.34 Kicks Entertainment submitted:

Extreme rises in all operating costs combined with macro-economic factors are pushing the level of ticket sales required to cover costs beyond event capacities, causing many historically viable events to either cancel or not run at all.<sup>37</sup>

2.35 Social State Entertainment said:

Basically, venue costs are up and venue income is down and to keep things rolling we need support. ... Issues like insurance, alcohol excise and a few others—mainly venue insurance, in particular—are crippling venues. A lot of venues within Victoria, including some that we've worked for previously, have closed.<sup>38</sup>

2.36 The Rechabite, a venue in Perth, told the Committee:

Costs have risen across the board, in terms of staffing costs, particularly around production and contractors that deliver live audio and lighting services, hired equipment costs and general maintenance. ...there has been a huge rise in the cost of stock and product as well.<sup>39</sup>

2.37 Tam Boakes, proprietor of a venue called Jive, in Adelaide, said:

...we are still suffering. Cancellations and postponements are still normal... Patronage is down 30 to 50 per cent. Expenditure is down about 50 per cent. Rent has gone up. Insurance has gone up. The cost of everything has gone up. ... It's just really hard. There's nothing else businesses can do to cover costs. We can't raise prices any higher. The ticket price goes to the band.<sup>40</sup>

2.38 Ms Boakes added: 'I'd love to be open every day of the week with music on, but it's just not realistic or viable right now'.<sup>41</sup>

2.39 Supersonic Australasia said:

Theatre shows set up in places for six months, they're amortising a lot of costs, especially marketing, and they can build an energy around a performance and grow numbers over that period, if it's a good show. ... With bands, we're mostly travelling around... doing one night.<sup>42</sup>

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<sup>36</sup> Michael Christidis, Untitled Group, Committee Hansard, 26 July 2024, p.21.

<sup>37</sup> Kicks Entertainment, Submission 23, p.1.

<sup>38</sup> James Power, Social State Entertainment, Committee Hansard, 5 August 2024, p.24.

<sup>39</sup> Kiera Owen, The Rechabite, Committee Hansard, 8 August 2024, p.21.

<sup>40</sup> Tam Boakes, Jive, Committee Hansard, 7 August 2024, p.23.

<sup>41</sup> Tam Boakes, Jive, Committee Hansard, 7 August 2024, p.29.

<sup>42</sup> Paul Sloan, Supersonic Australasia, Committee Hansard, 8 August 2024, p.33.

- 2.40 Other operating costs include taxes, licences and fees. For example, Jon Perring (private capacity) said:

Live music venues pay more tax, levies and licencing fees than almost any other sector of the economy. These taxes include the wine equalisation tax, alcohol excise, liquor license fees, land tax, PAYG, payroll tax, council rates, health licenses, fire levies, GST, water and waste charges, and company tax. Although not a tax, live music venues and festivals are also responsible for paying OneMusic music copyright license fees.<sup>43</sup>

- 2.41 Factors such as inflation and exchange rates may contribute to costs, particularly when goods or services are imported.<sup>44</sup> The Committee heard that artist fees are usually based on the United States Dollar, which has increased in value relative to the Australian Dollar.<sup>45</sup>

- 2.42 A submission from APRA AMCOS said that financial concerns, such as insufficient revenue and high costs, were a most common reason (around 70 per cent) why venues have discontinued hosting live music.<sup>46</sup>

## Logistics and travel

- 2.43 Travel costs can limit where artists or bands may choose to tour when performing live music in Australia. Vast geography, a dispersed market and the risk of losing money were among the factors discussed in the evidence.

- 2.44 Lanie Chopping, from the Western Australia Department of Local Government, Sport and Cultural Industries, said that 'freight costs are one of the main reasons given by promoters for why artists may not choose to come to Perth on their international tour schedule.'<sup>47</sup> Similarly, MusicSA said that geographic distance creates a significant disadvantage for artists, venues, festivals and music businesses in South Australia.<sup>48</sup>

- 2.45 MusicNT discussed the high prices of airfares to Darwin or Alice Springs, asking rhetorically:

Why would I go to Darwin or to Alice Springs to see a music event when I can see an equivalent one in Brisbane and Sydney and it's a third of the cost?<sup>49</sup>

- 2.46 The Northern Territory Government submitted:

The barriers to regular touring of live music to the NT or within the NT include flight costs, accommodation costs, travel time, freight costs, and freight time, as

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<sup>43</sup> Jon Perring, Submission 102, p.26.

<sup>44</sup> A New Approach, Submission 3, p.3;

<sup>45</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.4.

<sup>46</sup> APRA AMCOS, Submission 95, p.18.

<sup>47</sup> Lanie Chopping, Western Australia Department of Local Government, Sport and Cultural Industries, Committee Hansard, 8 August 2024, p.1.

<sup>48</sup> Christine Schloithe, MusicSA, Committee Hansard, 7 August 2024, p.1.

<sup>49</sup> Mark Smith, MusicNT, Committee Hansard, 28 June 2024, p.33.

well as a limited market size for ticket sales. It is a major challenge for the NT to provide live music across the NT, particularly the logistical challenge of providing equipment and resources to remote locations.<sup>50</sup>

2.47 The band Teen Jesus and the Jean Teasers discussed travel expenses:

...if you were going to do a national tour of Australia, you would pretty much have to fly to every show. ... Flights are extremely expensive. If you have a band of four people and you have a tour manager and a sound person and a lighting person with you, that's already a huge amount of flight costs.<sup>51</sup>

2.48 In addition to flights, ground transport adds to costs:

A lot of the time you need a van and an eight-seater with all the gear you have. On top of that, there is the gear to play the shows. ... Again, you're paying a tour manager and a lighting person and a sound person. There are the behind the scenes people you don't see, such as our managers. Booking agents take a cut from the shows as well.<sup>52</sup>

2.49 The Media, Arts and Entertainment Alliance said that tours are gruelling:

Touring is hard. I think there's a cultural assumption that music is an enjoyable thing to do... But, if you go on tour, you find it's gruelling. There is very little that is comfortable or reassuring about it. You don't know what audience you're going to play to, if any. You don't know if you're going to lose a lot of money.<sup>53</sup>

2.50 Furthermore, the Alliance said:

Sometimes you can't afford the budget and you're staying in a really uncomfortable bed somewhere. You're not seeing any of the city. ... You go from airport to venue to hotel and then back to airport to venue to hotel. You're away from your friends and your family and your life.<sup>54</sup>

2.51 The Australian Trade and Investments Commission (Austrade) discussed domestic travel and attendance at theatres or performing arts:

It follows a seasonal pattern... with peaks in the summer months and troughs in the winter. While attendance did drop off dramatically in COVID-19, it had really begun to recover.<sup>55</sup>

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<sup>50</sup> Northern Territory Government, Submission 73, p.5.

<sup>51</sup> Scarlett McKahey, Teen Jesus and the Jean Teasers, Committee Hansard, 25 July 2024, p.11.

<sup>52</sup> Jaida Stephenson, Teen Jesus and the Jean Teasers, Committee Hansard, 25 July 2024, p.11.

<sup>53</sup> Jessica Cerro, Media Entertainment and Arts Alliance, Committee Hansard, 26 July 2024, p.15.

<sup>54</sup> Jessica Cerro, Media Entertainment and Arts Alliance, Committee Hansard, 26 July 2024, p.15.

<sup>55</sup> Samantha Palmer, Austrade, Committee Hansard, 3 July 2024, p.1.

- 2.52 Austrade said that the number of domestic travellers who attended a theatre, concert or other performing arts activity in the June quarter of 2024 was 2.5 million travellers, and that was 17 per cent higher than pre-COVID-19 comparisons.<sup>56</sup>

## Security and policing

- 2.53 Events may require a police presence. Organisers can be asked to contribute towards this expense. The Committee heard that these costs are particularly high in NSW. For example, TEG Live told the Committee:

...the policing bill out of Melbourne might be \$10,000 or \$15,000. It might be \$50,000 or \$60,000 in Brisbane. It's up to \$150,000 in Sydney. It has an enormously debilitating impact on operating events.<sup>57</sup>

- 2.54 Laneway Festival said that policing costs in NSW are about 300 per cent higher than other states, something which their submission described as 'extreme'.<sup>58</sup>

- 2.55 The National Folk Festival discussed their security costs:

That was something which used to be done by volunteers... but is now required to be people with licences... it is a cost in the order of tens of thousands of dollars: nearly \$100 thousand a year for the five-day event.<sup>59</sup>

- 2.56 In a submission, Redfern Legal Centre said that 'ending the practice of over-policing young festival-goers' is going to be 'crucial for fostering a safer environment and relieving undue pressure on the music festival industry'.<sup>60</sup>

## Adverse weather

- 2.57 Many witnesses and submissions discussed the losses, increased costs and impacts resulting from adverse weather conditions.

- 2.58 For example, Tim Hollo submitted that weather events have made 'an uncertain music scene even more uncertain'.<sup>61</sup> The submission continued:

Speaking from personal experience, performing on outdoor stages in extreme heat is genuinely dangerous, potentially leading to dehydration, heat stress, headaches, tripping hazards from sweat and water on stage, and worse.<sup>62</sup>

- 2.59 The Association of Artist Managers said that when a festival cancels due to weather, the artist's fee is forfeited:

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<sup>56</sup> Samantha Palmer, Austrade, Committee Hansard, 3 July 2024, p.1.

<sup>57</sup> Tim McGregor, TEG Live, Committee Hansard, 5 July 2024, p.3.

<sup>58</sup> Laneway Festival, Submission 57, p.3.

<sup>59</sup> David Gilks, National Folk Festival, Committee Hansard, 5 July 2024, p.30.

<sup>60</sup> Redfern Legal Centre, Submission 65, p.5.

<sup>61</sup> Tim Hollo, Submission 93, p.6.

<sup>62</sup> Tim Hollo, Submission 93, p.6.

You... have put up costs that are not refundable. It's travel costs, rehearsal costs and crew. The resolution... after some recent cancellations... is that the artist needs to have insurance, which is an additional cost now on top of what you're already putting out—to potentially insure your own fee.<sup>63</sup>

2.60 MusicNT said that weather during Darwin's dry season could be variable:

Historically, if you were planning events in Darwin between May and September you could guarantee that it would just be sunshine and blue skies. I guess that one aspect is that the last few years have shown that isn't necessarily the case... I've lived in Darwin for my whole life and I still find that it gets hotter and hotter each year. ...to attract people to be active in a space where it's just getting hotter and hotter is a really tricky scenario.<sup>64</sup>

2.61 Green Music Australia said:

...some of the reason why insurance premiums have gone up is the climate crisis. Extreme weather events are hitting countries worldwide, and insurance companies are cognisant of what's happening and adjusting their premiums accordingly.<sup>65</sup>

## Large insurance increases

2.62 During the inquiry, witnesses often referred to increasing insurance costs. Venues and festival organisers need insurance to protect against risks such as personal injury to patrons or event cancellation.

2.63 In one example, the Committee heard that a venue's public liability insurance increased from \$10,000 to \$60,000 in one year.<sup>66</sup> Jessie Parker, from Laneway Festival, told the Committee:

Our cancellation insurance has increased by 280 per cent in four years. We went from \$138,000 in 2020 to \$526,000 in 2024. ...increasingly festivals are cancelling due to extreme weather events, which are becoming more common and more severe.<sup>67</sup>

2.64 The Marriner Group, which owns venues in Melbourne, said that their insurance costs had increased by 330 per cent over three years<sup>68</sup> with all venues 'lumped in one basket' without individual risks being considered.<sup>69</sup>

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<sup>63</sup> Jess Keeley, Association of Artist Managers, Committee Hansard, 26 July 2024, p.8.

<sup>64</sup> Mark Smith, MusicNT, Committee Hansard, 28 June 2024, p.33.

<sup>65</sup> Berish Bilander, Green Music Australia, Committee Hansard, 28 June 2024, p.23.

<sup>66</sup> Liam Matthews, The Old Bar, Committee Hansard, 5 August 2024, p.26.

<sup>67</sup> Jessie Parker, Laneway Festival, Committee Hansard, 5 July 2024, pp.1-2.

<sup>68</sup> Kayely Marriner, Marriner Group, Committee Hansard, 5 August 2024, p.24.

<sup>69</sup> Kayely Marriner, Marriner Group, Committee Hansard, 5 August 2024, p.26.



- 2.65 The Committee heard that prices changed after the COVID-19 pandemic. The Australian Live Music Business Council said:
- We've had members that have... been operating for 23 years. They have never had a claim. They were paying \$10,000 a year and then post-COVID their quotes for public liability grew to \$120,000.<sup>70</sup>
- 2.66 In addition, the Committee heard that there may not be enough competition among insurers. For example, the Queensland Music Network said:
- The problem with the insurance industry in Australia is that so many people have left it and, in those that have remained, there is an exaggerated understanding of what risk actually looks like in that space.<sup>71</sup>
- 2.67 The Insurance Council of Australia acknowledged the increasing insurance costs as a 'growing factor impacting the sustainability of many live music venues and events'.<sup>72</sup> The Committee heard that insurance losses may explain recent increases:
- Rising premiums and reduced capacity have been driven by unsustainable combined loss ratios where insurers are operating unprofitable insurance portfolios, paying out more in insurance claims than they collect in premiums. While there are now signs the market is stabilising, many live music venues continue to experience challenges obtaining the insurance that they need.<sup>73</sup>
- 2.68 In response to evidence heard during the inquiry, the Insurance Council referred to the 'inherent risks' of insuring live music events:
- These risks include the gathering of large crowds, the service of alcohol, late operating hours, the use of staging and rigging, and a transient and mobile workforce.<sup>74</sup>
- 2.69 The Insurance Council acknowledged that limited competition could also be a factor:
- Due to the specialised nature of these risks, very few insurers offer public liability insurance for large live music events and venues, and cover is typically only available internationally through the Lloyd's insurance market in London. Limited competition... can further exacerbate affordability challenges.<sup>75</sup>
- 2.70 The Australian Competition and Consumer Commission said that their oversight of insurance is 'relatively limited'.<sup>76</sup>

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<sup>70</sup> Howard Adams, Australian Live Music Business Council, Committee Hansard, 11 October 2024, p.17.

<sup>71</sup> Kris Stewart, Queensland Music Network, Committee Hansard, 24 July 2024, p.7.

<sup>72</sup> Alexandra Hordern, Insurance Council of Australia, Committee Hansard, 26 June 2024, p.1.

<sup>73</sup> Alexandra Hordern, Insurance Council of Australia, Committee Hansard, 26 June 2024, p.1.

<sup>74</sup> Alexandra Hordern, Insurance Council of Australia, Committee Hansard, 11 October 2024, p.1.

<sup>75</sup> Alexandra Hordern, Insurance Council of Australia, Committee Hansard, 11 October 2024, p.1.

<sup>76</sup> Scott Gregson, Australian Competition and Consumer Commission, Committee Hansard, 28 June 2024, p.17.



## Audiences buy late and spend less

- 2.71 The Committee often heard that the cost of living deters audiences from purchasing tickets or spending money when attending a show.
- 2.72 Witnesses also said that audiences are tending to buy tickets late, which creates risks for event organisers and may lead to events being cancelled. Fewer attendees means less money being made on food, drink and merchandise.

## Young people and cost of living

- 2.73 Witnesses said that young people are less likely to attend live music for cost of living reasons. For example, The Push, a youth music organisation, discussed survey findings on the relationship between cost of living and ticket purchases:

Recent data demonstrates that the percentage of young Australians buying music festival tickets has fallen sharply. Compounding these challenges are the financial difficulties faced by many young people across the country. We know that the cost of living is the No. 1 concern for young people, and that has become a major barrier to participating in live music.<sup>77</sup>

- 2.74 The Push continued:

...two in three young Australians say that attending music events is important to them and that the most common barrier stopping young Australians from attending music events is cost, followed by age, specifically the licensing that prevents underage young people from accessing live music venues, as well as location, which makes sense when we know that the majority of festivals and touring artists perform in major capital cities.<sup>78</sup>

## Impacts on ticket and beverage sales

- 2.75 The Committee heard that strong ticket sales give organisers confidence that they can proceed with planned events. However, audiences are now tending to purchase tickets close to the date that a show is scheduled to occur. Event organisers must judge whether to go ahead as planned.
- 2.76 For example, the West Australian Live Music Industry Association said:

We're seeing ticket purchasing behaviours where, previously, there would be a big spike at the beginning, a lull in the middle and a big spike towards the end. We're not seeing that big spike at the beginning... it makes them very nervous.<sup>79</sup>

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<sup>77</sup> Kate Duncan, The Push, Committee Hansard, 5 August 2024, p.8.

<sup>78</sup> Kate Duncan, The Push, Proof Committee Hansard, 17 October 2024, p.1.

<sup>79</sup> Livia Carre, West Australian Live Music Association, Committee Hansard, 8 August 2024, p.10.

2.77 Sally Mather, from the Marriner Group, which operates a venue called The Forum, said that late ticket sales led to shows being cancelled. In July 2024, she said that 23 confirmed shows were cancelled. She added:

We have recovered quite well in a lot of ways, but the rising costs on all sides mean that everything is super tight and everyone's risk appetite is quite low.<sup>80</sup>

2.78 TEG Live has observed a similar trend and linked late sales to cost of living:

That's a function... of the cost-of-living pressures at the moment meaning that people want to be sure they can afford it and that it's right for them at the time of the festival, rather than buy tickets early, load up the credit card and not be sure whether they can really afford to go at the time the show comes around.<sup>81</sup>

2.79 The NSW Government submitted:

Low ticket sales have been cited by several event owners as a contributing factor to cancellations. Events such as Groovin the Moo and Valleyways have both referenced poor tickets sales as a cause for cancellation. Cost of living pressures and reduced discretionary spending in the economy has resulted in greater sensitivity to live music ticket prices.<sup>82</sup>

2.80 However, the NSW Government submission said that an excess or 'surfeit in the market'<sup>83</sup> could also be a factor:

This is resulting in low ticket sales and a more casual approach to festival/event going with consumers buying tickets closer to the event time, reducing the event organiser's confidence to continue with event operations.<sup>84</sup>

2.81 The Australian Festival Association did not agree:

We don't have market saturation. We... have a wide and varied festival industry. The main forces that are affecting the market... are a product of federal and state laws. This includes lockout laws, lockdown laws and music festival regulations.<sup>85</sup>

2.82 Untitled Group said that negative media reports could be a factor:

...challenges are compounded by a noticeable decline in consumer confidence in Australian festivals. An onslaught of overly negative media stories has made it increasingly difficult to maintain trust with our community and encourage early ticket-buying behaviour.<sup>86</sup>

2.83 Humanitix said that consumers may also experience risks:

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<sup>80</sup> Sally Mather, Marriner Group, Committee Hansard, 5 August 2024, p.25.

