Australian Government

Creative Australia

Listening In:

Insights on live music attendance

Part one in a series of three reports exploring live music attendance, music discovery and consumption by Australian audiences.

Acknowledgement

Creative Australia acknowledges the many Traditional Custodians of Country throughout Australia and honours their Elders past and present.

We respect their deep and enduring connection to their lands, waterways and surrounding clan groups since time immemorial. We cherish the richness of First Nations peoples' artistic and cultural expressions.

We are privileged to gather on this Country and to share knowledge, culture and art, now and with future generations.

Attribution: Creative Australia 2025, *Listening In: Insights on live music attendance*.

This report was supported by a partnership with Untitled Group and The Daily Aus, as well as a collaboration with The Push.

Cover image: Fireworks going off behind the main stage at Wildlands over NYE in Brisbane.
Credit: Jordan Munns.

Contents

Foreword

Australians love music and Australia has a vibrant music industry.

We are avid consumers of music, and going to live gigs and concerts is a quintessential part of Australian life. In 2023, Australia was the tenth largest music market in the world[1], falling out of the top ten in 2024. In the same year, Australians purchased over 14 million tickets to contemporary music events and festivals, generating over $1.8 billion in ticket revenue.[2]

Over the past decade, social, economic and other technological transformations have played a strong hand in reshaping music engagement. These shifts have had immediate and lasting impacts, and we are now seeing new trends in the ways Australians engage with music – how they attend, what they listen to and how they spend their money.

Music Australia has been established within Creative Australia, the Australian Government's principal arts investment and advisory body, to support and invest in the Australian contemporary music.

Since our establishment in mid-2023, our investments and initiatives have sought to foster skills and creativity, develop local markets and expand export capability. We have also invested deeply in our evidence base. Robust data and insights are key to informing our strategic investment that will, in turn, shift the dial and grow audiences and opportunity for Australian music.

In this context, understanding the ways in which Australians are responding to transformations to the music industry is critical for the work of Music Australia. Especially important, is a better understanding of how Australians are engaging with Australian music, along with the opportunities for increasing that connection to and support for local artists.

As a series, *Listening In* explores the ways in which Australians are engaging with music – across attendance, listening and discovery and consumption. It will provide critical information to inform Music Australia's work and valuable intelligence for the sector as it seeks to enhance local audience engagement. It will also inform government policy that aims to support the Australian music industry, building on effective mechanisms such as the Australian Government's *Revive Live* program.

As the first in the *Listening In* series, this report focuses on Australians' attendance at live music events. This first report follows on from Creative Australia's research into music festivals in 2024: the *Soundcheck* reports. While the *Soundcheck* research focused on the logistics of putting on a festival, and challenges faced by festival organisers, this report on live music adds important insights on audience preferences, motivations and needs.

The insights from this first report complement the findings presented in the Parliamentary inquiry report on the challenges and opportunities within Australia's live music industry. They add richer context and understanding on changing audience behaviour and attitudes towards Australian live music.

Our later reports in the series will add to the discussion of broader opportunities and challenges facing the Australian music industry and address other critical issues in the changing music ecology. We look forward to sharing these insights with you later in 2025.

We trust these findings are useful to sector as it continues to deliver Australian audiences exciting and relevant music experiences.

Millie Millgate

Director
Music Australia

1 International Federation of the Phonographic Industry (IFPI) 2024, *Global Music Report 2024: State of the Industry.*
2 Live Performance Australia (LPA) 2024, *2023 Ticket Attendance and Revenue Report.*

Executive summary

Australia has a vibrant, dynamic live music scene spanning intimate gigs at small pubs to major stadium shows and festivals.

Australia was the tenth largest music market in the world in 2023,[3] falling out of the top ten in 2024. Recent research evidences the importance of live music to Australian audiences.[4]

In recent years, however, **Australians' engagement with Australian music has been declining**. There has been a significant drop in the number of Australian musicians featured on Australia's ARIA charts and triple j's hottest 100.[5]

While there has been an overall increase in live music attendance and industry revenue, this growth has mostly been driven by **international tours presented at major venues**.[6] Some **small music venues**, which are particularly important to the career progression of Australian local artists, have reported facing **difficulties staying viable** in a changing market.[7] **Australian music festivals are also moving through a period of significant adaptation**, facing changing patterns of audience behaviour and later purchasing of tickets.[8] Operating models for live music events appear to be changing, and new insights are needed to identify where the best opportunities for encouraging more Australians to seek out and find local, contemporary music, might lie.

Listening In: Insights on live music attendance **is the first in a series of three publications** that provide greater insights into how Australians discover and consume music along with audiences' wider attitudes, behaviours and preferences. Produced by **Creative Australia** for **Music Australia**, the series also seeks to better understand how Australian music sits within the overall music diet, as well as how people feel about Australian music, and their current access to it.

As a trilogy, ***Listening In*** investigates the attitudes and behaviours of two different groups: **the Australian population**, through a nationally-representative sample, and a subset of Australians who are actively engaged in music – or what we call **the 'music-engaged'**. While general population data gives us a view of broader trends, the project's original data on music-engaged audiences reveal the habits and attitudes of those who might be early adopters of new models for music discovery, consumption and live attendance. These insights on the 'music-engaged' are particularly important given the intensity of changes, challenges and new opportunities currently defining the contemporary music industry.

In order to paint this complex picture, the project draws together multiple data sources, including **existing literature, general population data** purchased from Nielson, **surveys** of music-engaged audiences and **focus group data**. The project was supported by a partnership with **Untitled Group** and **The Daily Aus**, as well as in collaboration with youth music organisation, **The Push**.

Listening In will be published in three reports across early and mid-2025, considering music engagement across three themes: **live music attendance, music discovery and music consumption**. This, the first report in the series, provides detailed and contemporary data on the barriers and motivations for Australians' attendance at live events.

3 International Federation of the Phonographic Industry (IFPI) 2024, *Global Music Report 2024: State of the Industry.*

4 VMDO and Music Victoria 2022, *VMDO Music Consumer Insights Survey.* Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.* Australia Institute 2024, *Polling – Young Australians' participation in live music.* Hays T and Minichiello V 2005, 'The contribution of music to quality of life in older people: an Australian qualitative study', *Ageing & Society, 25.*

5 Griffiths N 2025, '"Unfortunately Not New News": ARIA CEO weighs in on lack of Aussie acts in year-end charts yet again', *The Music*, 17 January. Jenke T 2025, 'This Year's Hottest 100 Is The Worst Result For Aussies In Almost Three Decades, So What Can We Do?', *The Music*, 25 January.

6 Live Performance Australia (LPA) 2024, *LPA 2023 Ticket Attendance and Revenue Report.*

7 Stafford A 2024, '"The Model is Broken": Brisbane live music venue the Zoo to close after 32 years', *The Guardian*, 1 May. Eliezer C 2024, 'Smaller Music Venues Musing Solutions As Crisis Bites Harder', *The Music,* 15 February.

8 VMDO and Music Victoria 2022, *VMDO Music Consumer Insights Survey.* Creative Australia 2024, *Soundcheck: Insights into Australia's music festival sector.*

Main findings

- **Music is important to the majority of Australians**. Younger music-engaged participants, in particular, recognise the **positive impact** live music has on their relationships, a sense of community and belonging, and on their mental health and wellbeing.
- **Australian music is highly valued and may be easier to see live than international acts**. **But while there is a keenness to see more Australian live music**, **many may be prioritising rare international acts as they are seen as a 'once in a lifetime' opportunity**. Indeed, there appears to be a disconnect between the supportive attitudes Australians hold towards emerging local music and actual attendance behaviour of some people. This raises the question of what attendance barriers may exist, and how we might leverage people's articulated interest in local acts.
- **Attendance is increasing for live music**, **with major venues the most popular location**. **At the same time**, **there is declining attendance for live music at pubs and clubs**, which are fertile grounds for local musicians to grow their audience. This changing behaviour corresponds with a spate of big international acts touring Australia after the pandemic and an excitement to get back to big, live events. At the same time, we are seeing shifts in ticket-buying patterns. Likely due to cost-of-living pressures, Australians are purchasing tickets closer to the event. This raises the question if this behaviour is a short-term reaction to being deprived of such acts in recent years, or if they are the indication of an emerging trend and a new generation of behaviour.
- **Cost is the primary barrier for Australians to attend live music events**, **and the number one barrier to attending live music for almost all music-engaged participants**. Audiences say the cost of tickets is not the only financial barrier, but also that associated expenses (including travel, accommodation and food and drinks at the venue) all add up and reduce the accessibility of some live music events.
- **While cost of living is concerning many young Australians**, **there is a willingness to spend money on the things that matter to them**, **and some are prepared to 'break the bank' to attend live music gigs**. Despite feeling less financially secure, young Australians are spending larger sums on entertainment and leisure in 2024 than they were in 2019. Findings from our research with music-engaged participants show that most people from this group are saving up to attend live music events that are important to them, prioritising these costs over other expenses.
- **There are other more subtle trends that seem to be sitting behind a lot of behaviour**, **including lack of interest**, **limited awareness of events and sentiment that some areas are served better live music offerings than others**. For the general population, these trends include a lack of interest in going out; a trend that is growing for the youngest age group. And for the music-engaged, they include a lack of interest in offerings at smaller venues, as well as a general lack of awareness about what is playing where and when. For over half of the music-engaged, lack of awareness is a barrier to attending more Australian live music. Those living outside the major centres are also feeling underserved when it comes to live music offerings in their area.
- **High costs for alcoholic drinks at live music events are compelling some of the music-engaged to alter their drinking habits**. While most music-engaged participants often or always drink alcohol at live music events, a proportion are choosing to only drink beforehand or find other ways to heighten their experience. Most say this is because alcohol is too expensive these days. This aligns with findings that cost is the primary barrier to live music attendance. This changing consumer behaviour has consequences for the viability of live music operating models that rely heavily on bar sales.

Live music attendance at a glance

Valuing live music

Six in ten Australians agree or strongly agree that **music is important** to them.

Of music-engaged respondents:

92% say that live music events have a big or very big impact on their **sense of wellbeing and happiness**.

72% say that live music events help them **deal with stress, anxiety or depression**.

Valuing Australian music

Of music-engaged respondents:

Half say they **would like to attend more local Australian music**, but do not know where to find out about it.

Drivers of attendance

Of music-engaged respondents:

FOMO (fear of missing out) is **a key driver** for live music attendance, especially for international acts.

Attendance

Almost half of Australians **attended at least one live music event** in the past 12 months.

But young Australians are now less **likely to say** they **prefer to go out than stay in** compared to 2019.

Major venues are the **most popular location** at which to attend live music events.

Attendance at pubs and clubs has dropped between 2019 and 2024, while **major venue attendance has remained steady**.

Of music-engaged respondents:

They are **equally as likely** to attend events featuring Australian artists and international artists.

Almost three quarters saved up money to attend one or more major live music events in the past 12 months.

Barriers to attendance

Cost is the **primary barrier** preventing Australians' attendance at live music.

Australians, especially those **aged 14–24**, are **increasingly feeling less financially secure**.

Among music-engaged respondents:

The **most common reason** for not attending was **not being able to afford tickets**.

94% say the **cost of living** is impacting their ability to attend live music.

96% say that a **voucher** would increase their attendance at live music events.

A **lack of nearby events** is the biggest barrier to attendance at live music events at small local venues, especially in regional areas.

Drinking habits

Two in five Australians agree they are **drinking less alcohol** these days (39%)

Among music-engaged respondents:

97% often or always **drink alcohol at live music events**.

More than half drink before they come to the event (54%), with most citing high costs of alcohol as the main reason.

Six in ten say they would use **pill testing** if it was available at music festivals.

Introduction

Australia's live music scene is vibrant, dynamic and promotes Australia's unique sounds.

Live gigs, concerts and festivals connect us with both our favourite artists and new music, as well as with each other. In our youth, these experiences can be formative in shaping our perceptions of the world, and, as we age, they continue to promote health and wellbeing.[9] What's more, engaging with Australian-made music helps us shape our shared values and national identity, connect with our local community, and build a stronger, more cohesive society.[10]

Australia was the tenth largest music market in the world in 2023,[11] falling out of the top ten in 2024. Recent research evidences the importance of live music to Australian audiences.[12] There were over 535 music festivals presented in Australia in 2022–23,[13] and data from industry body Live Performance Australia (LPA) shows more than 12 million Australians attended live music in 2023, generating $1.5 billion in revenue for the industry. This was primarily driven by an increase in international acts and tours, as well as increased ticket prices, with contemporary music contributing the largest market share for revenue and attendance.[14]

But in recent years, engagement with Australian music has been declining. There has been a drop in the number of Australian musicians featured on Australia's ARIA charts and triple j's hottest 100.[15]

At the same time, small live music venues, have been closing across the nation, with many citing operational challenges.[16] These venues form a vital part of Australia's music ecosystem and play a key role in the development of local artists.

Australian music festivals are also moving through a period of significant adaptation, facing changing patterns of audience behaviour and later purchasing of tickets.[17] Dozens of music festivals have cancelled in the last few years,[18] while others have recently reported record ticket sales and successful seasons.[19] Operating models for live music appear to be changing, and new insights are needed to identify where the best opportunities for encouraging more Australians to seek out and find local, contemporary music, might lie.

9 Kwon S, Choi B and Park S 2020, 'Effects of student- and school-level music concert attendance on subjective well-being: A longitudinal study of Korean adolescents,' *International Journal of Music Education, 38:2*. Cannon JW and Greasley AE 2021, 'Exploring Relationships Between Electronic Dance Music Event Participation and Well-being,' *Music & Science, 4*. Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*

10 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*

11 IFPI 2024, *Global Music Report 2024: State of the Industry.*

12 VMDO 2022, *VMDO Music Consumer Insights Survey.* Creative Australia 2024, *Creating Value: Results of the National Arts Participation Survey.* The Australia Institute 2024, *Polling – Young Australians' participation in live music*.

13 Creative Australia 2024, *Soundcheck: Insights into Australia's music festival sector.*

14 LPA 2024, *LPA 2023 Ticket Attendance and Revenue Report*.

15 Griffiths N 2025, '"Unfortunately Not New News": ARIA CEO weighs in on lack of Aussie acts in year-end charts yet again', The Music, 17 January. Jenke T 2025, 'This Year's Hottest 100 Is The Worst Result For Aussies In Almost Three Decades, So What Can We Do?', *The Music*, 25 January.

16 Darling A 2024, 'Australian Live Music Venues Closing as Cost of Living Hits Businesses and Patrons', *ABC*, 12 September.

17 Creative Australia 2024, *Soundcheck: Insights into Australia's music festival sector.* Creative Australia 2024, *Soundcheck 2: Analysis of Australian music festival models and operations*.

18 For example, see: Richards J 2025, 'Groovin the Moo Won't Return in 2025, Following Last Year's Cancellation', *ABC*, 31 January. Burke K 2025, 'Splendour in the Grass Festival Cancelled For Second Year Running', *The Guardian*, 23 January.

19 For example, see: Seidler J 2025, '"Never Been About Headliners": Behind Laneway's trend-defying success', *Sydney Morning Herald*, 30 January. Zylstra T 2024, 'Meredith Sold Out, Bluesfest And BTV On The Way: Is The Festival Crisis Over?', *The Music*, 29 August. Southern Riverina News Contributor 2024, 'Big Turnout for 15th Anniversary Festival', *Southern Riverina News*, 20 November.

***Listening In: Insights on live music attendance* is the first in a series of three publications** that provide greater insights into **how Australians discover and consume music** along with audiences' wider attitudes, behaviours and preferences. Produced by **Creative Australia** for **Music Australia**, the report trilogy also seeks to better understand **how Australian music sits within the overall music diet**, as well as **how people feel about Australian music – and their current access to it**. How are people finding new music? Is it the same for Australian and international acts? How do they feel about algorithms choosing their music for them? How are people spending their money when it comes to their music consumption? How do people feel about large stadium events, versus festivals versus small bars? Why do music-engaged audiences value live attendance so much? And why are they spending less money at the bar?

As a series, *Listening In* asks these questions of two different groups: **the Australian population**, through a nationally-representative sample, and a subset of Australians who are actively engaged in music – or what we call **the 'music-engaged'**. While general population data gives us a view of broader trends, the project's original data on music-engaged audiences reveal the habits and attitudes of those who might be early adopters of new models for music discovery, consumption and live attendance. These insights on the 'music-engaged' are particularly important given the intensity of changes, challenges and new opportunities currently defining the contemporary music industry.

In order to paint this complex picture, *Listening In* draws together multiple data sources, including **existing literature, general population data** purchased from Nielson, **surveys** of music-engaged audiences and **focus group data**. In this way, *Listening In* generates robust insights from multiple sites and perspectives, combining quantitative with qualitative material and synthesising various different kinds of information.

The data on music-engaged participants was largely generated through a partnership with **Untitled Group** and **The Daily Aus**, as well as in collaboration with youth music organisation, **The Push**.

Listening In will be published in distinct reports across early and mid-2025, considering music engagement across three themes: **live music attendance**, **music discovery and music consumption**. This, the first report in the series, provides detailed and contemporary data on the barriers and motivations for Australians' attendance at live events.

The Push All – Ages Tour in Bendigo, VIC. Credit: Darcy Goss Media.

Methodology

Research for the *Listening In* series consisted of:

- **A desktop review of existing research** on Australians' engagement with music, including how they discover and consume music, and attend live Australian music.
- **Analysis of existing datasets covering the general population**, namely:
    - **Data purchased from global market research firm**, **Nielson**. Creative Australia accessed Australian consumer data from the Nielsen Consumer & Media View (CMV) survey for 2019, 2022 and 2024. The CMV survey collects data from a sample of approximately 30,000 Australians aged 14 and over including demographics, consumer attitudes, behaviours and habits across a range of lifestyle categories, including music consumption and engagement.
- **Generation of new data on music-engaged participants** via:
    - Four audience surveys with Australians, primarily aged between 18 and 55, distributed via the social media networks and database of music promoters, Untitled Group; and via the social media networks of The Daily Aus, The Push and Music Australia.
    - Nine focus groups with Australians aged 15 to 60, recruited partly through youth arts organisation, The Push.
    - Mixed engagement groups included participants who were **actively engaged** with music, as well as those who were **passively engaged**.

This live attendance report draws in particular on two of the surveys distributed via the networks of Untitled Group, The Daily Aus, The Push and Music Australia, which included questions about live music attendance. Each survey garnered over 3,500 respondents. The survey data is skewed geographically and by age and gender. Most respondents reside in Victoria, are between the ages of 18 and 24, and identify as women or female.

See Appendix A for the **full project methodology**.

Part One:

Attitudes and preferences in relation to live music

Summary findings – on a page

Main insight:

Overall, the findings suggest that **Australian music is highly valued**, particularly by the music-engaged, and may be **more accessible than non-Australian music when it comes to live acts**. But while there is a keenness to see more Australian live music, many may be prioritising **rare international acts** as they are perceived as a **'once in a lifetime'** opportunity. Indeed, there appears to be a **disconnect** between the supportive attitudes Australians hold towards emerging local music and actual attendance behaviour of some people. This raises the question of what attendance barriers may exist, and how we might leverage people's articulated interest in local acts.

Findings from our **review of existing literature** and **analysis of Nielsen data** show Australians, particularly young Australians, **highly value music** and **live music experiences**.

Results from our **focus groups** and **surveys** show that **music-engaged participants** love attending live music gigs for the **atmosphere**, for the **sense of community and belonging**, and for the positive impact on their **wellbeing**. **Younger music-engaged participants** particularly note the **positive impact** live music has on their relationships, and sense of community and belonging.

Cécile McLorin Salvant, Melbourne International Jazz Festival 2023. Credit: Max Roux.

Focus groups also show music-engaged participants attend live music to **connect with the artists and the music** they love and for the opportunity to experience something that **cannot be replicated** and is **unique to that moment in time**.

Focus groups say ingredients for the 'ideal' night out are: **friends, ease of access** (including cost, safety and transport), seeing their **favourite music** played live and discovering **new music**, atmosphere and the feeling of **wanting to attend more**.

Our **survey results** show that overall, **music-engaged** participants **prefer larger music events**, opting for **big nights out** with large groups of friends. However, there are some **differences** among the age groups.

Many say if an adored **international artist** tours to Australia, it is an **opportunity that cannot be missed**. Some even spoke of their willingness to **'break the bank'** to see these international acts live. On the other hand, findings from our **focus groups** and **surveys** show **some music-engaged** participants **intentionally listen to Australian artists** because they have greater opportunities to see them live. Most music-engaged participants also **value Australian music** and **want to attend more** live music featuring Australian artists. This indicates that barriers may be hindering attendance and suggests an opportunity for increasing attendance at Australian acts.

Valuing live music

General population

Findings from our **literature review** and **analysis of Nielsen data** demonstrate the high value that Australians put on live music.

Nielsen data shows that in 2024, more than six in ten Australians agreed or strongly agreed that ***music is really important to them*** (62%) – an increase from 59% in 2019.[20]

Research conducted by the VMDO and Music Victoria in 2022 told a similar story, with more than one third of participants agreeing or strongly agreed that ***music is my life and number one passion*** (37%), an increase from 32% in 2019.[21] Results from Creative Australia's 2022 National Arts Participation Survey also show that nine in ten Australians listen to recorded music, **making music the most accessed**, and potentially most accessible, art form. Music is also the most popular art form to attend live, with 47% of Australians attending live music in 2022.[22]

Music is particularly important to **young people**. The Australia Institute's Polling on Young Australians' Participation with Live Music finds a significant proportion of **young Australians** say ***attending live music is important to them*** (64% of 16–25-year-olds).[23] Evidence shows, for **young people**, music provides a vehicle for understanding and developing their self-identity, connecting with other young people, and for gaining new skills and confidence.[24]

For **older people**, music provides strong associations with events and memories from their lives, linking them with people and places from their past.[25]

In Victoria, **venue-based live music** is particularly valued for its **social benefits**, with 76% of 18–19-year-olds reporting **expanded friendship groups** through live music events.[26] Live music performances were deemed as important as other social outings by 86% of patrons, contributing to community wellbeing.[27] The majority of patrons believe that live music **improves quality of life** (92%) and **provides a welcoming and safe environment** (84%).[28]

Research shows music is also an important contributor to personal wellbeing for many Australians, with engagement and participation in music associated with higher **subjective wellbeing**.[29] It is associated with emotional regulation and can act as a **coping mechanism for stress**,[30] as well as other therapeutic effects such as **easing pain**, reducing depressive symptoms, and promoting relaxation.[31] Music therapy and education can also assist people with **cognitive impairments**, such as children with non-verbal autism and adults with dementia, to communicate and interact socially.[32]

20 Nielsen 2019 and 2024, *Consumer & Media View (CMV) surveys.*
21 VMDO and Music Victoria 2022, *VMDO Music Consumer Insights Survey.*
22 Creative Australia 2024, *Creating Value: Results of the National Arts Participation Survey.*
23 The Australia Institute 2024, *Polling – Young Australians' participation in live music.*
24 Howard F 2022, 'Artistic Production and (Re)production: Youth Arts Programmes as Enablers of Common Cultural Dispositions', *Cultural Sociology*, 16:4.
25 Hays T and Minichiello V 2005, 'The contribution of music to quality of life in older people: an Australian qualitative study', *Ageing & Society, 25.*
26 Deloitte and Arts Victoria 2011, *The Economic, Social and Cultural Contribution of Venue-based Live Music in Victoria.*
27 As above.
28 As above.
29 Weinberg MK and Joseph D 2017, 'If You're Happy and You Know It: Music engagement and subjective wellbeing.' *Psychology of Music*, 45:2
30 Vidas D, Larwood JL, Nelson NL, Dingle GA, 2021, 'Music Listening as a Strategy for Managing COVID-19 Stress in First-Year University Students', *Frontiers in Psychology*, 12: 647065.
31 MacDonald RAR, Kreutz G and Mitchell LA (Eds.) 2012, *Music, Health and Wellbeing*. Moreno-Morales C, Calero R, Moreno-Morales P, Pintado C 2020, 'Music Therapy in the Treatment of Dementia: A systematic review and meta-analysis,' *Frontiers in Medicine,* 197:160.
32 As above.

