

ARIA SUBMISSION - A NEW LOOK AT CULTURE - TOWARDS THE STATE'S FIRST ARTS, CULTURE & CREATIVE INDUSTRIES POLICY 2023

Executive Summary

- Goldman Sachs predicts that the global recording industry will double in size to reach US\$151.4 billion by 2030 and NSW has a huge opportunity to capture a share for our local artists and music businesses of the expected growth in global recorded music driven by streaming over the coming decade.
- Recorded music in NSW is a critical part of the contemporary music ecosystem. Major and independent labels are the single-largest investors in music investing a considerable portion of their revenues into the discovery and development of artists and their creative vision. This significant investment not only sustains the ecosystem but amplifies its growth and feeds its natural evolution.
- ARIA urges the NSW Government to implement the NSW Vote Music Policy Paper in full. This policy statement was developed by industry after an extensive development and consultation process and has the backing of 28 of music's peak organisations. If the policies outlined in the paper are implemented, we will see a state that celebrates, supports and invests in its music, artists and culture - and ensure NSW is the premier music destination in Australia.
- In order to capture an increased share of global streaming for NSW artists and music businesses, Sound NSW must have an urgent focus on and co-investment into NSW music export strategy. NSW has always had strong success with music export of our artists but the landscape has changed. The importance of success internationally, particularly global playlisting on major streaming services, drives success domestically as much as it does internationally. Export development must now be seen as the key part of local audience development that it is.
- NSW contemporary music strategy must urgently explore the issue of music discoverability and audience development for both live and recorded music.
- ARIA has historically received strong support from the NSW Government to host the only nationally free to air televised, streamed, and heavily promoted music award show. The ARIAs are a crucial platform for shining a spotlight on, and creating a week-long nationwide public focus for, Australian music and our talented artists.
- There is very little data or research currently available on the music industry and this is hampering the industry's efforts to grow and address current challenges such as discoverability but also diversity and inclusion across the various sectors. Sound NSW must invest in crucial benchmark data capture across the sector.
- ARIA thanks the Minns Labor government for building on the success of Great Southern Nights (GSN) in 2020 and 2022, by committing to a multi-year extension. GSN showcases artists from globally successful Australian recording stars to emerging up and comers – with gigs held in venues of varying size across every corner of the State.

INTRODUCTION

The Australian Recording Industry Association (ARIA) welcomes the Minns Government's commitment to develop the State's first Arts, Cultural & Creative Industries Policy that aims to grow the sector in NSW.

As we saw reflected in the National Cultural Policy, contemporary music must be a central focus. Music brings joy and connection but is also a powerful economic, cultural, and social force that has the potential to unlock a bigger, and broader culture in this state. We support an integrated whole of government policy, creating a legacy that embeds the creative industries to this State's growth and success.

The first-ever NSW Cultural Policy must incorporate measures to unlock the boundless potential of Australian music—both locally and on the global stage. Simultaneously, it should address the substantial structural challenges that are currently obstructing emerging Australian recording artists from achieving chart-topping hits, connecting with fans across diverse global platforms, and building an audience in our state, across Australia, and internationally.

- **How can we create better, more inclusive pathways and support for practitioners in the arts, culture and creative industries?**
- **How can we create and improve sustainable access to spaces, programs and other support for all aspects of artistic and cultural activity?**
- **Where should the NSW Government focus the greatest effort and resources?**

1. Implement the NSW Vote Music Policy Paper in full, in consultation with industry

The Vote Music paper reflects a coordinated industry position addressing the immediate and long-term needs of the NSW music industry. ARIA supports the further development and implementation of this plan as part of this cultural policy process. The following policy actions have been identified as priorities.

Music Hub: The establishment of a Music Hub in Tech Central is not just about the physical space but a concept that empowers the music industry in NSW, cementing its place alongside the allied tech industry. It fosters collaboration, supports emerging talent, and propels the sector into a new era of innovation and growth. We want the hub to become a cornerstone of the NSW music ecosystem, strengthening its cultural and economic impact.

ARIA commits to the success of this unifying concept and confirms an ARIA tenancy would be considered in any future Music Hub.

NSW content procurement: Music has the power to enrich cultural experiences. Whether it's playing local music in government buildings, during events, in advertising or as hold music, it enhances the overall atmosphere and connects people to the cultural fabric of NSW. This commitment also sends a message to local artists that they are valued, and their music will be backed by their home-state in a similar way to support shown for sporting codes. It will also drive income for NSW artists through public performance or sync revenue opportunities.

ARIA welcomed this pre-election commitment and looks forward to working with Sound NSW on further development of this simple but important policy.

Pathways for young people: Engaging young people as audience members and in career development, can lead to lifelong engagement, bolstering future audience numbers and cultivating a culturally aware and appreciative society. Young people are often at the forefront of setting cultural trends and exploring innovative artistic expressions. Their perspectives and creativity can serve as a valuable resource for predicting emerging markets and trends within the creative industries. A commitment to funding programs for young people in music is not just a cultural investment; it is an investment in the future of this state.

Positive Police relationships: The establishment of a dedicated music industry liaison team within the police force is a forward-thinking initiative aimed at fostering better relationships between law enforcement and the music industry. This collaborative approach can lead to the development of music-friendly policies, particularly regarding under-18s and all-ages music events, and a comprehensive review of User-Pays policing for music events, including festivals and concerts. Additionally, it underscores the importance of moving away from genre-based risk assessments for safety management, while emphasizing that musical genres should not be the sole basis for safety considerations. ARIA strongly opposes any form of genre-based generalised policing that leads to music censorship.

ARIA proposes Sound NSW immediately convene an interim music advisory group to workshop this policy initiative further.