<sup>81</sup> Tim McGregor, TEG Live, Proof Committee Hansard, 5 July 2024, p.4.

<sup>82</sup> NSW Government, Submission 71, p.6.

<sup>83</sup> NSW Government, Submission 71, p.6.

<sup>84</sup> NSW Government, Submission 71, p.6.

<sup>85</sup> Australian Festival Association, Submission 75, p.2.

<sup>86</sup> Michael Christidis, Untitled Group, Committee Hansard, 26 July 2024, p.21.

Consumers are having to put up with things like dynamic pricing, drip pricing, tickets being hoarded off, tickets actually going into the resale market sometimes—is what we've understood happens—and then the resale market being run by the ticketing company who then gets to double-dip on fees where they can cycle the ticket.<sup>87</sup>

- 2.84 Shane Chidgzey, owner of two venues that recently closed – The Zoo and Stranded – said that more shows would be scheduled and staff and security rostered to work, only to find that many ticket holders did not appear. He added: 'We probably only had about 60 per cent attendance on ticket sales. They just don't turn up.'<sup>88</sup> Mr Chidgzey said:

Our venue was predominantly geared towards metal, punk, a bit heavier music—predominantly quite big drinkers That pared off massively, going from sold-out shows doing \$15,000 to \$18,000 to doing \$3,000 to \$4,000. The cost-of-living issue is massive. Discretionary spending is well on the down low.<sup>89</sup>

- 2.85 He said that The Zoo needed to make \$1.2 million to keep the doors open, without considering other running costs.<sup>90</sup> He added: 'People shouldn't have to get drunk to keep a music industry alive, and that's what it is; it's a food and beverage model.'<sup>91</sup>
- 2.86 Christopher Eassey, from the National Drug and Alcohol Research Centre, said that 'generationally, alcohol is falling out of favour' and the 'rising cost of alcohol is changing use patterns'.<sup>92</sup>

## Merchandise sales

- 2.87 Witnesses discussed the importance of merchandise sales, which add to earnings made from live music.
- 2.88 The band Teen Jesus and the Jean Teasers said that 'the money you make on merchandise is the best money that you will be making on a show'.<sup>93</sup>
- 2.89 Bird's Robe, a music business, submitted:

Merchandise sales are a crucially important form of income for most live music performers. In some cases they can form the entire profit margin of a live music concert tour.<sup>94</sup>

<sup>87</sup> Adam McCurdie, Humanitix, Proof Committee Hansard, 22 November 2024, p.5.

<sup>88</sup> Shane Chidgzey, The Zoo, Committee Hansard, 24 July 2024, p.39.

<sup>89</sup> Shane Chidgzey, The Zoo, Committee Hansard, 24 July 2024, p.38.

<sup>90</sup> Shane Chidgzey, The Zoo, Committee Hansard, 24 July 2024, p.37.

<sup>91</sup> Shane Chidgzey, The Zoo, Committee Hansard, 24 July 2024, p.41.

<sup>92</sup> Christopher Eassey, National Drug and Alcohol Research Centre, Committee Hansard, 5 August 2024, p.47.

<sup>93</sup> Scarlett McKahey, Teen Jesus and the Jean Teasers, Committee Hansard, 25 July 2024, p.12.

<sup>94</sup> Bird's Robe, Submission 117, p.12.

2.90 However, Olivia Hally, an Australian artist, submitted that ‘merchandise sales that once propped up live music tours are now largely undercut by streaming services’.<sup>95</sup>

2.91 Ruth Hazleton (private capacity) said:

Prior to the dominance of music streaming, the live music economy was being subsidised by sales of physical recorded product. For years, artists could reasonably expect 10-15% of any live audience would purchase a cassette/CD/vinyl and it wasn’t uncommon to walk away from a festival or event with double or triple the performance fee in merchandise sales. While CD and merch sales are still viable to an extent in my community, it is nowhere near the reliable source of income it once was.<sup>96</sup>

2.92 The Music Press said that in general, emerging artists will incur losses, something that has remained unchanged over time:

They needed to get those CDs into shops. They needed to get those CDs to the radio stations. ... Even to get your video played on rage you had to send it in on a Betacam that cost \$120, and you had to post it. The costs there were astronomical. By the time you work out what they made versus what they spent, they were probably making the same loss that artists today are making.<sup>97</sup>

2.93 In addition to pressure from streaming services, Bird’s Robe added that some venues charge up to 20 per cent commissions on merchandise sales.<sup>98</sup> Bird’s Robe commented:

This is a form of cost shifting, from venues struggling under the weight of red tape of licensing, insurance premiums and increasing rents, to artists, who are also struggling with increased costs of operation.<sup>99</sup>

2.94 Live Nation said that merchandise commissions are now standard at large venues:

As a company, we took the position in the last couple of years that in venues up to a certain capacity we won’t charge any merchandising commission at all. ... We also reduced the levels of charges in larger venues that we operate. By comparison, if you, as an artist, play any of the arenas in Australia, you’ll be charged 17.5 per cent of the merchandise sales you conduct there. ... The norm of the industry is that merchandise and sales attract a commission.<sup>100</sup>

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<sup>95</sup> Olivia Hally, Submission 11, p.2.

<sup>96</sup> Ruth Hazleton, Submission 113, p.6.

<sup>97</sup> Stephen Green, The Music Press, Committee Hansard, 24 July 2024, p.32.

<sup>98</sup> Bird’s Robe, Submission 117, p.12.

<sup>99</sup> Bird’s Robe, Submission 117, p.13.

<sup>100</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.8.

- 2.95 Bird's Robe recommended that 'Government policy to abolish or minimise merchandise commissions from venues to artists would help improve the viability of touring performers'.<sup>101</sup>

## Artist discovery and emergence

- 2.96 How music is played and consumed is changing and this, in turn, has changed how audiences are likely to discover Australian artists.

### Algorithms

- 2.97 The Committee heard that algorithms – or the way computers calculate our music selections – could have a bias against Australian artists. For example, the Queensland Music Network said:

...a most critical and existential challenge we're facing is around discoverability. It is around a new generation that is not hearing Australian artists, because we've gone from discovering on radio to discovering via algorithm.<sup>102</sup>

- 2.98 The Queensland Music Network continued:

What the algorithm will continue doing, if it thinks I like something, is give me more and more of that. ...there are some shocking stats about how quickly an algorithm will take you away from an Australian artist to an international artist. These systems are set up and are gamified to not help our artists.<sup>103</sup>

- 2.99 Tam Boakes, a venue proprietor, told the Committee:

If you're not in the right algorithms, it's really hard... for emerging talent to get noticed. Spotify or whatever will just pick up things you're already listening to and that you like. You're getting completely missed if you're just a local Adelaide band.<sup>104</sup>

### Social media and streaming

- 2.100 In addition to algorithms, social media and access to older music has changed the pathway to discovery for Australian artists. Music Australia observed that the nature of competition has changed:

No longer are Australian artists just competing with other Australian artists. They are not just competing with other international artists that happen to have a

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<sup>101</sup> Bird's Robe, Submission 117, p.13.

<sup>102</sup> Kris Stewart, Queensland Music Network, Committee Hansard, 24 July 2024, p.2.

<sup>103</sup> Kris Stewart, Queensland Music Network, Committee Hansard, 24 July 2024, p.2.

<sup>104</sup> Tam Boakes, Jive, Committee Hansard, 7 August 2024, p.23.

release that week. They are now competing with every single song that has ever been released.<sup>105</sup>

- 2.101 The Australian Record Industry Association said that this is a 'big challenge'.<sup>106</sup> Furthermore, the Association said:

...the fact that you've now got almost every song ever created at the touch of a button—that is absolutely wonderful, and people are listening to more music now than they ever have—but... in that massive amount of music, how do you find the little path through for new Australian music?<sup>107</sup>

- 2.102 Arts Queensland said that on TikTok, for example, 'you can find something from Austria as quickly as you can find something from Australia'.<sup>108</sup>

- 2.103 Dr Lachlan Goold, from the University of the Sunshine Coast, said:

...streaming doesn't pay artists; it pays the rights holders and aggregators. A small portion goes to publishers. The pie is just split so small. The record companies are making more money out of Queen than they are out of emerging artists. There's not a lot of incentive for them to support emerging artists.<sup>109</sup>

- 2.104 The Association of Artist Managers stated:

...for artists who are not signed to a major label, Spotify have a device by which you can take a reduced royalty in order to push your music more algorithmically. ...it is a pay per play, because you're taking a reduced payment so that Spotify enhances the algorithmic push of your music.<sup>110</sup>

- 2.105 Music Australia said:

...we have a discoverability problem in this country. Australians are not hearing Australian music in the same way that they might have before because of the way people are listening... They've got a choice now to listen to podcasts and even watch video. ...we do need to look at how the consumption, listening and discoverability is all working across both broadcast and streaming.<sup>111</sup>

- 2.106 YouTube, a video sharing website, submitted that they share revenue from advertisers and subscribers with content creators.<sup>112</sup> In addition, YouTube submitted:

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<sup>105</sup> Millie Millgate, Music Australia, Committee Hansard, 25 July 2024, p.3.

<sup>106</sup> Annabelle Herd, Australian Record Industry Association, Committee Hansard, 26 July 2024, p.51.

<sup>107</sup> Annabelle Herd, Australian Record Industry Association, Committee Hansard, 26 July 2024, p.51.

<sup>108</sup> Kirsten Herring, Arts Queensland, Committee Hansard, 24 July 2024, p.10.

<sup>109</sup> Dr Lachlan Goold, University of the Sunshine Coast, Committee Hansard, 24 July 2024, p.18.

<sup>110</sup> Jess Keeley, Association of Artist Managers, Committee Hansard, 26 July 2024, p.9.

<sup>111</sup> Mille Millgate, Music Australia, Committee Hansard, 25 July 2024, p.6.

<sup>112</sup> YouTube, Submission 129, p.3.

Creators and artists can also earn more by offering subscribers exclusive content and perks through Channel Memberships. The Shopping function enables creators to sell products and merchandise directly through their YouTube channel. Musicians, artists and performers can also sell tickets directly through the platform so that as fans are watching music videos... a link to concert tickets will appear on the video page, with the date and time of the concert.<sup>113</sup>

2.107 The streaming service Spotify submitted:

Live music and streaming are complementary modes of music consumption: listeners who discover artists at live events can continue to support them through streaming, providing a longer tail of income; at the same time, discovering artists on streaming platforms generates new interest... There is a correlation between the discovery and subsequent increase in streaming volumes with artists gaining new fans after live music performances at small to medium venues and festivals.<sup>114</sup>

2.108 Spotify noted that since commencing in 2008, streaming has steered the music industry out of a 'crisis of piracy' and 'more than 80% of all royalties generated by Australian artists on Spotify were from listeners outside of Australia'.<sup>115</sup>

## Fewer suitable places to perform live music

2.109 Finding venues to perform live music or sites to host a festival can be challenging. Issues include infrastructure costs, accessibility and regulation relating to noise.

2.110 The Committee was advised that since the COVID-19 pandemic, 1,300 live music venues have closed, crowds at nightclubs have halved and 'this is the biggest crisis to hit the live music scene in a generation'.<sup>116</sup>

2.111 Laneway Festival told the Committee:

There are many sites we've looked at and earmarked. Then, as soon as we go to state government or the local council responsible for looking after them, we're told, 'No, that's not approved for major event usage.' There's an attitude that we're not considered to be contributing to the community, without really understanding or acknowledging how much we can contribute to the community in the area and the local economy.<sup>117</sup>

2.112 Bega Valley Shire Council said that venues could be ageing:

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<sup>113</sup> YouTube, Submission 129, p.3.

<sup>114</sup> Spotify, Submission 43, p.1.

<sup>115</sup> Spotify, Submission 43, p.3.

<sup>116</sup> APRA AMCOS, Submission 95, p.4.

<sup>117</sup> Jessie Parker, Laneway Festival, Committee Hansard, 5 July 2024, p.5.

In the Bega Valley we have... 17 community halls, which are often used for live music. ... There's definitely scope to improve our halls to be live music venues. They're all very old, so they're not necessarily set up for live music. They may not have the sound equipment or the lighting or the soundproofing.<sup>118</sup>

2.113 The ACT Government told the Committee that in Canberra, 'noise complaints present a real issue to small businesses and prevent them sometimes from getting musicians and live music in.'<sup>119</sup>

2.114 Ben Skinner (private capacity) said:

... the industry is not growing due to overt government regulation administered by local councils, manifested through woeful problem-solving ability for prospective event producers to use council facilities as well as overwhelming red tape to establish a permanent commercial live music venue. Entrepreneurs are forced to spend significant capital or time to submit numerous documents to abide by these gatekeeping regulations.<sup>120</sup>

2.115 He continued:

In regard to potential live music venues, over a dozen commercial real estate properties in Springwood, New South Wales, are vacant, and many have been vacant for over a year. This is a bad look for the community and a horrendous squandering of resources.<sup>121</sup>

2.116 ei Productions said that poker machines make more money for clubs than live music:

...back in the 1980s... You'd work every night and twice on a Sunday, pretty much. I've just seen it change. A good case in point up here is the Central Coast League Club, which is a monster club with a monster auditorium, and was once a regular stop for local and international bands. Clubs now run on poker machines.<sup>122</sup>

2.117 Joseph Flack, an amateur musician and 'big supporter of live music' commented on the Caloundra Music Festival's 2024 cancellation due to rising operating costs and cost of living pressures.<sup>123</sup> He submitted:

If live music venues and festivals only look at their own profits and ignore community benefits, then the entire live music benefits have not been evaluated sufficiently. The benefits to the surrounding community should also be considered.<sup>124</sup>

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<sup>118</sup> Emily Harrison, Bega Valley Shire Council, Committee Hansard, 5 July 2024, p.12.

<sup>119</sup> Wilhelmina Blount, Chief Minister, Treasury and Economic Development Directorate, Committee Hansard, 28 June 2024, p.11.

<sup>120</sup> Ben Skinner, Committee Hansard, 25 July 2024, p.50.

<sup>121</sup> Ben Skinner, Committee Hansard, 25 July 2024, p.50.

<sup>122</sup> Neale Mace, ei Productions, Committee Hansard, 5 July 2024, p.36.

<sup>123</sup> Joseph Flack, Submission 33, p.1.

<sup>124</sup> Joseph Flack, Submission 33, p.1.



2.118 Artback NT said:

There are so many challenges, but the benefits are really felt straight away. You can see it if you go to a music festival in the NT in any community. The support for the acts that tour there is like beatlemania, really. We toured a band last year called Eastern Arrernte Band, who are from Santa Teresa in the desert. We took them across the NT for a three-week tour. They were travelling via two vehicles, and everywhere they went, everyone knew all the words to their songs.<sup>125</sup>

2.119 The National Folk Festival submitted:

Very few community festivals receive regular and/or significant funding from the Federal Government. In some cases, State, Territory and local governments are more responsive to the needs of live music festivals but this support varies significantly between events and jurisdictions.<sup>126</sup>

2.120 The National Folk Festival added that 'very few community festivals are for-profit organisations' and instead they 'rely almost entirely on ticket sales and armies of volunteers to survive'.<sup>127</sup>

## Accessibility and safety

2.121 Venue accessibility and safety can be factors that deter young people from attending live music. The Push submitted:

Access to live music events is not a reality for all young people in Australia. There are fewer events in regional and outer-suburban areas, many events come with unaffordable ticket prices, and rarely are live music events staged for underage audiences or designed to be accessible and culturally safe.<sup>128</sup>

2.122 The Push added:

Feedback from young people highlights the critical role that access, diversity, representation and inclusion play in their perceptions of cultural organisations and their purchasing decisions. Young people want to see themselves represented on stages, reflecting the diversity of voices in their community.<sup>129</sup>

2.123 Charlie Pierre (private capacity) said:

One of the biggest challenges is the absence of small venues and spaces that encourage young people to be engaged in live music, whether that be as musicians performing at open mic nights or at small curated festivals, or as crew and audience members that have opportunities to come and see young talent.

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<sup>125</sup> Evan Saunders, Artback NT, Proof Committee Hansard, 8 November 2024, p.16.

<sup>126</sup> National Folk Festival, Submission 21, p.3.

<sup>127</sup> National Folk Festival, Submission 21, p.3.

<sup>128</sup> The Push, Submission 105, p.3.

<sup>129</sup> The Push, Submission 105, p.4.

There's a real absence of these venues that allow people to come together within the context of a safe space.<sup>130</sup>

- 2.124 Arts Access Victoria said that venue access and wheelchair accessible bathrooms can be a barrier.<sup>131</sup> This makes clear that 'the space isn't made for you, because there's no ramp, the lights are too bright or there are flashing lights'.<sup>132</sup>

## Infrastructure

- 2.125 Venues and festivals need various infrastructure for hosting large gatherings of people, such as toilets and sewers, rubbish disposal, access roads and temporary or possibly permanent structures.

- 2.126 Winarch Group discussed infrastructure requirements:

...you need the infrastructure for artists and performers to deliver their performances. Whether it's for 50 people or 30,000 or more, you need that infrastructure. Touring and providing events is very costly, so the more permanent versus temporary infrastructure you have, the less costly it is to run those tours....<sup>133</sup>

- 2.127 Dr Lachlan Goold told the Committee:

...there are issues with infrastructure and venues. The regulation for a venue to put on live music is quite onerous, and for a lot of them it's just easier to either have pokie machines or put on light music rather than have someone playing acoustic guitar at a dinner time.<sup>134</sup>

- 2.128 Untitled Group said:

We... contend with substantial investments required for infrastructure development, including the maintenance of festival sites, external roads and telecommunications systems. These investments in regional communities are rarely subsidised or supported externally.<sup>135</sup>

- 2.129 Wide Open Space Festival, from the Northern Territory, discussed how infrastructure limits potential growth:

...we used to get NT major events funding, which is focused on growth. We had prescriptive grants that said you had to spend X amount on marketing, you have to demonstrate growth of the event, and we were consistently growing up until we had this big event where nearly everybody had been through lockdown in 2020

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<sup>130</sup> Charlie Pierre, Proof Committee Hansard, 17 October 2024, p.36.