Music-engaged participants

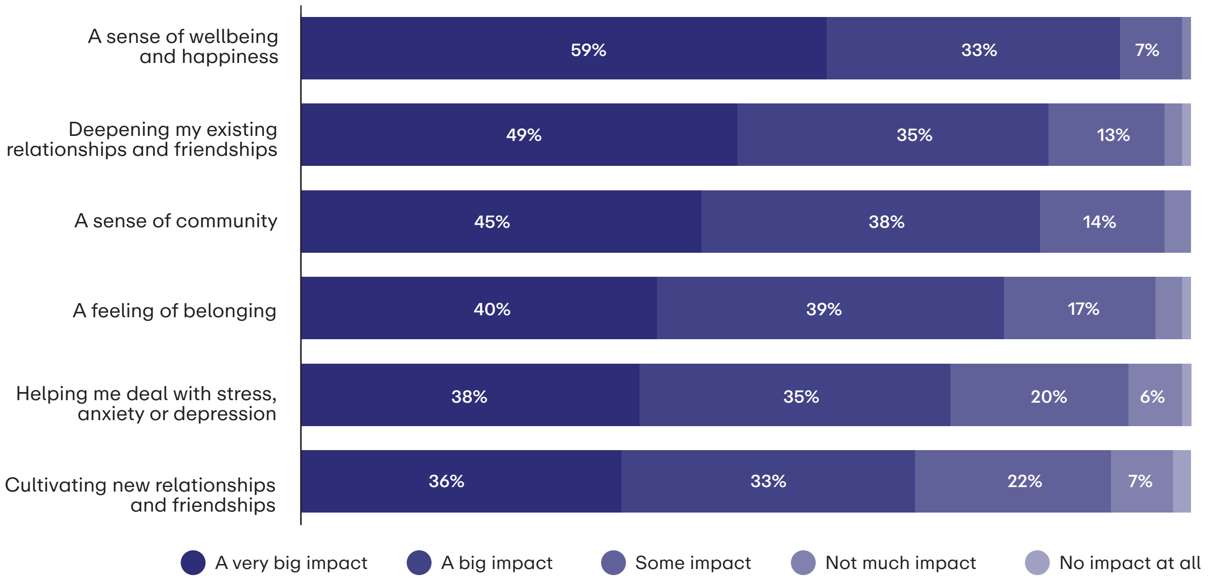
Findings from our **survey** with music-engaged participants demonstrate the additional importance that live music has for this group.

- Over nine in ten music-engaged survey respondents say live music events have a positive impact on ***their sense of wellbeing and happiness*** (92%), including 59% who said it had a 'very big' impact'.
- Around eight in ten music-engaged survey respondents say that attending live music events has a 'big' or 'very big' impact on ***deepening their existing relationships and friendships*** (85%), ***a sense of community*** (83%), and ***a feeling of belonging*** (80%).
- Seven in ten music-engaged survey respondents say live music events has a 'big' or 'very big' impact on ***helping them deal with stress***, ***anxiety or depression*** (72%) and ***cultivating new relationships and friendships*** (69%).
- **Younger respondents**, **women** and **First Nations respondents** are more likely than their counterparts to **recognise the positive impacts** of attending live music events.
- **Women** are more likely than men to say live music events have a 'big' or 'very big' impact on ***a sense of wellbeing and happiness*** (94% compared to 89%) and ***a feeling of belonging*** (81% compared to 77%).
- **First Nations music-engaged survey respondents** are more likely than non-First Nations respondents to say live music events have a 'big or 'very big' impact on:
    - ***a feeling of belonging*** (87% compared to 79%)
    - ***a sense of community*** (87% compared to 82%)
    - ***cultivating new relationships and friendships*** (80% compared to 68%).
- **Younger respondents** are more likely than older respondents to say live music events have a 'big' or 'very big' impact on:
    - ***deepening my existing relationships and friendships*** (88% of 18–24-year-olds compared to 80% of 25–39-year-olds and 66% of people aged 40 and over)
    - ***a sense of community*** (86% of those aged under 25 compared to 77% of 25–39-year-olds and 74% of people aged 40 and over)
    - ***a feeling of belonging*** (82% of those aged under 25 compared to 76% of 25–39-year-olds and 71% of those aged 40 and over)
    - ***cultivating new relationships and friendships*** (75% of those aged under 25 compared to 61% of 25–39-year-olds and 39% of those aged 40 and over).

Adrian Dzvuke supporting Coldplay at Optus Stadium, Perth 2023. Credit: Sam Makumbe.

Figure 1:

Impacts of attending live music events



Q. Thinking about the last few live music events you attended, how much impact do you think they had on the following: Source: Value of music survey. N=4,307.

Note: Data labels of 5% and lower are not displayed in the chart.

Cahli Blakers (Teenage Joans) performing at Bigsound Brisbane 2022. Credit: Will Johnstone.

Valuing Australian music

General population

Our **literature review** shows Australians' **engagement with Australian music** has been **declining in recent years**.

Results from the Australian Recording Industry Association (ARIA) reveal **the number of Australian musicians** featured on Australia's ARIA charts **has been dropping**. Curiously, in 2024, the top Australian act to feature on the charts was Vance Joy's *Riptide*, which was released more than a decade ago.[33] triple j's 2024 Hottest 100 also saw a **decline in the number of Australian tracks featured**, from 52 down to 29 local songs, made by only 18 Australian artists.[34] Data released by APRA AMCOS provides more context and shows a **year-on-year decline in the percentage of local content** consumed across streaming services.[35]

Adding to this, **some small live music venues** in Australia have closed, and many **music festivals** across the nation were cancelled or postponed throughout 2023 and 2024, citing a raft of operational challenges.[36]

This raises the **question of the value** Australians hold for **Australian music** compared to international acts.

Music-engaged participants

Findings from our **surveys** and **focus groups** with music-engaged participants adds another layer of understanding.

Our **survey** results show that most music-engaged participants **value Australian music**.

- Around six in ten survey respondents agree or strongly agree with the statements:
  - ***I would like to listen to more Australian music*** (66%)
  - ***I feel a connection to Australian music*** (62%)
  - ***Australian music is as good as international music*** (62%).

Survey results also show that music-engaged participants **want to attend more live music featuring Australian artists**, indicating they may face barriers to attendance. See Part Two: Attendance and behaviours in relation to live music for more information.

- Almost half of music-engaged survey respondents **would like to attend more live music events *featuring Australian artists*** (48%); however, a larger proportion say they would like to attend more live music events ***featuring international artists*** (54%).
- Over half agree or strongly agree ***I would like to attend more local Australian music – I just don't know where to find out about it*** (51%).

However, many **focus group** participants spoke about attending international artist concerts **because that was who they listened to and were excited about**. There was also a sense among some participants that the local music industry is 'struggling' and that festivals are 'dying'.

Australians' engagement with Australian music will be explored further in our reports exploring discoverability and consumption, which will be published across early to mid-2025.

33 See ARIA Top Singles for 2024 at https://www.aria.com.au/charts/2024/singles-chart. Griffiths N 2025, '"Unfortunately Not New News": ARIA CEO weighs in on lack of Aussie acts in year-end charts yet again', *The Music*, 17 January.

34 Mitchell T 2025, 'Worst in 30 Years: What Hottest 100 says about the state of Aussie music', *Sydney Morning Herald*, 28 January. Jenke T 2025, 'This Year's Hottest 100 Is The Worst Result For Aussies In Almost Three Decades, So What Can We Do?', *The Music*, 25 January.

35 See APRA AMCOS 2024, *Record $740m revenue announced, but live local music crisis continues* [Media release], 17 October.

36 Eliezer C 2024, 'Smaller Music Venues Musing Solutions As Crisis Bites Harder', *The Music*, 15 February. LPA 2022, 2021 Ticket Attendance and Revenue Report. Stafford A 2024, '"The Model is Broken": Brisbane live music venue the Zoo to close after 32 years', *The Guardian*, 1 May. Condon D 2023, 'Australian Live Music Venues 'Firmly in Crisis' as Gig Goers Shift Behaviours Post-Lockdown', *ABC*, 4 December. See also Creative Australia 2023, *Soundcheck: Insights into Australia's music festival sector.*

Motivations for attendance at live events

General population

From our **literature review**, we know that **entertainment**, **social connection and the chance to understand other perspectives and cultures** are the key drivers of arts attendance for Australians.

Results from Creative Australia's 2022 National Arts Participation Survey show most Australians attend arts events ***to have fun and be entertained*** (69% up from 63% in 2019). Just under half of Australians attend arts events ***to socialise and connect with others*** (46% up from 41% in 2019); and more than one in three Australians attend arts events ***to understand other perspectives and cultures*** (36% up from 33% in 2019). The results also show that a significantly larger proportion of Australians now attend arts events ***to improve their wellbeing*** than before the pandemic (32% up from 25% in 2019).[37]

Attending live music is particularly important to young people, with a 2024 Australia Institute Poll finding two in three 16–25-year-olds say ***attending live music important to them*** (64%).[38] Evidence also shows that for young people music provides a way to understand and develop their self-identity, to connect with other young people, and to gain new skills and confidence.[39]

Music-engaged participants

Not dissimilarly, our **focus groups** with music-engaged participants indicated that **atmosphere**, **community and connecting with the artists they love** are the primary motivators for attending live music. Findings also show that the **opportunity to be part of a rare experience** is a key driver.

Focus group participants interested in attending live music events (single shows, mixed bills and festivals) emphasise several core reasons why they love attending live music. These include:

- live music ***provides a sense of community and belonging*** as attendees are taking part in an experience with like-minded people
- live music ***creates an atmosphere unlike anything else***. For many, the spectacle and sounds of live shows are awe-inspiring
- attending a live show ***gives them a feeling of connection with the artists and music they love***, going beyond listening to their headphones or in the car on the way to work
- the opportunity to experience something that ***could not be replicated*** and was ***unique to that moment in time***.

'[I like] that instant connection to their music on stage, even just seeing kind of who they are shine through on stage and their presence there, that can really make me quite drawn to an artist.'

Focus group participant (They/them, 23, suburban SA, actively engaged)

37 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey*.
38 The Australia Institute 2024, *Polling – Young Australians' participation in live music*.
39 Howard F 2022, 'Artistic Production and (Re)production: Youth Arts Programmes as Enablers of Common Cultural Dispositions', *Cultural Sociology* 16:4.

Focus groups revealed that **opportunity and the rarity of getting to see major international artists is a key driver** for live music attendance for this group. Numerous focus group participants cited Taylor Swift's Eras Tour as the prime example of a 'cultural event' they **could not miss**, while several others mentioned Travis Scott and Coldplay as other recent examples.

> *'I think I've realised the abundance of Australian artists. And then if an international artist comes [I think] they probably won't be back here for another 20 years. So let me capitalise on this. So I went to Paul McCartney [...] And I did that because I realised he probably won't be back where Australian artists, they'll always be around.*
>
> **Focus group participant (He/him, 17, suburban VIC, actively engaged)**

Some **focus group** participants said they were willing to ***break the bank*** to go see international acts that rarely visit Australia. As major international artists often only visit a few major Australian cities – Melbourne, Sydney, and sometimes Brisbane – those from **regional Australia and suburban areas** were sometimes willing to spend much more beyond the ticket itself (eg, travel, accommodation and food) to make sure they could go see their favourite artist.

> *'I think because we are living in Australia, where we're so isolated to a lot of the rest of the world, I feel like a lot more people – if it's an artist, they really like – would pay a lot more money, because [...] we don't know if we'll ever get the chance to see them again.'*
>
> **Focus group participant (She/They, 20, inner city QLD, actively engaged)**

In contrast, **some focus group** participants noted that they **intentionally listened to Australian artists** because of greater opportunities to see them live.

Actively engaged focus group participants who frequently attend live gigs were **especially likely** to say they **listen to Australian artists because they have more opportunities to see them live**. Greater opportunity to see Australian artists live was also associated with **cheaper ticket prices and fewer additional hassles and expenses**. **Regional Australians** with a live music scene also mentioned these opportunities.

> *'I like listening to Australian artists because I'm more likely to be able to see them live.'*
>
> **Focus group participant (She/They, 20, inner city QLD, actively engaged)**

Similarly, when asked what they like about Australian music, many **survey respondents** said they like knowing they have an **opportunity to see the artist live**.

> *'I like that I can have an opportunity to see [Australian artists] live and also their music also captures that day-to-day Aussie life well.'*
>
> **Survey respondent**

Focus: Fear of missing out on being part of cultural moment

Today, marketing for live music events and concerts can be amplified by social media. Platforms like Tik Tok and Instagram can be saturated with live music footage, fashion trends and viral moments, intensifying the experience and making it appear even more elusive.

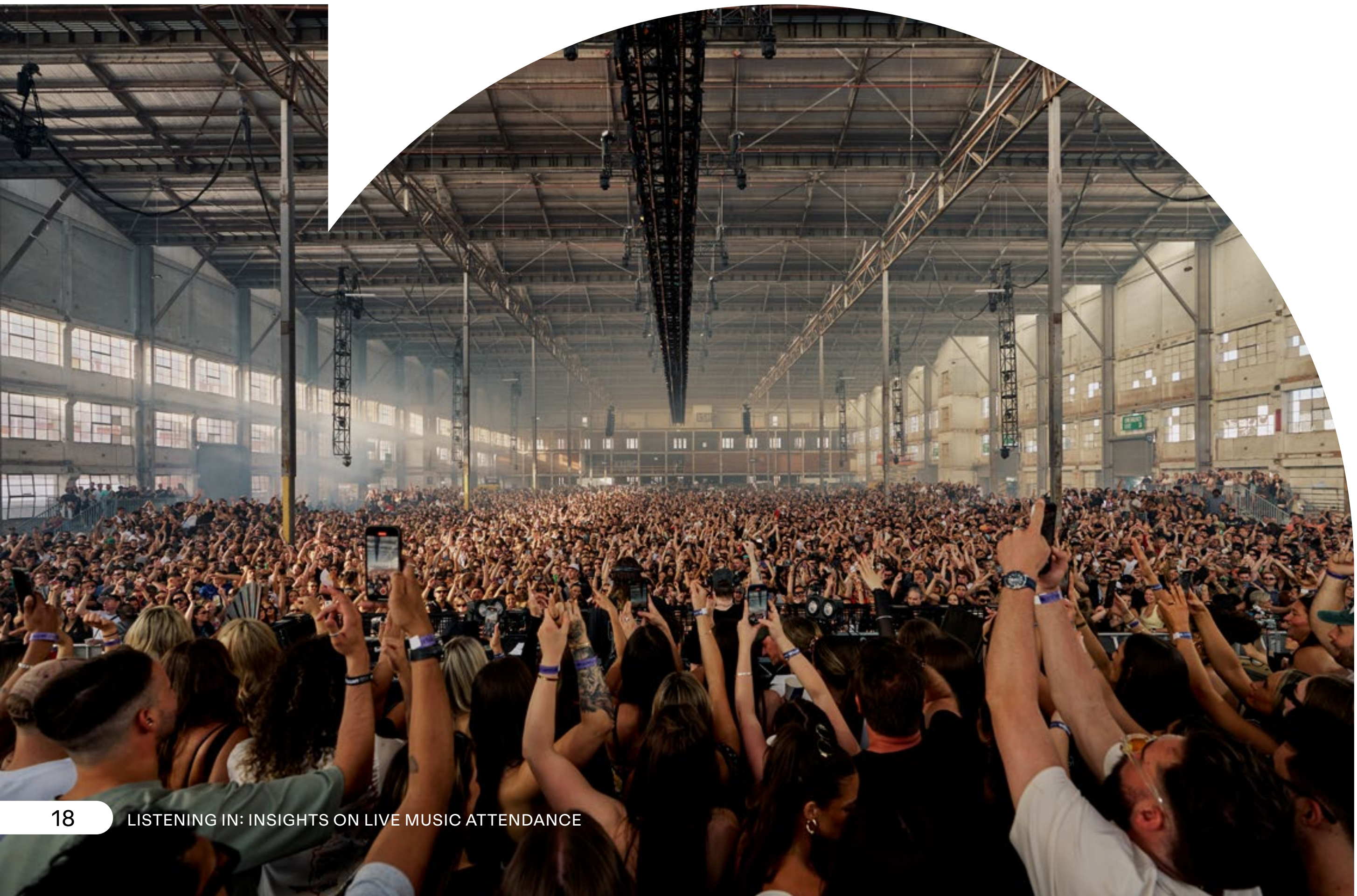
This is when audiences may start to feel a fear of missing out (FOMO), and concerts may start to appeal to more fringe audiences who may want to be part of a collective experience. This can help to drive ticket sales.[40]

Attending a live music event can sometimes be about more than just the music. It can also be about being part of a key moment in history.

For many, it is not simply a personal connection to the artist that creates a desire to attend the live music event. It is also about participating in a larger phenomenon that is trending in real time.

For example, Taylor Swift's *Eras Tour* offered more than just music – it provided an immersive journey through her career. Her fans prepared for months crafting handmade outfits, trading friendship bracelets and sharing their setlist predictions.[41] Attending an *Eras Tour* provided a rare opportunity to be part of a Taylor-Swift world, engendering feelings of nostalgia, belonging and sense of community.[42] Such experiences transcend music preferences, appealing to both casual listeners and longtime fans, because they create unique and unforgettable memories.

40 Japurtra A 2025, 'The dark side of brands: Exploring fear of missing out, obsessive brand passion, and compulsive buying', *Journal of Business Research*, 186.
41 Robertson B et al, 'Taylor Swift's Australian Eras tour is over. What were your favourite bits? – open thread', *The Guardian*, 28 February.
42 Berckelman H 2024, 'The surprising detail in Taylor Swift's Eras tour that I can't stop thinking about', *Body and Soul*, 27 February.



Preferences for types of events

General population

Our analysis of **Nielsen data** reveals that the same proportion of Australians are attending live music at **major venues** in 2024 as they did in 2019, however **fewer** are attending live music at **pubs and clubs**.[43]

According to the LPA, in 2023, **ticket prices for live music concerts**, such as big stadium shows, rose to $128.21, up from $87.01 in the previous year. This cost increase coincided with a **return to international touring** and a shift to large-scale arena shows following a period of limited activity during COVID-19.[44] LPA reported 12 million in attendance at contemporary music gigs alone in 2023.

Findings from our **surveys** with music-engaged participants show that **major venues** are more popular, and these are slightly more popular venues to see **international acts**. On the other hand, **pubs and clubs** and **single-day music festivals** are significantly more popular to see **Australian artists**. See Part One: Attitudes and behaviours in relation to live music for more detail.

Dom Dolla b2b Solomun at the return of The Wool Store for Untitled Group's 10th anniversary. Credit: Alex Drewniak

Music-engaged participants

Findings from our **surveys** show that music-engaged participants **prefer larger music events**.

- Most music-engaged survey respondents **prefer larger events**, such as huge outdoor music festivals, medium size clubs or major stadium concerts.
- Overall, music-engaged survey respondents **ranked their ideal music experience**, from most to least preferred:

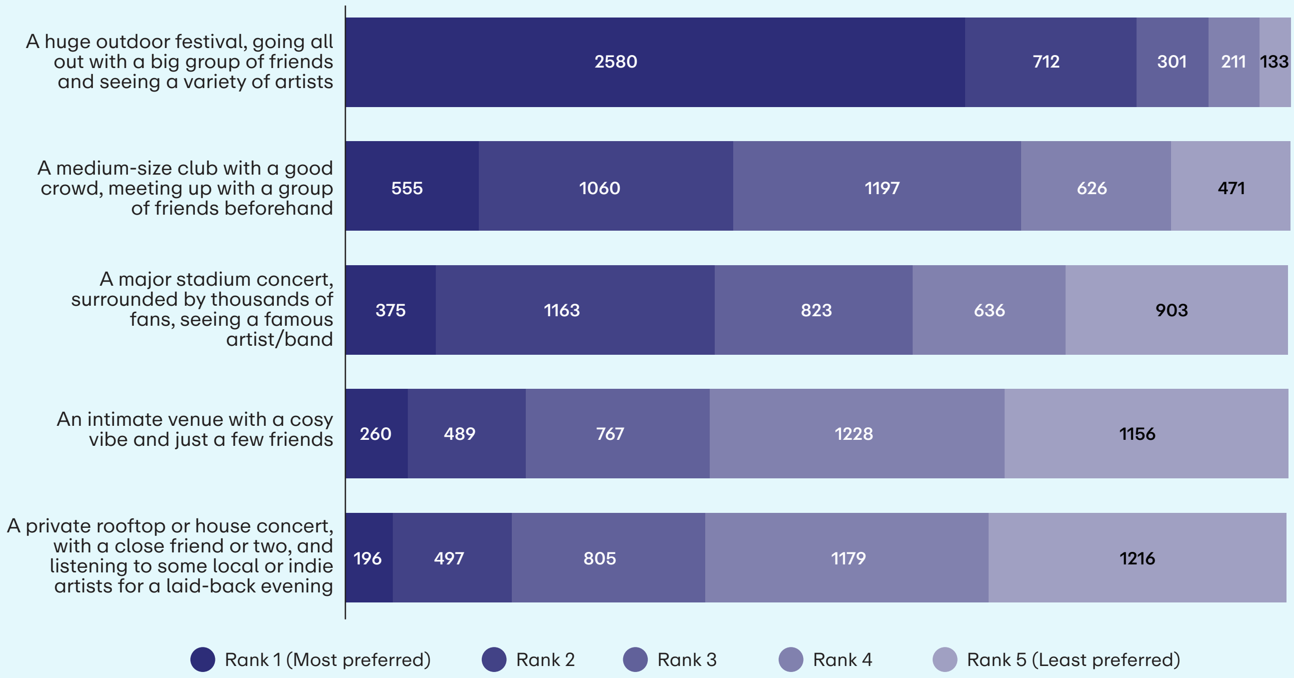
  1. ***A huge outdoor festival, going all out with a big group of friends and seeing a variety of artists.***
  2. ***A medium-size club with a good crowd, meeting up with a group of friends beforehand.***
  3. ***A major stadium concert, surrounded by thousands of fans, seeing a famous artist/band***
  4. ***An intimate venue with a cosy vibe and just a few friends.***
  5. ***A private rooftop or house concert, with a close friend or two, and listening to some local or indie artists for a laid-back evening.***

- **For those aged 40 and over,** the top ideal music experience is ***a medium-size club with a good crowd***, ***meeting up with a group of friends beforehand***. Whereas those under 40 prefer ***a huge outdoor festival***, ***going all out with a big group of friends and seeing a variety of artists***.

43 Nielsen 2019 and 2024, *Consumer & Media View (CMV) surveys.*
44 LPA 2024, *2023 Ticket Attendance and Revenue Report.*

Figure 2:

Count of ideal music experiences ranked



Q. Which of the following describes your ideal music experience? (Please rank the options from most preferred to least preferred)? Source: Value of music survey.

Focus group participants were asked to describe their 'perfect' live music event. Overall, focus groups most commonly described their **'perfect' live music event** as:

- The night starts by ***gathering with friends who have a shared love of an artist***, excited about the night of live music to come.
- ***Convenient and affordable transportation*** is available to the venue – which is ***not too far away*** and is ***in a safe area***.
- The ***venue is accommodating and accessible*** for a variety of different people and groups. It feels ***safe, secure and not overcrowded***.
- Tickets are ***affordable***, and attendees can relax and fully enjoy the show knowing that it did not hurt their bank account too much to be there.
- The show provides the ***opportunity to listen and learn about new and emerging Australian artists*** in addition to the main attraction.
- The live music atmosphere is unlike anything else, with attendees ***captivated by the sights***, ***sounds***, ***and uniqueness*** of their favourite music being played live.
- Attendees leave the venue thrilled with the show they just saw, affirmed by the community around them and ***eager to attend the next live music event in their area***.

Part Two:

Attendance and behaviours in relation to live music

Summary findings – on a page

Main insight:

Overall, the findings show **attendance is increasing for live music**, with **major venues** the most popular location. At the same time, there is **declining attendance** at live music at **pubs and clubs**, which are fertile grounds for local musicians to grow their audience. This changing behaviour corresponds with a spate of big international acts touring Australia after the pandemic and an excitement to get back to big, live events. Research shows that, at the same time, we are seeing shifts in ticket-buying patterns. Likely due to cost-of-living pressures, Australians are purchasing tickets closer to the event. This raises the question if this behaviour is a **short-term reaction** to being deprived of such acts in recent years, or if they are the indication of an **emerging trend and a new generation of behaviour**.

Generally, this report finds more Australians are **attending** live music events, with **major venues** the most popular location to attend. At the same time, **fewer** Australians are attending events at **pubs and clubs**. Among the music-engaged, **major concerts** and **single-day festivals** are also **more popular** than pubs and clubs.

These findings coincide with the **return to international touring** and a **shift to large-scale arena** shows following a period of limited activity during COVID-19.[45]

Survey results with music-engaged participants show this group is **equally as likely** to attend live music events featuring **Australian artists** as they are to attend events featuring **international artists**. However, those who attend **more frequently** are **more likely** to go to live music events featuring **Australian artists**.