Music industry review: The state's cultural policy has the power to be a transformative force in making the music industry a more equitable, safe, and vibrant space for all music workers. The commitment to specific resources, programs, and training to address these issues is welcome however, to assess the effectiveness of programs and training initiatives, benchmarks and metrics are essential. These benchmarks should be designed to measure progress in employment, workplace safety and inclusivity.

ARIA recommends working with the Centre for Creative Workplaces, Music Australia and other state and territory departments on a whole-of-industry employment study and initiatives to promote more female leadership across the business side of the industry.

Attracting Audiences Rebuild: The success of rebuilding audience confidence hinges significantly on programs developed in partnership with industry experts. Through combining the resources and expertise of government, industry stakeholders, and artists, NSW can rebuild audience confidence in live music and create a vibrant and sustainable music culture that thrives for years to come. This collaborative effort not only boosts the economy but also enriches the cultural fabric of the region.

Great Southern Nights (GSN) brings together all aspects of the music ecosystem to deliver a program of live music events directly to fans. These shows drive new audiences in key music precincts across the state while growing the capacity of industry partnerships.

ARIA thanks the Minns government for the ongoing commitment to Great Southern Nights and looks forward to rolling the program out over the next three years.

- **How can we grow local, national and international audiences for cultural experiences, for the benefit of our community and the broader economy?**

2. Urgent focus and co-investment programs for music export

Contemporary Australian artists have always made waves on the global stage, often achieving international recognition before gaining widespread popularity within their home country. This trend has been observed across various creative industries, including music. While it showcases the immense talent of Australian artists, it also reflects the challenges they face in a rapidly changing and globalized music industry.

Many Australian artists have found success abroad due to a combination of factors, including the global reach of streaming platforms, collaborations with international artists, and the ability to connect directly with global audiences through social media. This overseas recognition has often paved the way for artists to gain recognition and success in their home country. Notable recent examples include Rufus Du Sol and The Kid Laroi.

Despite their international acclaim, Australian artists are having difficulty connecting with audiences in their home markets and this is being reflected in the ARIA Charts. This can be attributed to several factors, including a crowded music landscape, challenges in securing airplay on local radio, and the dominance of international acts in the Australian music scene. Additionally, the impact of the COVID-19 pandemic has posed significant challenges for the live music sector in NSW and beyond.

To address these challenges and harness the potential of Australian talent, it is crucial to focus on supporting commercial, export-ready artists. These are artists who have already demonstrated their appeal and viability in international markets. Export success of local artists helps to position NSW on the world stage, reflecting this state's cultural identity and telling stories from a unique NSW perspective.

Supporting export-ready artists in their home country can help solidify their presence and success locally. This can include increased radio play, media coverage, and partnerships with local venues and promoters. A strong export offering will compliment strategies to increase live music opportunities in NSW, including the commitment to doubling the music venues in this state.

Recommendations

- **Urgent co-investment and/or matched funding export programs with the commercial music industry for top and mid-tier export-ready NSW artists**
- **“Managers on Tour” fund to ensure NSW artists increase commercial opportunities at global showcases**
- **Establish a regular roadshow by the Sound NSW team to global Investment NSW Offices with a focus not just on live opportunities but also promotion, publicity and playlisting.**

3. Addressing challenges of music discoverability

In today's digital age, music distribution has undergone a seismic shift, with music streaming platforms now the dominant the platform for audiences to consume music. While this has opened doors for

artists worldwide, it has also created a formidable challenge: the sheer volume of music available online. With over 130,000 songs uploaded to streaming services globally every day, the quest for discovery and recognition has become increasingly difficult for emerging artists and even new music of established artists.

Australia faces unique challenges in this global music landscape. Geographical isolation can hinder Australian artists from accessing international markets and audiences. Moreover, Australia's smaller domestic market and fragmentation of media means that local musicians struggle to garner the attention and support necessary to be successful or develop sustainable careers. We are also competing with other major English-speaking markets such as the US, UK and Canada for local language music.

Rather than viewing these challenges as insurmountable obstacles, we can see them as opportunities for innovation and experimentation. Given more artists and music industry businesses call NSW home than any other state or territory, this state can be as a leader on this issue, particularly if it is approached as a creative industries issue rather than just contemporary music.

Recommendations

- **The contemporary music policy from Sound NSW must have an urgent focus on music discoverability in NSW and tools to develop audiences for NSW artists across streaming and live.**
- **Develop a clear and simple NSW Music Content Policy to ensure the pre-election commitment that “NSW artists should be the soundtrack to our state”**
- **Request a regular meeting with Music Australia and other relevant state and territory departments to discuss issues of discoverability.**

Support for other submissions

ARIA would like to support the submissions from the following organisations:

- Association of Artist Managers (AAM)
- Australian Festival Association (AFA)
- MusicNSW
- Vote Music

ABOUT ARIA

The Australian Recording Industry Association (ARIA) is a national industry association with more than 170 members representing major and independent record producers, manufacturers, and distributors. ARIA acts as an advocate for the Australian music industry, administers the labelling code of practice, and compiles industry information and research. It also produces the ARIA Charts every week and the prestigious annual ARIA Awards. Most importantly, ARIA supports Australian music and creates opportunities for it to be heard.

We acknowledge First Nations people as the Traditional Owners and sovereign custodians of the lands on which we work and live. We recognise their continuing connection to Country and their respective nations across this continent and pay our respects to their Elders past and present. We also celebrate the unique and inspiring creativity and songlines of the world's oldest living culture and give thanks for the immeasurable influence First Nations people continue to have over the music and art we all enjoy.

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ARIA confirms that this submission is not confidential and can be made public