<sup>131</sup> Arty Owens, Arts Access Victoria, Committee Hansard, 8 November 2024, p.1.

<sup>132</sup> Arty Owens, Arts Access Victoria, Committee Hansard, 8 November 2024, p.1.

<sup>133</sup> Kyle McKendry, Winarch Group, Committee Hansard, 5 July 2024, p.39.

<sup>134</sup> Dr Lachlan Goold, University of the Sunshine Coast, Committee Hansard, 24 July 2024, p.22.

<sup>135</sup> Michael Christidis, Untitled Group, Committee Hansard, 26 July 2024, p.21.

and 2021, and came out to Central Australia, but sort of over-inflated our numbers and pushed our systems to the point where we've found, 'Oh, we need to invest to grow'—the toilets, the bar, more staff, more volunteers, more parking, all those sorts of things.<sup>136</sup>

## Workplace conditions and culture

2.130 The Committee heard that while some artists or events are successful and aim for high standards, working conditions can be poor, earnings low and that the culture in some live music workplaces deters participation.

2.131 Rod Davies (private capacity) submitted:

The number one concern amongst emerging musicians is fair pay. Guaranteed fees for live performance are scarce and payment is often tied to ticket sales, or even worse, bar takings. In 2024, it's unethical for a three-piece band working in a professional live music venue to only be offered a percentage of the bar takings as payment, yet this happens. ... Many artists currently go to work not knowing if they will break even.<sup>137</sup>

2.132 The Media, Entertainment and Arts Alliance said that around half (49 per cent) of musicians earned less than \$6,000 per year and many had other jobs to supplement their income.<sup>138</sup> Furthermore:

The main source of revenue for Australian musicians is live performance. Unfortunately, work in this sector continues to be characterised by low rates of pay, inconsistent work, delayed payments, wage theft, a lack of superannuation, and the widespread expectation that musicians will play unpaid gigs in return for 'exposure'.<sup>139</sup>

2.133 Support Act, a charitable organisation that provides crisis support for the music industry, discussed the results of a survey they conducted on challenges of working in the sector:

...68 per cent said the cost of living, perhaps not surprisingly. Another 57 per cent said the low level of income from working in the creative industries, and, perhaps as a subset of that, 20 per cent of the total reported a total annual income that sits below the poverty line for a single working person. Fifty-two per cent said burnout and fatigue, and 43 per cent said job insecurity and also the lack of opportunities due to external impacts like venue closures and festival cancellations. ... And 43 per cent said the high cost of doing business.<sup>140</sup>

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<sup>136</sup> James Cocking, Wide Open Space Festival, Proof Committee Hansard, 17 October 2024, p.29.

<sup>137</sup> Rod Davies, Submission 34, p.2.

<sup>138</sup> Media Entertainment and Arts Alliance, Submission 101, p.5.

<sup>139</sup> Media Entertainment and Arts Alliance, Submission 101, p.5.

<sup>140</sup> Clive Miller, Support Act, Proof Committee Hansard, 8 November 2024, p.5.

- 2.134 ei Productions, which provides technical equipment to festivals and shows, discussed the informal nature of their work and contracts:

The production side of it is fairly maverick. ... it's virtually impossible to get any promoter to sign a contract or an agreement or a cancellation policy... Usually we start to talk about money changing hands a week out, where we say, 'If something happens here, we've spent money on people prepping the gear and putting things together.'<sup>141</sup>

- 2.135 Furthermore:

It also affects the industry as a whole. ...with Splendour in the Grass falling over there was a knock-on effect that rippled around the industry of tours and shows being cancelled, but it's more the individual guys who are out of work... They have the gig economy type thing going on and they need that money, then suddenly it's gone and there's no recourse for them.<sup>142</sup>

## Workplace culture

- 2.136 Some witnesses described potentially concerning characterisations about the culture in the live music industry.

- 2.137 In a survey, Support Act found that around 54 per cent of respondents reported 'high or very high levels of psychological distress'.<sup>143</sup>

- 2.138 Dr Catherine Strong, from RMIT University, said that while 'things have been improving'<sup>144</sup> for women in music, change is slow:

We've seen, over decades, things like women putting on shows where they showcase other women... running training for other women and mentorship programs. ... All of these things, though, are very piecemeal.<sup>145</sup>

- 2.139 Australian Women in Music discussed travel with young children, childcare and maternity leave:

All of those things just are not available to those women. That is across the board. We also have seen situations where women have left major jobs in the music industry on maternity leave with the promise of... being able to fulfil those jobs and be reinstated. Many of those women were not reinstated.<sup>146</sup>

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<sup>141</sup> Neale Mace, ei Productions, Committee Hansard, 5 July 2024, pp.33-34.

<sup>142</sup> Neale Mace, ei Productions, Committee Hansard, 5 July 2024, p.34.

<sup>143</sup> Clive Miller, Support Act, Proof Committee Hansard, 8 November 2024, p.5.

<sup>144</sup> Dr Catherine Strong, RMIT University, Committee Hansard, 6 August 2024, p.9.

<sup>145</sup> Dr Catherine Strong, RMIT University, Committee Hansard, 6 August 2024, p.9.

<sup>146</sup> Vicki Gordon, Australian Women in Music Awards and Conference Program, Committee Hansard, 26 July 2024, p.4.

- 2.140 In addition, Australian Women in Music told the Committee that the music industry is male-dominated and there is an ‘alarming culture in which sexual harm, sexual harassment and systemic discrimination is very dominant across the sector’.<sup>147</sup>

## Finding volunteers

- 2.141 Some festivals and events rely on volunteers. For example, the Bega Valley Shire Council, where the Cobargo Folk Festival is held, told the Committee:

...live music generally relies on volunteers so heavily, whether it's an event, a festival or even potentially just a smaller gig, there are usually volunteers that are helping set that up, make it work and I think we underestimate that at times. There is a risk that if those volunteers decide to retire or move away or have other priorities in their life, what will that mean for live music?<sup>148</sup>

- 2.142 The National Folk Festival said that volunteers are workers who need training:

If there were off-the-shelf, ready-to-go packages that supported that sort of training that could be rolled out to volunteers at our organisation or others like us, that would be a relatively low cost and simple way to support people to volunteer and help make the industry sustainable.<sup>149</sup>

- 2.143 Queenscliff Music Festival, held in Victoria, discussed the value of volunteers:

The festival emphasises community involvement, with local businesses and groups participating. We have a number of local community groups that form part of our strong volunteer basis. The festival heavily relies on a volunteer contribution to survive. It is governed by a volunteer board coming from varying areas of expertise. And the event is delivered by over 400 volunteers operating various front of house positions.<sup>150</sup>

## Access to music education

- 2.144 The Committee heard that music education, skills and knowledge can be overlooked in schools and that private lessons are expensive.

- 2.145 For example, the Australian Music Association submitted:

Quality music education is not universal in Australia. Although progress has been made... we don't really know the extent to which students are receiving an arts

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<sup>147</sup> Vicki Gordon, Australian Women in Music Awards and Conference Program, Committee Hansard, 26 July 2024, p.1.

<sup>148</sup> Emily Harrison, Committee Hansard, 5 July 2024, p.10.

<sup>149</sup> David Gilks, National Folk Festival, Committee Hansard, 5 July 2024, p.28.

<sup>150</sup> Claire Stickland, Queenscliff Music Festival Inc, Proof Committee Hansard, 17 October 2024, p.27.

education at all, the depth and quality of their arts education experience, or the resources available (and required) to deliver the curriculum.<sup>151</sup>

2.146 The Music Press told the Committee:

If we're going to go for incentives, if the algorithms are going to only give people what they already want, we need to get people more curious about what they don't know. That's where music education really comes in.<sup>152</sup>

2.147 Music NSW said:

I think it costs \$30,000 to \$40,000 to get your kid from beginning a lesson to maybe getting to the con or to tertiary level as a player. There is a huge barrier there for participation generally as a young artist.<sup>153</sup>

2.148 In addition, MusicNSW said that music is linked to knowledge about information technology:

...there's a role for our music education systems to play in making young people aware of the diverse range of careers available to them in the contemporary music world outside of just being an artist. I think there is also a role for our education system to play in contemporising the way that we give that education generally so that we're using contemporary language to talk about songwriters, not just composers, and we're talking about computers as instruments, not just violins, and electronic music as opposed to just classical music.<sup>154</sup>

2.149 Dr Diana Tolmie, from the Queensland Conservatorium, told the Committee:

The decline of Australian music education and public lack of respect for the music profession has a broad and direct correlation to potential diminishing cultural identity, de-skilling our future workers and, therefore, negatively impacting our economy.<sup>155</sup>

2.150 The Australian Curriculum, Assessment and Reporting Authority said:

...understanding notating, documenting and recording music is a musical practice that is clearly stated within the curriculum. ... It is an integral part of the curriculum.<sup>156</sup>

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<sup>151</sup> Australian Music Association, Submission 83, p.2.

<sup>152</sup> Stephen Green, The Music Press, Committee Hansard, 24 July 2024, p.33.

<sup>153</sup> Joe Muller, Music NSW, Committee Hansard, 25 July 2024, p.20.

<sup>154</sup> Joe Muller, Music NSW, Committee Hansard, 25 July 2024, p.20.

<sup>155</sup> Dr Diana Tolmie, Queensland Conservatorium, Committee Hansard, 24 July 2024, p.15.

<sup>156</sup> Sharon Foster, Australian Curriculum, Assessment and Reporting Authority, Committee Hansard, 28 June 2024, p.5.

2.151 Literacy and numeracy and subjects such as computing, civics and science are nationally assessed. However, the Authority said that there is not a national assessment program for music education.<sup>157</sup>

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<sup>157</sup> Stephen Gneil, Australian Curriculum, Assessment and Reporting Authority, Committee Hansard, 28 June 2024, p.6.







## 3. Possible strategies to improve sustainability

### Overview

- 3.1 This chapter discusses evidence received on possible strategies (or proposals) to improve the sustainability of live music in Australia.
- 3.2 Most commonly, witnesses recommended more government grants, financial support and related interventions to save venues and festivals. Other possible strategies included introducing a ticket levy, a voucher scheme or tax offsets
- 3.3 Additionally, witnesses recommended relief or reform in other areas that included:
- insurance arrangements
  - support for Australian artists, which could include minimum pay for musicians, Australian content quotas and improvements to event accessibility
  - support for communities, networks, live music promotion and change to allow more events to admit attendees of all ages
  - support for music education, skills and audience curiosity
  - regulatory controls to oversee competition and artificial intelligence.
- 3.4 The Committee's views and recommendations are discussed in Chapter 4.

### Government grants and financial support

- 3.5 As discussed above, many witnesses had views on government grants and financial support for live music. The Australian Festival Association said:

I think there's a role from the federal government to lead the states from a federal arts perspective that includes guidance on the grants system, which is state based and generally focused on tourism, that doesn't support the real ecosystem of the music industry.<sup>1</sup>

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<sup>1</sup> Adelle Robinson, Australian Festival Association, Committee Hansard, 26 July 2024, p.22.

3.6 Kicks Entertainment submitted:

The Australian live music industry requires urgent local/state Government financial support through new targeted grants and funding to help bridge the gap between rising costs and affordable ticket prices.<sup>2</sup>

3.7 The Australian Live Music Business Council said that the application process for grants is 'extremely long' with months of waiting and 'that doesn't really enable you to plan'.<sup>3</sup> The Council said that there could be a charitable institution with a representative board to decide who receives grants, which could be funded from a ticket levy (discussed later in this chapter).<sup>4</sup>

3.8 The Council added that 'grassroots' venues could be identified as being broadly eligible for grants,<sup>5</sup> which could speed up the process:

It's the kind of venue that puts on live music first and foremost as its reason for being in business. It puts on original music. It has a sound system. It has sound engineers. It advertises the bands by name and promotes them. Obviously, if you're dealing with regional towns, you would need to be a little bit more lenient... By preapproving the venues, it means that the grant system can be operated very quickly.<sup>6</sup>

3.9 The Association of Artist Managers said that RISE (Restart Investment to Sustain and Expand) grants 'created a false ecosystem because it was too much money and not enough oversight'.<sup>7</sup> For example, Port Fairy Folk Festival said:

There's talk of overcrowding in the marketplace, yet the government is supporting new events. Not only that... several of these new events that have started with post-COVID recovery funding on the promise that they'd be around for years to come, and they've run for one year. Then, once they've had a reduction or withdrawal of that government funding, they haven't proceeded beyond that.<sup>8</sup>

3.10 The Festival's organisers said that the marketplace is 'crowded' and 'funnelling funds to new events is to the detriment of the existing ones'.<sup>9</sup>

3.11 The Australian Festival Association said that larger grants are needed:

... there needs to be a higher maximum grant. For a show like... Listen Out festival, which travels to five Australian cities and is looking at over 170,000

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<sup>2</sup> Kicks Entertainment, Submission 23, p.2.

<sup>3</sup> Howard Adams, Australian Live Music Business Council, Committee Hansard, 11 October 2024, p.17.

<sup>4</sup> Howard Adams, Australian Live Music Business Council, Committee Hansard, 11 October 2024, p.18.

<sup>5</sup> Howard Adams, Australian Live Music Business Council, Committee Hansard, 11 October 2024, p.17.

<sup>6</sup> Howard Adams, Australian Live Music Business Council, Committee Hansard, 11 October 2024, p.17.

<sup>7</sup> Alastair Burns, Association of Artist Managers, Committee Hansard, 26 July 2024, p.12.

<sup>8</sup> Justin Rudge, Port Fairy Folk Festival, Committee Hansard, 5 July 2024, p.22.

<sup>9</sup> Justin Rudge, Port Fairy Folk Festival, Committee Hansard, 5 July 2024, p.22.

patrons and overall operating costs of \$30 million, a grant of \$100,000 doesn't make a dent.<sup>10</sup>

- 3.12 Similarly, the Hills Are Alive Group submitted that more financial support – ‘at least double’<sup>11</sup> – is needed because costs for festivals have increased:

With increased operational costs of 30-40 per cent and a weak Australian Dollar putting upward pressure on ticket prices coupled with cost of living for attendees putting downward pressure on ticket prices, festival margins have decreased to the point that many events have become too financially risky for private and community operators.<sup>12</sup>

- 3.13 The Hills Are Alive Group cautioned that ‘if significant funding is not made available in the next 3-6 months many festivals will need to cancel their shows for the 2024-2025 season and may never return’.<sup>13</sup>

- 3.14 A submission from William Street Bird, a small venue in Western Australia, noted that government grants paid to artists may not result in better audience attendance:

While this... was a step in the right direction, the outcome that we saw was artists did not have the same drive and motivation to promote their gigs, in some cases leading to poor attendance where the artist was covered financially, the venue was in terms of venue hire but was not profitable as a whole for the night.<sup>14</sup>

- 3.15 Instead, the Committee was told that grants for venues could reduce the hiring costs charged to artists:

If we could reduce that, artists could keep tickets at a price which their crowds could afford and be able to come out to multiple gigs a week and not just pick one or two.<sup>15</sup>

- 3.16 Supersonic Australasia said that pubs could be given a quarterly subsidy or grant if the venue programs original music on at least four nights of the week.<sup>16</sup> However, Century Venues said that this could have unintended consequences:

...the challenge that we face in Sydney is government competition through government run programs and funded venues. ... Taxpayer funds are being used to undercut venues by waiving their fees or providing irresistible offers that the independent sector is unable to compete with.<sup>17</sup>

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<sup>10</sup> Australian Festival Association, Submission 75, p.1.

<sup>11</sup> The Hills Are Alive Group, Submission 31, p.1.

<sup>12</sup> The Hills Are Alive Group, Submission 31, p.1.

<sup>13</sup> The Hills Are Alive Group, Submission 31, p.1.

<sup>14</sup> William Street Bird, Submission 44, p.3.

<sup>15</sup> Emma Adams, Mojo's Bar and William Street Bird, Committee Hansard, 8 August 2024, p.22.

<sup>16</sup> Paul Sloan, Supersonic Australasia, Committee Hansard, 8 August 2024, p.31.

<sup>17</sup> Sam Nardo, Century Venues, Proof Committee Hansard, 17 October 2024, p.7.

- 3.17 The Committee heard that some groups or music genres may miss out on funding. For example, Kieren Bramham, who represented a group of independent musicians, DJs, promoters, agents and venues, said that there are limited grants for electronic music. In addition, he said grants would:
- ...benefit from being more focused on promoters, who in this space are the ones who increasingly book the venues, pay the artists and also book the artists. A lot of grant programs are only open to licensed venues, which excludes a lot of promoters. We also recommend a greater focus for ....audiovisual, soundproofing and the growth and expansion of venues—all these things would facilitate more individuals to go to more events.<sup>18</sup>
- 3.18 Paul Mason (private capacity) said:
- ...venues appear to have limited funds to spend on programming... other contemporary performance companies—dance and theatre, for example—regularly mount national tours utilising this infrastructure and accessing the significant funding available through the federal Playing Australia program.<sup>19</sup>
- 3.19 Mr Mason added that unlike dance and theatre, government funds for music tours are ‘exceptionally underutilised by the music industry’.<sup>20</sup>
- 3.20 The African Music and Cultural Festival submitted that funding will ‘often exclude’ multi-disciplinary events.<sup>21</sup> The submission said:
- Despite live music being a central component, our broader cultural scope precludes us from many live music funding opportunities.<sup>22</sup>
- 3.21 The submission recommended that live music funding be expanded ‘to include free, community-focused events that incorporate live music as a primary feature’.<sup>23</sup>
- 3.22 The Department of Infrastructure, Transport, Regional Development, Communications and the Arts had a grants program called Revive Live (now closed), which ‘funded hundreds of venues... to upgrade their facilities’ for live music. The Department said that a new grants program is expected and, based on this successful experience, there is likely to be ‘strong demand’.<sup>24</sup>

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<sup>18</sup> Kieren Bramham, Committee Hansard, 8 August 2024, p.38.

<sup>19</sup> Paul Mason, Proof Committee Hansard, 17 October 2024, p.15.

<sup>20</sup> Paul Mason, Proof Committee Hansard, 17 October 2024, p.16.

<sup>21</sup> African Music and Cultural Festival, Submission 127, p.2.

<sup>22</sup> African Music and Cultural Festival, Submission 127, p.2.

<sup>23</sup> African Music and Cultural Festival, Submission 127, p.2.