Among the music-engaged, there is some **sense of openness** to seeing **new and unknown artists**. One quarter are attending live music events **without knowing which artists or bands are playing**.

Ticket-purchasing habits have also been evolving, with our **literature review** observing a trend for **later ticket-buying** both in Australia and internationally. These changes in behaviour are likely due to financial pressures affecting Australians at large.

For **music-engaged participants**, there is **broad frustration with ticket processes**, particularly long online queues and the dynamic pricing structures where prices change mid purchase. Our **surveys** show music-engaged participants are also using **secondary markets** to buy live music tickets, most commonly for sold-out events or to buy a cheaper resale ticket.

45 LPA 2024, *2023 Ticket Attendance and Revenue Report.*

The audience for live music in Australia

General population

Findings from our **literature review** and **analysis of Nielsen data** show Australians are **increasingly attending live music events**.

Nielsen data shows:

- **Australians are increasingly attending live music**.
  - Almost **half of Australians** aged 14 and over **attended at least one live music event** in the past 12 months (48%), up from 45% in 2019.[46] These recent figures align with the results from the 2022 National Arts Participation Survey which found 47% of Australians aged 15 and over attended live music events and festivals.[47]
- Australians of **all groups are attending more** live music events and festivals in 2024 than they were before the pandemic in 2019. See Figure 3.
  - **Young people aged 18–24** are the **most likely age group** to attend live music events, with almost three in five going to at least one live music event in the past 12 months (59% compared to 56% of 25–39-year-olds, 51% of 14–17-year-olds, 48% of 40–54-year-olds, and 36% of people aged 55 and over). Earlier data from 2022, and reporting on attendance of young Australians aged 15–24, mostly aligns with these results. Creative Australia's 2022 National Arts Participation Survey found young people aged 15–24 are increasingly attending live music events (71% in 2022 up from 66% in 2019).[48]
  - **Those aged 25–39** reported the largest **increase in attendance** (56% in 2024 compared to 52% in 2019). This aligns with data from the *Soundcheck* report, which showed that people in their mid-to-late-20s were purchasing music festival tickets at greater rates in 2022–23 compared to 2018–19.[49]
- Australian **men** and **women equally attend** live music events: 50% of men and 50% of women attended at least one live music event in the past 12 months.[50]
- **Live music attendance is mostly consistent across the states and territories**. In addition, the proportion of people who reported attending a live music event in the past 12 months **rose in all states between 2019 and 2024**, except for WA which remained consistent (46%). See Figure 4.
- Live music attendance **increases with income**, with those earning less than $40,000 a year **least likely to attend** and those earning $100,000 or more a year **most likely to attend** (42% compared with 54%). Interestingly, the difference between levels of engagement across income levels has subdued between 2019 and 2024. A range of factors could be contributing to these shifts, and points to a need to better understand the factors at play here.
- **Australians who play a musical instrument are more likely to attend live music**. Those who have played a music instrument at least once in the last 12 months **were twice as likely** to have attended at least one live music event in the past 12 months (66% compared to 42% of those who haven't played one at all).

Music-engaged participants

We have not reported on the demographics for this group, since this group is defined by the methodology and sample characteristics as outlined in the methodology section.

46 Nielsen 2019 and 2024, *Consumer & Media View (CMV)* surveys. Based on a nationally representative sample of Australians. Results include Australians who reported attending at least one of the following events in the past 12 months: rock/pop concert at a major venue and/or pub/club, other popular music concert at a major venue and/or pub/club, classical music event, rock/pop music event, other popular music event, jazz music event, country music event, alternative music event.

47 Creative Australia 2024, *Creating Value: Results of the National Arts Participation Survey.*

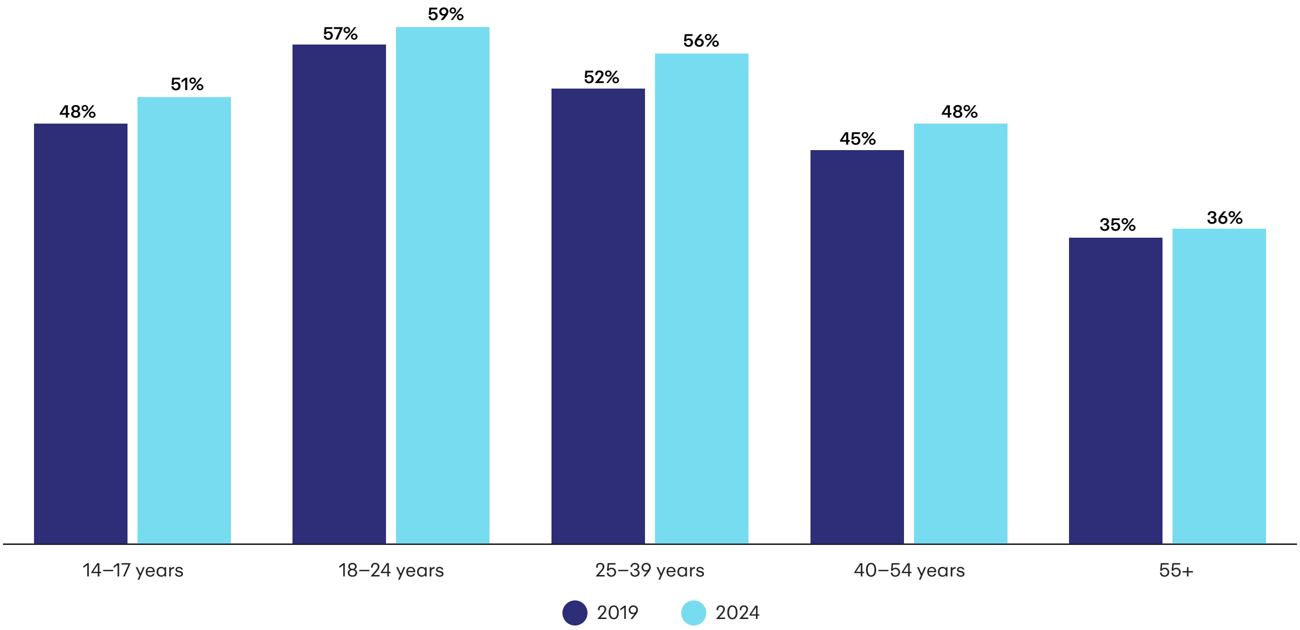
48 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.* Australia Council 2020, *Creating Our Future: Results of the National Arts Participation Survey.*

49 Creative Australia 2024, *Soundcheck: Insights into Australia's music festival sector.* It is also notable that *Soundcheck* identified that those aged 25–29yrs old had, since 2019, become the main demographic purchasing tickets. The difference in findings here suggests discrepancy between audiences for festivals specifically, versus live music in general; and potentially a difference between those who are buying the tickets (an older age group, whose data was collecting from ticketing agencies in the *Soundcheck* report) and those who actually attend (a younger demographic, who have reported their attendance in this Nielson data).

50 Nielsen 2019, 2022 and 2024, *Consumer & Media View (CMV) surveys.*

Figure 3:

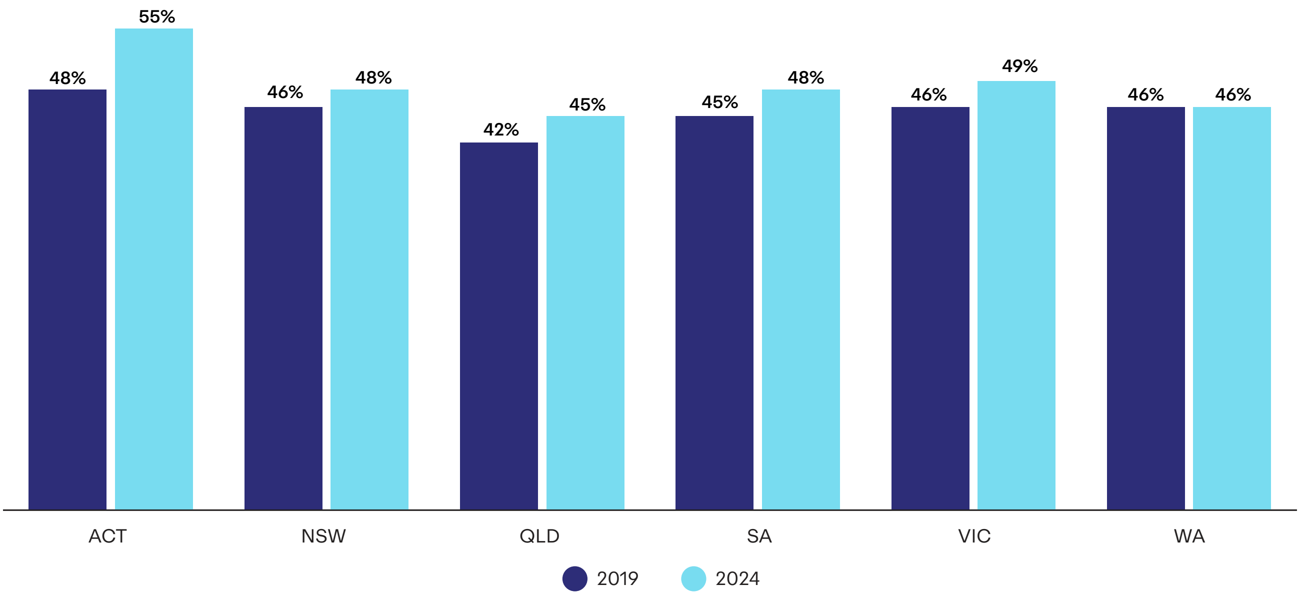
Percentage of Australians who attended at least one live music event in the past 12 months by age group, 2019 and 2024



Q. Performances or events attended in the past 12 months Q: Activities attended in the past 12 months. Source: Nielsen.

Figure 4:

Percentage of Australians who attended at least one live music event in the past 12 months by state/territory, 2019 and 2024[51]



Q. Performances or events attended in the past 12 months Q: Activities attended in the past 12 months. Source: Nielsen.
Note: Figures for the NT and TAS are not reported due to small sample sizes.

51 Note: The sample sizes for NT and TAS were too small to include.

Venues and genres

General population

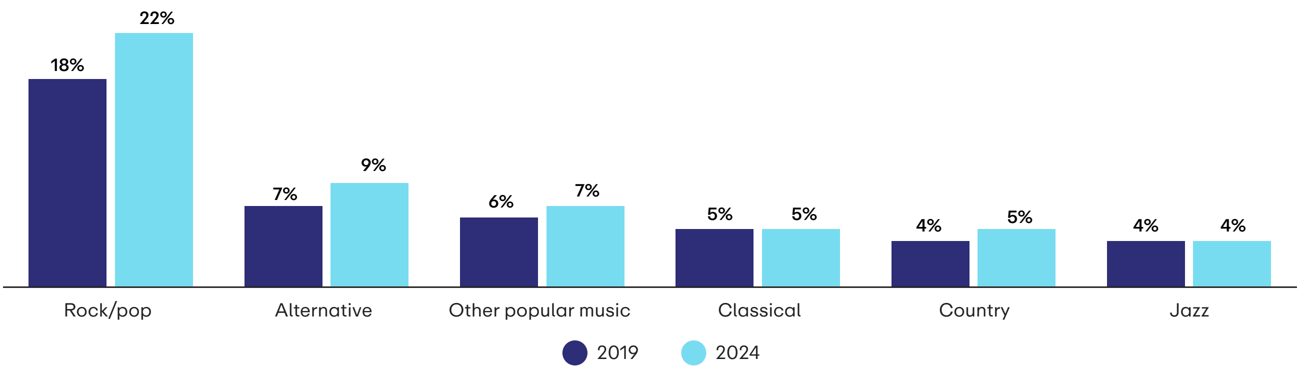
Our analysis of **Nielsen data** shows **major venues** are the **most popular** venue to attend live music events and **rock/pop** is the most **popular genre** to attend.

Nielsen data shows:

- **Major venues** are the most popular venue **to attend live music events** (33% of Australians reported attending a live music event at a major venue in the past 12 months compared to 25% at a pub or club).[52] **Major venues** are more popular for both **rock/pop** music events (28% compared to 21% who attended pubs/clubs) and **other popular music** (20% compared to 17% who attended pubs/clubs).
- ***Rock/pop*** is the **most popular genre of music event** that Australians attend (22%), followed by ***alternative*** (9%) and ***other popular music*** (7%).[53]
- Attendance increased to most genres of live music between 2019 and 2024, with the largest increase in attendance at ***rock/pop events*** (22% in 2024 up from 18% in 2019). This is consistent with ticketing data from LPA which shows **significant growth in revenue and attendance across contemporary music** from 2019 to 2023.[54]
- While Australian **men** and **women equally attend** live music events,[55] data from 2024 shows **men** are **more likely** than women to attend live music events at **pubs and clubs**, both for **rock/pop events** (24% compared to 19%) and to see **other popular music** (19% compared to 15%). On the other hand, **women** are **more likely** to attend **live rock/pop** music events at **major venues** (29% compared to 27% of men).
- Attendance at ***classical and jazz*** events has stayed consistent between 2019 and 2024. This is in line with ticketing data from LPA which shows **classical music attendance remained at 1.3 million** in both 2019 and 2023.[56]

Figure 5:

Percentage of Australians who attended at least one live music event in the past 12 months by genre



Q. Activities attended in the past 12 months. Source: Nielsen.

52 Nielsen 2019 and 2024, *Consumer & Media View (CMV) surveys*. Based on a nationally representative sample of Australians. Results include Australians who reported attending at least one of the following events in the past 12 months: rock/pop concert at a major venue and/or pub/club, other popular music concert at a major venue and/or pub/club, classical music event, rock/pop music event, other popular music event, jazz music event, country music event, alternative music event.

53 As above.

54 Live Performance Australia 2020, *Ticket Attendance and Revenue Report*. Live Performance Australia 2024, *Ticket Attendance and Revenue Report*.

55 Nielsen 2019, 2022 and 2024, *Consumer & Media View (CMV) surveys*.

56 Live Performance Australia 2020, *Ticket Attendance and Revenue Report*. Live Performance Australia 2024, *Ticket Attendance and Revenue Report*.

Music-engaged participants

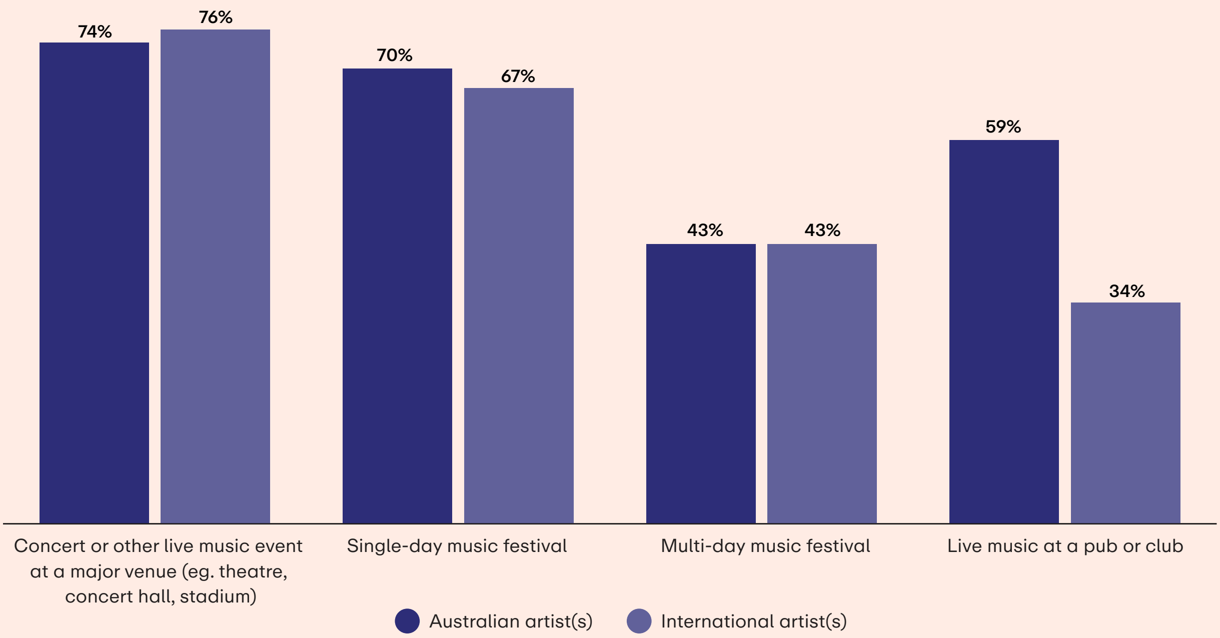
Insights from our **surveys** with music-engaged participants provide a more detailed view and consider the relationship between venue type and artist origin.

Results from **our surveys** show:

- ***Concerts or other live music events at major venues*** (such as theatres, concert halls and stadiums) are the **most popular** place for music-engaged survey respondents to see live music. ***Major venues*** are **slightly more popular spots** for music-engaged respondents to see **international acts** than **Australian acts** (76% compared to 74% Australian artists).[57]
- Music-engaged survey respondents are **significantly more likely** to see **Australian artists** at ***pubs and clubs*** (59% compared to 34%) and ***single-day music festivals*** (70% compared to 67%) than they are to see than international artists.[58]

Figure 6:

Percentage of music-engaged survey respondents who attended at least one live music event in the past 12 months by event type



Q. Which of the following types of live music events have you attended? Source: Live attendance survey n=3,816.

57 Based on a sample of 3,881 Australians who are considered engaged with music.
58 As above.

Genre at music festivals in Australia

Music festivals are a popular way for many music fans to see their favourite bands, find new music and enjoy a sense of community and shared identity with other like-minded fans.

More than one in five Australians aged 15 and over attended at least one music festival in 2022 (22%).[59]

Published in April 2024, *Soundcheck: Insights into Australia's music festival sector* provided in-depth insights into the Australian music festival industry. In the 2022–23 financial year, more than 500 music festivals were held across the country – almost 1.5 music festivals for every day of the year. Almost one in four music festivals in Australia feature electronic music (23%), with rock, country, indie and folk festivals also popular.

Electronic, rock and metal festivals are more likely to be held in major cities, while country music and folk festivals are more commonly held in regional areas. For many regional towns, music festivals play a crucial role in reinvigorating and supporting local tourism and economic growth. For example, the Tamworth Country Music Festival injects an estimated $60 million into the local economy.[60]

59 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*
60 Tamworth Regional Council 2024, *Message from the Mayor* | Tamworth Regional Council.

Close Counters at the Strawberry Fields music festival. Credit: Max Roux.

Attendance and frequencies

General population

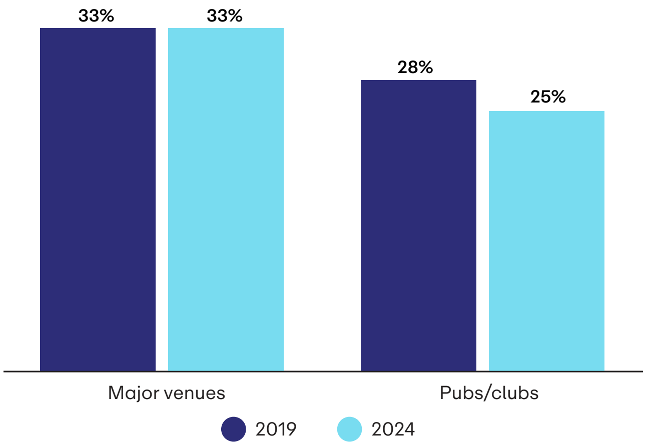
Our analysis of **Nielsen data** shows that live music attendance has **dropped at pubs and clubs** but not major venues.

- Attendance at **major venues** has remained consistent between 2019 and 2024 (both 33%), while live music attendance at **pubs and clubs has dropped** (28% in 2019 down to 25% in 2024). This drop can be mostly attributed to a **decline in attendance at pubs and clubs to see other popular music** (21% in 2019 down to 17% in 2024). Those **aged 25–39** have seen the **largest decrease** in live music attendance at pubs and clubs (36% in 2019 down to 30% in 2024).

These findings coincide with the **return to international touring** and a **shift to large-scale arena** shows following a period of limited activity during COVID-19.[61] The decline in attendance at pubs and clubs sits alongside ***increasing broader economic pressures*** and ***a spike in the proportion who would prefer to stay in***. See Part Three: Barriers to live music attendance for more information.

Figure 7:

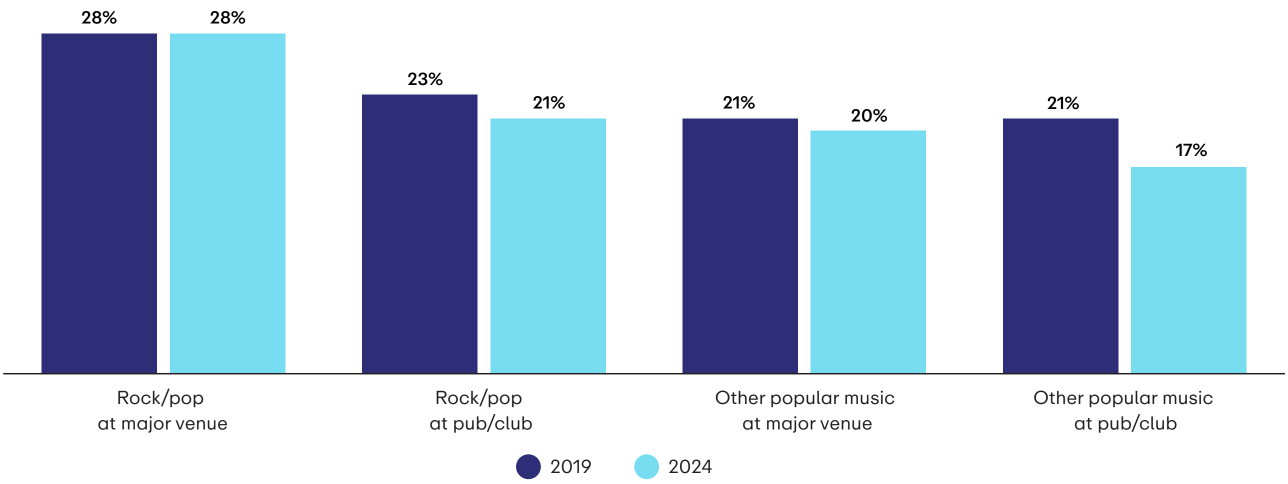
Percentage of Australians who attended at least one live music event in the past 12 months by venue type, 2019 and 2024



Q. Performances or events attended in the past 12 months.
Q: Activities attended in the past 12 months.

Figure 8:

Percentage of Australians who attended at least one live music event in the past 12 months by genre and venue type, 2019 and 2024



Q. Performances or events attended in the past 12 months Q: Activities attended in the past 12 months.

61 See Live Performance Australia 2024, *2023 Ticket Attendance and Revenue Report.*

Results from the 2022 National Arts Participation Survey reveal that, despite strong overall engagement with live music, Australians are **attending live music less often**.

Weekly attendance at music events in 2022 dropped by three percentage points (3% compared to 6% in 2019), and, instead, ***more Australians are attending every couple of months*** (26% compared to 21% in 2019).[62]

Live music attenders are attending ***less live music events per year***. On average, those who attended live music attended 8.7 music events in the year, a drop from attending an average of 10.9 events in 2019.[63]

These figures coincide with the findings that Australians **increasingly want to attend more arts and cultural events**, suggesting barriers are hindering the frequency at which Australians are able to attend. Almost half of Australians would like to attend more creative, cultural and artistic events (49% up from 42% in 2019).[64]

While the 2022 National Arts Participation Survey identified a **drop in how often Australians were attending live music** in 2022, more recent **Nielsen data** points to specific a drop in the proportion of Australians attending **pubs and clubs**. This may be a factor contributing to the overall drop in frequency of live music attendance.

Music-engaged participants

Survey results with music-engaged participants show this group are most likely to attend **between three and five live music events** a year.

They also show that those who attend **more frequently** are **more likely** to go to live music events featuring **Australian artists**.