<sup>24</sup> Dr Stephen Arnott, Department of Infrastructure, Transport, Regional Development, Communications and the Arts, Committee Hansard, 5 June 2024, p.3.

- 3.23 The grants contributed towards expenses such as artist wages, 'other' wages (such as booking agent, sound technician, crew), marketing, equipment costs and event costs (such as staging, insurance and security).<sup>25</sup>
- 3.24 The Department added that the states, territories and the Australian Government each have their own roles and 'we do the best we can to support the industry and act through a coordinated effort'.<sup>26</sup>
- 3.25 Creative Australia discussed the findings of their research on music festivals:
- We found that, while a lot of the challenges were varied, something we could see quite clearly was that the commercial festivals were suffering the most from increasing insurance costs and user-pays policing. That would be one thing that you could address if you wanted to address their concerns.<sup>27</sup>
- 3.26 In addition to government grants, other options were also discussed, including tax offsets, a voucher scheme and a ticket levy.

## **Tax offsets**

- 3.27 Some witnesses proposed that the Australian Government could create a tax offsets scheme, which could, for example, reduce payable tax in exchange for investment in Australian live music.
- 3.28 A submission from APRA AMCOS submitted:
- Long standing local venues have been closing down from red-tape and over-regulation. ... Australia urgently needs a national catalyst in the form a tax offset to revive Australian live music.<sup>28</sup>
- 3.29 The submission included some further detail on the offsets proposal, identifying the following preferred option and its estimated benefits:
- A combined venue offset (of 5 per cent of expenses for current live music venues and \$12,000 in expenses for those not currently hosting) would boost the incomes of musicians and artists by \$205 million per year with an additional 203,200 gigs.<sup>29</sup>
- 3.30 The Australian Festival Association said that government grants are usually limited in their value and do not help larger events. While a voucher scheme could be more impactful, the Association's preferred option was tax offsets:

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<sup>25</sup> Department of Infrastructure, Transport, Regional Development, Communications and the Arts, Supplementary Submission 69.1, pp.1-2.

<sup>26</sup> Dr Stephen Arnott, Department of Infrastructure, Transport, Regional Development, Communications and the Arts, Committee Hansard, 5 June 2024, p.6.

<sup>27</sup> Dr Christen Cornell, Creative Australia, Committee Hansard, 8 November 2024, p.22.

<sup>28</sup> APRA AMCOS, Submission 95, p.3.

<sup>29</sup> APRA AMCOS, Submission 95, p.27.

Giving a lot of money to 18- to 25-year-olds is a cost for government, but it would have a huge impact. The other option being put forward is these tax offsets... If you want to support the live music industry, those tax offsets need to apply to the people who are putting the content through the venues and bringing the artists over—so that would be festival and music promoters.<sup>30</sup>

3.31 The NSW Department of Creative Industries, Tourism, Hospitality and Sport said:

...rather than one-off grant programs or bursts of cash. ...tax offsets can make it easier for venues to operate. Not every single venue, but you do have to meet a threshold and work out exactly what that model would look like. It's a viable way to provide ongoing sustainability and confidence to the sector.<sup>31</sup>

3.32 Sally Mather, from the Marriner Group, which operates a venue called The Forum, in Melbourne, said that tax offsets should be designed to incentivise Australian music:

...it has to recognise the cultural value of live music but in the essence of what this is, so it has to be original as well and it has to be in relation to Australian musicians and Australian music. That's really what needs support and what is the driver of our industry.<sup>32</sup>

## Voucher scheme

3.33 Some witnesses proposed that the Australian Government could create or support a voucher scheme, whereby government-issued vouchers could be redeemed for tickets to see live music. Similar schemes in Europe were often discussed.

3.34 For example, QMusic submitted:

Traditional ticket selling models and timelines seem largely broken - countries such as Spain and Germany have explored culture credits, vouchers and passes as different models to resource young audiences to be able to access music events. Innovative new music pass options need to be explored as a way of reintroducing audiences to Australian venues and artists.<sup>33</sup>

3.35 The Australia Institute submitted:

Around the world, more and more countries are introducing schemes in which young people are granted money to spend on arts. ... youth cultural passes are an effective way of increasing engagement with the arts. Australia Institute polling shows that four in five young Australians (80 per cent) would increase the

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<sup>30</sup> Mitch Wilson, Australian Festival Association, Committee Hansard, 26 July 2024, p.22.

<sup>31</sup> Emily Collins, Department of Creative Industries, Tourism, Hospitality and Sport, Committee Hansard, 25 July 2024, p.45.

<sup>32</sup> Sally Mather, Marriner Group, Committee Hansard, 5 August 2024, p.30.

<sup>33</sup> QMusic, Submission 64, p.3.

number of music events they attend if a \$200 government-funded voucher were available.<sup>34</sup>

- 3.36 The Australia Institute's submission added that a voucher scheme should be designed to benefit Australian artists, cultural institutions and business.<sup>35</sup>
- 3.37 Century Venues said that vouchers for live music would be welcome and suggested that transport costs, especially in regional areas, could be redeemable.<sup>36</sup>
- 3.38 The South Australian Department of Premier and Cabinet said that the state had created a voucher scheme for businesses to hire artists to perform live music.<sup>37</sup> The scheme offered a \$2 million pool of vouchers worth \$400 each 'to get live music acts back into pubs, clubs, small bars, restaurants, cafes, and other smaller venues'. The Committee was advised that around 3,000 (out of 4,000) available vouchers were redeemed.<sup>38</sup>
- 3.39 John Wardle Consulting said that while the voucher models used during the pandemic have 'extraordinary potential',<sup>39</sup> some issues need to be resolved:
- One of the shortfalls from the voucher system was it whilst it worked well business to business such as between a customer and a restaurant, when a third-party was involved such as ticketing agency then complications arose.<sup>40</sup>
- 3.40 A venue owner submitted that vouchers should be redeemed at the point of booking. Otherwise, the submission said, people make their bookings and then change their minds without consequence.<sup>41</sup> The submission said:
- They were able to retain their vouchers with no consequences, while we were sometimes left with a Sold Out sign and a near-empty room. This had a detrimental effect, both on us and the artists.<sup>42</sup>

## **Ticket levy**

- 3.41 The Committee was told that a ticket levy – perhaps \$1 for each ticket sold – could generate money for a fund that could be used to invest in small venues and emerging artists. However, there was some debate in the evidence about how the levy could work and what would be defined as 'grassroots' music.
- 3.42 For example, The Australian Live Music Business Council discussed how a levy introduced in the United Kingdom could be replicated in Australia:

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<sup>34</sup> Australia Institute, Submission 128, p.11.

<sup>35</sup> Australia Institute, Submission 128, p.11.

<sup>36</sup> Sam Nardo, Century Venues, Proof Committee Hansard, 17 October 2024, p.11.

<sup>37</sup> Clare Mockler, SA Department of Premier and Cabinet, Committee Hansard, 7 August 2024, p.8.

<sup>38</sup> South Australian Government, Supplementary Submission 91.1, p.3.

<sup>39</sup> John Wardle Consulting, Submission 92, p.2.

<sup>40</sup> John Wardle Consulting, Submission 92, p.3

<sup>41</sup> Name Withheld, Submission 67, p.5.

<sup>42</sup> Name Withheld, Submission 67, p.5.

This levy would involve collecting a small amount—projected at \$1—from each ticket sold for major events in large arenas. The funds would be managed through a trust specifically established to support smaller, independent venues that are crucial to the nurturing and development of local talent.<sup>43</sup>

3.43 The Push, a youth music organisation, supported the \$1 ticket levy proposal:

A levy such as this will support the next generation of live music audiences and artists across Australia and will assist with shifting the funding model away from the consumption of alcohol.<sup>44</sup>

3.44 Rosemount Hotel, a venue in Perth, said that ‘if everyone who went to Coldplay contributed a dollar towards grassroots venues it would make such a big difference’.<sup>45</sup>

3.45 The Jive, a venue in Adelaide, supported the idea of a \$1 ticket levy on shows with attendance of over 2,000 people:

... we've been advocating for that quite strongly... None of those really large arena shows and festivals and things would ever happen if small venues didn't exist to begin with. It all starts here and it grows.<sup>46</sup>

3.46 However, the Committee notes that Bluesfest Byron Bay defined a ‘grassroots’ venue as having a capacity of 2,000 to 3,000 attendees.<sup>47</sup>

3.47 Paul Mason (private capacity) said that while a levy is a ‘fantastic idea’, the details should be considered:

How much of that gets soaked up in administrative costs? How broadly is that largesse spread around the music community? For me, there's no single music economy. There are multiple music communities and multiple music economies.<sup>48</sup>

3.48 The Australian Live Music Business Council defined an ‘arena show’ to mean a show with more than 5,000 attendees.<sup>49</sup>

3.49 A submission from the venue William Street Bird summarised their view on the hierarchy of venue spaces in relation to artist progression or popularity:

- small capacity venues which hold up to 250 people are the starting point for any live musician and are arguably the most important for the development of new artists

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<sup>43</sup> Australian Live Music Business Council, Submission 78, p.1.

<sup>44</sup> The Push, Submission 105, p.6.

<sup>45</sup> Sinead O'Hara, Rosemount Hotel, Committee Hansard, 8 August 2024, p.25.

<sup>46</sup> Tam Boakes, Jive, Committee Hansard, 7 August 2024, p.28.

<sup>47</sup> Peter Noble, Bluesfest Byron Bay, Proof Committee Hansard, 17 October 2024, p.21.

<sup>48</sup> Paul Mason, Proof Committee Hansard, 17 October 2024, p.18.

<sup>49</sup> Howard Adams, Australian Live Music Business Council, Committee Hansard, 11 October 2024, p.17.



- medium capacity venues which hold 250 to 1,000 people are usually the next stepping stone
- large capacity venues which hold 1,000 people to 5,000 people are when a band has garnered a following which allows them to hold an event in a larger space. Artists will usually be confident they can sell out the space when moving to a venue of this size
- festival or stadium appearance is at the point where a musician is nationally or internationally acclaimed.<sup>50</sup>

3.50 Dr Ben Green and Dr Sam Whiting suggested that a levy could operate depending on ticket price, starting at tickets priced over \$100.<sup>51</sup>

3.51 Live Nation questioned how a ticket levy could operate:

...it's a little bit more complex than perhaps other people have suggested. Firstly, it is the headliner who sets the economic parameters of the tour. So the question is: is that levy coming out of the artist side of the financial arrangements or the promoter's side of the financial arrangements?<sup>52</sup>

3.52 Live Nation added:

The other questions... are the detail: is this is a national scheme, was it a state-by-state scheme? Clearly, Victoria and New South Wales attract the majority of performances, so would the scheme, if it goes into operation, generate income nationally for all grassroots venues or only as per state performances?<sup>53</sup>

3.53 Similarly, Live Performance Australia said:

We're not sure how this levy would work, who's collecting it, who would be making decisions and where it would be going. We're not sure why international artists should be subsidising other parts of the industry.<sup>54</sup>

3.54 Live Performance Australia added that the levy proposed in the United Kingdom is 'not an operational model' and 'the government there has already indicated it wouldn't mandate for that kind of levy'.<sup>55</sup>

3.55 At the time of preparing this report, the UK Creative Industries Minister had supported a voluntary ticket levy and asked the live music industry to 'work together' on a solution to come into effect in 2025.<sup>56</sup>

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<sup>50</sup> William Street Bird, Submission 44, pp.1-2.

<sup>51</sup> Dr Sam Whiting and Dr Ben Green, Submission 123, p.2.

<sup>52</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.3.

<sup>53</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.3.

<sup>54</sup> Evelyn Richardson, Committee Hansard, 6 August 2024, p.5.

<sup>55</sup> Evelyn Richardson, Committee Hansard, 6 August 2024, p.5.

<sup>56</sup> 'Minister urges live music industry to introduce voluntary ticket levy to protect grassroots venues', 14 November 2024, at <https://www.gov.uk/government/news/minister-urges-live-music-industry-to-introduce-voluntary-ticket-levy-to-protect-grassroots-venues>

## Insurance solutions for venues and festivals

3.56 As discussed in Chapter 2, many witnesses representing festivals and venues said that insurance costs have sharply increased.

3.57 The Australian Live Music Business Council said that there could be more competition:

The big thing that we need for live music venues... is to have more insurers coming back into the marketplace. That means more capacity, more competition and so hopefully a leveling or some decrease in premium.<sup>57</sup>

3.58 However, the Council said that this could take time:

But this is really going to be a long-term process like tort reform. To convince insurance companies to come back into the marketplace is going to take some time and it's going to take evidence and data for that to happen.<sup>58</sup>

3.59 Untitled Group, an Australia festival and event promotor, said that the aim should be to reduce risks:

...we would like propose establishing a clear insurance regime, including a code of conduct and crisis decision-making policies to protect event organisers. ... We would also like to see increased investment in supporting the festivals and events, allocating grant funding that would support existing events... This would derisk the industry and decrease insurance premiums and operational costs, crucial for maintaining festival viability.<sup>59</sup>

3.60 Christopher Eassey, from the National Drug and Alcohol Research Centre, said:

Alcohol and drug use in licensed entertainment settings and outdoor music festivals has been associated with various harms... We have found that proactive harm reduction measures can improve safety outcomes, thereby reducing the need for extensive policing at events. ... By tracking these outcomes we can demonstrate a reduction in harms at music festivals, which could lead to lower event insurance costs and in turn improve the economic viability of these events.<sup>60</sup>

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<sup>57</sup> Andrew Bassingthwaighe, Australian Live Music Business Council, Committee Hansard, 11 October 2024, p.15.

<sup>58</sup> Andrew Bassingthwaighe, Australian Live Music Business Council, Committee Hansard, 11 October 2024, p.15.

<sup>59</sup> Michael Christidis, Untitled Group, Committee Hansard, 26 July 2024, p.22.

<sup>60</sup> Christopher Eassey, National Drug and Alcohol Research Centre, Committee Hansard, 5 August 2024, pp.47-48.

3.61 Music Victoria advised against subsidised insurance because ‘insurers will charge more’.<sup>61</sup> Other witnesses suggested that the government could accept some of the insurance risks:

- the Australian Festival Association and Live Performance Australia recommended ‘government-backed underwriting of public liability and cancellation insurance’.<sup>62</sup>
- Ewen Craig, from Cedar Mill Group, suggested that with government assistance, a self-insurance scheme could be established or a ‘financial guarantee’ offered from government to assist with insurance.<sup>63</sup>
- the Insurance Council of Australia referred to the Victorian Managed Insurance Authority as an ‘obvious example’ of how government could help events with their insurance.<sup>64</sup>

3.62 Statewide Mutual, a local government insurance pool, discussed how buying together helps with price negotiation and risk management.<sup>65</sup> Statewide Mutual said:

We're essentially the insurer on risk for Tamworth City Council, who run the country music festival. We're on risk for all the Anzac Day and Australia Day festivities that are run by different councils as well. They're quite reasonable gatherings. ... Every time a council does an event, from a citizenship ceremony to a youth concert, they now have a culture where they undertake a full risk management appraisal that gets submitted to us... It's certainly not a driver of a lot of losses for us, even though we do participate quite widely in that space. ...we're doing what we can to ensure that our community can roll up at these events and have a good, safe, fun day.<sup>66</sup>

3.63 H2 Insurance, an insurance broker, said that risk depends on the setting:

A live music venue is treated totally differently to how a festival is treated, which is also very different to how an indoor event is treated or a conference. We have a specialist policy for conference and exhibition. Again, that liability risk is a bunch of people walking into a flat room... It's a totally different liability risk from an outdoor festival.<sup>67</sup>

3.64 The Insurance Council also referred to the role of brokers and risk:

...if we introduce them to a broker that's specialised... they're able to articulate the risks to the underwriter or the insurer in a way that provides a level of comfort or a level of tailoring for that business. ... Taylor Swift is not treated the same as Motley Crue.<sup>68</sup>

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<sup>61</sup> Simone Schinkel, Music Victoria, Committee Hansard, 5 August 2024, p.3.

<sup>62</sup> Australian Festival Association, Submission 75, p.6; Live Performance Australia, Submission 81, p.2.

<sup>63</sup> Ewen Craig, Cedar Mills, Committee Hansard, 5 July 2024, p.42.

<sup>64</sup> Tom Lunn, Insurance Council of Australia, Committee Hansard, 26 June 2024, p.5.

<sup>65</sup> Naaman-Israel Eurell, Statewide Mutual, Committee Hansard, 11 October 2024, p.22.

<sup>66</sup> Naaman-Israel Eurell, Statewide Mutual, Committee Hansard, 11 October 2024, p.24.

<sup>67</sup> Jason Holmes, H2 Insurance, Committee Hansard, 11 October 2024, p.13.

<sup>68</sup> Alexandra Hordern, Insurance Council of Australia, Committee Hansard, 11 October 2024, p.5.

- 3.65 The Department of Infrastructure, Transport, Regional Development, Communications and the Arts told the Committee that government's role is 'not quite clear' as insurance is a commercial matter.<sup>69</sup> The Department added:

...we work closely with relevant colleagues in the Treasury and in Music Australia as well as with state and territory music officials to make sure we understand the nature of the issue. ...the insurance industry charges what they do so they can manage their risks, and we don't get involved in that assessment.<sup>70</sup>

- 3.66 The Committee was advised that the South Australian Government had established a cancellation fund for live music and events, which granted up to \$250,000 to cancelled events.<sup>71</sup>

## Support for Australian artists

- 3.67 The Committee received various proposals aimed at supporting Australian artists, including by giving Australian music greater prominence, minimum pay and making spaces accessible.

### Minimum fee or payment for musicians

- 3.68 Some witnesses discussed the adoption of a minimum \$250 fee when governments hire musicians or performers for publicly funded events.

- 3.69 The Media, Arts and Entertainment Alliance said that most jurisdictions had endorsed the minimum fee and said that the Australian Government, Tasmanian and Northern Territory governments should also endorse the \$250 minimum for taxpayer-subsidised events.<sup>72</sup> In addition, the Alliance said:

The \$250 minimum should be adopted by commercial operators across Australia as part of broader industry solutions. ... This principle should also apply in the case that government funding (direct or indirect) is to be directed towards festivals. In other words, any government funding of the sector should be tied to the condition of fair payment to musicians.<sup>73</sup>

- 3.70 Leon Pratt (private capacity) submitted:

A \$250 minimum payment for musicians for live performance, which will ensure that a foundational culture of music is built to support local musicians, music practice and local music culture.<sup>74</sup>

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<sup>69</sup> Dr Stephen Arnott, Department of Infrastructure, Transport, Regional Development, Communications and the Arts, Committee Hansard, 5 June 2024, p.1.