- Unsurprisingly, almost all music-engaged survey respondents **attended at least one live music event** in the last 12 months (94%). This group are **equally as likely** to attend live music events featuring **at least one Australian artist** as they are to attend events featuring **at least one international artist** (both 94%).[65]
- Considering events featuring **Australian artists**, almost two in five music-engaged survey respondents say they attended ***between three and five live music events featuring at least one Australian artist*** in the past 12 months (38%). A further 31% attended one or two events featuring at least one Australian artist. One quarter attended six or more events (25%), while 6% did not attend any live events featuring at least one Australian artist.
- Considering events featuring **international artists**, almost two in five music-engaged survey respondents say they attended ***between three and five live music events featuring at least one international artist*** in the past 12 months (39%). A further 33% attended one or two events featuring at least one international artist. Less than one quarter attended six or more events (23%), while 6% did not attend any live events featuring at least one international artist.
- Music-engaged survey respondents who attended fewer (one or two) live music events in the past 12 months were **slightly more likely** to have attended events featuring ***at least one international artist*** (33% compared to 31% who attended an event featuring at least one Australian artist).
- Those who **attend more frequently** are **more likely** to go to live music events featuring **Australian artists**. Music-engaged survey respondents **who attended more than ten live music events** in the past 12 months are **more likely** to have attended events featuring ***at least one Australian artist*** than events featuring at least one international artist (10% compared to 7%).

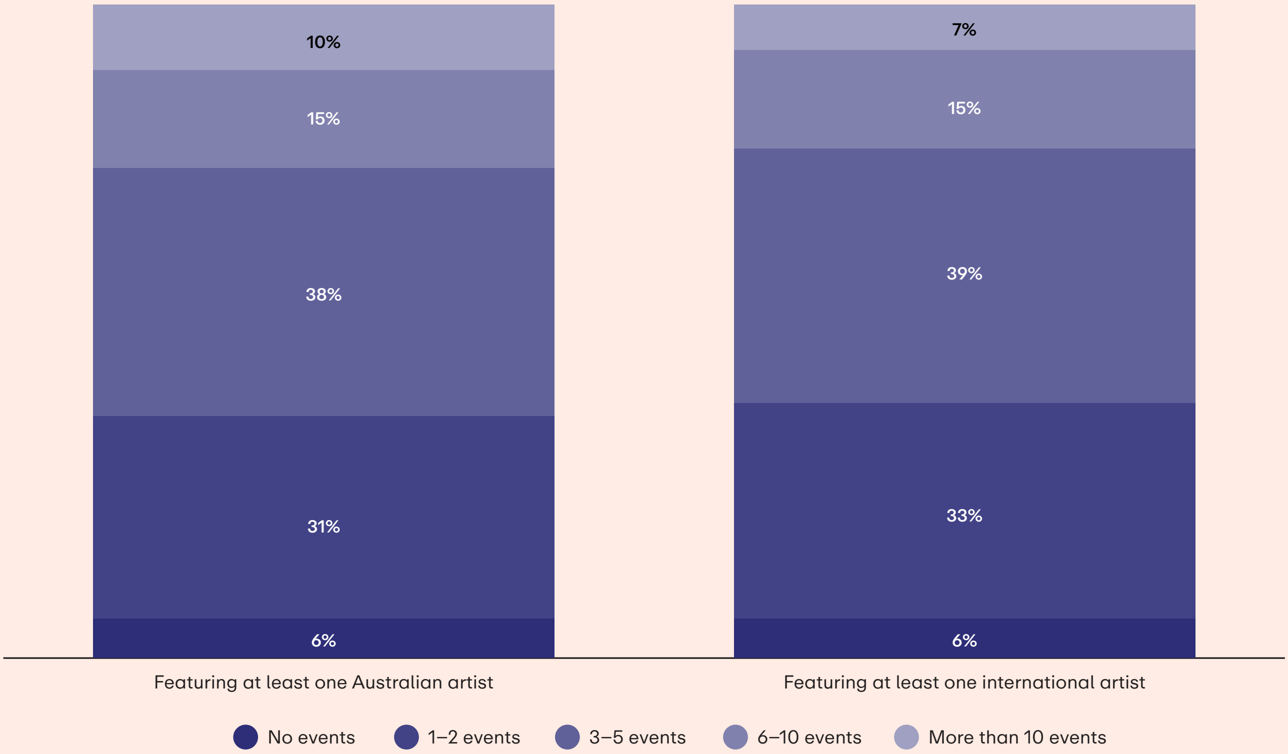
62 Creative Australia 2024, *Creating Value: Results of the National Arts Participation Survey.*
63 As above.
64 As above.
65 Based on a sample of 3,881 Australians who are considered engaged with music.

- Music-engaged respondents who identify as **man or male**, **non-binary**, **transgender or another gender** are attending live music events **more** frequently than **women**.
  - More than three in five Australians who identify as non-binary, transgender or another gender (62%) and one-third of music-engaged men ***attended six or more*** live music events **featuring at least one Australian artist/band** in the past 12 months (33%) compared to just 23% of women.
  - More than two in five Australians who identify as non-binary, transgender or another gender (43%) and just under one-third of music-engaged men ***attended six or more*** live music events **featuring at least one international artist/band** in the past 12 months (31%) compared to just 20% of women.

Chris Griffiths, Preben Ningarmarra and Andrew Daylight, The Journey Down in Kununurra, a Tura project, presented in partnership with the WA Museum, 2023. Credit: Edify Media.

Figure 9:

Percentage of music-engaged survey respondents who attended live music events in the past 12 months by artist nationality



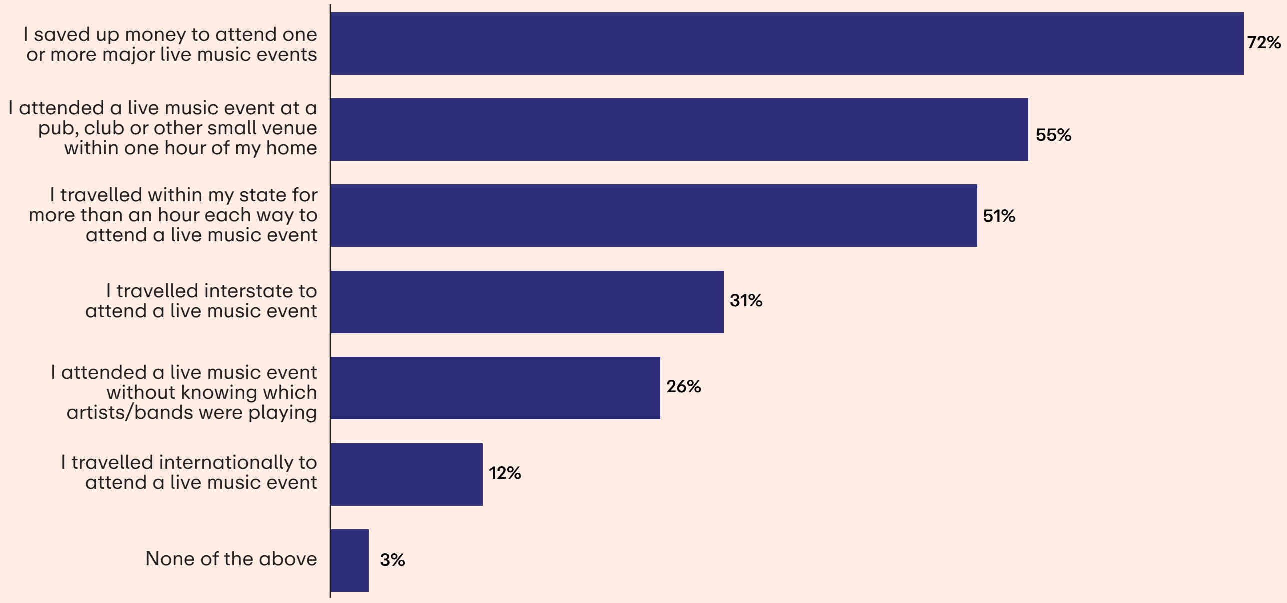
Q. How many live music events featuring at least one Australian/international artist have you attended in the past 12 months?
Source: Live attendance survey n=3,881.

Findings from the **surveys** show that more than half of music-engaged participants are **saving up money** and **travelling within their state** to attend their preferred live music events.

- Almost three quarters of music-engaged survey respondents ***saved up money to attend one or more major live music events*** in the past 12 months (72%).
    - **Young people** are more likely than older people to have ***saved up money to attend one or more major live music events*** (79% of those aged 24 and under compared to 61% of those aged 25–39 and 31% of those aged 40 and over).
- More than half of music-engaged survey respondents ***attended a live music event at a pub, club or other small venue within an hour of their home*** (55%).
- More than half of music-engaged survey respondents ***travelled within their state for more than an hour each way to attend a live music event*** (51%), while 31% ***travelled interstate to attend a live music event***. More than one in 10 ***travelled internationally to attend a live music event*** (12%).
- More than one quarter of music-engaged survey respondents ***attended a live music event without knowing which artists/bands were playing*** (26%).

Figure 10:

How music-engaged survey respondents plan their attendance at live music events



Q. In the past 12 months, how did you plan your attendance at live music events? Source: Live attendance survey n=3,629.

Buying tickets

General population

Findings from our **literature review** show young Australians prioritise **flexibility** when purchasing tickets.

The 2022 National Arts Participation Survey asked what would encourage Australians to engage more often with creative activities in person. Over half of those aged 15–24 said ***refunds if they cannot attend an event*** (55%, compared to 49% of Australians aged 25 and over). Additionally, 37% of younger Australians said ***an easy phone or online service for ticket changes***, a higher percentage than older Australians (22%). About half of younger Australians aged 15–24 said ***free or subsidised events*** (48%) would encourage them to engage more often with creative activities, and one quarter said ***government arts and culture vouchers*** (26%).[66]

Research shows patterns in **later ticket-buying**. *Soundcheck: Insights into Australia's music festival sector* found in the early years of the pandemic, consumers moved away from purchasing tickets months in advance and towards purchasing tickets closer to the festival opening date.[67] According to the Audience Outlook Monitor, **under 35-year-olds** comprise a large proportion of last-minute ticket buyers, with 43% ***booking last-minute***.[68]

Cost of living concerns may be a contributing factor to this behaviour in Australia. The Audience Outlook Monitor found that, across all arts and cultural events, **financial concerns** are causing audiences to delay the purchase of tickets until closer to the event.[69] See Financial pressures and the cost of live events for more information.

Soundcheck: Insights into Australia's music festival sector found despite an increase in ticket sales in 2022–23, data suggests that patterns of later ticket buying are continuing; however there has been **a slight shift back towards advance purchasing**.[70]

Late ticket-buying is an **international trend**. In the United States, for example, younger audiences aged 15–25 are attending more live music events and spending more on tickets, yet they are also ***more likely to delay purchasing tickets***. Factors such as ***limited disposable income*** and the need for parental permission likely contribute to this behaviour.[71]

In the United States, data shows younger people are spending more money on tickets and VIP experiences. More than half of millennials in the USA ***purchased a VIP ticket in the last year*** (52%), and 45% report they have become ***more willing to buy VIP experiences compared to pre-pandemic***.[72] Over two in five say ***concerts and festivals are more important since COVID-19*** (44%) and over half say they ***even saw the same act more than once within a 12-month period*** (56%).

66 Insights from the 2022 National Arts Participation Survey. See also: Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*
67 Creative Australia 2024, *Soundcheck: Insights into Australia's music festival sector.*
68 Patternmakers 2023, *Audiences 2023: The top trends shaping Australian Audiences in 2023 and beyond.* Patternmakers 2023, *Snapshot Report: How rising inflation is impacting audiences.*
69 Patternmakers 2023, *Audience Outlook Monitor: Audiences 2023.*
70 Creative Australia 2024, *Soundcheck: Insights into Australia's music festival sector.*
71 Patternmakers 2023, *Audiences 2023: The top trends shaping Australian Audiences in 2023 and beyond.* Patternmakers 2023, *Snapshot Report: How rising inflation is impacting audiences.*
72 UTA IQ 2023, *Standing Room Only: Live Music's Epic Resurgence.*

Music-engaged participants

Findings from **focus groups** show that music-engaged participants there is **broad frustration with the state of the ticket-buying process** for live shows.

Dynamic pricing practices (where a ticket price may increase during the course of transaction), and the **application of additional fees** throughout the ticket-buying process, can occur in the music industry.

Music-engaged focus group participants noted they are **dissatisfied with long queues**, **stressful buying processes**, and **limited seat availability** only to get to the checkout and spend exorbitant amounts of money. Many were critical of ticketing platforms, which they perceived as using 'predatory' pricing practices. Several younger participants felt these practices should be illegal, advocating for regulations to cap ticket prices.

> *'Everyone is using like 10 devices to access a ticket. And we can't even buy one, so the reseller is trying to sell to us for like $400, for Coldplay, for example.'*
>
> **Focus group participant (She/her, 25, suburban VIC, CALD, actively engaged)**

> *'[Ticket providers charge] $10 extra for service fee just to push a button. It's kind of like tipping in America. Like, what's the point?'*
>
> **Focus group participant (He/him, 17, suburban VIC, actively engaged)**

Our **survey** results indicate that in order to **secure tickets** to desirable shows, many music-engaged survey respondents are **turning to secondary ticket markets**.

- Most music-engaged survey respondents report having ***purchased tickets to a live music event on the secondary market*** (83%).[73]
- The most common reason for purchasing tickets on the secondary market was that ***official tickets were sold out*** (83% of respondents who purchased tickets on a secondary market), followed by ***tickets were cheaper on the secondary market*** (40%).
- Other reasons for purchasing tickets on the secondary market included ***wanting to help out a friend or family member*** (15%) and ***being able to get better tickets on the secondary market*** (eg, better seats, VIP package) than through the official ticket seller (11%).
- Some said they purchased tickets on the secondary market as they made **a last-minute decision to go to a sold-out event and tickets were only available on the secondary market**.

As part of this research project, **further analysis on music consumption** will be published across early to mid-2025.

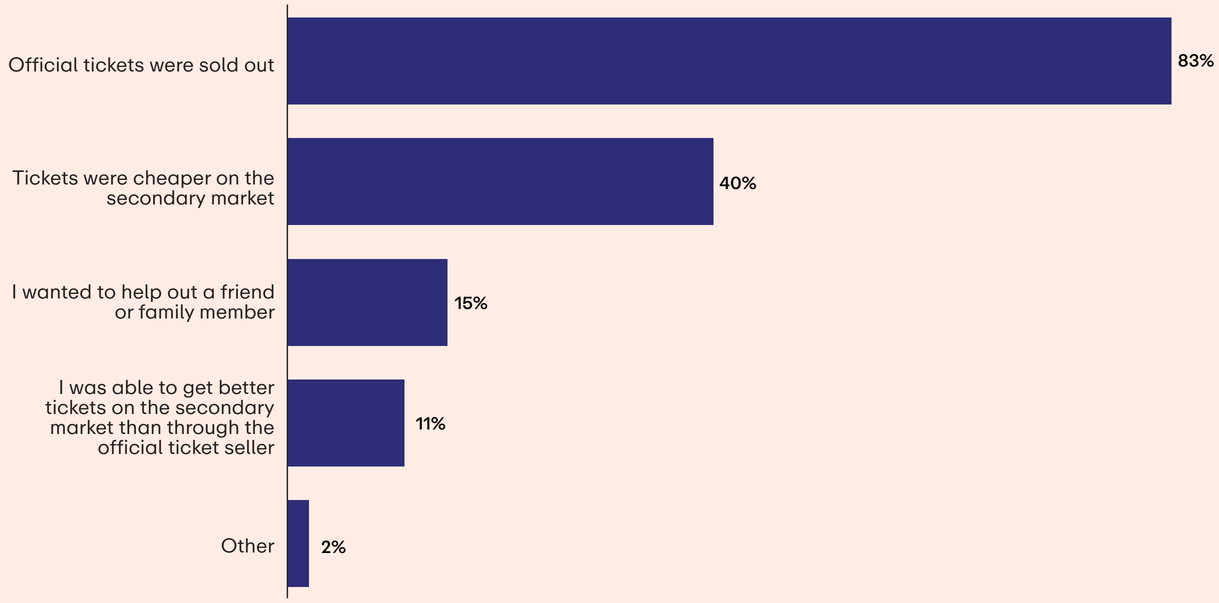
Many survey respondents are choosing to **buy their tickets on the secondary market**.

- ***Official ticket seller resale websites*** (eg, Ticketek Marketplace, Ticketmaster Resale, Tixel) are the **most popular** go-to places to purchase tickets on the secondary market (76%).
- ***Purchasing tickets from family or friends*** isthe second most popular way to purchase pre-owned tickets (38%).
- One in ten have purchased from ***unofficial ticket seller resale websites*** (eg, Viagogo, Ticketswap) (11%) and ***Facebook or other social media*** (11%).

73 Based on a sample of 3,881 Australians who are considered engaged with music.

Figure 11:

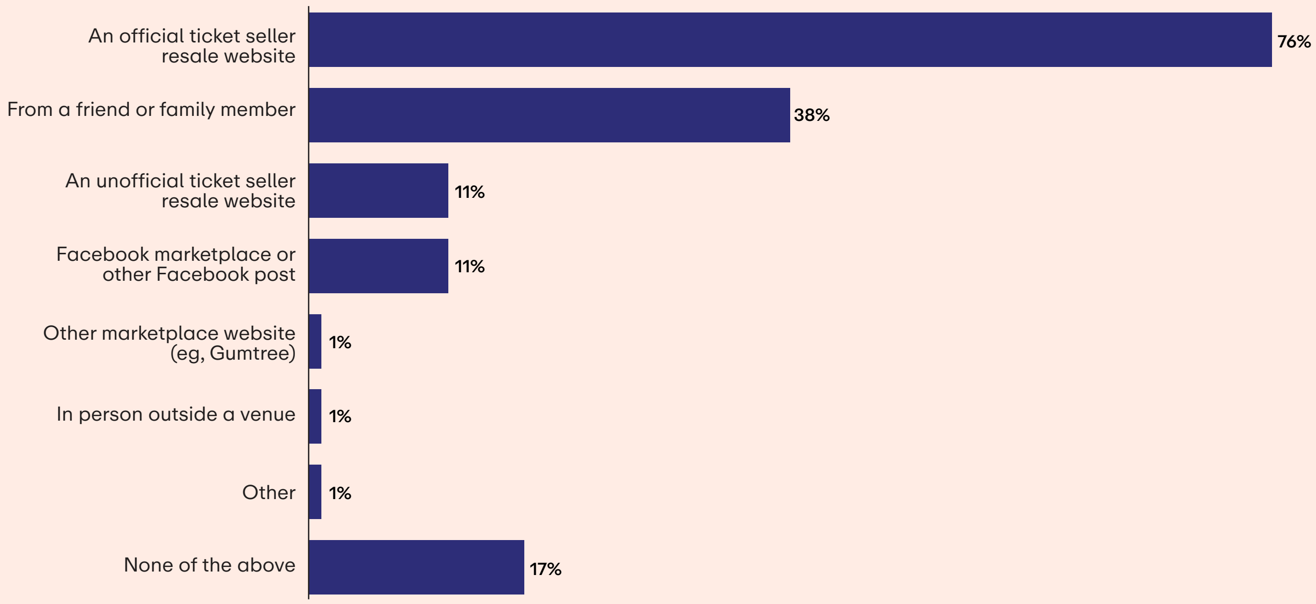
Reasons for use of secondary ticket markets amongst music-engaged survey respondents



Q. Why did you choose to purchase tickets on a secondary market? Source: Live attendance survey n=3,026.

Figure 12:

Use of secondary ticket markets amongst music-engaged survey respondents



Q. Have you ever purchased tickets to a live music event on any of the following secondary markets? Source: Live attendance survey n=3,652.

Young people's ticket purchasing habits

Social media may be playing a significant role in boosting ticket sales among younger audiences.

Reports from the United States show that social media *significantly boosts global awareness and artist discovery.* Promotors and venues are increasingly using *social media influencers* to sell tickets to live music events. Some 72% of young Americans aged 11–26 now *rely on influencers* to make consumer decisions, highlighting its influence on ticket purchases.[74]

Younger audiences in the USA are spending more on VIP tickets and experiences.

In recent years, younger people are spending more money on tickets and VIP experiences. More than half of millennials in the US *purchased a VIP ticket in the last year* (52%), and 45% report they have become *more willing to buy VIP experiences compared to pre-pandemic.*[75] Over two in five say *concerts and festivals are more important since COVID-19* (44%) and over half say they *even saw the same act more than once within a 12-month period* (56%).

Young Australians prioritise flexibility when purchasing tickets.

The 2022 National Arts Participation Survey asked what would encourage Australians to engage more often with creative activities in person. It found that 55% of those aged 15–24 selected *refunds if they cannot attend an event,* compared to 49% of Australians aged 25 and over. Additionally, 37% of younger Australians selected *an easy phone or online service for ticket changes,* a higher percentage than older Australians (22%). About half of younger Australians selected *free or subsidised events* (48%), and one quarter support *government arts and culture vouchers* (26%).[76]

Last-minute ticket-buying is becoming more common among young Australians.

According to the Audience Outlook Monitor, under 35-year-olds comprise a large proportion of last-minute ticket buyers, with 43% *booking last-minute.*[77]

Soundcheck: Insights into Australia's music festival sector found 18–24-year-olds are *purchasing tickets at lower rates than* before the COVID-19 pandemic.

74 UTA IQ 2023, *Standing Room Only: Live Music's Epic Resurgence.*
75 As above.
76 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*
77 Patternmakers 2023, *Audiences 2023: The top trends shaping Australian Audiences in 2023 and beyond*. Patternmakers 2023, *Snapshot Report: How rising inflation is impacting audiences.*

In 2018–19, before the COVID-19 pandemic, young Australians aged 18–24 were the primary consumer group for music festivals. However, those in their mid-to-late 20s became the main ticket-buyers to music festivals for 2022–23.[78]

Despite an increase in ticket sales in 2022–23, data suggests that patterns of later ticket buying are continuing; however there has been a slight shift back towards advance purchasing.[79]

Cost of living pressures are particularly concerning for young Australians.

The Audience Outlook Monitor found that, across all arts and cultural events, financial concerns are causing audiences to delay the purchase of tickets until closer to the event.[80]

In 2022, over eight in ten Australians aged 15–24 said they were concerned with the *rising cost of living* (83% compared to 87% of Australians aged 25 and over).[81] Seven in ten Gen Z Australians (aged 18–28) *experienced financial stress in 2023* (70%).

Globally, younger audiences are delaying ticket purchases.

Late ticket-buying is an international trend. In the United States, for example, younger audiences aged 15–25 are attending more live music events and spending more on tickets, yet they are also *more likely to delay purchasing tickets*. Factors such as *limited disposable income* and the need for parental permission likely contribute to this behaviour.[82]

78 Creative Australia 2024, *Soundcheck: Insights into Australia's music festival sector.*
79 As above.
80 Patternmakers 2023, *Audience Outlook Monitor: Audiences 2023+.*
81 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*
82 Patternmakers 2023, *Audiences 2023: The top trends shaping Australian Audiences in 2023 and beyond.* Patternmakers 2023, *Snapshot Report: How rising inflation is impacting audiences.*

Sunsetting over the Beyond The Valley Dance Dome. Credit: Kelsey Zafiridis.

Part Three:

Barriers to live music attendance

Summary findings – on a page

Main insight:

Overall, while all groups are pointing to **cost as the primary barrier** to attendance – and cost is clearly a very real issue – there are **other more subtle trends** that seem to be sitting behind a lot of behaviour. For the general population, these trends include a **lack of interest in going out**; a trend that is growing for the youngest age group. And for the music-engaged, they include a **lack of interest in offerings at smaller venues**, as well as a general **lack of awareness** about what is playing where and when. Those living outside the major centres are also feeling underserved when it comes to live music offerings in their area.

Cost is cited as the number one barrier to attendance for all groups, and across all datasets referenced in this research. However, the detail of findings shows this story is more complex, since **other considerations interact with cost in different ways for different groups**.

For **the general population** (including young people), people are **feeling less financially secure** and are **conscious of the cost of attendance** – including associated costs, not just tickets. But overall, people **are actually spending more on arts and leisure** than in 2019, including young people. This is potentially related to the 'lipstick effect', a term used to describe increased consumer spending on small luxuries, **rather than big-ticket items**, **during a recession or economic downturn**. When consumers are unable to afford cars, holidays and other big-ticket items during tough times, a live music event could be seen as a smaller luxury or 'treat' **on which music-engaged consumers are happy to spend their money**.

A less obvious but potentially trickier barrier is **a decrease in the attraction of big nights out**, with the biggest drop in interest among the under 18s. Younger Australians aged 14–17 are increasingly reporting they **prefer nights in**, and **fewer say they love big nights out** and are their **best in a crowd of people**. **Location** is another barrier registered across the Australian population.

For the **music-engaged**, **cost** is also reported as the biggest barrier for **attending major venues**. But many are prepared to **save or 'break the bank'** to go.

For the **music-engaged** considering **smaller venues**, **lack of interesting events nearby** and **lack of awareness** – especially for Australian acts – are major barriers. It is worth noting that lack of awareness is something that could be positively addressed, since people say they would attend more Australian music if they knew about it.