<sup>70</sup> Dr Stephen Arnott, Department of Infrastructure, Transport, Regional Development, Communications and the Arts, Committee Hansard, 5 June 2024, p.1.

<sup>71</sup> Clare Mockler, Department of the Premier and Cabinet, Committee Hansard, 7 August 2024, p.10.

<sup>72</sup> Media, Entertainment and Arts Alliance, Submission 101, p.7.

<sup>73</sup> Media, Entertainment and Arts Alliance, Submission 101, p.7.

<sup>74</sup> Leon Pratt, Submission 8, p.1.

3.71 Dr Robert Stove (private capacity) said that while this proposal is a ‘good thing’, a musician could agree to ‘undercut’ the minimum and accept a lower price.<sup>75</sup>

3.72 One venue owner opposed the minimum pay proposal, submitting that ‘this is unsustainable for small, independent venues such as ours’.<sup>76</sup> The submission continued:

If they know they will receive \$250 regardless of whether there are 4 or 40 people buying tickets, bands sometimes don’t promote at all or save their efforts for gigs where every ticket matters. But from the venue’s perspective, as the band is getting nearly all the ticket proceeds, we rely on people spending over the bar to cover our costs, so we need at least 20-30 people in the room buying 2 or 3 drinks each just to break even. Other nights, we charge even less for entry, so again, having a mandatory \$250 fee is unworkable.<sup>77</sup>

## Australian content quota

3.73 The Association of Artist Managers said that Australia should be ‘looking into content quotas and algorithmic quotas’ and potentially ‘looking at other countries to see what they have done’, as well as ‘research to find out how we can open that up for Australian audiences’.<sup>78</sup>

3.74 For example, Music Victoria said:

...we need to increase the discoverability, introducing local music content quotas everywhere—radio, streaming, film, television, on-hold music, live shows, on bills with internationals.<sup>79</sup>

3.75 In addition, Music Victoria discussed Canadian content rules:

...if a user is on a platform like Netflix, Spotify and TikTok, and has a Canadian IP [Internet protocol] address, the services are required to deliver back a certain amount of Canadian created content in the search results.<sup>80</sup>

3.76 Robert Baxter (private capacity) said:

It would be amazing if we had more shows interviewing artists, platforming them, and letting us know that Australian artists are important. ...big artists are pushed but why are the big artists not Australian? Why is the content that TikTok pushes not Australian content that we are producing? We could be producing amazing content because, as we have seen, we have amazing musicians here.<sup>81</sup>

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<sup>75</sup> Dr Robert Stove, Committee Hansard, 5 August 2024, p.16.

<sup>76</sup> Name Withheld, Submission 67, p.2.

<sup>77</sup> Name Withheld, Submission 67, p.10.

<sup>78</sup> Maggie Collins, Association of Artist Managers, Committee Hansard, 26 July 2024, p.13.

<sup>79</sup> Simone Shinkel, Music Victoria, Committee Hansard, 5 August 2024, p.1.

<sup>80</sup> Simone Shinkel, Music Victoria, Committee Hansard, 5 August 2024, p.2.

<sup>81</sup> Robert Baxter, private capacity, Committee Hansard, 5 August 2024, p.21.

3.77 Dr Sam Whiting and Dr Ben Green submitted that Australian content quotas should be legislated for digital streaming services – for both music and screen media.<sup>82</sup>

3.78 The Queensland Department of Treaty, Aboriginal and Torres Strait Islanders Partnerships, Communities and the Arts said that television productions could be asked to include more Australian music in their soundtrack. The Department said:

The majority of Australian productions, and certainly international productions, receive tax incentives from government to film... I was absolutely mind blown by the outcomes that Heartbreak High had as a production. ... In the first season, 128 songs played. That show was in the top 10 internationally on the Netflix platform. ...it can mean a big boost in profile, not to mention that income fees paid for the right to use the track can range a few thousand dollars at the low end to \$100,000 at the high end.<sup>83</sup>

3.79 The Department added:

If the government is funding and incentivising these productions, can government do more in terms of Australian procurement and procuring local artists and local businesses to get more value out of that for live musicians?<sup>84</sup>

3.80 Live Performance Australia said:

...we must invest in the artist career matrix. We need to understand the myriad of pathways an artist now has to navigate to grow and sustain a music career. What does that career matrix look like in 2025 and beyond and where does government invest public funds to support local artists to succeed in a global market?<sup>85</sup>

3.81 Furthermore:

...we must identify options for cutting through on the streaming services. This may be through having a percentage of local content requirement on locally curated playlists in our market. The bigger challenge is how we get our Australian artists onto global playlists.<sup>86</sup>

3.82 Spotify submitted that 'live music and streaming are complementary modes of music consumption' because streaming services help build an artist's popularity, following and ability to attract new fans.<sup>87</sup>

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<sup>82</sup> Dr Sam Whiting and Dr Ben Green, Submission 123, p.2.

<sup>83</sup> Kirsten Herring, Queensland Department of Treaty, Aboriginal and Torres Strait Islanders Partnerships, Communities and the Arts, Committee Hansard, 24 July 2024, p.9.

<sup>84</sup> Kirsten Herring, Queensland Department of Treaty, Aboriginal and Torres Strait Islanders Partnerships, Communities and the Arts, Committee Hansard, 24 July 2024, p.9.

<sup>85</sup> Evelyn Richardson, Live Performance Australia, Committee Hansard, 6 August 2024, p.2.

<sup>86</sup> Evelyn Richardson, Live Performance Australia, Committee Hansard, 6 August 2024, p.2.

<sup>87</sup> Spotify, Submission 43, p.1.

## Australian support acts for international artists

- 3.83 The Association of Artist Managers discussed ‘Michael’s rule’, a convention whereby ‘there was an Australian act... for every international one’ at big concerts.<sup>88</sup> The Association said:

There have been some fantastic examples where that's worked so well. Pink and Tones and I is probably one of the greatest examples, especially in the larger scale. We just want to see more of that. ...it's not just about that support moment when they're on stage. It is about the marketing and getting that name out there for all of those people who are anticipating the show.<sup>89</sup>

- 3.84 The Queensland Music Network supported this position:

...a very simple intervention... is to say that any international artist playing a venue larger than a thousand seats in Australia needs an Australian support artist. You can't just bring them in from overseas, and you don't have an option to do nothing. It costs nothing for that international to do.<sup>90</sup>

- 3.85 Teen Jesus and the Jean Teasers said that ‘it would be really cool to see if acts such as Taylor Swift were made to have an Australian opener on their line-up and it was a rule that was put into place’.<sup>91</sup>

## More opportunities to perform live music

- 3.86 The Committee was told that artists need suitable spaces to perform live music for audiences. Small venues, for example, are important for emerging artists.

- 3.87 The Australian Music Association discussed the idea of ‘make music day’, which originated in France in 1982. The Association said:

They said: ‘We need a day when everyone goes out and enjoys music in the street. It can be anywhere.’ And they encourage people to put on big concerts in public spaces and so on. ...the only two things that are really fundamental... are that it's on that day—you do all that stuff on that day—and that it's free to attend.<sup>92</sup>

- 3.88 The NSW Department of Creative Industries, Tourism, Hospitality and Sport said:

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<sup>88</sup> Maggie Collins, Association of Artist Managers, Committee Hansard, 26 July 2024, p.7.

<sup>89</sup> Maggie Collins, Association of Artist Managers, Committee Hansard, 26 July 2024, p.7.

<sup>90</sup> Kris Stewart, Queensland Music Network, Committee Hansard, 24 July 2024, p.6.

<sup>91</sup> Jaida Stephenson, Teen Jesus and the Jean Teasers, Committee Hansard, 24 July 2024, p.12.

<sup>92</sup> Alexander Masso, Australian Music Association, Committee Hansard, 25 July 2024, p.40.

...what will really help get this industry back on track is not only increasing the numbers in audiences, the number of people going out, but being able to increase their spend and supporting them to do that.<sup>93</sup>

3.89 The Department added:

Without that, the sector is in some real trouble, as we're already seeing with a lot of venues, festivals and businesses in the live music space struggling to adapt, and I think it's particularly impacting the small-to-medium sector.<sup>94</sup>

3.90 MusicNSW said:

...having community owned and operated venues with a lower barrier to entry, especially for young people to hone their craft and to experiment with not just performing live music but rehearsing it, creating it and making it, is super important.<sup>95</sup>

3.91 The Queensland Music Network said that intervention is needed:

The market will not solve small to medium sized venues being able to be sustainable and support Australian artists. That needs some immediate level of intervention. The market will not solve discoverability. That's really the next level of how we make it easier for Australians to find Australians.<sup>96</sup>

3.92 The Australian Festival Association said that potentially, venue costs can be too high:

State owned venues need to reduce their hire fees, noting that venues like Centennial Park in Sydney have become completely untenable for events under 25,000 patrons. In particular, in New South Wales, state venues are more expensive than commercial venues, which, in the current crisis, doesn't make sense. ... The regulation costs to operate in New South Wales are far higher than anywhere else in the rest of the country.<sup>97</sup>

## **Making sites and spaces safe and accessible**

3.93 As discussed in the previous chapter, the safety and accessibility of live music events can impact on artist and audience participation.

3.94 The Live Music Office, which works on better regulation and policy for live music, discussed their role with the Committee:

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<sup>93</sup> Emily Collins, Department of Creative Industries, Tourism, Hospitality and Sport, Committee Hansard, 25 July 2024, p.44.

<sup>94</sup> Emily Collins, Department of Creative Industries, Tourism, Hospitality and Sport, Committee Hansard, 25 July 2024, p.44.

<sup>95</sup> Joe Muller, Music NSW, Committee Hansard, 25 July 2024, p.19.

<sup>96</sup> Kris Stewart, Queensland Music Network, Committee Hansard, 5 July 2024, p.5.

<sup>97</sup> Adelle Robinson, Australian Festival Association, Committee Hansard, 26 July 2024, p.22.



We advocate to local councils for a whole-of-council approach to supporting live music. We start a conversation about live music, but it ends up becoming a bigger conversation about their evening economy strategies and the policies they have around decision-making for planning and zoning. It becomes much more technical because live music... attracts that kind of regulation separately to other art forms like the visual arts, libraries or museums.<sup>98</sup>

3.95   Untitled Group said:

Establishing an infrastructure fund to enhance festival sites could also be a reliable resource for sustaining positive impacts on festivals, particularly in regional communities.<sup>99</sup>

3.96   MusicNT said that musicians, audiences and staff are attracted to venues committed to creating a safe environment. However, if a venue has 'a particular reputation the other way, there is a dramatic step back to musicians wanting to engage in that space'.<sup>100</sup>

3.97   Kieren Bramham, who represented a group of independent musicians, DJs, promoters, agents and venues, told the Committee:

You often see free or very discounted tickets for people who identify as Indigenous or for other groups.... We're also investing in safe security that is representative of the demographic and... trained in dealing with different communities. During a trans night it's quite important that there's a large contingent of trans or queer folk there so that those individuals feel safe and feel comfortable in that space. That can be quite hard if it's just a small group of individuals who are in a large, very heteronormative environment.<sup>101</sup>

3.98   Australian Women in Music said:

The music industry has been... traditionally a very sexist and misogynist industry. The fact that women are being excluded from line-ups from some of the major festivals is just astounding... to many people across the sector, including many men across the sector, who are very concerned about that as well.<sup>102</sup>

3.99   However, change is possible:

...there is a very strong sense that the industry needs to change. We are seeing small steps heading in the right direction. I believe that everybody wants to work

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<sup>98</sup> Lucy Jospheh, Live Music Office, Committee Hansard, 25 July 2024, p.32.

<sup>99</sup> Michael Christidis, Untitled Group, Committee Hansard, 26 July 2024, p.22.

<sup>100</sup> Mark Smith, MusicNT, Committee Hansard, 28 June 2024, p.32.

<sup>101</sup> Kieren Bramham, Committee Hansard, 8 August 2024, p.41.

<sup>102</sup> Vicki Gordon, Australian Women in Music Awards and Conference Program, Committee Hansard, 26 July 2024, p.4.

in an industry that is inclusive and diverse and a healthy, safe and supportive place for everybody.<sup>103</sup>

- 3.100 Australian Women in Music said that government has a role to monitor progress on representation in at festivals and in the live music industry.<sup>104</sup>

## Marketing and promotion

- 3.101 Some witnesses suggested that live music could be promoted more effectively, including by attracting tourists to attend events and developing an export strategy.

- 3.102 The Marriner Group said that live music venues were portrayed as 'dangerous' places during the COVID-19 pandemic. The Marriner Group observed:

If that's the messaging being heard by teenagers who are turning 18 and... are trying to work out what spaces they want to go to and be safe in, that's not something that they'll easily forget.

- 3.103 Ms Mather continued:

In terms of turning that around, I feel that there is some work to be done from the government's side in changing that messaging back around and reminding people of the cultural value to the community and the positivity that comes out of the live music space...<sup>105</sup>

- 3.104 Sinead O'Hara, from Rosemount Hotel in Perth, said:

Everyone knows that Melbourne is thriving with live music... The broader WA audience don't know that original live music happens in Perth. It could be good to tie that into some kind of marketing campaign with the ticket levy that goes out through more mainstream channels, tourism channels and things like that. I have often seen things pop up on social media that are like '10 things to do when you visit Perth', and most of the time it never includes anything to do with live music, let alone the arts.<sup>106</sup>

- 3.105 MusicSA said:

...there can be a stronger conversation between arts, culture, creative industries and education, for example, or tourism. Tourism, I think, is very underexploited, in terms of visibility around live music in South Australia, particularly in connection with some of our pinnacle festivals.<sup>107</sup>

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<sup>103</sup> Vicki Gordon, Australian Women in Music Awards and Conference Program, Committee Hansard, 26 July 2024, p.4.

<sup>104</sup> Dr Catherine Strong, RMIT University, Committee Hansard, 6 August 2024, p.9.

<sup>105</sup> Sally Mather, Marriner Group, Committee Hansard, 5 August 2024, p.32.

<sup>106</sup> Sinead O'Hara, Rosemount Hotel, Committee Hansard, 8 August 2024, p.25.

<sup>107</sup> Christine Schloithe, MusicSA, Committee Hansard, 7 August 2024, p.6.

3.106 Live Performance Australia said that a 'global export strategy' is needed:

This requires pulling the various parts of the music industry together, including live record labels, publishers and the streaming companies. This should be a first order priority for Music Australia.<sup>108</sup>

3.107 The Jive, a venue in Adelaide, suggested that tourists could be given information about 'what's happening in Adelaide'.<sup>109</sup>

## Connecting artists with audiences and communities

3.108 During the inquiry, many witnesses discussed the role of live music in their community, the idea of grassroots music, how networks are established, the role of radio stations and conducting research.

### Radio broadcasting

3.109 Many witnesses and submissions said that despite the emergence of social media and streaming services, radio remains an important medium for connecting artists with their audiences.

3.110 The Australian Broadcasting Corporation discussed their role in music promotion and broadcasting, such as the Unearthed radio program:

Unearthed is such an important way for young and emerging Australian artists to be discovered and to build fan bases... So I think developing Unearthed further so that live shows can be highlighted through gig guides and promoters can be helped when they're looking to find local artists, or First Nations artists, who can appear on line-ups through the kind of searching and filtering that could be added to the platform would go a really long way in providing that extra level of support for artists who are trying to grow their careers and, therefore, extend into live music performances.<sup>110</sup>

3.111 Radio station 3MBS Melbourne, a classical and jazz community radio station, discussed their experience:

We have weekly programs that promote upcoming live music events. ... National, regional and Melbourne-based arts organisations and festivals promote their concerts on 3MBS regularly in the form of sponsorship ads... The station provides a free service for community musicians to promote their concerts on our website and as a daily broadcast.<sup>111</sup>

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<sup>108</sup> Evelyn Richardson, Live Performance Australia, Committee Hansard, 6 August 2024, p.2.

<sup>109</sup> Tam Boakes, Jive, Committee Hansard, 7 August 2024, p.26.

<sup>110</sup> Emily Copeland, Australian Broadcasting Corporation, Committee Hansard, 26 July 2024, p.45.

<sup>111</sup> Gail Southwell, 3MBS Melbourne, Committee Hansard, 5 August 2024, p.42.

3.112 Further, after COVID-19 and lockdowns, the station found that they could ‘play a big role in getting people out to live music again’.<sup>112</sup> For example:

We asked our arts, classical music arts organisations and artists, to come in and talk about their live concerts. We initiated our Made in Melbourne program, that ensured a significant number of paid performances for musicians whose income had been affected by the pandemic.<sup>113</sup>

3.113 The Committee heard that community radio’s potential for artists developing their career pathway. FBi radio, a station in Sydney, told the Committee:

There are countless examples of artists who have been played for the first time on FBi. That has kickstarted their career. One that comes to mind... is the success of Flume, a local electronic producer who was played for the very first time on FBi and was interviewed on FBi when he was a teenager. He then went on to play hugely successful shows in Sydney and is now one of the most successful electronic music acts in the world.<sup>114</sup>

## Developing music communities

3.114 During the inquiry, the Committee was often advised on events that are described as being grassroots, community-focused and building the next generation of artists.

3.115 MusicNSW said that ‘the idea that we just prop the sector up with government investment is not where we should be headed’.<sup>115</sup> Rather:

It's about developing those grassroots communities. ...looking at the missing middle... the early career developing artists and industry and thinking about how we support them with professional development opportunities, with opportunities to perform in communities so that there is a thriving and diverse range of activity happening across Australia. Within that comes a competitive environment and a market, where artists have the capacity to rise to export levels.<sup>116</sup>

3.116 MusicNSW discussed the regional touring network, which has a website that maps venues and helps artists plan their tours:

You go to a website and there is a map of... venues across regional New South Wales. You can search using a variety of filters around accessibility or the capacity sizes that you think you're ready to play in. You use that to create touring opportunities outside the metro centres.<sup>117</sup>

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<sup>112</sup> Gail Southwell, 3MBS Melbourne, Committee Hansard, 5 August 2024, p.42.

<sup>113</sup> Gail Southwell, 3MBS Melbourne, Committee Hansard, 5 August 2024, p.42.

<sup>114</sup> Amy Solomon, FBi Radio, Committee Hansard, 25 July 2024, p.26.

<sup>115</sup> Joe Muller, MusicNSW, Committee Hansard, 25 July 2024, p.18.

<sup>116</sup> Joe Muller, MusicNSW, Committee Hansard, 25 July 2024, p.18.

<sup>117</sup> Joe Muller, MusicNSW, Committee Hansard, 25 July 2024, p.21.

3.117 The NSW Department of Creative Industries, Tourism Hospitality and Sport said that supporting grassroots live music venues is ‘a real priority’.<sup>118</sup> The Department said:

There are many ways you could do that. ...you could consider tax concessions or whatever it is for venues or looking at working with international tours—I don’t have a specific opinion on which one, but really looking at how we support that local grassroots sector is important.<sup>119</sup>

3.118 Dr Diana Tolmie, from the Queensland Conservatorium, told the Committee:

The current macro-environmental stresses experienced by the live music industry are not helping to inspire or support our future musicians to follow a career in music. Without targeted support of emerging, particularly female, artists attrition will continue to increase. This is not ideal in an AI [artificial intelligence] future where authentic experiences such as live music performance will be increasingly desired.<sup>120</sup>

3.119 The Cobargo Folk Festival, a festival in southern NSW, said:

We’re part of a network of folk and roots festivals around the country. Festivals like ours provide paid opportunities, and quite good paid opportunities... to showcase the creative work of independent Australian artists from all over the country who come to our events to perform. Probably around about 80 per cent of the artists that we take at our festivals are Australian.<sup>121</sup>

3.120 The Cobargo Folk Festival creates wider benefits for the community:

We fund music education, music development and music participation activities. For more than a decade, we have hosted the Crossing Youth stage, where many young musicians from our region have had their start, and many of them have gone on to rewarding musical careers here and overseas. We train our volunteers, especially our young people, building skills in stage management, logistics, not-for-profit governance, financial administration and all the other skills needed to produce a complex, multiday, live event in a rural area. We inject more than \$2 million... in our local area in direct and flow-on expenditure, and we draw thousands of visitors to our area at festival time and beyond.<sup>122</sup>

3.121 Festival tickets are available in various tiers, including single day, full weekend and stage price releases, making it accessible to a wide audience. The festival is known for its welcoming vibe, making it suitable for families and music lovers of all ages.<sup>123</sup>

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<sup>118</sup> Emily Collins, NSW Department of Creative Industries, Tourism Hospitality and Sport, Committee Hansard, 25 July 2024, p.46.

<sup>119</sup> Emily Collins, NSW Department of Creative Industries, Tourism Hospitality and Sport, Committee Hansard, 25 July 2024, p.46.

<sup>120</sup> Dr Diana Tolmie, Queensland Conservatorium, Committee Hansard, 24 July 2024, p.15.

<sup>121</sup> Zena Armstrong, Cobargo Folk Festival, Committee Hansard, 5 July 2024, p.8.

<sup>122</sup> Zena Armstrong, Cobargo Folk Festival, Committee Hansard, 5 July 2024, p.8.

<sup>123</sup> Claire Stickland, Queenscliff Music Festival Inc, Proof Committee Hansard, 17 October 2024, p.27.

3.122 The City of Fremantle discussed local government's changing role:

Over the last 10 to 20 years, there has been a radical change in community expectations about what local governments deliver... Currently... we run around 45 medium to higher attendance level gigs across the year and 15 or so major concerts across the year, and they are well attended by both the community and the wider metropolitan area.<sup>124</sup>

3.123 The City of Fremantle added that 'budgets aren't increasing' and the council is relying on audiences to contribute towards costs.<sup>125</sup>

## All ages events

3.124 Some witnesses suggested that venues and festivals could improve their viability if all ages – including attendees aged under 18 – could more easily attend live music. In addition, witnesses referred to the lost opportunity of young people to attend live music during the COVID-19 pandemic.

3.125 The Australian Festival Association discussed events where people aged 16 or older are permitted to attend, such as the Listen Out festival:

In New South Wales, Victoria and Western Australia, they have to have a guardian with them at all times. ... In Queensland and South Australia, you don't have to have a guardian with you. ... When I'm looking for ways to try to increase our audience and therefore make the festivals more viable, that's a real sign of something that can be done and that can be changed.<sup>126</sup>

3.126 The Push discussed a Victorian program called FReeZA, which offers grants for events aimed at young people aged 12 to 25:

FReeZA is a Victorian government program which currently provides 82 teams of local young people across Victoria with the opportunity to stage the music events that they want to see in their local communities. ...these kinds of programs can address the skills shortages that our sector is currently facing. It's nurturing not only just a pipeline for young audiences but also for industry practitioners.<sup>127</sup>

3.127 Bluesfest Byron Bay said:

We don't charge anything for parents bringing children at the ages of 10 or under... I'm telling you there are generations that come to Bluesfest because they grew up with it. Then, for children between the ages of 10 and 14, it's only \$100 to bring your child for the whole four or five days. We don't start to charge full fees until the age of 18 and over, because we view ourselves as a family event and we want young people coming. We want them to experience the gift of

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<sup>124</sup> Pete Stone, City of Fremantle, Committee Hansard, 8 August 2024, p.15.

<sup>125</sup> Sarah Wilkinson, City of Fremantle, Committee Hansard, 8 August 2024, p.16.

<sup>126</sup> Adelle Robinson, Australian Festivals Association, Committee Hansard, 26 July 2024, p.26.

<sup>127</sup> Kate Duncan, The Push, Committee Hansard, 5 August 2024, p.11.

music, and we put on a style of music where the musicians are renowned for their level of dexterity, their ability to write great songs, and their great performances.<sup>128</sup>

- 3.128 The West Australian Live Music Association said that it is ‘cost prohibitive for an 18-plus venue to open to a younger audience’.<sup>129</sup> However, the Association added that some venues are instead targeting older audiences – the ‘traditional drinkers’ – who are more likely to spend money at the bar.<sup>130</sup>

## First Nations

- 3.129 The Committee heard evidence on supporting and recognising First Nations live music and artists.

- 3.130 Songline Music Aboriginal Corporation said discussed the Share the Spirit festival:

It's a big festival in the eyes of the community and it is our largest festival in the state. What it does is nurture younger musicians of any ilk to be able to come and show their wares, express themselves and perform in environments that they would otherwise not have the opportunity to. Nurturing that is something that we take very seriously, and we look at how we can further their careers.<sup>131</sup>

- 3.131 The Community Broadcasting Association of Australia submitted:

First Nations community broadcasters have played an instrumental role in raising the profile of First Nations musicians. They nurture and support First Nations artists and are a conduit for the production and a promotion of their work. Almost half First Nations listeners (46 per cent) have discovered a local or emerging artist by listening to community radio.<sup>132</sup>

- 3.132 West Australian Music submitted:

...First Nations individuals may struggle to comprehend the grant processes. Filtering these grants through peak bodies or organisations that can champion First Nations artists has proven beneficial in overcoming these obstacles.<sup>133</sup>

- 3.133 APRA AMCOS submitted that there should be a ‘dedicated First Nations Music Commissioning Fund for First Nations artists and First Nations led organisations’.<sup>134</sup>

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<sup>128</sup> Peter Noble, Bluesfest Byron Bay, Proof Committee Hansard, 17 October 2024, p.24.

<sup>129</sup> Livia Carre, West Australian Live Music Association, Committee Hansard, 8 August 2024, p.12.

<sup>130</sup> Livia Carre, West Australian Live Music Association, Committee Hansard, 8 August 2024, p.13.

<sup>131</sup> Robbie Bundle, Songline Music Aboriginal Corporation, Committee Hansard, 11 September 2024, p.1.

<sup>132</sup> Community Broadcasting Association of Australia, Submission 106, p.7.

<sup>133</sup> West Australian Music, Submission 49, p.2.

<sup>134</sup> APRS AMCOS, Submission 95, p.20.



## Environmentally sustainable events

- 3.134 Some witnesses discussed making their events environmentally sustainable. For example, Green Music Australia said:

...the shift to circular economies is good for the climate. The data that we've seen shows that festivals can save up to 66 per cent on their waste bills by switching to reusable crockery, cutlery and cups. That's really good for jobs, because there are a large number of jobs associated with the reusable economy in terms of washing stuff and putting it back on shelves, and it's going to be good for the festivals, because it saves them money.<sup>135</sup>

- 3.135 In addition, Green Music Australia said that climate should be recognised in government policies on the arts:

The Revive policy... is wonderful in many respects... but it doesn't include climate. There's no mention of climate in that policy, as opposed to, for example, Creative Victoria, that have a whole chapter and a whole strategic priority dedicated to climate in their arts policy.<sup>136</sup>

- 3.136 Queenscliff Music Festival said that they are 'committed to environmental sustainability' and 'received accolades over recent years for our initiatives in relation to waste minimisation, product stewardship and an emissions reduction program that benefits the local community'.<sup>137</sup>

## Research and data

- 3.137 Witnesses discussed the importance of doing research to understand audience behaviours and environmental impacts on live music events.

- 3.138 For example, the NSW Department of Creative Industries, Tourism Hospitality and Sport said that strategies to sustain live music should be based on data:

Before you start any kind of strategy for trying to grow or build the sector, you've got to understand it... being able to quantify and understand all the different components—whether it's recording studios and rehearsal spaces, which are vital to the ecosystem, or venues themselves—will play a really important role in not only setting a benchmark for progress and how you improve things over the next few years but guiding what strategies you employ to grow that sector.<sup>138</sup>

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<sup>135</sup> Berish Bilander, Green Music Australia, Committee Hansard, 28 June 2024, pp.23-24.

<sup>136</sup> Berish Bilander, Green Music Australia, Committee Hansard, 28 June 2024, p.24.

<sup>137</sup> Claire Strickland, Queenscliff Music Festival, Proof Committee Hansard, 17 October 2024, p.28

<sup>138</sup> Emily Collins, NSW Department of Creative Industries, Tourism Hospitality and Sport, Committee Hansard, 25 July 2024, p.43.



3.139 Australian Women in Music told the Committee that ‘women and diverse minorities working in the Australian music industry is one of the least researched areas’.<sup>139</sup>

3.140 The Australian Festival Association said that future climate change impacts should be researched:

We want to know whether the sites and spaces around the country that we're using for festivals at the moment will be viable into the long term. ... If we can be a bit surer about areas that are safe to have mass gatherings in, outdoors in the heat, and that events won't get cancelled because of weather patterns, then let's get the research done.<sup>140</sup>

3.141 Paul Mason (private capacity) said:

...there have been numerous research projects, but they are... one-off snapshots. What hasn't happened is a regularly updated state-of-the-nation report that affords the ability to track trends and developments over time.<sup>141</sup>

## **Music skills, education and audience curiosity**

3.142 Further to evidence on the importance of connecting communities with audiences, some witnesses said that this process begins with music education, knowledge about music and encouraging people to be curious about music.

3.143 For example, Creative Australia said:

Communities are going to be such a big part of our strategy to grow a market. You need to come right back to grassroots communities that can evolve through community radio, through scenes and through different genres. ... I think it will be a feature of Music Australia's policy. We want to look at community music hubs. Whilst we're talking big festivals and big picture, we're going to have to come back down to the grass roots. We're going to have to look at music education in schools.<sup>142</sup>

3.144 MusicSA said:

The creation of new and visible pathways in music education and training in schools and in tertiary institutions is a major contributor to future music audiences and workforces. We must address the disadvantage that many urban and regional areas across Australia experience in the development and delivery of grassroots live music... We need nuanced and regional-specific industry

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<sup>139</sup> Vicki Gordon, Australian Women in Music Awards and Conference Program, Committee Hansard, 26 July 2024, p.1.

<sup>140</sup> Mitch Wilson, Australian Festival Association, Committee Hansard, 26 July 2024, p.28.

<sup>141</sup> Paul Mason, Proof Committee Hansard, 17 October 2024, p.15.

<sup>142</sup> Millie Millgate, Creative Australia, Committee Hansard, 8 November 2024, p.27.

development and investment opportunities to transition to and build sustainable and diverse business models for live music.<sup>143</sup>

3.145 Dr Benjamin Green, from Griffith University, said:

...there are known skills shortages in the live music industry. It's perhaps not musicians but in crew, production and technical sectors. They have been a real problem since COVID, where there were mass departures from those occupations. That was partly as a result of the casualisation that's been happening in there for a long time now. ... I've seen examples where businesses have worked with local TAFEs to develop traineeships and had great results... that's something I think could be encouraged.<sup>144</sup>

3.146 The Music Press said:

Local Australian music is becoming less visible as it competes in a more globally programmed marketplace. For live music, if the audience don't know the band, they won't buy the ticket.<sup>145</sup>

3.147 In addition, the Music Press Recommended:

Australia needs to develop greater musical curiosity, starting with school education and strategies to expose kids to live music both as audience and participants. The pipeline of curiosity needs to be met with supports for grassroots venues, media and music creation infrastructure. ... then we can move on to how you convince an 18-year-old to go to a live music venue and pay \$15 for a beer when they can't afford their rent.<sup>146</sup>

## Other matters

3.148 The Committee received evidence on some additional issues that may impact on the sustainability of live music:

- the Australian Government's role in ensuring fairness and competition through regulators
- artificial intelligence and copyright.

## Enforcing fairness and market competition

3.149 The Committee discussed competition and market concentration with the Australian Competition and Consumer Commission (ACCC). In response to the Committee's questions, the ACCC said:

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<sup>143</sup> Christine Schloithe, Music SA, Committee Hansard, 7 August 2024, p.2.

<sup>144</sup> Dr Benjamin Green, Griffith University, Committee Hansard, 24 July 2024, p.23.

<sup>145</sup> Stephen Green, The Music Press, Committee Hansard, 24 July 2024, p.32.

<sup>146</sup> Stephen Green, The Music Press, Committee Hansard, 24 July 2024, p.32.

Competition drives cheaper prices. Efficient pricing benefits consumers. And that's the reason we have both a market economy and laws that seek to prevent anticompetitive conduct. ... Despite merger laws, we do see concentration arising in markets, and that's where you've got to then look at misuse of market power, exclusivity type arrangements and the competition provisions.... But, absolutely, where those restrictions are in place, they go to lessening of competition, which inevitably restricts choice, increases prices and leads to inefficient outcomes.<sup>147</sup>

- 3.150 The Committee asked the ACCC about monopolisation, Live Nation and legal action occurring in the United States. The ACCC said:

We're familiar with that action. We work very closely with the Department of Justice and other competition regulators in the US, including the FTC [Federal Trade Commission]. There are a couple of points to note... They have similar, but not the same, laws and regimes. ...the market circumstances and the factors impacting the US are slightly different than in Australia. We don't comment on matters that might be under investigation, but if your question is: Do we receive similar issues? Do we look? Are we watching the DOJ [United States Department of Justice] action? Yes, is the answer to all of those.<sup>148</sup>

- 3.151 As discussed in the previous chapter, some witnesses shared these concerns in their evidence to the Committee.

- 3.152 In response, Live Nation said that its share of the Australian market is not the same as in the United States:

Live Nation has dominant position in the US concert market. It's by far the major promoter; it has perhaps 75 or 85 per cent of the concert market in the USA. Ticketmaster is also the major ticketing provider in USA. In Australia, there are three companies—Live Nation, TEG and AEG Frontier—that have roughly equivalent shares of the major concert market... In that sense, structurally, it is a very different competitive environment in Australia than in the USA.<sup>149</sup>

- 3.153 Live Nation added that they own 'six out of approximately 2,700 venues' in Australia, adding 'the six venues that we own and/or operate in Australia are either public or private partnerships'.<sup>150</sup> Live Nation said that unofficial ticket resellers should be the main concern:

If you look internationally at companies like Viagogo and StubHub, they're billion-dollar enterprises, and they're built on the back of artist endeavour, where the artist sees no return. We may have an operating margin of three or four per cent of gross income. StubHub and Viagogo operate at a 23 per cent margin, and that

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<sup>147</sup> Scott Gregson, Australian Competition and Consumer Commission, Committee Hansard, 28 June 2024, p.15.

<sup>148</sup> Scott Gregson, Australian Competition and Consumer Commission, Committee Hansard, 28 June 2024, p.14.

<sup>149</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.5.

<sup>150</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.2.

margin is earned on the back of artists whose tickets are taken and put into the secondary market.<sup>151</sup>

- 3.154 The ACCC said that they had successfully ‘taken action against resellers such as Viagogo for what we say are misrepresentations’.<sup>152</sup>

## Copyright and artificial intelligence

- 3.155 During the inquiry, some witnesses discussed the risks of artificial intelligence (AI), whether it could displace human-created music and how this could also impact on artists’ rights to protect their creations.

- 3.156 The Queensland Music Network said that artificial intelligence should not be writing songs, because ‘an algorithm cannot be as good as a human, because it will always look historically; it can’t look forward’.<sup>153</sup>

- 3.157 The Australian Copyright Council submitted:

Copyright is the bedrock of artist development and their career pathways, ‘the economic foundation of the Australian music industry and strong copyright laws ensure artists and other rightsholders can protect their work and investment and make an income’.<sup>154</sup>

- 3.158 Dr Suelette Dreyfus (private capacity) said:

We might like to say that markets are a good thing. They can be a good thing for outcomes; however, they only work when you have proper information. What we see here is the advent of AI based music being potentially put on a set of large streaming entities, and the consumers don’t know what they’re buying.<sup>155</sup>

- 3.159 Dr Christopher Ewin discussed artificial intelligence, telling the Committee that transparency about its use is preferable to ‘harsh regulation’. He said:

...AI is a valuable tool; it is a co-creation tool for a lot of artists. For example, you have the ability to expand upon lyrics that you might have already generated, you can test different ideas, and you can experiment with different instruments that otherwise might not have been possible. That can aid an individual artist’s development; not just in producing a track but also in building the artist’s ability to deliver live music. So the idea should not be to regulate it out of existence... Transparency, from my point of view, is probably the most critical aspect.<sup>156</sup>

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<sup>151</sup> Michael Coppel, Live Nation, Proof Committee Hansard, 25 November 2024, p.10.

<sup>152</sup> Scott Gregson, Australian Competition and Consumer Commission, Committee Hansard, 28 June 2024, p.16.

<sup>153</sup> Kris Stewart, Queensland Music Network, Committee Hansard, 24 July 2024, p.4.