Location is also an issue for many **music-engaged** participants, especially those located outside the East Coast cities of Sydney, Melbourne and Brisbane. Calls for more local events are intertwined with concerns about the costs required to travel to events in other parts of Australia.

Overview of attendance barriers

General population

There are myriad benefits of attending live music gigs, including listening to your favourite band play live, having fun, dancing and singing with your friends and boosting your wellbeing.[83] But some people **face barriers** to attending live music events and festivals as much as they would like to.

In recent years, while there has been an increase in live music attendance overall,[84] there has been a **drop in attendance at small music venues** which are particularly important to the career progression of Australian local artists.[85]

To better understand the factors affecting overall attendance, we examined what we know about attendance barriers for **Australians in general**, as well as those hindering attendance for **those who are engaged with music**.

A **review of existing literature** on barriers for Australians in general overwhelmingly points to **cost as the primary barrier**, and is a particular concern for **young people**. According to The Push and The Australia Institute, while three in three 16–25-year-olds say ***attending music events is important to them*** (64%), three in five identify ***cost as a barrier*** (59%), and one in three say ***cost is the most significant barrier*** (35%).[86]

Beyond cost, literature shows ***a lack of nearby venues and transport*** are also significant barriers for Australians to attend live music events. According to Winarch Group's annual Australian Live Music Census, fewer than half of respondents ***felt that their area has sufficient live music venues*** (43%). Half of respondents said that ***having venues closer to their homes would increase their attendance*** (50%) and almost one-third said ***better transport*** (32%).[87] This aligns with Creative Australia's 2022 National Arts Participation Survey which shows two in five Australians say ***there are no arts events near where they live*** (40% up from 25% in 2019).[88]

The biggest frustration respondents feel when attending live events is ***toilet queues*** (59%), however this is more prominent among **women** (67% compared to 50% of men). ***Booking fees*** (41%) and ***transport to and from the venue*** (41%) were other common concerns. ***Inadequate transport*** was most likely to impact younger respondents aged 18–24 (48% compared to 32% of the respondents aged 65 and over).[89]

83 Kwon S, Choi B and Park S 2020,'Effects of student- and school-level music concert attendance on subjective well-being: A longitudinal study of Korean adolescents,' *International Journal of Music Education, 38:2*. Cannon JW and Greasley AE 2021,'Exploring Relationships Between Electronic Dance Music Event Participation and Well-being,' *Music & Science, 4*. Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*

84 LPA 2023, *LPA 2023 Ticket Attendance and Revenue Report*.

85 Eliezer C 2024, 'Smaller Music Venues Musing Solutions As Crisis Bites Harder', *The Music*, 15 February. Ernst & Young 2023, Live Performance Industry in Australia: 2021 ticket attendance and revenue report.

86 The Push & The Australia Institute 2024, *Young Australian Music Audiences*.

87 Winarch Group 2024, 2024 Australian Live Music Census.

88 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*

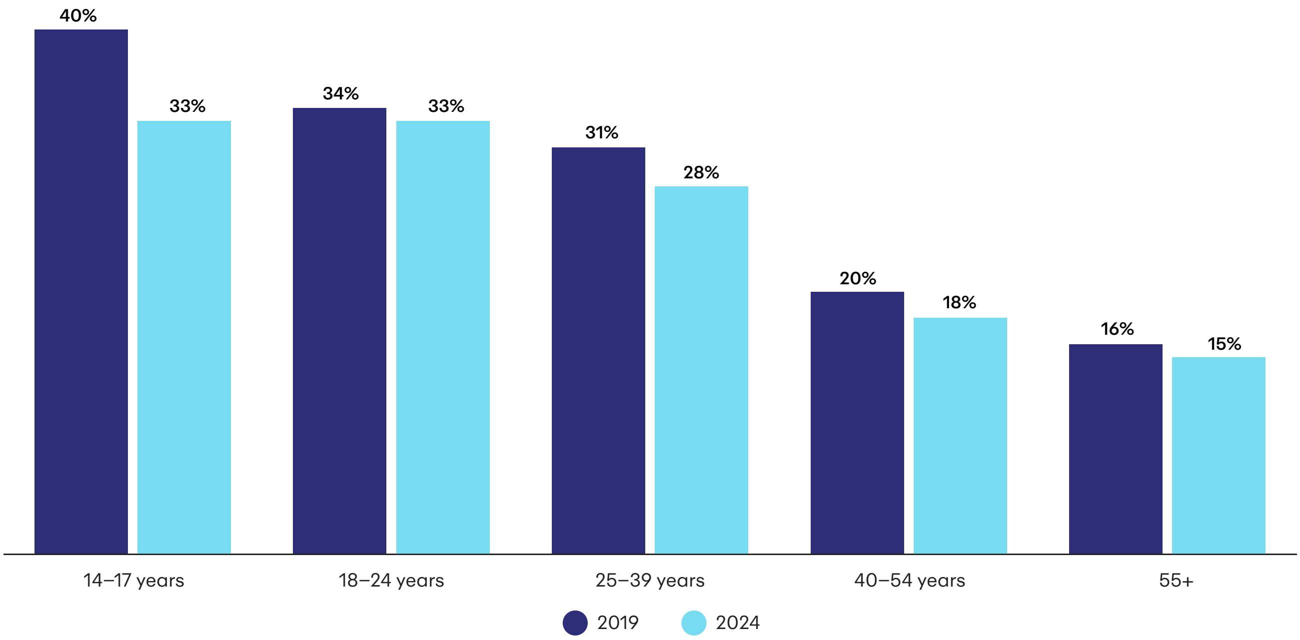
89 Winarch Group 2024, 2024 Australian Live Music Census.

Our **analysis of Nielsen's global market research data** adds another layer of intelligence to consider.

- Findings show across all age groups there has been an overall **drop** in the proportion of Australians who ***prefer to go out than go out than stay in***.
- Younger Australians aged 14–17 are increasingly reporting they **prefer nights in**, and **fewer say they love big nights out** and are their **best in a crowd of people**.
  - Younger Australians aged 14–17 are increasingly reporting they would ***prefer to stay in***, with a significant drop in the proportion of those who would prefer to go out than stay in (from 40% in 2019 to 33% in 2024).
  - There has also been a drop in the proportion of younger Australians aged 14–17 who report they ***love big nights out***, from 44% in 2019 down to 40% in 2024.
  - In addition, there has been a significant drop in the proportion of younger Australians aged 14–17 who say they are ***at their best with a crowd of people*** (36% in 2019 down to 28% in 2024).
- In 2024, Australians aged 18–24 are slightly less likely than they were in 2019 to ***prefer to go out than stay in*** (34% down to 33%), and say they are at their ***best in a crowd of people*** (28% down to 27%). However, they are slightly more likely to say they ***love big nights out*** (41% up to 42%).

Figure 13:

Proportion of Australians who prefer to go out than stay in



Q. I prefer to go out than stay in (agree/strongly agree). Source: Nielsen.

Music-engaged participants

Our **survey** results show that music-engaged respondents would like to **attend more live music**.

- More than two-thirds of music-engaged survey respondents say they would like to attend more live music events at ***major venues*** (67%) and more than half would like to attend more live music events at ***small local venues*** (54%).[90]
- Fewer than one-third are ***happy with the amount of live music events they attend*** (30%). According to the National Arts Participation Survey, almost half of Australians would like to attend more creative, cultural and artistic events overall (49%).[91]

Findings from our **surveys** and **focus groups** with Australians who are **engaged with music** (either passively or actively) identified a number of **barriers** to live music attendance.

Our **focus groups** found that many music-engaged **participants would like to participate more in live music**, but face barriers to doing so, including **low awareness**, **high costs**, and a **lack of events near where they live**.

Overwhelmingly, **survey respondents** identified ***cost*** **as the number one barrier** to attending live music at major venues. ***No interesting events nearby*** was the main barrier to small local venues. These align with findings from our literature review.

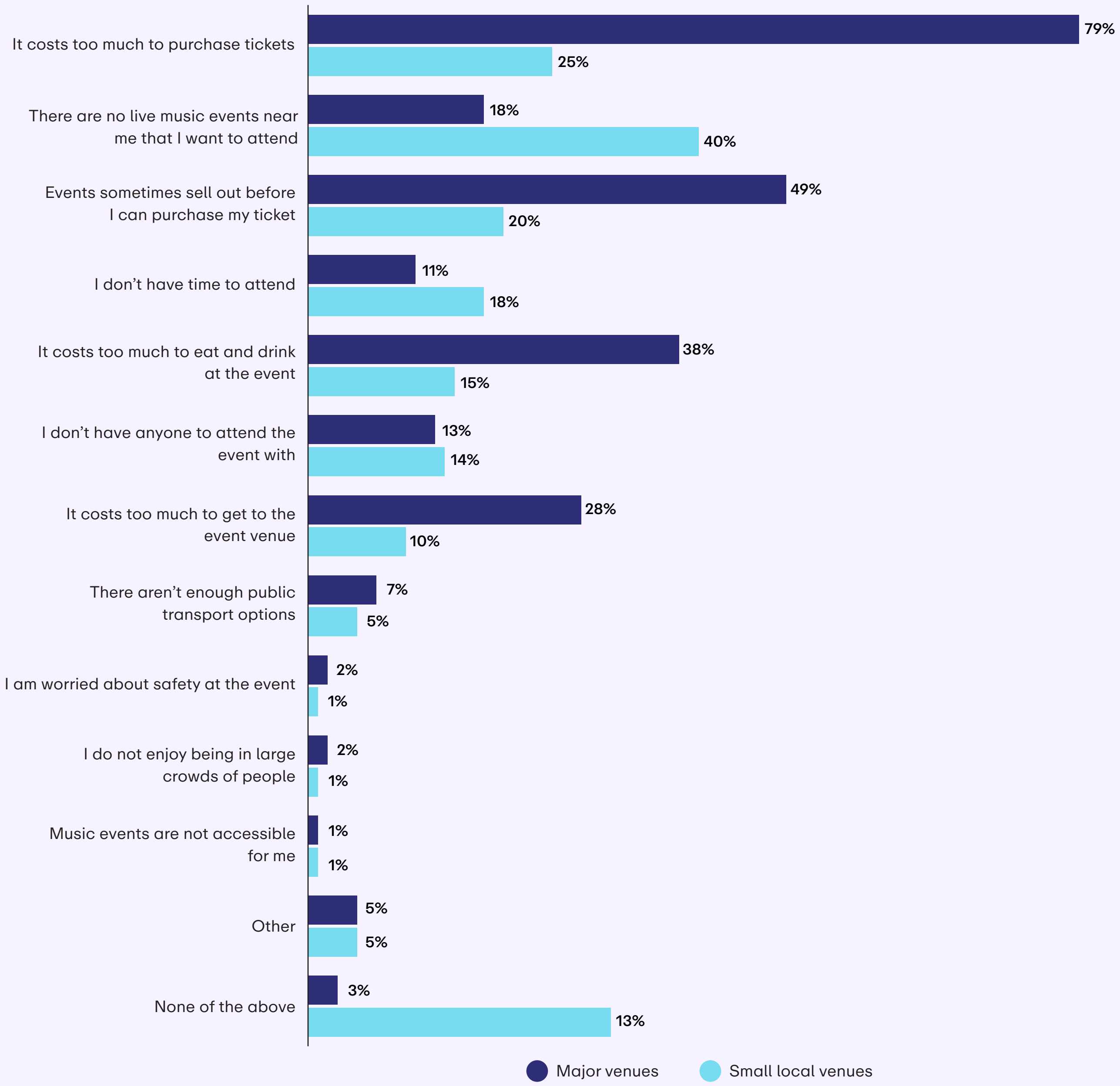
- ***Cost of tickets*** is the most commonly identified barrier to live music attendance at **major venues** (79%) followed by ***events selling out before they can purchase a ticket*** (49%). These factors were also ranked as the most **impactful barriers** to attendance.
- **Associated costs,** beyond the ticket price, are also barriers for this group to attend more live music at **major venues**. Almost two in five say the ***cost of eating and drinking at the event*** prevents them from attending (38%), and almost three in ten say the ***cost of getting to the event venue*** (28%) is a barrier.
- ***A lack of nearby events that I want to attend*** is the most commonly identified barrier to attending live music at **small local venues** (40%). This was also ranked as the **most impactful barrier** to attendance at small local venues.
- Music-engaged survey respondents **located in regional or remote areas** are far more likely to report ***a lack of nearby events that they want to attend*** as a barrier to attendance at **both major venues** and **small local venues**. These respondents were also more likely to identify the ***cost of getting to the event venue*** as a barrier to attending events at major venues (40% compared to 26% of respondents living in major cities).
- ***Cost of tickets*** prevent a quarter of music-engaged survey respondents from attending live music at **small local venues** (25%). This was the **second most impactful barrier** to attendance at small local venues.
- **Men** are more likely than women to report ***not having time to attend live music events*** at **major venues** (15% compared to 9%) and at **small local venues** (23% compared to 16% of women).
- While **men** are slightly more likely than women to report that ***not having anyone to go with*** is a barrier for them to attend at **major venues** (14% compared to 12% of women), **women** are more likely to say not having anyone to go with is a barrier for them to attend **small local venues** (15% compared to 12% of men).
- Other barriers mentioned for both major venues and small local venues include **caring and family responsibilities** and **lack of awareness of events happening until it is too late to purchase tickets**.
- Some survey respondents said **unappealing lineups** and **event cancellations** were barriers for attending **major venues**. Other survey respondents said **work schedules** prevent them from attending more live music at **small local pubs**.

90 Based on a sample of 3,881 Australians who are considered engaged with music.
91 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*

> *'Absolutely love that there's so many options for music events but have to pick and choose due to cost of every event. Spoilt for choice and such a first world problem but there's basically something every weekend.'*
>
> **Survey respondent**

Figure 14:

Barriers to attendance at live music events at major venues and small local venues, music-engaged survey



Q. Which of the following barriers prevent you from attending live music events at major venues, or from attending more? (n=3,881) Q: Which of the following barriers prevent you from attending live music events at small local venues, or from attending more? (n=3,774) Source: Live attendance survey.

Findings from our **surveys** show that music-engaged participants **consider a variety of factors** when choosing to attend live music events.

- When asked to think about what makes a music event worth the cost, a majority of music-engaged survey respondents consider ***the artist/band lineup up at the event*** (89%) followed by ***the cost of the ticket compared to similar events*** (57%).
- Other common considerations are ***how important music is in their life*** (32%), ***the exclusivity or uniqueness of the event*** (32%) and ***whether the money could be better spent on other fun things*** (31%).
- Free text responses included **whether their friends were attending, other associated costs** (eg, travel, accommodation or food/drink at the venue), and the **memories they would be able to make at the event**.

'How long is the main act on for? Is it worth that cost? Eg, a recent event was $100 and artist was on for 1 hour. NOT WORTH IT.'

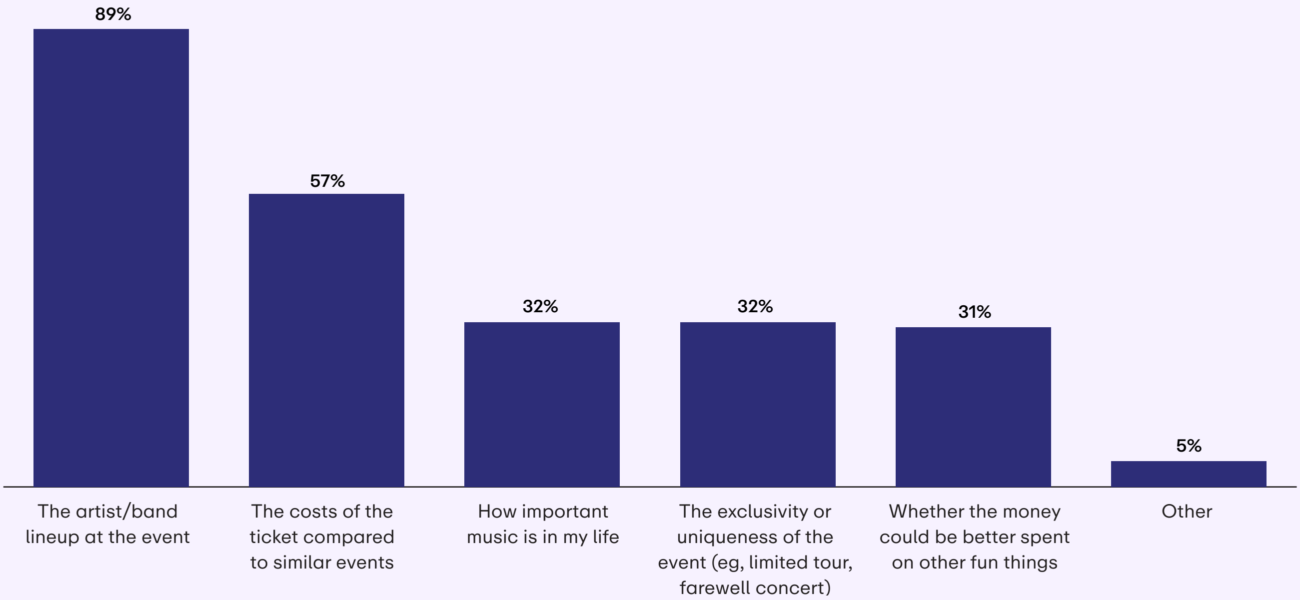
Survey respondent

'Cost of flights/accommodation at that time (I live in a rural area). Also I consider if it's worth it based on my savings for that month, or if I've recently spent money on/attended another event.'

Survey respondent

Figure 15:

Factors that make live music events worth the cost



Q. When thinking about whether a ticket to a music event is worth the cost, which of the following do you consider? (Select all that apply). Source: Value of music survey. N=4,132.

However, most music-engaged survey respondents say there was **at least one live music event** in the past 12 months that they ***wanted to attend but did not*** (93%).

- ***Not being able to afford the ticket price*** (61%) was the most common reason for not attending, followed by the ***event selling out before they could purchase a ticket*** (42%).
- Other common reasons include an ***inability to afford the associated costs with attending*** (eg, transport, accommodation, parking, food and drink) (37%); feeling that ***the cost of the ticket did not represent value for money*** (29%); the ***event was too far away or too difficult to get to*** (26%); ***and not having anyone to go with*** (23%).
- Other reasons include **clashes with work or other commitments**, **not knowing about the event beforehand**, **family and caring commitments**, and **prioritising one event over another**.

'I had already bought too many tickets to other concerts. I was financially restrained from the number of excellent concerts on offer.'

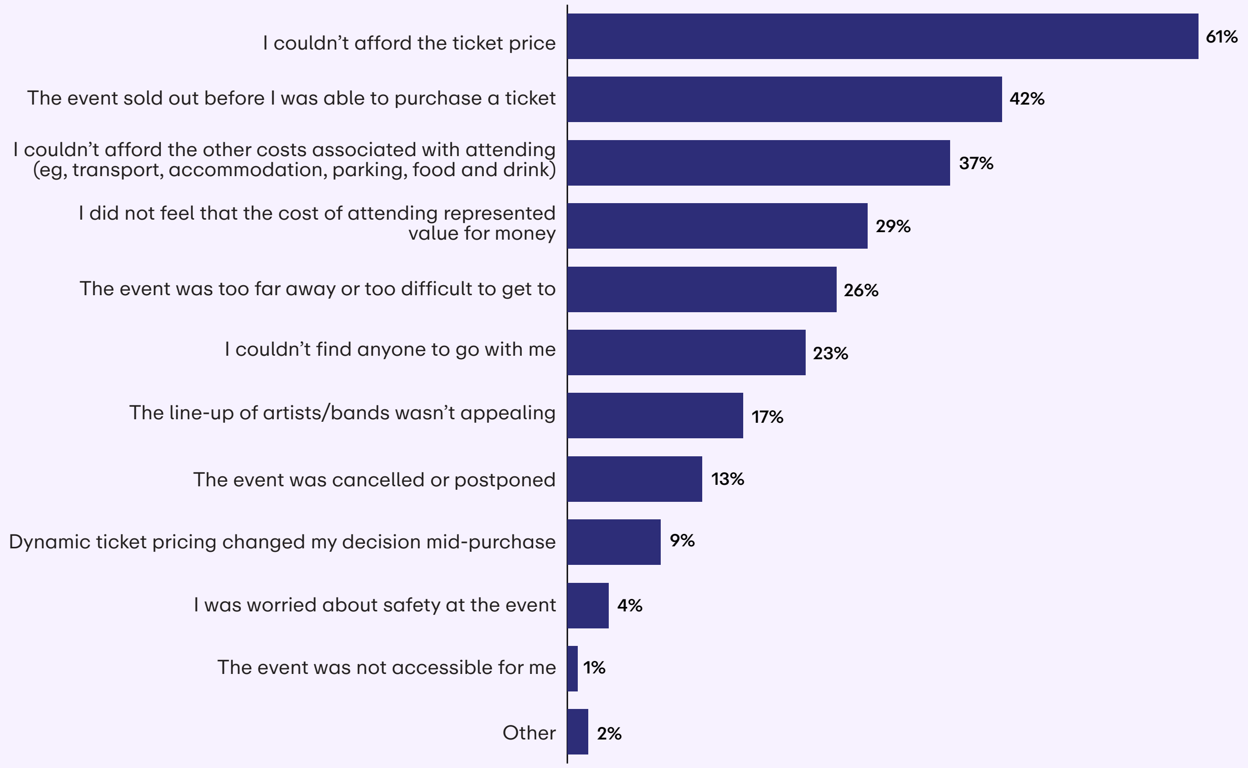
Survey respondent

'Didn't find about the event until the day hence wasn't prepared enough to buy [a] ticket, but regretted [it] after seeing videos.'

Survey respondent

Figure 16:

Reasons music-engaged respondents did not attend a live music event that they had wanted to



Q. Why didn't you attend? Source: Live attendance survey n=3,392.

Are younger people not going out as much as they used to?

Do young people prefer to stay in?

Our analysis of **Nielsen data** shows that young people aged 14–17 are increasingly reporting they **prefer to stay in**, and **fewer say they love big nights out** and are their **best in a crowd of people**. Similarly, **those aged 18–24** are slightly less likely than they were in 2019 to ***prefer to go out than stay in***, and say they are at their ***best in a crowd of people***. However, they are slightly more likely to say they ***love big nights out***.

These findings align with research and media highlighting Gen Z Australians are **choosing to go out less**.[92] A similar trend can be seen in the United Kingdom where a recent study by Rekom found that one in three younger Britons are **socialising less**.[93] In South Korea, concern about **'reclusive youths'** who rarely leave their homes recently prompted South Korea's government to propose a monthly allowance of $490 in an attempt to reintegrate young people.[94]

Is it cost of living or choice?

Gen Z experienced a **particularly disruptive period in their early adulthood** due to the impacts of the COVID-19 pandemic and rising cost of living.

While inflation is impacting most Australians, Gen Z has seen the **biggest reduction in discretionary spending** across categories like dining out, retail, travel and entertainment. Data from a Commonwealth Bank survey in November 2024 found that young Australians aged 18 to 29 are the most likely to have **cut back due to cost-of-living pressures**.

In the three months to September 2024, 18–29-year-olds **reduced their spending** by 2% compared with the same period in 2023, with a 'notable decline' in both essential and discretionary spending.[95]

Young Australians reduced their spending on essentials such as petrol and bills by 2.3% and on discretionary items, such as clothes and holidays, by 1.9%. People aged 30 to 39 also spent less, with a 1.1% decline in essential spending and 1% reduction in the discretionary categories, which also included household items.

Mission Australia's Youth Survey Report 2024 found the **top concern of young people in the past year was the cost of living** (56%), with many expressing concerns about interest rates, inflation and food prices, as well as the impact on their personal finances and future prospects.[96]

The Sugababes performing at Festival Hall in Melbourne. Credit: Mitch Lowe.

92 Findlay S 2023, 'Why Gen Z aren't having any fun', *Mamamia*, 1 October. Based on research conducted by Stake in 2023 which found that 71% of Gen Z Australians did not go out in the last 4 months.

93 Hinsliff G 2024, 'Meet generation stay-at-home: 'You don't need to pay to go clubbing: you can sit at home and watch it on your phone', *The Guardian*, 10 February.

94 Feng J 2023, 'The South Koreans Who Won't Leave Their Rooms', *Newsweek.com*, 20 May.

95 Commonwealth Bank 2024, *Cost of Living Insights Report November 2024*.

96 Mission Australia 2024, 2024 Youth Survey. https://www.missionaustralia.com.au/what-we-do/research-impact-policy-advocacy/youth-survey.