<sup>154</sup> Australian Copyright Council, Submission 80, p.2.

<sup>155</sup> Suelette Dreyfus, Committee Hansard, 5 August 2024, p.34.

<sup>156</sup> Dr Christopher Ewin, Committee Hansard, 5 August 2024, p.36.

3.160 Dr Ewin's colleague, Dr Suelette Dreyfus, said that music wholly created with artificial intelligence could be tarified:

...a small tariff... to provide a subsidy for the performances or creations of live music artists... That might be a method of levelling the playing field and preventing the risk of vertical-integration domination by a few international behemoths of the industry.<sup>157</sup>

3.161 YouTube said that artificial intelligence has 'brought music to the cusp of a new era'.<sup>158</sup> In addition:

YouTube continues to lean into these principles and is developing new synthetic-singing identification technology within Content ID that will allow partners to automatically detect and manage AI-generated content on YouTube that simulates their singing voices. We're refining this technology with our partners, with a pilot program planned for this year.<sup>159</sup>

3.162 The Australian Copyright Council said:

Last year there was a series of ministerial roundtables run by the Attorney-General and the Attorney-General's Department... The Copyright and Artificial Intelligence Reference Group has also been established... The government is looking at copyright very robustly at the moment.<sup>160</sup>

3.163 The Australian Copyright Council noted that the Attorney-General's Department is reviewing Australia's copyright enforcement. The review, which is pending completion, included consideration of ways for small creators to claim for copyright breaches.<sup>161</sup> Otherwise, the Council said, Australian copyright laws are 'good'.<sup>162</sup>

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<sup>157</sup> Dr Suelette Dreyfus, Committee Hansard, 5 August 2024, p.36.

<sup>158</sup> YouTube, Submission 129, p.6.

<sup>159</sup> YouTube, Submission 129, p.6.

<sup>160</sup> Eileen Camilleri, Australian Copyright Council, Committee Hansard, 28 June 2024, p.20.

<sup>161</sup> Eileen Camilleri, Australian Copyright Council, Committee Hansard, 28 June 2024, p.21.

<sup>162</sup> Eileen Camilleri, Australian Copyright Council, Committee Hansard, 28 June 2024, p.20.





## 4. Committee views and recommendations

### Committee views

- 4.1 The inquiry has demonstrated the value live music in Australia and highlighted how urgent action is necessary to ensure its survival into the future.
- 4.2 While the Committee heard a range of views during the inquiry, the evidence about live music's challenges were often similar. In summary, after disruptions and cancellations during the COVID-19 pandemic, live music venues, festivals and events have struggled to recover.
- 4.3 At the same time, recent global tours coming to Australia have attracted large audiences. In addition, the rise of streaming services and social media has given audiences access to music on demand. While likely having many positive benefits, especially for enduring fans, the Committee heard that this has changed the way audiences consume music. This, in turn, has changed the way music generates revenue and who shares in that revenue.
- 4.4 Artists usually begin with small shows and aim to progress to bigger events as their popularity increases. Without these opportunities, getting discovered becomes harder. Factors including narrow margins, declining revenue and unpredictable ticket sales have made the future of some festivals and small venues doubtful or unviable. If these trends continue, the Committee heard that it could be devastating for the Australian music industry.
- 4.5 Getting audiences to live music events and keeping venues and spaces open for live music are core challenges. However, keeping spaces open can mean ticket prices are too high to attract a crowd. Changing audience behaviour and rising costs for venues are limiting the market's ability to create solutions.
- 4.6 Disruption from streaming services – which the Committee heard may both help and hinder artists – adds to the mix of challenges. Insurance prices were another prominent concern.
- 4.7 The Committee heard that, potentially, these changing market dynamics could result in Australian artists making less money (or not making money in music at all), audiences paying more for live music and global tech companies expanding their influence over the music available to Australians.

- 4.8 In this regard, the Committee notes the evidence received on the adoption of a minimum \$250 fee when governments hire musicians or performers for publicly funded events. The Committee believes that the minimum fee could be higher.
- 4.9 The Committee notes that there are proposals to amend Australian Consumer Law being considered. This includes:
- conduct that distorts, manipulates or undermines consumer choice, without necessarily being misleading or deceptive, such as practices that create an undue sense of urgency or scarcity
  - subscription related practices, including practices which make it difficult for consumers to cancel a subscription
  - pricing-related practices, including drip pricing, dynamic pricing and hidden fees
  - post-sale practices, including imposing unreasonable barriers to accessing customer support.<sup>1</sup>
- 4.10 The Australian Competition and Consumer Commission's website advises that hiding fees and charges is misleading:
- 'Drip pricing' is when a price is advertised at the beginning of an online purchase, but then extra fees and charges (such as booking and service fees) are gradually added during the purchase process. This can result in consumers paying more than they initially intended to.
- Businesses must be upfront and clearly disclose to consumers at the start of a purchasing process the types of fees that will apply and when.<sup>2</sup>
- 4.11 Dynamic pricing and surge pricing can be misleading, if prices are not properly disclosed, but the practice is not currently illegal:
- Surge or dynamic pricing is when businesses increase their prices during periods of high demand. For example, ride-share companies may increase their prices when there are many people wanting rides and not enough available drivers.
- Surge or dynamic pricing is not illegal, but businesses must be clear about the price consumers will pay. They must also not make false or misleading claims about their prices.<sup>3</sup>
- 4.12 In relation to these reforms, the Committee believes that preventing ticket scalping or dubious reselling should be considered. This conduct takes revenue away from artists and events and, potentially, directs income to profiteers who are indifferent to the future of Australian live music.

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<sup>1</sup> The Treasury, 'Unfair Trading Practices', November 2024, p. 5.

<sup>2</sup> Australian Competition and Consumer Commission, 'Price displays' at <https://www.accc.gov.au/consumers/pricing/price-displays>

<sup>3</sup> Australian Competition and Consumer Commission, 'Setting prices: what's allowed' at <https://www.accc.gov.au/business/pricing/setting-prices-whats-allowed>



- 4.13 Many potential actions or recommendations are already found in *Revive: Australia's Cultural Policy* and are being progressed.
- 4.14 The Committee does not intend to restate the same recommendations, except to note that some of them align with proposals discussed during the inquiry. For example:
- supporting First Nations arts and culture
  - minimum remuneration for musicians
  - safety in entertainment workplaces
  - music in the Australian education curriculum
  - research and surveys
  - reforms to media laws, including Australian content on streaming services.<sup>4</sup>
- 4.15 In NSW, for example, the Contemporary Music Strategy has identified priorities that include:
- prioritise and protect First Nations music
  - strengthen the live and recorded music ecosystem
  - future-proof the industry
  - improve industry capacity, diversity, safety and standards
  - expand international markets
  - support music communities including regional NSW.<sup>5</sup>
- 4.16 The Committee notes that some proposals discussed during the inquiry are primarily state, territory or local government responsibilities. However, governments should work together on ways to make live music sustainable.
- 4.17 A ticket levy could help provide stability for small venues, regional festivals and live music with a community or cultural focus. Other options include a voucher scheme or tax offsets. There would be some technical policy detail to be determined, such as how a large music events would be defined, what threshold would trigger the levy to be applied and which smaller events or festivals should benefit from these schemes.
- 4.18 While these ideas may work in principle, successful implementation could depend on the detail:
- witnesses had varying definitions of grassroots music or what scale makes an event large enough to be regarded as successful and sustainable
  - who decides how the revenue is used, who should receive financial benefits and whether revenue generated locally should be retained within the community

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<sup>4</sup> Office of the Arts, 'Revive: Australia's Cultural Policy', February 2023, pp.97-106.

<sup>5</sup> NSW Government, 'NSW Contemporary Music Strategy 2025-2034', December 2024, p.3.

- whether any form of subsidisation has unintended consequences, such as impacts on other businesses or events
  - whether conditions should be placed on recipients of these funds, such as workplace standards, adherence to safety and measures to prevent discrimination.
- 4.19 The way Australians listen to music has changed. Songs used to be played on radio or television, albums were sold at retail stores and magazines published stories about artists and bands. While this still occurs to some extent, music is now kept in your pocket on mobile devices. Global entities such as YouTube, Apple and Spotify offer music on demand. Many Australians follow or like artists and bands on social media. The Committee believes that Australian content should be given a fixed proportion of time and space in the digital world.
- 4.20 The Committee believes that music education, skills and knowledge should be recognised in curriculums and available courses. In a 2019 report, this Committee observed that 'if Australia wishes to remain competitive as a music export nation, we must not neglect to invest in the crucial first stage of the talent pipeline'.<sup>6</sup>
- 4.21 The impacts of artificial intelligence on music are potentially broader than the purpose of this inquiry. There could be both costs and opportunities for creative industries and music, as discussed in a November 2024 Senate committee report on artificial intelligence.<sup>7</sup> Nevertheless, setting up a framework to protect the integrity of original music could be a starting point for policy makers.

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<sup>6</sup> House of Representatives Standing Committee on Communications and the Arts, 'Report on the inquiry into the Australian music industry', March 2019, p.69

<sup>7</sup> Senate Select Committee on Adopting Artificial Intelligence, 'Select Committee on Adopting Artificial Intelligence', November 2024, pp.79-92.

# List of recommendations

## Recommendation 1

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- 4.22** The Committee recommends the Australian Government investigate the potential benefits of a tax offset for the live music industry. The Treasury, the Office of the Arts and Creative Australia should be tasked with developing a policy proposal for the Australian Government to consider.
- 4.23** Such a tax offset might be considered in conjunction with proposals for a live performance offset that would benefit other artforms such as theatre.

## Recommendation 2

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- 4.24** The Committee recommends Australian consumer law be amended to better regulate the selling of tickets to live music, by:
- improving the transparency of fees and charges within the price of tickets
  - limiting extreme variability in ticket prices caused by ‘dynamic pricing’.

## Recommendation 3

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- 4.25** The Committee recommends the Australian Competition and Consumer Commission monitor the Australian music industry for anti-competitive conduct and take enforcement action as required.

## Recommendation 4

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- 4.26** The Committee recommends the Australian Government add a small levy to the price of tickets to large music events and direct the funds raised to support for small venues and grassroots live music (see Recommendation 5).

## Recommendation 5

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- 4.27** The Committee recommends an extension and expansion of the Revive Live program. This expansion might be funded through a ticket levy (Recommendation 4) and funds could be disbursed by Music Australia. The funding could be offered in three streams:
- Live and local: a series of performances at a live music venue or non-traditional venue with mandated minimum performance fees.
  - Live ready: funding for capital improvements to live music venues to improve the functionality and accessibility of venues. This could include costs like sound-proofing, equipment upgrades, disability access.

- **Live for all: funding for music festivals with an emphasis on improving the accessibility, viability and diversity of live music, including regional festivals, all-ages events, First Nations festivals, community focussed events and not-for-profit based operations.**

## **Recommendation 6**

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- 4.28 The Committee recommends state, territory and local governments consider designating ‘special entertainment precincts’ in recognition of the economic and cultural value of these places.**
- 4.29 Special Entertainment Precincts should benefit from a regulatory regime more supportive to their ongoing viability. This may include exemptions to trading hour restrictions, concessional liquor excise rates and differentiated noise complaint processes.**
- 4.30 Further, the Committee recommends the Australian Government gather information on best practice in this area, provide advice to jurisdictions on how to establish and support special entertainment precincts, and monitor the effectiveness of reforms across the jurisdictions that implement them.**

## **Recommendation 7**

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- 4.31 The Committee recommends the Australian Government assess the viability of a rebate or voucher scheme to incentivise younger audiences to attend live music.**
- 4.32 This may include offering event presenters a rebate to compensate them for income foregone by offering discounted tickets to young audiences and ‘two for one’ tickets for audience members required to attend with an adult or support person/carer.**
- 4.33 An alternative approach may be to offer vouchers directly to prospective audience members.**
- 4.34 The scheme should prioritise:**
  - **young audiences, from under 18s to early 30s – the demographic in most significant decline amongst live music audiences**
  - **events, venues or festivals with Australian artists and original music in their programs**
- 4.35 The Committee recommends the Australian Government partner with state and territory jurisdictions in funding a trial of any future rebate or voucher scheme.**

## **Recommendation 8**

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- 4.36** The Committee recommends the Australian Government consider ways in which it could partner with state and territory governments to improve the standard of music education in primary schools.
- 4.37** This may include support for pilot projects to deliver quality music education in communities of socio-economic disadvantage and an evaluation of the impacts of this on student outcomes.
- 4.38** The Committee recommends the Australian Curriculum, Assessment and Reporting Authority work closely with state and territory governments to ensure better incorporation of music education into school curricula, with the aim of significantly increasing the number of children studying music at primary and high school.

## **Recommendation 9**

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- 4.39** The Committee recommends a minimum fee reflective of Award rates and conditions be established for the hiring of musicians and performers at public events that are run, sponsored or otherwise supported by the Australian Government, and that this fee be indexed yearly by CPI or average wages.

## **Recommendation 10**

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- 4.40** The Committee recommends the Australian Government partner with relevant stakeholders to undertake research into the viability of a self-insurance or mutual insurance model for the music industry and investigate other reforms and initiatives for insuring live music activities that could result in lower premiums for presenters.
- 4.41** Further, the Committee recommends the Australian Government provide information on best practice management of live music venues and events with a view to reducing both risk to insurers and premiums for presenters.
- 4.42** The Committee recommends Music Australia partner with the Live Music Business Council and the Insurance Council of Australia to develop a self-assessment app to provide a more accurate prediction of risk and a more customised insurance premium to reflect the main drivers of risk (outdoor events, multi-day events, late events, etc).

## **Recommendation 11**

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- 4.43** The Committee recommends the introduction of a new obligation for major international tours to include Australian support acts as a condition of approval – a proposal commonly referred to as ‘Michael’s Rule’.

## **Recommendation 12**

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- 4.44** The Committee recommends the Australian Government conduct comprehensive research into changes in audience behaviour and generational attitudes and behaviours that have affected demand for live music.

## **Recommendation 13**

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- 4.45** The Committee recommends the Australian Government develop a centralised source of information on compliance, age-based access, regulation, and training requirements across national, state, territory and municipal jurisdictions that can inform the planning and management of festivals and live music venues.

## **Recommendation 14**

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- 4.46** The Committee recommends state and territory governments consider a reduction or abolition of user-pays policing charges at music festivals.

## **Recommendation 15**

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- 4.47** The Committee recommends state and territory governments re-evaluate the need for large police presences at live music events and the use of sniffer dogs and strip-searches.

## **Recommendation 16**

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- 4.48** The Committee recommends Austrade expand its support for Australian music exports to support the global reach of Australian music.

## **Recommendation 17**

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- 4.49** The Committee recommends the Australian Government undertake research on business models for live music that do not require dependence on the sale of alcohol.

## **Recommendation 18**

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- 4.50** The Committee recommends state, territory and local governments support the development of dedicated and permanent outdoor live music spaces (such as sound shells and associated equipment and infrastructure) to reduce the marginal cost of staging events for presenters.
- 4.51** The Committee recommends state, territory and local governments support private sector efforts to establish permanent and dedicated festival sites in

**regional settings that are resilient against extreme weather events and ensure these sites are served with appropriate amenities.**

- 4.52 The Committee recommends state, territory and local governments re-evaluate their pricing regimes for government-operated venues and provide concessional fees to presenters fulfilling cultural imperatives.**

#### **Recommendation 19**

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- 4.53 The Committee recommends the Australian Government consider supporting live music event-related training programs for young people.**

#### **Recommendation 20**

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- 4.54 The Committee recommends the Australian Government work with music streaming services to increase the proportion of Australian content that algorithms or automated playlists generate for Australian users, and that if co-operation is not forthcoming that legislation be strongly considered to mandate and enforce higher proportions of Australian music on these services.**

Brian Mitchell MP

Chair

5 March 2025







## A. Submissions

- 1 Damien Johnson
- 2 Adelaide Fringe
- 3 A New Approach
- 4 Clubs Australia
- 5 *Name Withheld*
- 6 Mr Michiel de Ruyter
- 7 Jive
- 8 Mr Leon Pratt
- 9 Freo Social
- 10 A group of smaller independent musicians, DJs, promoters, agents and venues
- 11 Ms Olivia Hally
- 12 Dr Peter Vadiveloo
- 13 Rosemount Hotel
- 14 Mr Matt Harris
- 15 MusicNSW
  - 15.1 Supplementary to submission 15
- 16 Insurance Council of Australia
  - 16.1 Supplementary to submission 16
- 17 Yuin Folk Club
  - 17.1 Supplementary to submission 17
- 18 Dr Sophie Scamps MP
- 19 Mr Frank Lang
- 20 Austrade

- 20.1 Supplementary to submission 20
- 20.2 Supplementary to submission 20
- 21** National Folk Festival
- 22** Australian Broadcasting Corporation
  - 22.1 Supplementary to submission 22
- 23** Kicks Entertainment
- 24** Sound Story
- 25** WOMADelaide
- 26** Cedar Mill Group
- 27** Regional Music Research Group
  - 27.1 Supplementary to submission 27
  - Attachment 1
- 28** Social State Entertainment
- 29** Dr Robert James Stove
- 30** Musicians Union of Australia
- 31** The Hills Are Alive Group
- 32** Australian Women In Music
- 33** Mr Joseph Flack
- 34** Dr Rod Davies
- 35** Mr Brian Heywood
- 36** UNIFIED Music Group
- 37** Mr Nicholas Georganos
- 38** Usual Company
- 39** Green Music Australia
  - 39.1 Supplementary to submission 39
- 40** Granite Belt Music Council
- 41** Yarra City Council

<b>42</b>	Ms Alexandra Bock & Mr Garry Daud
<b>43</b>	Spotify AU
<b>44</b>	The William Street Bird
<b>45</b>	Confidential
<b>46</b>	Phoenix Central Park
<b>47</b>	ACT Government
<b>48</b>	City of Fremantle
<b>49</b>	The West Australian Music Industry Association Inc
<b>50</b>	<i>Name Withheld</i>
<b>51</b>	<i>Name Withheld</i>
<b>52</b>	<i>Name Withheld</i>
<b>53</b>	<i>Name Withheld</i>
<b>54</b>	<i>Name Withheld</i>
<b>55</b>	<i>Name Withheld</i>
<b>56</b>	Sounds Australia
<b>57</b>	Laneway Festival
<b>58</b>	Mr Paul Curtis
<b>59</b>	Sweet Mate Music
<b>60</b>	TEG
<b>61</b>	Mr Chris Anderson
<b>62</b>	Mr Charlie Mgee, Formidable Vegetable
<b>63</b>	ei Productions
	<ul style="list-style-type: none"> <li>• 63.1 Supplementary to submission 63</li> <li>• Attachment 1</li> </ul>
<b>64</b>	QMusic
<b>65</b>	Redfern Legal Centre