Financial pressures and the cost of live events

General population

Over the past few years Australians have felt the pinch on their household budgets due to **rising inflation** and **cost of living pressures**.

A review of existing literature highlights **cost is the primary barrier** preventing Australians to attend live music events.

Creative Australia's 2022 National Arts Participation Survey found the ***cost of tickets/ entry*** to arts events prevents more than half of Australians from attending as many events as they would like to (55% up from 34% in 2019). LPA's 2023 Ticket Attendance and Revenue Report found that 2023 saw the highest ever recorded average ticket price, an increase of 22.6% from $90 in 2022 to $111.48 in 2023.[97] Increased ticket prices are to offset dramatically higher business operating costs due to cost of living pressures.

Creative Australia's 2022 National Arts Participation Survey shows other financial barriers. In 2022, over eight in ten Australians aged 15–24 said they were concerned with the ***rising cost of living*** (83% compared to 87% of Australians aged 25 and over). Seven in ten Gen Z Australians (aged 18–28) ***experienced financial stress*** in 2023 (70%).[98]

Winarch Group's annual Australian Live Music Census shows two in five Australians say ***booking fees*** are a barrier to attending live music events (41%).[99]

The literature also highlights that **young people** are especially impacted by costs. According to research conducted by The Push and The Australian Institute, while two in three 16–25-year-olds say ***attending music events is important to them*** (64%), three in five identify ***cost as a barrier*** (59%), and one in three say ***cost is the most significant barrier*** (35%).[100]

Our **analysis of Nielsen's global market research data** adds further context to the discussion.

Findings show Australians, particularly younger Australians, are **feeling less financially secure** in 2024 than they did in 2019.

- **Young Australians** have experienced the **largest increase** in the proportion who ***do not feel financially secure:*** 36% of 14–17-year-olds felt financially insecure in 2024 up from 23% in 2019 and 38% of 18–24-year-olds felt financial insecure in 2024 up from 27% in 2019.
- More than one-third of 18–24-year-olds agree or strongly agree that they ***find it hard to make ends meet*** (36%), a significant increase from 24% in 2019.
- Australians increasingly say they are ***careful with their money***, particularly 14–17-year-olds (56% in 2024 up from 44% in 2019) and 18–24-year-olds (57% in 2024 up from 49% in 2019).[101]

However, our review of existing literature indicates **Australians are spending more on discretionary expenses**, including arts and leisure. Data from the ABS showed that household **spending on recreation and culture increased** between May and July 2024,[102] while CommBank's Cost of Living Insights Report showed a 3% **rise in discretionary** spending on entertainment in the quarter to March 2024.[103] This aligns with data which shows the **average ticket price** for contemporary music events increased significantly, jumping by 47% from 2022 to 2023.[104]

97 LPA 2024, *2023 Ticket Attendance and Revenue Report.*
98 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*
99 Winarch Group 2024, 2024 Australian Live Music Census.
100 The Push & The Australia Institute 2024, *Young Australian Music Audiences*. The Australia Institute 2024, *Polling – Young Australians' participation in live music.*
101 Nielsen 2019 and 2024, *Consumer & Media View (CMV) surveys*. Based on a nationally representative sample of Australians.
102 ABS 2024, *Household Spending by category*.
103 CommBank iQ 2024, *Cost of Living Insights Report*.
104 LPA 2024, *2023 Ticket Attendance and Revenue Report*.

Our **analysis of Nielsen data** supports these findings. Results indicate that while more Australians are feeling **financially insecure**, overall, Australians are **spending more on entertainment and leisure** activities than they were before the pandemic.

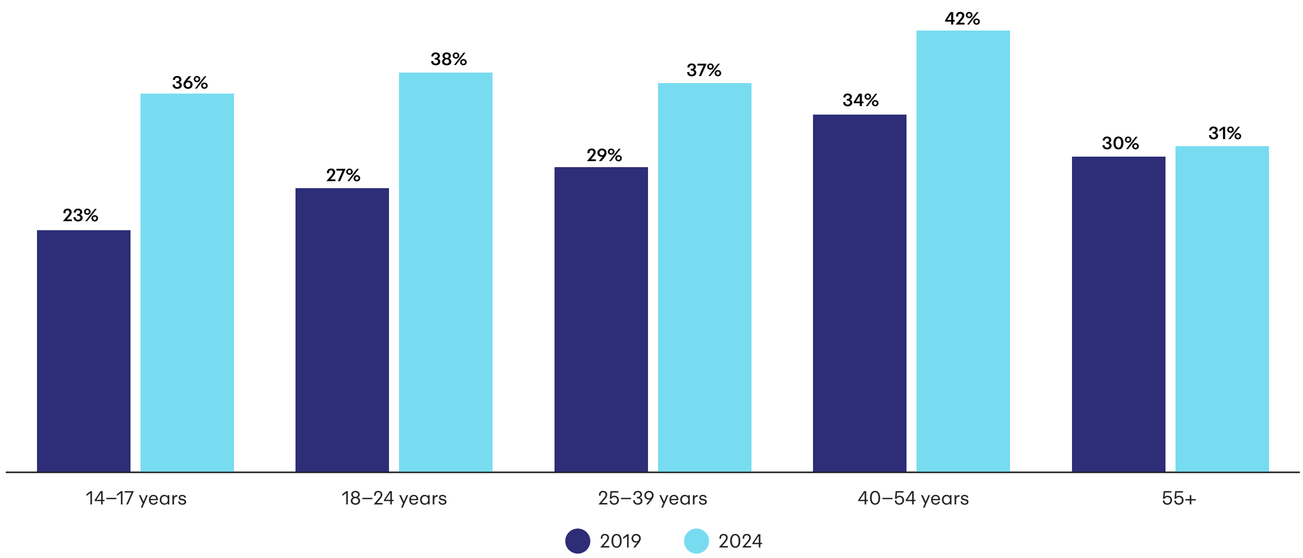
- **More Australians** report spending **between $50 and $149 on entertainment** in 2024 than they were in 2019 (30% in 2019 up to 36% in 2024), while the proportion of Australians spending less than $20 has declined (40% in 2019 down to 34% in 2024).[105]
- Despite feeling more financially insecure, **young Australians** are **spending larger sums** on entertainment and leisure per week.
    - Young Australians aged 18–24 report increasingly spending **between $20–$149** per week on entertainment and leisure (50% in 2019 up to 66% in 2024) and **decreasingly spending under $20** (from 42% in 2019 down to 29% in 2024).[106] See Figure 18. This may be partly due to increases in the price of tickets to live music events.[107]
    - However, 2024 survey of young Australians by The Push and The Australia Institute found that after paying all their bills, most young Australians have **less than $100 per week** to spend on all forms of entertainment and activities.[108]

105 Note: These figures have not been adjusted for inflation.
106 Nielsen 2024. Based on a nationally representative sample of Australians. Note: these figures have not been adjusted for inflation.
107 LPA 2024, *LPA 2023 Ticket Attendance and Revenue*.
108 The Push and The Australia Institute 2024, *Young Australian Music Audiences*.

Bundaberg Connect Concert.
Credit: Kane Moroney.

Figure 17:

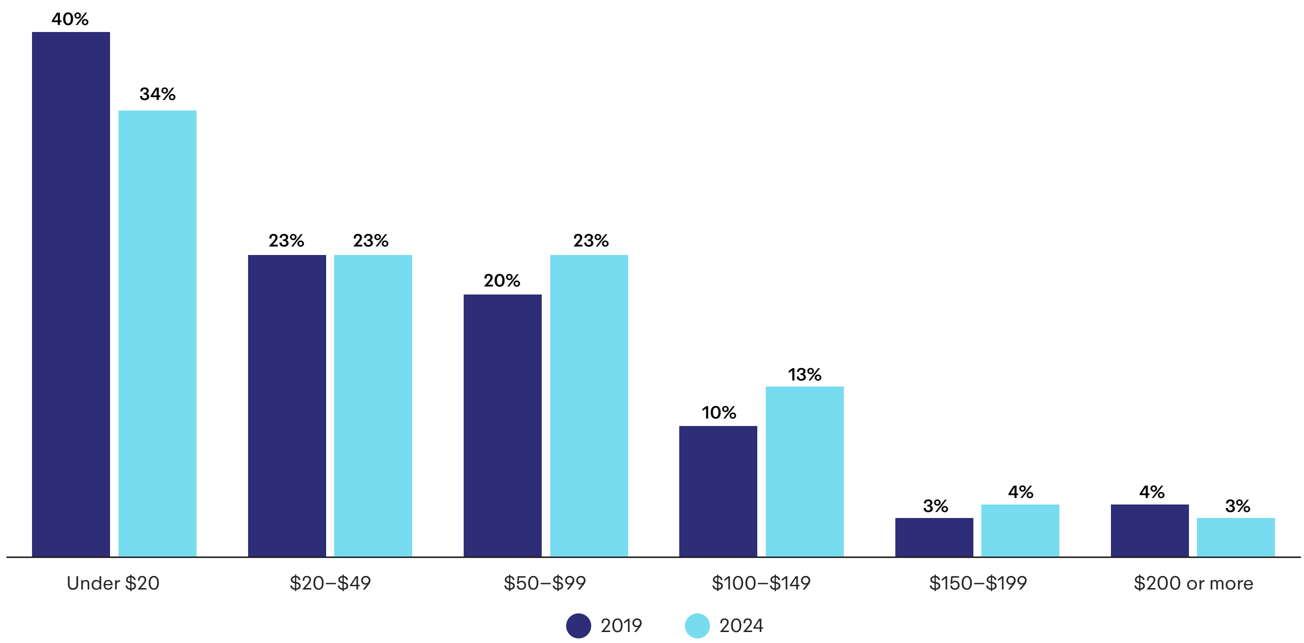
Percentage of Australians who do not feel financially secure by age group



Q. I feel financially secure (disagree/strongly disagree). Source: Nielsen.

Figure 18:

Australians' weekly spend on entertainment and leisure



Q. How much do you spend on entertainment and leisure activities in an average week? Source: Nielsen.

Music-engaged participants

Cost was the number one barrier to attending live music stressed through our **focus groups** and **surveys**. The cost of tickets is a major barrier, but findings show the costs of tickets compound with other **associated expenses** (including travel, accommodation and food and drinks at the venue) and prevent attendance.

Survey respondents identified **cost as the major barrier** affecting their live music attendance.

- ***Cost of tickets*** is the most identified and most impactful barrier to live music attendance at **major venues** (79%). Cost of tickets was the second most identified barrier and second most impactful barrier to live music attendance at **small local venues** (25%).
- Ticket prices, however, are not the only financial barrier. These costs are compounded with the **associated expenses of travel and eating and drinking at the event** and impact attendance. Almost two in five music-engaged survey respondents say that the ***cost of eating and drinking at the event*** (38%), and almost three in ten say the ***cost of getting to the event venue*** (28%) are barriers to attendance.
- ***Not being able to afford the ticket price*** is the most common reason music-engaged survey participants **did not attend a live music event that they wanted to** (61%). Almost two in five say they ***could not afford the other costs associated with attending*** (eg, transport, accommodation, parking, food and drink) (37%).

Survey respondents highlighted that the **current cost of living is affecting their live music attendance**.

- **Almost all** music-engaged survey respondents say ***cost of living is having an impact on their ability to buy tickets to live music event*** (94%).
- Half say they can ***generally only afford to buy tickets to see artists/bands that are very important to them or for very special occasions*** (51%). Those aged 25–39 are slightly more likely than other age groups to say this (55% compared to 49% of those aged under 25 and 52% of those aged 40 and over).
- A quarter say ***it is tough, but they prioritise tickets to live music events over other things*** (23%) and one in five say they can ***generally only afford to buy tickets if they can get cheaper or discounted tickets*** (20%).
- Just 6% said the cost of living ***has no major impact – they can generally afford tickets for the live music they want to see***. **People aged 40 and over** are more likely than those aged under 25 to say the cost of living is having no major impact on their live music attendance (15% compared to 4%).

Cost was also the **primary barrier** discussed in the **focus groups**. Participants of all ages, backgrounds, and levels of engagement noted the **high (and sometimes prohibitively expensive) prices of tickets** for many live music events (especially those featuring international artists).

Music-engaged focus group participants from **regional Australia** noted that attending anything other than a gig at their local pub often **requires flights**, **hotel stays**, **meals and transportation**. Even those living in major cities, or in outer suburban areas, noted the costs associated with **getting to and from the venue and other** costs associated with having a night out.

'I've noticed that the big bands would [set] high prices, from $200 to $500 or so, riding on their popularity, because they know that they'll sell the tickets.... So they'll put them at a high price to get a bigger revenue.'

Focus group participant (He/him, 16, regional QLD, actively engaged)

While cost is a primary barrier and cost of living is a major concern to music-engaged participants, our **survey** results show that this group **save up for music events**, demonstrating the strong importance of attending live music events. See Attendance and frequencies for more information.

Focus groups suggested a number of potential solutions to reduce the impact of cost as a barrier including ensuring ***affordable tickets*** and ***affordable transportation***.

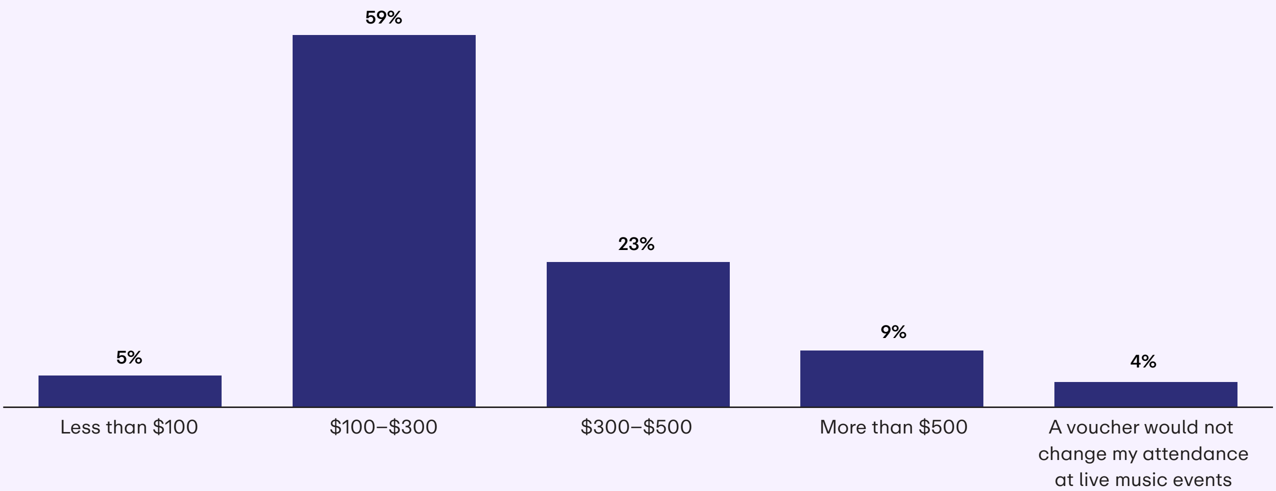
Research suggests that **government incentives** may help increase young peoples' live music attendance. For example, a 2024 Australia Institute poll found that 4 in 5 Australians aged 16–25 say a $200 government-funded voucher ***would increase the number of music events they attend*** (80%).[109] Creative Australia's 2022 National Arts Participation Survey asked what would encourage Australians to engage more often with creative activities in person. It found one quarter of younger Australians aged 15–34 selected ***government arts and culture vouchers*** (26%).[110]

Overwhelmingly, survey respondents supported the **concept of a culture pass**.

- Almost all music-engaged survey respondents say ***a voucher would increase their attendance at live music events*** (96%). Only 4% of music-engaged survey respondents stated that a voucher ***would not change their attendance at live music events***.[111]
- Most music-engaged survey respondents stated that ***a voucher valued at $100–$300 would be sufficient to increase their attendance*** (59%).
- Almost all music-engaged survey respondents say ***a voucher would increase their attendance at live music events*** (96%). Only 4% of music-engaged survey respondents stated that a voucher ***would not change their attendance at live music events***.[112]

Figure 19:

Voucher value that would increase attendance at live music events



Q. If you were offered a gift voucher to spend on live music, what value would be needed for you to increase your attendance at live music events? Source: Live attendance survey n=3,630.

109 The Australia Institute 2024, *Polling – Young Australians' participation in live music.*
110 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*
111 Based on a sample of 3,881 Australians who are considered engaged with music.
112 Based on a sample of 3,881 Australians who are considered engaged with music.

Focus: Government-funded culture passes for young people

Several European countries have implemented some form of cultural pass for young people, with the goal of encouraging attendance at arts and cultural events.

In **France**, the Culture Pass was introduced in February 2019 and was subsequently expanded to offer people aged 15–18 a voucher of up to €300 for cultural activities. Uptake of the program is high, with the ***majority of vouchers spent on books and comics***.[113] A group pass is also offered for ***cultural outings arranged by teachers and schools***, up to €200 per student over five years of schooling.[114]

In 2023, the **German** government offered a €200 KulturPass to all 18-year-olds to spend on their choice of cultural activities. Administration of the KulturPass is conducted via an online app, where young people can identify themselves using an online ID card procedure. ***Cultural providers register on the platform to accept vouchers***, which are retrospectively refunded.[115] In its first two months, the program ***generated more than €3.2 million in revenue*** for cultural products, events and services. ***Books*** led the percentage share of purchases (49%) followed by ***cinema*** (37%) and ***concerts and theatre*** (14%).[116] The program was continued in 2024 with a reduced voucher amount of €100.[117]

In **Italy**, the Culture Bonus, or '18App', was introduced in 2016 and gives 18-year-olds a €500 voucher to spend on cultural goods and activities. Evaluation data suggest that the voucher was successful in ***fostering participation in cinema***, ***non-classical concerts and reading books***,[118] and was strongly supported by many parts of the creative and cultural sector. In 2024, the budget for vouchers was reduced from €230 million to €190 million and was split into two types of vouchers that are distributed based on income and merit.[119] In the first six months of 2024, **Italy's music market grew** by 15%.[120]

In 2022, the **Spanish** Ministry for Culture launched a €400 cultural voucher for people turning 18, consisting of up to €200 for live performance arts, €100 for physical format products, and €100 for digital or online cultural content. As of March 2023, ***almost €27 million in revenue has been generated by the program***, with the majority spent on ***live performance arts*** (58%).[121] The program was renewed for another year in 2024.[122]

Outside of Europe, other countries such as **South Korea** have also implemented similar culture passes targeted at youth.[123] To mark the anniversary for Singapore's 60th birthday, **Singapore** announced the SG Culture Pass which provides $100 worth of credits to attend local arts and heritage programs. Dissimilar to other culture passes, the SG Culture Pass is available for any person aged 18 and over.[124]

113 Breeden, A 2021, *France Gave Teenagers $350 for Culture. They're Buying Comic Books*. New York Times.
114 European Commission 2022, *France: The Culture Pass for secondary school pupils*.
115 KulturPass, see https://www.kulturpass.de/en/about-kulturpass.
116 Publishing Perspectives 2023, *Germany's KulturPass: Books Lead in Unit Sales*.
117 Isermann R 2024, *"Our goal is a Europe of culture"*.
118 Baldin A, Marenzi A & Zantomio, F 2024, 'The impact of a public voucher for the arts: evidence from the Italian *18app', Società italiana di economia pubblica,* Working Paper No 782.
119 Rise Bookselling 2023, *Industry Insights: Culture vouchers*.
120 Deloitte data for FIMI 2024, *Italian Music Market: Growth by 15.1% in the first half of 2024*.
121 Rise Bookselling 2023, *Industry Insights: Culture vouchers*.
122 La Moncloa 2024, *Youth Cultural Bonus: what is it and what can it be spent on?*
123 Arts Council Korea 2024, *Press Release*.
124 See: SG60, *SG Culture Pass*, https://www.sg60.gov.sg.

In Hearts Wake at The Forum in Melbourne.
Credit: Scot Kaufman.

Safety as a barrier to attendance

General population

Our literature review found **safety** is often highlighted as a concern for music attendance. Types of safety concerns include **personal safety, crowd issues** and **extreme weather events**.

Personal safety was ranked as an important driver for many festival ticket purchasers in the *Regional Victoria Live Music Census and Audit 2021*.[125] A recent study reported that many musicians and event-goers – **primarily women** – have experienced **touching**, **verbal abuse**, **hissing or general sexual harassment at venues**, **mosh pits or bars**, and this often goes unreported.[126] Other personal safety concerns include **crowd behaviour** and **poor safety management**.[127]

Young people are more likely to feel **concerned about safety** when attending live music events. In a recent survey published by The Push and The Australia Institute, one quarter of 16–25-year-olds identified **safety** as a barrier to attendance at live music events (25%).[128]

This survey did not ask what ‘safety’ meant to participants and therefore could cover a variety of safety concerns – from extreme weather such as bushfires or anti-social crowd behaviour.

Creative Australia research found there is recognition among Australian music festival organisers that **increased policy and security regulation has improved patron safety** and has been **net positive for the industry**.[129]

> *‘Rowdy crowds and extreme weather [are] a concern – handing out water has been a good measure and also more security in the lines leading up to the show as often they get rowdy before the show starts.’*
>
> **Survey respondent**

125 Newton, D & Coyle-Hayward, R 2022, *Regional Victoria Live Music Census and Audit 2021.*
126 Baker, A 2023, *Examining sexual violence in Greater Melbourne, a renowned music city.* (1 ed.) Department of Families, Fairness and Housing (Victorian State Government).
127 Sydney Morning Herald 2022, *Melbourne concert ‘stampede’ prompts safety concerns, internal review.*
128 The Push and The Australia Institute 2024, *Young Australian Music Audiences.*
129 Creative Australia 2024, *Soundcheck: Insights into Australia’s music festival sector.*

Music-engaged participants

Insights from our **surveys** and **focus groups** with music-engaged participants **tell a slightly different story**.

Safety is not a major concern for most music-engaged **survey respondents**.

- Only a small proportion of survey respondents say ***feeling worried about safety at the event*** prevents them from attending live music events as **major venues** (2%).
- A smaller percentage of survey respondents report that **safety concerns** are a barrier to attendance at **small local venues** (1% compared to 2% at major venues).
- Common reasons given for feeling unsafe included **unruly crowd behaviour**, the **effect of alcohol and drugs on other attendees**, and the **possibility of extreme weather events**.
- **Women are more likely to feel concerned about safety**, with two-thirds of music-engaged survey respondents who say they ***feel worried about safety at the event*** identified as a **woman or female** (66%).

> *'It is a bit nerve wracking, especially when you're traveling by yourself in sketchy areas late at night, sometimes not getting to your accommodation until really early in the morning.'*
>
> **Focus group participant (She/her, 21, First Nations, regional NSW, actively engaged)**

Focus group results suggest that, while safety is not a concern for the majority of survey respondents, ***safety is a significant barrier for those who do hold safety concerns***.

A number of participants, especially young women, spoke of safety concerns particularly when attending events alone or in small groups. Young women were notably ***wary of late-night concerts*** and ***getting home safe*** (either walking, cars or public transport) late at night. Some spoke about having to ***weigh up*** how safe they would feel travelling to and getting home from a music event with attending.

Other young men and women spoke about ***feeling uncomfortable*** at events with large crowds or at multi-day festivals where ***drug use and erratic behaviour were common***.

> *'Travis Scott is playing in Melbourne right now and my mates are all about that. They've all got their shirts off probably, in a mosh pit, but I don't want to be a part of that. I still remember hearing about Astroworld and all those guys that died.'*
>
> **Focus group participant (He/him, 17, suburban VIC, actively engaged)**

Focus group participants of all ages and backgrounds shared considerations during event planning **that would help facilitate safe attendance**.

Focus group participants suggested ***cultivating safe***, ***respectful cultures at live music events*** and ***designing events with safety and convenience in mind***.

Accessibility as a barrier to attendance

General population

Our literature review highlighted that **accessibility barriers** to attending live music events vary according to personal need.

In particular, **people with physical disabilities** face certain barriers at live music events. According to data from the Australian Institute of Health and Welfare, about 4.4 million Australians, or 18% of the population, are **living with a disability**.[130] Barriers to attendance for people with physical disabilities that have been reported in the literature include difficulties ***getting to arts events***, ***issues with accessible seating*** and ***segregation***, ***blocking of sightlines***, ***lack of accessible toilets***, ***poor wheelchair accessibility***, and ***lack of hearing loops***.[131]

Beyond physical disabilities, people living with **sensory processing disorders** and **audio sensitivities** may experience additional accessibility barriers for live music events.[132]

Creative Australia's 2022 National Arts Participation Survey shows that **people with disability** are ***less likely*** than Australians without disability **to attend live events** (58% compared to 70%).[133]

> *'I live with Autism Spectrum Disorder and a chronic illness that makes it difficult to stand for long periods of time. For the most part I am able to self-regulate independently, but the presence of enough seating to comfortably rest with friends and the option to temporarily relocate to a quiet space that doesn't require me to fully leave the venue (and risk not getting back in or having to wait an extended period of time) is incredibly useful.'*
>
> **Survey respondent**

Music-engaged participants

In addition to **accessibility barriers at the event**, insights from our **surveys** and **focus groups** with music-engaged participants indicate that **accessibility means different things to different people**.