- 66**     *Name Withheld*
- 67**     *Name Withheld*
- 68**     *Name Withheld*
- 69**     Department of Infrastructure, Transport, Regional Development, Communications and the Arts
- 69.1 Supplementary to submission 69
  - 69.2 Supplementary to submission 69
- 70**     Victorian Government
- 71**     NSW Government
- 71.1 Supplementary to submission 71
- 72**     Western Australian Government
- 72.1 Supplementary to submission 72
- 73**     Northern Territory Government
- 74**     Creative Australia
- 75**     Australian Festival Association
- 76**     Regional Arts Australia
- Attachment 1
  - Attachment 2
- 77**     MusicSA
- 78**     Australian Live Music Business Council
- 79**     Queensland University of Technology
- 80**     Australian Copyright Council
- 81**     Live Performance Australia
- 81.1 Supplementary to submission 81
- 82**     City of Port Phillip
- 83**     Australian Music Association
- 84**     Association of Artist Managers
- 85**     The Music Press Pty Ltd

- 86** Dr Diana Tolmie
- 87** *Name Withheld*
- 88** Live Music Office
- 89** School of Computing and Information Systems, University of Melbourne
- 90** Australian Recording Industry Association & Phonographic Performance Company of Australia
- 91** South Australian Government
- 91.1 Supplementary to submission 91
- 92** Mr John Wardle
- Attachment 1
- 93** Mr Tim Hollo
- 94** Dr Jeff Crabtree
- Attachment 1
- 95** APRA AMCOS
- 96** Woodfordia Inc.
- 97** City of Gold Coast
- 98** Mr Christopher Eassey, Associate Professor Phillip Wadds, Dr Monica Barratt, Associate Professor Caitlin Hughes and Dr Dominique de Andrade
- 98.1 Supplementary to submission 98
  - Attachment 1
  - Attachment 2
  - Attachment 3
- 99** Dr Shaun Rigney
- 100** The Association of Australian Musicians
- 101** Media, Entertainment and Arts Alliance
- 101.1 Supplementary to submission 101
  - 101.2 Supplementary to submission 101
- 102** Mr Jon Perring
- 103** Australian Small Business and Family Enterprise Ombudsman

- 104** Commercial Radio & Audio
- 105** The Push
- 106** Community Broadcasting Association of Australia
- 107** Associate Professor Catherine Strong, Associate Professor Shelley Brunt and Dr Fabian Cannizzo
- 108** Dr Ben Green, Associate Professor Catherine Strong, Professor Lauren Rickards & Dr Todd Denham
- 109** Ms Ann Palumbo
- 110** Arts Queensland
- 111** Untitled Group
- 112** Ms Gabriela Johnson
- Attachment 1
- 113** Ms Ruth Hazleton
- 114** Ms Helen Tuckey
- 115** Lost Paradise Glenworth Valley
- 116** Ms Kimberley Wheeler
- 116.1 Supplementary to submission 116
- 117** Bird's Robe Records
- 118** Miss Audrey Fitzgerald
- 119** Corner Group
- 120** Mr Harry Coulson
- 121** Ms Joanne Mitchelson
- 122** Australian Curriculum Assessment and Reporting Authority (ACARA)
- 123** Dr Sam Whiting and Dr Ben Green
- 124** Adelaide Festival Centre
- 125** Bluesfest
- 127** African Music and Cultural Festival

**128** The Australia Institute

**129** YouTube

**130** Confidential







## B. Public Hearings

### **Wednesday 5 June 2024**

Parliament House, Canberra

*Department of Infrastructure, Transport, Regional Development, Communications and the Arts*

- Dr Stephen Arnott, Deputy Secretary, Creative Economy and the Arts

### **Wednesday 26 June 2024**

Parliament House, Canberra

*Insurance Council of Australia*

- Mr Tom Lunn, Director, Insurance Lines
- Ms Alexandra Hordern, General Manager, Regulatory and Consumer Policy

### **Friday 28 June 2024**

Parliament House, Canberra

*Australian Curriculum Assessment and Reporting Authority (ACARA)*

- Mr Stephen Gniel, Acting Chief Executive Officer
- Ms Sharon Foster, Executive Director, Curriculum

*Australian Capital Territory Government*

- Mr Daniel Bailey, Group Manager, Operations, Economic Development, Chief Minister, Treasury and Economic Development Directorate
- Ms Caroline Fulton, Executive Branch Manager, artsACT, Chief Minister, Treasury and Economic Development Directorate
- Mr Matthew Elkins, Executive Branch Manager, Venues Canberra, Economic Development, Chief Ministry, Treasury and Economic Development Directorate
- Ms Wilhelmina Blount, Head, Better Regulation Taskforce, Chief Minister, Treasury and Economic Development Directorate
- Mr Graham Chadwick, Director, Better Regulation Taskforce, Chief Minister, Treasury and Economic Development Directorate

*Australian Competition & Consumer Commission (ACCC)*

- Mr Scott Gregson, Chief Executive Officer

- Mr Richard Fleming, General Manager, Competition Enforcement and Advocacy

*Australian Copyright Council*

- Ms Eileen Camilleri, Chief Executive Officer

*Green Music Australia*

- Mr Berish Bilander, Chief Executive Officer

*MusicNT*

- Mr Mark Smith Executive Director

## **Wednesday 3 July 2024**

Parliament House, Canberra

*Austrade*

- Ms Carla Giuca, Branch Head, Visitor Economy Capability, Workforce and Export Market Development Grants Policy Branch
- Ms Samantha Palmer, General Manager, Visitor Economy and Client Programs Division

## **Friday 5 July 2024**

Parliament House, Canberra

*TEG Live*

- Mr Tim McGregor, Managing Director, TEG Live

*Laneway Festival*

- Ms Jessie Parker, General Manager

*Yuin Folk Club*

- Mr Peter Logue, President
- Ms Zena Armstrong, Director, Cobargo Folk Festival

*Bega Valley Shire Council*

- Mrs Emily Harrison, Director, Community, Environment and Planning

*Tamworth Country Music Festival*

- Mr Barry Harley, Country Music, Tamworth Regional Council

*Tamworth Regional Council*

- Mr Peter Ross, Executive Manager, Creative Communities and Experiences

*Tamworth Business Chamber*

- Mr Matthew Sweeney, President

*Port Fairy Folk Festival*

- Mr Justin Rudge, Program Director

*Moyne Shire Council*

- Ms Kate Lindsey, Economic Development and Tourism Coordinator

*National Folk Festival*

- Mr David Gilks, President

*ei Productions*

- Mr Neale Mace, ei Productions

*Cedar Mill Group*

- Mr Kyle McKendry, Chief Executive Officer, Winarch Group
- Mr Ewen Craig, Head

**Wednesday 24 July 2024**

Brisbane

*QMusic*

- Mr Kris Stewart, Chief Executive Officer

*Arts Queensland*

- Ms Kirsten Herring, Deputy Director-General

*Regional Music Research Group*

- Dr Lachlan Goold, Senior Lecturer in Contemporary Music, University of the Sunshine Coast
- Dr Benjamin Green, Research Fellow, Griffith University

*Queensland University of Technology*

- Dr Yanto Browning, Lecturer (Music), School of Creative Arts, Faculty of Creative Industries, Education and Social Justice

*Dr Diana Tolmie, Private capacity*

*Dr Jeff Crabtree, Private capacity*

*CAST - Centre for Arts, Sports and Technology (formerly the Usual Company)*

- Mr Gav Parry, Founder and General Manager
- Mr Joel Edmondson, Board Advisor

*The Music Press Pty Ltd*

- Mr Stephen Green, Chief Executive Officer

*The Zoo*

- Mr Shane Chidgzey, Owner

*Woodfordia Inc.*

- Ms Amanda Jackes, Managing Director, Woodfordia Inc; and Festival Director, Woodford Folk Festival

*Granite Belt Music Council*

- Mr Kelvin Johnston, Founder and Patron
- Ms Marissa Clark, Secretary and Promotions Manager

**Thursday 25 July 2024**

Sydney

*Creative Australia*

- Mr Adrian Collette, Chief Executive Officer, Creative Australia; and Chair, Music Australia

*Music Australia*

- Ms Millie Millgate, Director

*Regional Arts Australia*

- Ms Ros Abercrombie, Chief Executive Officer

*Sounds Australia*

- Ms Esti Zilber, Executive Producer

*Australian Communications and Media Authority*

- Ms Autumn Field, General Manager, Content Division
- Ms Jenny Allen, Acting Executive Manager, Content Safeguards Branch
- Ms Michele Reddy, Acting Manager, Content and Media Reform Team

*Teen Jesus and the Jean Teasers*

- Ms Scarlett McKahey, Member
- Ms Jaida Stephenson, Member

*MusicNSW*

- Mr Joe Muller, Managing Director

*Community Broadcasting Association of Australia*

- Mr Jon Bisset, Chief Executive Officer

*FBI Radio*

- Mrs Amy Solomon, President

*Live Music Office*

- Ms Lucy Joseph, Engagement and Programs Manager

*Australian Music Association*

- Mr Alexander Masso, Executive Officer

*New South Wales Government*

- Ms Emily Collins, Head of Sound NSW
- Ms Annette Pitman, Chief Executive Officer, Create NSW
- Mr Michael Rodrigues, NSW 24-Hour Economy Commissioner, Officer of the 24-Hour Economy Commissioner

*Ms Ann Palumbo, Private capacity*

*Ms Nicola De Sensi, Private capacity*

*Mr Ben Skinner, Private capacity*

**Friday 26 July 2024**

Sydney

*Australian Women In Music*

- Ms Vicki Gordon, Non-executive Director, Founding Executive Producer and Program Director

*Association of Artist Managers*

- Ms Jess Keeley, Co-Chair
- Mr Alastair Burns, Co-Chair
- Ms Maggie Collins, Executive Director

*Media, Entertainment and Arts Alliance*

- Mr Paul Davies, Director, Campaigns
- Ms Lilia Anderson, Research and Policy Lead
- Ms Kimberley Wheeler, Board Member and Member
- Ms Jessica Cerro, Musician and Member
- Mr Matthew Jeffrey, Member

*Australian Festival Association*

- Ms Adelle Robinson, Managing Director, Fuzzy Operations; and Chair, Australian Festival Association

- Mx Mitch Wilson, Managing Director

*Untitled Group*

- Mr Michael Christidis, Director

*Commercial Radio & Audio*

- Mr Ciaran Davis, Chair
- Ms Sarah Kruger, Head of Policy and Legal Affairs

*Australian Live Music Business Council*

- Mr Howard Adams, Chair

*Australian Broadcasting Corporation*

- Ms Emily Copeland, Head of Music
- Mr Chris Scaddan, Head of Audio Strategy and Audio On-Demand
- Ms Natalie Waller, Head of Music and Events, ABC Commercial

*Australian Recording Industry Association & Phonographic Performance Company of Australia (ARIA & PPCA)*

- Ms Annabelle Herd, Chief Executive Officer
- Ms Julia Robinson, Head of Policy and Advocacy

*Australasian Performing Rights Association Ltd and Australasian Mechanical Copyright Owners Society (APRA AMCOS)*

- Mr Dean Ormston, Chief Executive

*National Aboriginal and Torres Strait Islander Music Office (NATSIMO)*

- Ms Leah Flanagan, Director

**Monday 5 August 2024**

Melbourne

*Contemporary Music Victoria (Music Victoria)*

- Ms Simone Schinkel, Chief Executive Officer

*City of Yarra*

- Ms Vicky Guglielmo, Manager, Libraries, Arts and Events

*City of Port Phillip*

- Mr Patrick Donovan, Live Music Lead
- Mr Sullivan Patten, St Kilda Festival Lead
- Mrs Holli Taylor, Coordinator, Festivals and First Peoples Programs
- Ms Jay-Dee Pitcaithly, Youth Engagement and Participation Officer

*City of Darebin*

- Ms Rebeca Sacchero, Creative Engagement Producer
- Ms Rosemary Brown, Team Leader, Youth Programs Decibels

*The Push*

- Ms Kate Duncan, Chief Executive Officer
- Mr Craig Rogers, Head of Programs

*Robert Baxter, Private capacity*

*Dr Rod Davies, Private capacity*

*Ms Olivia Hally, Private capacity*

*Ms Ruth Hazleton, Private capacity*

*Dr Shaun Rigney, Private capacity*

*Dr Robert James Stove, Private capacity*

*Social State Entertainment*

- Mr James Power, Managing Director
- Mr Kit Atkinson

*Marriner Group*

- Ms Kayely Marriner, Chief Financial Officer
- Ms Sally Mather, Programming and Commercial Director, Forum Melbourne

*The Old Bar*

- Mr Liam Matthews, Director
- Mr Joel Morrison, Booker

*School of Computing and Information Systems, University of Melbourne*

- Dr Suelette Dreyfus, Senior Lecturer
- Dr Christopher Ewin, Lecturer in Applied Computing
- Ms Emma Baillie, PhD Researcher

*Triple R Broadcasters Ltd (3RRR)*

- Mr David Houchin, Station Manager

*3MBS Melbourne 103.5FM*

- Ms Gail Southwell, General Manager

*Mr Christopher Eassey, Private capacity*

## **Tuesday 6 August 2024**

Melbourne

*Live Performance Australia*

- Ms Evelyn Richardson, Chief Executive

*Dr Catherine Strong, Private capacity*

## **Wednesday 7 August 2024**

Adelaide

*MusicSA*

- Ms Christine Schloithe, Chief Executive Officer

*South Australian Government*

- Ms Claire Mockler, Executive Director, Arts South Australia, Department of the Premier and Cabinet
- Ms Laura Vozzo, Manager, Music Development Office, Arts South Australia

*Mr Jake Fleming, Private capacity*

*Mr Frank Lang, Private capacity*

*Adelaide Festival Centre*

- Ms Sarah Bleby, Executive Producer, Adelaide Guitar Festival and Commercial Music

*Jive*

- Ms Tam Boakes, Proprietor

## **Thursday 8 August 2024**

Perth

*Western Australian Government*

- Ms Lanie Chopping, Director-General, Department of Local Government, Sport and Cultural Industries
- Ms Nikki Miller, Executive Director, Culture and Arts, Department of Local Government, Sports and Cultural Industries
- Mr Patrick McLaughlin, Project Officer, Investment, Culture and Arts, Department of Local Government, Sport and Cultural Industries

*The West Australian Music Industry Association Inc*

- Mrs Livia Carre, Executive Director



*City of Fremantle*

- Mr Pete Stone, Director, Creative Arts and Community
- Ms Alli Doherty, Creative Industry Lead
- Ms Sarah Wilkinson, Manager of Arts
- Ms 'Ofa Fotu, Festival Coordinator

*Rosemount Hotel*

- Ms Sinead O'Hara, Programming and Communications Manager

*The Rechabite*

- Miss Kiera Owen, Live Music and Club Program Manager

*The William Street Bird*

- Mr Mark Neal, Music Bookings Coordinator
- Ms Emma Adams, Music Bookings Coordinator, Mojo's Bar and William Street Bird

*Mr Patrick Smith, Private capacity*

*Ms Helen Tuckey, Private capacity*

*Billions Australia Pty Ltd trading as Supersonic Australasia*

- Mr Paul Sloan, Managing Director

*A group of smaller independent musicians, DJs, promoters, agents and venues*

- Mr Kieren Bramham, Group Convenor
- Mr Tim Fennell, Owner and Promoter, Miscellania
- Mr Simon Graser, Founder and Promoter, Confide and DJ, Simonetti

**Wednesday 11 September 2024**

Parliament House, Canberra

*Songlines Music Aboriginal Corporation*

- Mr Robbie Bundle, Chief Executive Officer

**Friday 11 October 2024**

Parliament House, Canberra

*Insurance Council of Australia*

- Ms Alexandra Hordern, General Manager, Regulatory and Consumer Policy

*H2 Insurance*

- Mr Jason Holmes, Director

*Australian Live Music Business Council*

- Mr Howard Adams, Chair
- Mr Andrew Bassingthwaite, Board Member

*Statewide Mutual*

- Mr Naamon-Israel Eurell, Executive Officer

**Thursday 17 October 2024**

Parliament House, Canberra

*The Push*

- Ms Kate Duncan, Chief Executive Officer
- Mr Craig Rogers, Head of Programs

*The Australia Institute*

- Dr Morgan Harrington, Research Manager

*Century Venues*

- Mr Sam Nardo, Chief Operating Officer

*Mr Paul Mason, Private capacity*

*BluesFest*

- Mr Peter Noble, Festival Director

*Airey's Inlet Music Association*

- Mr Ed Prendergast, Treasurer

*Queenscliff Music Festival Inc*

- Ms Claire Stickland, Festival Director
- Ms Claire Stickland, Festival Director

*Wide Open Space Festival*

- Mr James (Jimmy) Cocking, Director

*Carclew*

- Ms Lisa Baker, Head of Programming
- Mr Nicholas O'Connor, Music Specialist

*Creative Industries Youth Advisory Group*

- Mr Charlie Pierre, Member

## **Friday 8 November 2024**

Parliament House, Canberra

### *Arts Access Victoria*

- Mx Arty Owen, Coordinator and Creative Producer, Youth Programs

### *Support Act*

- Mr Clive Miller, Chief Executive Officer

### *Music Victoria*

- Ms Simone Schinkel, Chief Executive Officer

### *Artback NT*

- Mr Evan Saunders, Performing Arts Manager

### *Music Australia*

- Ms Millie Millgate, Director, Music Australia
- Dr Christen Cornell, Research Fellow and Manager, Research Partnerships, Creative Australia

## **Friday 22 November 2024**

Parliament House, Canberra

### *Humanitix*

- Mr Adam McCurdie, Co-Chief Executive Officer and Co-Founder

### *Untitled Group*

- Mr Michael Christidis, Managing Director
- Mr Pete Sofo, Director of Festivals and Major Events

### *TEG Live*

- Mr Tim McGregor, Global Head of Touring, TEG Live

## **Monday 25 November 2024**

Parliament House, Canberra

### *Live Nation Australasia*

- Mr Michael Coppel, Chairman