Overall, **accessibility is not a barrier** for the majority of music-engaged survey respondents.

- Less than 1% of music-engaged survey respondents report **accessibility as a barrier to attendance** at live music events at major venues and small local venues.
- Survey respondents noted physical accessibility requirements, including the need for ***available seating*** and ***wheelchair access***.
- Beyond citing a lack of physical accessibility for diverse and disabled attendees, some respondents discussed ***distance*** and ***lack of food options*** as accessibility concerns.

> *'More public transport options and chartered organised transport that is more affordable. Having music events in an area that is convenient for the general population of music goers. Not far away where Ubers/ bus/ train don't run. Provide a substantial amount of Plan B for those who are drinking.'*
>
> **Survey respondent**

130 Australian Institute of Health and Welfare 2022, *People with disability in Australia.*

131 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.* Myers E 2022, *Australia is behind on accessibility at music festivals and gigs and fans with a disability are missing out,* ABC News. Music NSW 2022, *Music Accessibility Project Pilot Report.*

132 White K 2023, 'Addressing auditory processing challenges and accessibility in live music settings,' *Proceedings of Meetings on Acoustics,* 51:1.

133 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*

Insights from **our focus groups align with the survey responses**, with participants interpreting accessibility in a variety of ways.

Concerts and festivals were seen as often ***lacking the facilities and amenities required for those living with disability and/or neurodivergence to comfortably attend***.

Participants, particularly those actively engaged in live music, mentioned the ***lack of ramps or reserved spaces for those in wheelchairs***, a refusal by venues to ***cap speaker volume***, and the continued use of ***strobe lights*** as examples of how events were **excluding some people from attending**.

Some focus group participants – particularly those who were actively engaged – lamented ***the lack of all ages shows versus those that are 18+***. They felt that all-ages shows had a different type of energy, often more positive, and that venues and event planners were more willing to accommodate for the needs of all attendees.

'I find these all-ages events to be more accessible, because I feel like there's just a better sense of community there. I feel people have a lot more sympathy and understand [the needs of attendees].

Focus group participant (She/her, 20, inner city QLD, actively engaged)

Focus group participants gave several suggestions for improving the accessibility of live music events, including providing ***sufficient seating***, ***quiet spaces***, ***wheelchair access***, ***a wider range of food options for people with dietary restrictions*** and ***better public transport options***.

Focus: Festival of Small Halls

The **Festival of Small Halls** is a touring music event that brings together the best folk and contemporary acoustic artists from major Australian festivals to **perform in small halls in communities across Australia**.

Produced by **Woodfordia**, in partnership with many of Australia's festivals, regional partners and supporters of folk and contemporary music, these events include at least one Australian and one international artist.

Inspired by similar events in **Canada,** the festival **celebrates community and live music in regional areas**. Each event is hosted by local volunteers, and includes a supper break with tea and cake for all ages to enjoy.[134]

Monique Clare, Festival of Small Halls Summer Tour 2025 in Parkham, Tasmania. Credit: Wendy Silvester.

134 See www.festivalofsmallhalls.com.

Event location as a barrier to attendance

General population

Literature reveals that **location is a main barrier** to arts attendance among Australians.

Creative Australia's 2022 National Arts Participation Survey shows two in five Australians say ***there are no arts events near where they live*** (40% up from 25% in 2019). This barrier is strong among Australians who want to attend more events.[135]

According to Winarch Group's annual Australian Live Music Census, less than half of respondents ***felt that their area has sufficient live music venues*** (43%). Half of respondents said that ***having venues closer to their homes would increase their attendance*** (50%).[136]

Similarly, research from Flight Centre Travel Group's Stage and Screen in 2024 also showed that more than one third of 18–25-year-old Australians are ***put off by the logistical challenges of getting to festival locations*** (35%).[137]

Music-engaged participants

The results from the **surveys** and **focus groups** stress that **location is a barrier** for music-engaged participants, particularly for those **located outside of the major cities** of Sydney, Melbourne and Brisbane.

Results from survey respondents show that a **lack of nearby events they want to attend** is an attendance barrier, particularly for **small local venues**.

- One quarter say the reason they did not attend a live music event that they wanted to was because ***the event was too far away or too difficult to get to*** (26%).
- ***A lack of nearby events that I want to attend*** is the most commonly identified barrier to attending live music at **small local venues** (40%). Almost one in five say ***a lack of nearby events that they want to attend*** prevents them from attending more live music at **major venues** (18%).
- Those located in **regional or remote areas** are significantly more likely to report ***a lack of nearby events that I want to attend*** as a barrier to attendance at **small local venues** (54% compared to 38% of respondents located in metropolitan areas). This group are also far more likely to report ***a lack of nearby events that they want to attend*** as a barrier to attendance at **major venues** (32% compared to 16% of respondents located in metropolitan areas).
- Seven out of ten music-engaged survey respondents said they ***would attend more local Australian music if it was available near me*** (69%). Respondents living in ***regional or remote areas*** were much more likely than those living in metro areas to agree with the statement ***I would attend more local Australian music if it was available near me*** (84% versus 72%).
- **Younger respondents** are more likely than older respondents to agree that they ***would attend more local Australian music if it was available near them*** (73% of those aged under 25 compared to 64% of people aged 25 and over).

135 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*
136 Winarch Group 2024, *2024 Australian Live Music Census.*
137 Stage and Screen 2024, *Festival Fever Fading: Data shows mud and money steering young Aussies away from festivals and toward stadium acts.* Data is derived from Stage and Screen's survey and travel booking data. The survey is based on an independent panel of 1,000 18 to 35-year-old Australians.

‘There are no local gigs in my area. If there is, it is a major act coming through that costs $80 or more. I have to travel to Melbourne if I just want to go to a bar gig or a pub gig and I can't afford to do that every week like I want to.’

Focus group participant (She/her, 19, regional VIC, actively engaged)

‘We don't have any artists come here, we don’t have international artists, or even Australian artists [...] They'll go to Newcastle, they'll go to Wollongong, [...] and they won't come to Canberra and, that's pretty disappointing.’

Focus group participant (She/her, 23, regional NSW with a strong live music scene, actively engaged)

Many **focus group** participants, including those from mid-sized cities (eg, Canberra) or regional areas with local music scenes (eg, Newcastle, Geelong), noted ***major international acts rarely performed at venues easily accessible to them***.

Even those in **major cities**, such as Perth, spoke about the ***considerable cost and effort required to travel across the country for international concerts*** in Melbourne or Sydney as most artists don’t play in Western Australia.

However, some focus group participants spoke of their willingness to ***break the bank*** to go see international acts that rarely visit Australia. As major international artists often only visit a few major Australian cities – Melbourne, Sydney, and sometimes Brisbane – those from **regional Australia and suburban areas** were sometimes willing to spend much more beyond the ticket itself (eg, travel, accommodation and food) to make sure they could go see their favourite artist.

One of the most unanimous sentiments from those who lived outside of Melbourne-Sydney-Brisbane was the ***desire for more opportunities*** to attend live music events not just in Australia but ***in their state***, ***region***, ***and town***.

Calls for more local events were intertwined with concerns about the ***costs*** (ie, tickets, transport, accommodation and time off work) required to travel to events in other parts of Australia.

Lack of awareness as a barrier to attendance

General population

Our **literature review** shows Australians **increasingly feel they lack awareness** of what arts and cultural events are on.

Creative Australia's 2022 National Arts Participation Survey shows more than one quarter of Australians find they ***lack awareness and information***, for example when and where events take place (27% up from 17% in 2019).[138]

CALD respondents are more likely than non-CALD respondents to cite a ***lack of information and awareness*** (33% compared to 26%).

The results also show that while specifically-engaged regional and remote First Nations respondents experience a number of barriers to attendance, ***lack of awareness/information about events*** is the **greatest barrier**. More than two in five specifically-engaged regional and remote First Nations respondents do not attend more creative and cultural events for this reason (43% compared to 27% of Australians overall).[139]

Our literature review also found, however, that **social media** is having an impact on boosting event awareness. See Breakout Box: Young people's ticket purchasing habits.

138 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey.*
139 As above.

Sycco – One Night Stand Warrnambool. Credit: Meg Siejka.

Music-engaged participants

Not knowing about live music events was a key barrier which emerged from the **surveys** and **focus groups** with those who are engaged with music.

Findings from the survey show that most music-engaged participants find out about live music events via **social media** (97%).

- Other common ways include ***word of mouth*** (66%), ***artist/band websites and mailing lists*** (48%), ***live music venue websites or mailing lists*** (37%), ***streaming platforms*** (30%) and ***posters, flyers and other physical advertising*** (25%).
- However, ***not knowing about the event beforehand*** was a common reason why music-engaged survey respondents missed out on attending ***at least one live music event*** in the past 12 months that they ***wanted to attend but did not***.

Music-engaged survey respondents – particularly **younger respondents** and **First Nations respondents** – indicated a **lack of awareness** as a barrier to live music attendance.

- Many survey participants reported being **unaware** of upcoming events until ***after they had happened or had sold out***.
- Over half agree or strongly agree ***I would like to attend more local Australian music – but just don't know where to find out about it*** (51%).
- **Younger respondents** are more likely than older respondents to report that they ***would like to attend more local Australian music – but just don't know where to find out about it*** (55% of those aged under 25 compared to just 29% of those aged 40 and over).
- **First Nations respondents** are more likely than non-First Nations respondents to report they ***would like to attend more local Australian music – but just don't know where to find out about it*** (65% compared to 50%).

With the exception of the most actively engaged few, many **focus group** participants said they ***lack awareness of the Australian music scene*** – whether that be up and coming Australian artists or live events in their area.

The vast majority of music-engaged focus group participants expressed an ***openness and interest in more gigs featuring Australian artists***, however they said they ***lack awareness of the music and events available to them***.

Those more involved and enthusiastic about their local scene and Australian music ***tended to have much greater awareness*** of the music calendar: who local artists were, and where they could see them live.

Overall, focus group participants felt there was a need to ***boost discoverability and awareness of local gig guides and upcoming live music events***.

‘Sometimes you just don’t know what’s on, you don’t know where to look.’

Focus group participant (She/her, 15, regional QLD, actively engaged)

Part Four:

Drinking habits, drug consumption and spending at the bar

Summary findings – on a page

Main insight:

Overall, the findings suggest that **cost-of-living pressures** are having an impact on **drinking habits** and **spending at the bar at live music gigs**. While most music-engaged participants often or always drink alcohol at live music events, a proportion are choosing to only drink beforehand or find other ways to heighten their experience. Most say this is because alcohol is too expensive these days.

This shift in behaviour is already **disrupting modes of operation**. Should this be an enduring trend it may have damaging consequences for the **viability of current live music operating models**.

Our **review of existing literature** shows live music venues and festivals, particularly small venues like pubs and clubs, **rely on the sale of alcohol** as a **key revenue source**.[140] For example, *Soundcheck 2: Analysis of Australian music festival models and operations* found that food and beverage income contributes the **second largest proportion of total income** for commercial music festivals.[141] Anecdotally, alcohol sales can sometimes **be the primary source of income**, and the only way for a **venue to break even** on a live music performance.[142]

Recently, venue owners have highlighted **sales from alcoholic drinks have significantly declined**, leaving them **concerned for their future viability**. For example, last year the Zoo, a long-established live music venue in Fortitude Valley, announced its closure after 32 years citing cost of living pressures and decreased bar sales. The venue noted that while they had sold the most tickets in 2023 than in any other year, income from alcohol sales was down considerably.[143]

This **raises the question of whether Australians are drinking less** overall or **only buying fewer alcoholic drinks while out**, and if so, why.

Findings from our **literature review** show that while overall alcohol consumption is rising, **young people are drinking less frequently or abstaining from alcohol altogether**.

However, our **analysis of Nielsen data** on **changing drinking habits** tells a different story. The data shows that, according to self-reported drinking patterns, a substantial proportion of Australians, particularly young Australians aged 18–24, believe their **consumption of alcohol is decreasing**. Data on drinking locations shows that Australians believe they are drinking slightly less at licensed premises and private functions, with those aged 18–24 seeing the largest decrease in drinking out at private functions.

Our **survey data** of those who are considered engaged with music provides a more nuanced picture on drinking habits and spending at the bar. The survey results show most music-engaged respondents are ***often or always*** drinking at live music events. However, one in five say they ***only drink alcohol before they arrive at the gig***, with overwhelming sentiment being **alcohol is too expensive these days**. **Younger survey respondents** were much more likely than older survey respondents to say they ***only drink before events***.

140 Creative Australia 2024, *Soundcheck 2: Analysis of Australian music festival models and operations.*
141 Creative Australia 2024, *Soundcheck 2: Analysis of Australian music festival models and operations.*
142 See Phoenix Central Park 2024, *Submission to the Inquiry Into The Challenges and Opportunities Within Australian Live Music Industry.*
143 Stafford A 2024, '"The Model is Broken": Brisbane live music venue the Zoo to close after 32 years', *The Guardian,* 1 May.

Overall, the **data tells a complex story** but overwhelmingly points to changing patterns in drinking behaviour. These results align with the finding that **cost is the primary barrier** to live music attendance. They indicate that **altering drinking habits is a way to keep costs down** and continue to attend live music events. This behaviour may have consequences for the sustainability of live music operating models that rely heavily on bar sales.

Drinking habits

General population

In recent years, **venue owners** have reported that **alcohol sales** have **significantly declined**, particularly amongst younger music-goers.[144] Similar trends have been reported in the media in other countries, including the United Kingdom and Canada.[145] Research finds possible reasons for this decline include the rising cost of living reducing disposable income, young people choosing other venues in which to socialise, and greater awareness of the risks of alcohol consumption.[146]

Our **review of existing literature** finds that while overall alcohol consumption may be gradually rising, **young people may be drinking less frequently**.

According to the Australian Institute of Health and Welfare Australians' **consumption of alcohol has risen** from 2019–20 through to 2022–23.[147]

However, the proportion of people aged 18–24 who drank **alcohol monthly dropped** from 34% in 2019 to 29% in 2022–23. The proportion who **drank infrequently or not at all also increased**; 20% of young people drank alcohol less often than monthly in 2022–23 (up from 14% in 2001) and 16% had never had a full glass of alcohol (up from 8% in 2001).[148]

Compared to 2007, more 18–24-year-olds are **reporting that they abstain from alcohol** in 2022–23 (23% in 2022–23 up from 13% in 2007).[149] Factors that may be contributing to this decrease in alcohol consumption amongst young people include changes in preferred places to socialise, increasing awareness of alcohol-related harm, and affordability concerns.[150]

Our **analysis of Nielsen data** tells us more about **changing drinking habits**, particularly emerging trends following COVID-19.

- Data on self-reported drinking patterns show a substantial proportion of Australians believe their **consumption of alcohol is decreasing**. See Figure 20.
  - Two in five Australians agree they are ***drinking less alcohol these days*** in 2024 than they did in 2019 (39% in 2024 down from 47% in 2019).
  - This change is **most pronounced** amongst **Australians aged 18–24** (29% in 2024 compared to 40% in 2019), indicating younger Australians are either maintaining their level of alcohol consumption or are drinking more.
  - Examining data on drinking locations shows that Australians say they are **drinking slightly less at licensed premises and private functions**. Young people have seen the biggest drop in drinking at private functions. The proportion of those aged 18–24 who say they are drinking more at private venues/functions has dropped from 30% in 2019 to 26% in 2024. See Figure 21 and Figure 22.
- However, fewer Australians report that they are drinking more at licensed premises and private functions in 2024 compared to 2019. Research from the Foundation for Alcohol Research and Education (FARE) shows that, for all age groups, the **home is the most frequent place to drink alcohol**.[151]

144 Naglzas M 2024, Gen Z is not drinking – and it's threatening Perth's live music scene.WA Today. Ballico C 2020, 'Caught in the act: the impact of liquor regulation on original live music activity in Perth, Western Australia', *International Journal of Cultural Policy,* 27(3), 394–408.

145 Cross A 2023, Gen Z isn't big into drinking alcohol and this has an impact on live music. Global News. Pilley M 2024, Pryzm boss blames "young people drinking less" for nightclub closures', *NME,* 15 February.

146 Fenton L, Pennay A, Holmes J 2024, *Youth drinking is declining – myths about the trend, busted.* The Conversation.

147 AIHW 2023, *Alcohol available for consumption in Australia.*

148 AIHW 2023, *Young people's consumption of alcohol.*

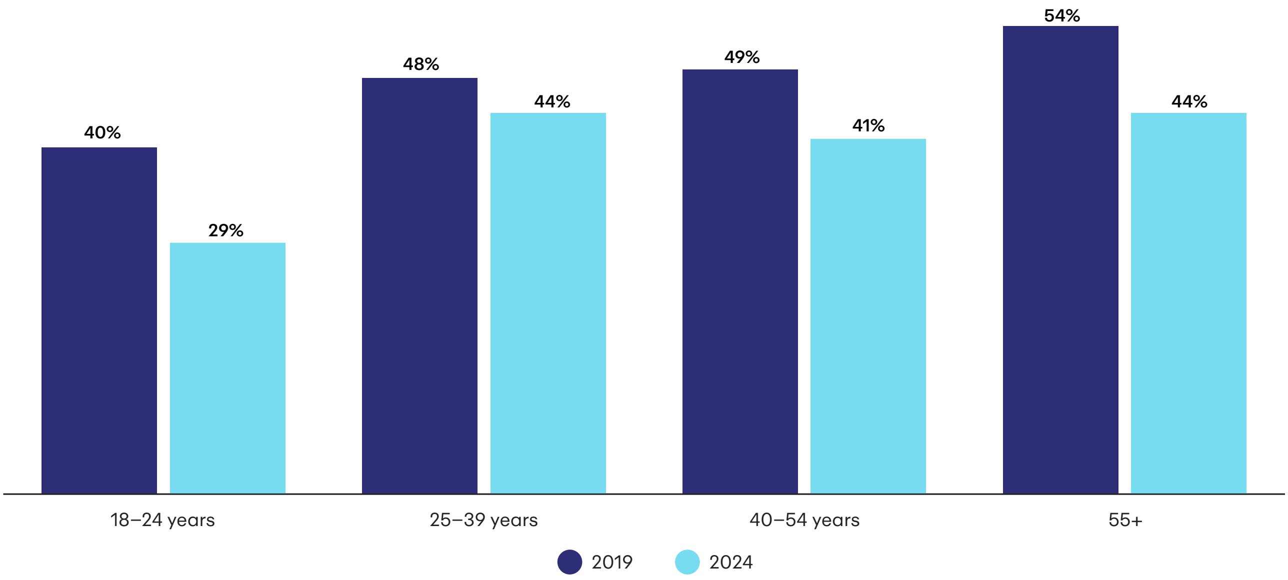
149 AIHW 2024, *Alcohol, tobacco & other drugs in Australia – Younger people.*

150 Whitaker V, Curtis P, Fairbrother H, Oldham M & Holmes J 2023, 'Young people's explanations for the decline in youth drinking in England.'BMC Public Health, 23(402). Bennet S 2023, *Young Australians are drinking less. Why is Gen Z so sober-curious?* SBS News.

151 FARE 2020, *2020 Annual Alcohol Poll – Attitudes and Behaviours.*

Figure 20:

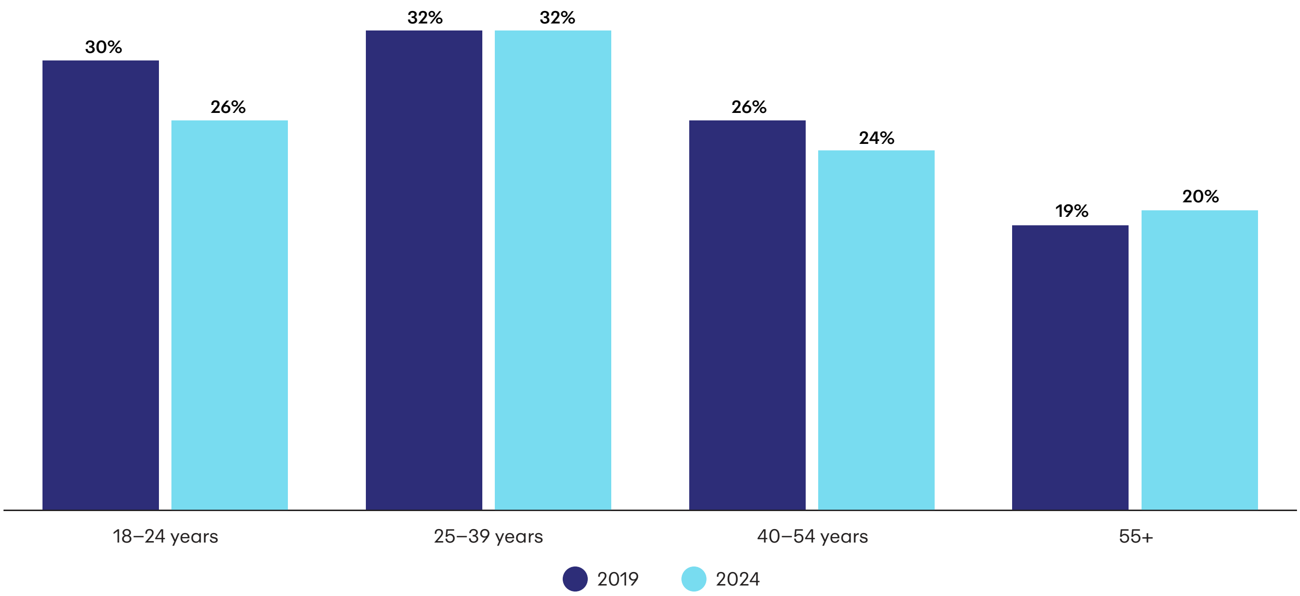
Percentage of Australians who agree or strongly agree that they are drinking less alcohol these days by age group



Q. I am drinking less overall these days (strongly agree/agree).

Figure 21:

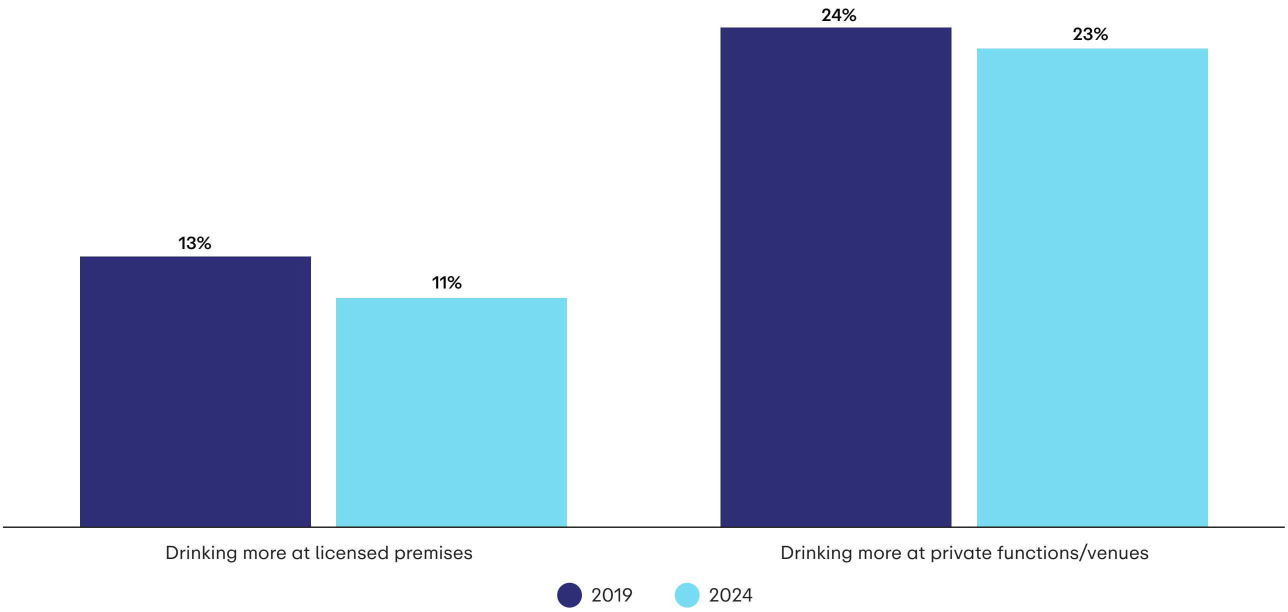
Percentage of Australians who agree or strongly agree that they are drinking more at private functions/venues these days by age group



Q. I am drinking more at private functions/venues these days (strongly agree/agree).

Figure 22:

Percentage of Australians who agree or strongly agree that they are drinking more alcohol these days by location and year



Q. I am drinking more at licensed premises these days (strongly agree/agree) Q: I am drinking more at private functions/venues these days (strongly agree/agree).

Queenscliff Music Festival, Burger Joint.
Credit: Lucina Goodwin.

Music-engaged participants

Findings from our **surveys** with those who are music-engaged **show a slightly different picture**.

- **Almost all** music-engaged survey respondents ***drink alcohol at live music events*** (97%), with the majority saying they ***often*** or ***always*** drink (71%).
- **Those aged between 25–39** and **men** are most likely to say they ***often*** or ***always drink alcohol***, while **people aged 40 and over** are the most likely group to ***never drink alcohol***.
- Of those who drink alcohol, the most common ***drinking habit is drinking before coming to the event*** (54%) followed by ***buying more than two alcoholic drinks*** (46%) or ***one or two alcoholic drinks at the venue*** (41%). One in five ***find other ways to heighten their experience at the event*** (19%) – for more information see Drug consumption.
- **Men** and **people aged 25 and over** are more likely than their counterparts to ***drink more than two alcoholic drinks at the venue*** (52% of men compared to 43% of women, and 51% of people aged 25 and over compared to 43% of people aged under 25).
- **Women** are more likely than men to ***drink alcohol before they come to the event*** (56% compared to 52%) or ***only buy one or two alcoholic drinks at the venue*** (45% compared to 33%).
- Around one in five respondents said they ***only*** drink alcohol ***before they come to the event*** (19%).[152] **Younger respondents** were much more likely than older respondents to say they ***only drink before events*** (72% of people aged under 25 compared to 24% of 25–39-year-olds and just 4% of people aged 40 and over).
- When asked to explain their answer, many said the **cost of alcohol at events is too high these days**. These results align with the finding that **cost is the primary barrier** to live music attendance and indicate that in order to attend live music events, many are **altering their drinking habits to keep costs down**. See Part Two: Barriers to live music attendance for more information.

‘Drinks are now upwards of $15 each, plus waiting in massive lines just isn't worth it. It’s better to drink beforehand or not drink at all.’

Survey respondent

- Others mentioned they liked to **pre-drink prior to the event to socialise** with their friends or to **get into the mood:**

‘Money and how much drinks are will depend on how many I have at the event. Pre-drinks is always fun and good way to get the energy up [as well as] kill time before the event.’

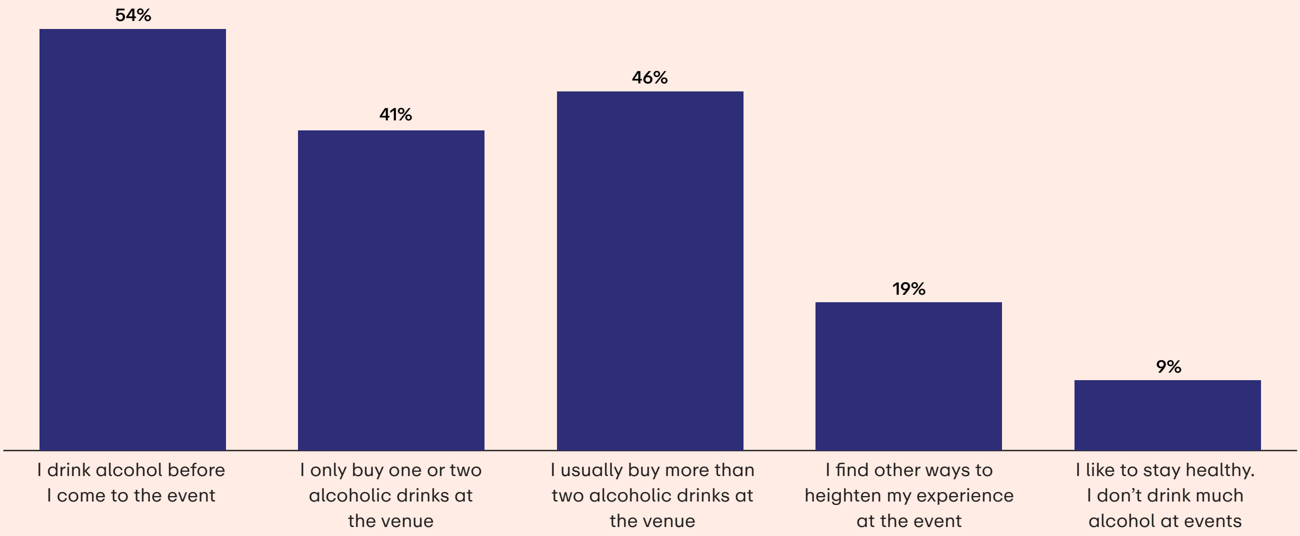
Survey respondent

Vv Pete performing a the Opera House. Credit Daniel Boud.

152 Note: small number of these respondents may actually drink alcohol at the event as alluded to in their open-ended responses when asked to tell us more.

Figure 23:

Drinking habits of music-engaged survey respondents at live music events



Q. Which of the following describes your drinking habits at live music events? (Select all that apply) Source: Value of music survey. N=3,575.

Drug consumption

General population

According to the 2022–23 National Drug Strategy Household Survey, it is estimated that almost **half of Australians aged 14 and over have illicitly used a drug at some point in their lifetime**.[153] Cannabis is the most commonly used illicit drug in Australia, used by 11.5% of the population in 2022–23 (consistent with 2019).[154]

Amongst all Australians, **young adults aged 18–24 are the most likely group to have used illicit drugs** in the past 12 months.[155] Usage of certain types of drugs, such as ecstasy, has declined amongst people in their 20s since 2019, likely due to a reduction in supply and opportunities for usage during COVID-19.[156] However, use of other types of illicit drugs, including cocaine and hallucinogens, has increased. Between 2016 and 2022–23, hallucinogen use amongst people in their 20s more than doubled (from 3% in 2016 to almost 7% in 2022–23).[157]

Illicit drug use often occurs at live music events. A 2018 survey found that almost three quarters of attendees at a major Australian music festival reported that they had taken drugs in the previous 12 months,[158] while 30% of respondents in another survey reported taking ecstasy pills at the last festival they attended.[159] It has been suggested that some young Australians are turning to drugs as a substitute for alcohol, with the term ‘California sober’ or ‘sober lite’ colloquially used to describe people who don’t drink but use drugs.[160] Deaths caused by drug use continue to be reported at live music events and are often exacerbated by other factors such as high temperatures.[161]

153 AIHW 2024, *Illicit drug use*.
154 AIHW 2024, *Cannabis*.
155 Alcohol and Drug Foundation 2021, *Young Australians, illicit drug use and harm reduction*.
156 AIHW 2024, *National Drug Strategy Household Survey 2022-23*.
157 As above.
158 Day N, Criss J, Griffiths B, Gurjal SK, John-Leader F, Johnson J and Pit S 2018, ‘Music festival attendees’ illicit drug use, knowledge and practices regarding drug content and purity: a cross-sectional survey.’ *Harm Reduction Journal,* 15:1.
159 Grigg J, Barratt MJ & Lenton S 2018, ‘Double dropping down under: Correlates of simultaneous consumption of two ecstasy pills in a sample of Australian outdoor music festival attendees.’ *Drug and Alcohol Review,* 37.
160 Wedesweiler M 2024, ‘Young Australians are drinking less alcohol but some are trying “California sober”’, *SBS News,* 1 February.
161 Haghani M and Varamini P 2023, ‘Planning to use drugs at a festival on a scorching summer day? Here’s why extreme heat might make MDMA riskier,’ *The Conversation,* 12 December.

Music-engaged participants

Findings from our **surveys** with music-engaged participants show that a substantial proportion **consume illicit drugs at live music events**.

While some survey respondents said they feel ***other substances enhance their experience of the music***, most of those who find other ways to heighten their experience say ***alcohol is too expensive***.

- One in five music-engaged survey respondents ***find other ways to heighten their experience at the event*** (19%). **Men** are more likely than women to say they ***find other ways to heighten their experience at the event*** (22% compared to 18%).
- Most of those who find other ways to heighten their experience say ***alcohol is too expensive*** and they feel other ***substances enhance their experience of the music***.

> *'Alcohol costs way too much when considering the cost of the ticket. After the day you have easily spent hundreds of dollars.'*
>
> **Survey respondent**

> *'I believe it massively enhances the music itself and also my experience with my friends, allowing us to bond better as we can articulate our feelings that the music is giving us easier.'*
>
> **Survey respondent**

- Some say that they ***prefer other drugs to alcohol*** as they feel other substances have fewer negative effects on their body.

> *'Alcohol can make me quite tired and other substances can make you feel the music better.'*
>
> **Survey respondent**

> *'Alcohol is a depressant and sometimes the hangover just isn't worth it – other means are sometimes a lot less detrimental.'*
>
> **Survey respondent**

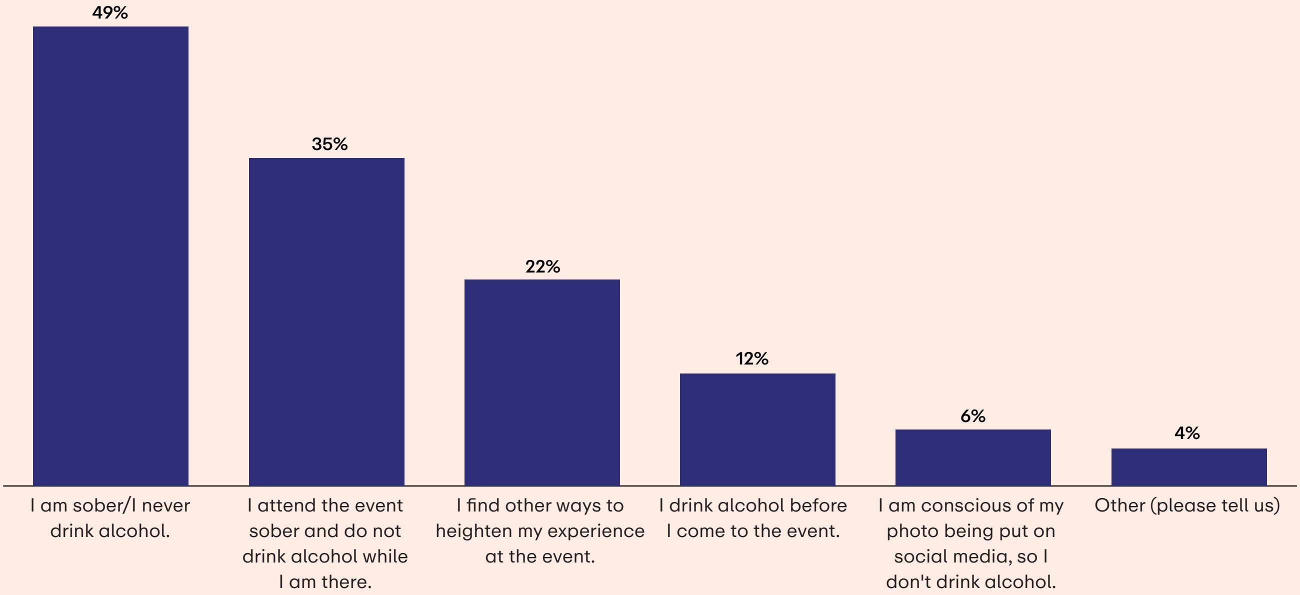
- A small proportion of music-engaged survey respondents ***never drink alcohol at live music events*** (3%).
- Of those respondents who never drink alcohol at live music events, around half are ***sober/ never drink alcohol*** (49%) and many explain they are either sober or do not like the taste of alcohol.
- Other common responses for never drinking alcohol at such events include ***attending the event sober and not drinking while there*** (35%) and ***finding other ways to heighten their experience at the event*** (22%).
- Some respondents said they ***do not feel they need to drink alcohol to enjoy themselves*** and ***prefer to be fully present*** to experience and remember the live music event.

> *'I stopped drinking alcohol nearly 4 years ago and have found that I have a much better experience at gigs sober than I did when I drank. This is because I am able to relish in the moment, as well as remember the entire gig with clarity.'*
>
> **Survey respondent**

> *'I want to be able to fully remember and experience these events, especially since they're often artists who I may not ever see again/see again for at least a few years, and I've paid a lot to be there. Drinking makes it harder to focus and really experience and remember the music.'*
>
> **Survey respondent**

Figure 24:

Why some music-engaged survey respondents never drink alcohol at live music events



Q. Which of the following describes why you never drink alcohol at live music events? (Select all that apply). Source: Value of music survey. N=108.

Survey respondents were asked if they would use **pill testing** if it was available to them.

- Most music-engaged survey participants say they ***would use pill testing*** if it was available at music festivals (62%). Just under 3 in 10 say they ***would not use pill testing*** (29%) and 9% ***prefer not to say***.
- **Men** and **younger** music-engaged survey respondents are more likely than their counterparts to say they ***would make use of pill testing*** (66% of men compared to 59% of women, and 63% of those aged under 25 compared to 45% of those aged 40 and over).

Drug testing trials at music festivals

Drug testing is a strategy that can reduce harm and save lives.

Australia's National Drug Strategy includes three pillars of harm minimisation; demand reduction, supply reduction and harm reduction.[162] Pill testing, or drug checking, is a harm reduction strategy that provides a free and confidential way for people to test their drugs to find out what substances are actually in them.[163]

Australian states and territories have begun conducting drug testing trials at music festivals.

In 2019, the Australian Capital Territory ran a government-sanctioned pill testing trial at the Groovin' the Moo festival. The evaluation of this trial found that the service was received positively by festival attendees who used it, helped to educate users about potential harms of illicit drug use, and prevented some users unknowingly consuming substances associated with significant harm, overdose and death.[164]

In Queensland, a multi-day pill testing service was rolled out at the 2024 Rabbits Eat Lettuce festival, where more than 250 festivalgoers had their drugs checked and met with a harm reduction worker.[165]

The Victorian Government conducted pill testing trials over the summer 2024–25 music festival season. More than 700 people used the pill testing service at the Beyond the Valley Festival. Early data found nearly 40% of those who used the service said they would take less of their drugs than they previously planned.[166]

New South Wales have also announced music festival pill testing trials to commence in early 2025.[167]

162 Department of Health 2017, *National Drug Strategy 2017-2026*.
163 Booth G 2023, *What is pill testing and how does it work?* Australian National University.
164 Olsen A, Wong G & McDonald D 2019, *ACT Pill Testing Trial 2019: Program Evaluation*. Australian National University.
165 Queensland Government 2024, *Pill testing results show service's importance to health and safety.*
166 Hon Jacinta Allan MP 2025, *Victoria's First Pill Testing Trial Off to A Successful Start* [Media release], 2 January.
167 NSW Government 2024, NSW to trial pill testing at music festivals in 2025 [Media release], 19 December.

Niles Rogers & CHIC at Jazz a the Bowl, Melbourne International Jazz Festival 2023. Credit: Wil Hamilton-Coates.

Spotlight

Anyma performing on the largest-ever LED screen in the Southern Hemisphere.
Credit: Jordan Munns.

Young music-engaged people's attendance at live music events

Young people say live music attendance impacts their relationships, sense of community and a feeling of belonging.

Young music-engaged participants are more likely than those older to say that attending live music events has a 'big' or 'very big' impact on ***deepening my existing relationships and friendships*** (88% of those aged under 25 compared to 80% of 25–39-year-olds and 66% of peopled aged 40 and over); ***a sense of community*** (86% of those aged under 25 compared to 77% of 25–39-year-olds and 74% of people aged 40 and over); ***a feeling of belonging*** (82% of those aged under 25 compared to 76% of 25–39-year-olds and 71% of those aged 40 and over); and ***cultivating new relationships and friendships*** (75% of those aged under 25 compared to 61% of 25–39-year-olds and 39% of those aged and over).

Young people prefer going to big multi-act festivals with lots of friends and are likely to drink.

Music-engaged focus group participants aged under 40 are most likely to prefer a ***huge outdoor festival, going all out with a big group of friends and seeing a variety of artists***.

Older Gen Z and Millennials aged between 25–39 and men are most likely to say they ***often or always drink alcohol***. Those aged under 25 are more likely than older people to say they ***would make use of pill testing*** (63% of those aged under 25 compared to 45% of those aged 40 and over).

Cost of living is impacting young people's live music attendance, and most are saving up to see major events.

Those aged under 25 are more likely than those aged over 40 to say the cost of living is ***impacting their live music attendance***. Those aged 25–39 are slightly more likely than other age groups to say they can ***generally only afford to buy tickets to see artists/bands that are very important to them or for very special occasions*** (55% compared to 49% of those aged under 25 and 52% of those aged 40 and over).

Young people are more likely to have ***saved up money to attend one or more major live music events in the past 12 months*** (79% of those aged 24 and under compared to 61% of those aged 25–39 and 31% of those aged 40 and over).

Appendices

Appendix A: Research project methodology

Research for this project was conducted in the following ways:

- Review of existing research and analysis of existing datasets
- Generation of new data via:
  - audience surveys
  - focus groups.

Review of existing research and analysis of existing datasets

This part of the research involved reviewing existing literature and analysing existing national datasets.

We conducted a desktop review of publicly available data on Australians' engagement with music, including how they discover and consume music, and attend live Australian music.

We also analysed existing market research data on current trends surrounding Australians' discoverability, consumption of music and attendance at live music. See below for an outline of market research data we analysed as part of this project.

Market research data

- **Nielsen** is a global market research company specialising in audience measurement, data and analytics. Between June and December 2024, Creative Australia accessed Australian consumer data from the Nielsen Consumer & Media View (CMV) survey for 2019, 2022 and 2024. The CMV survey collects data from a sample of approximately 30,000 Australians including demographics, consumer attitudes, behaviours and habits across a range of lifestyle categories, including music consumption and engagement.

Generation of new data

This part of the research involved collecting and analysing new datasets better understand music audiences behaviours, attitudes, preferences and barriers.

We collected this data via:

- four separate surveys on music discoverability, consumption, attendance and value
- nine focus groups with members of the public.

See below for more details.

Surveys

During October and November 2024, Music Australia partnered with Untitled Group, The Daily Aus and The Push to distribute a series of 4 surveys to people within those organisations' networks. The surveys aimed to gather data on how Australians, who are already engaged with music, discover, consume and attend music. Each survey consisted of 12–17 questions on music engagement, as well as 4 demographic questions.

The surveys were distributed during October 2024 via Untitled Group and The Daily Aus email mailing lists and social media channels. The surveys were promoted on social media by Music Australia and The Push and were each open for approximately one week.

This publication predominantly reports on findings from the live attendance survey, with further context and understanding provided by findings from the final survey exploring the value of music.

Live attendance survey

A total of 3,576 complete responses were received for the live attendance survey. A further 305 partially completed responses were included in the analysis for the questions that had been completed.

- A majority of respondents were 18–24 years old (71%) while 23% were 25–39 years old. 5% were aged 40 or older, while 1% were under 18.
- A majority of respondents identified as a woman or female (69%), while 30% identified as a man or male. Less than 1% of respondents identified as transgender, non-binary or another gender.
- 3.8% of respondents identified as Aboriginal and/or Torres Strait Islander.
- Half of respondents were from Victoria (50%). 15% were from NSW. 14% from QLD, 11% from SA, 10% from WA, 7% from TAS, 2% from the ACT and 1% from the NT.
- Most respondents were located in major cities (78%). 14% were located in regional Australia, and less than 1% were located in remote Australia. The remainder did not report a postcode and were therefore unable to be classified.

Discovery survey

A total of 1,185 complete responses were received from the discovery survey. An additional 363 partially completed responses were included in the analysis for the questions that had been completed.

- A majority of respondents were aged 18–24 (71%) followed by those aged 25–39 (23%). Just 6% were aged 40 and over.
- A majority of respondents identified as woman or female (64%), while 36% identified as a man or male. Just 2 respondents identified as transgender, non-binary or another gender.
- 4% of respondents identified as Aboriginal and/or Torres Strait Islander.
- 48% of respondents were from Victoria. 15% were from QLD, 15% from WA. 11% from SA. 9% from NSW. 1% from TAS, 1% from ACT less than 1% of respondents from NT.
- Most respondents were located in major cities (81%). 18% were located in regional areas and less than 1% were in remote Australia. The remainder did not report a postcode and were therefore unable to be classified.

Consumption survey

A total of 2,302 complete responses were received from the consumption survey. An additional 1,018 partially completed responses were included in the analysis for the questions that had been completed.

- A majority of respondents were aged 18–24 (69%) followed by those aged 25–39 (23%). Just 6% were aged 40 and over, while 2% were aged under 18.
- A majority of respondents identified as woman or female (68%), while 31% identified as a man or male. Less than 1% of respondents identified as transgender, non-binary or another gender.
- 3% of respondents identified as Aboriginal and/or Torres Strait Islander.
- 41% of respondents were from Victoria. 23% were from QLD. 13% from SA. 12% from NSW. 10% from WA, 1% from TAS, and just two respondents from NT.
- Most respondents were located in major cities (83%). 16% were located in regional areas and 3% were in remote Australia. The remainder did not report a postcode and were therefore unable to be classified.

Value of music survey

A total of 3,634 complete responses were received for the value of music survey. A further 1,186 partially completed responses were included in the analysis for the questions that had been completed.

- A majority of respondents were 18–24 years old (64%) while 29% were 25–39 years old. 6% were aged 40 or older, while just 1% were under 18.
- A majority of respondents identified as a woman or female (68%), while 31% identified as a man or male. Less than 1% of respondents identified as transgender, non-binary or another gender.
- 4% of respondents identified as Aboriginal and/or Torres Strait Islander.
- A majority of respondents were from Victoria (46%). 17% were from QLD. 16% from WA, 10% for both SA and NSW. ACT and TAS had 1%. NT had under 1%.
- Most respondents were located in major cities (84%). 16% were located in regional Australia, and less than 1% were located in remote Australia. The remainder did not report a postcode and were therefore unable to be classified.

Dancing in the rain at the Friends and Relatives Festival, Wootton NSW. Credit: Carl Muxlow.

Focus groups

This part of the research featured a series of 60-minute mini focus groups with members of the public. The focus groups aimed to explore how Australians listen to music, what they listen to, how they discover new music, their thoughts on Australian music and artists, and their experiences and engagement with live music.

In October 2024, nine focus groups were conducted on Zoom, averaging 6 participants per group. Participants were aged between 15 and 60 years old and were living in a range of inner-city, outer suburban, regional and rural locations across Australia. Groups were mixed gender and in some cases were split by music engagement, location, or demographic characteristics.

Mixed engagement groups included both actively engaged and passively engaged Australians.

- Australians who are actively engaged are passionate about music and consider it to be an important part of their lives. They are often involved in their local music scene – either by attending live events, performing or supporting local artists – and are attending live music concerts, events or festivals at least a few times a year. They actively follow music news, and stay up to date about new releases – especially from their favourite artists. This group also enjoy discovering new music and some are actively seeking out new artists and genres.
- Australians who are passively engaged appreciate music, but would not consider it an important part of their daily life. They do attend live music events, concerts and festivals but maybe only once a year. They are more likely to be passively exposed to new music, either through recommendations or by chance, but are not going out of their way to discover new artists and genres. Most hear about new releases and music news occasionally but are not active followers. Overall, they are not very involved in their local music scene but would occasionally support local artists or attend local events.

People who do not consider music to be important to them and who listen/follow music very little or not at all were considered not engaged and were excluded during the recruitment process.

The focus groups were conducted by 89 Degrees East, a national data, strategy and delivery agency, and the results of the focus groups were analysed thematically.

Table 1:

Focus group structure

Group	Target
1	Passively engaged 26–60s, mixed location
2	Mixed engagement, culturally and linguistically diverse 18-25s, mixed location
3	Passively engaged 18–25s, mixed location
4	Actively engaged 18–25s, mixed location*
5	Actively engaged 26–60s, mixed location
6	Actively engaged 18–25s in regional areas with a strong live music scene*
7	Actively engaged 18–25s in regional areas without a live music scene*
8	Actively engaged 15–17s, mixed location* (Parental consent obtained for all participants)
9	Actively engaged First Nations 18–25s, mixed location

*Groups recruited by Creative Australia in partnership with The Push.

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