Australian Government
Department of Infrastructure, Transport, Regional Development and Communications

Bureau of Communications, Arts and Regional Research

Australia’s live music sector: an occupation-based analysis

The live music sector spans a diverse range of occupations, skills and industries

BCARR has defined the sector based on the occupations required to put on a live music performance

- The live music sector had **41,000 workers** in 2019-20, based on income tax data
- This uses the primary occupation recorded by individuals when lodging their tax with the ATO and as such may exclude some live music workers, including musicians, whose main source of income is not live music
- **Employment in the sector grew 3.3 per cent a** year, on average, for the four years to 2019-20
- COVID-19 has significantly impacted the live music sector – affecting performances and jobs
- The number of promoted live music events fell by 80 per cent between 2019 and 2020
- The sector’s estimated value was **$5.7 billion** in 2019 by the Live Entertainment Industry Forum
- Around **9.7 million patrons** attended a ticketed live music event in 2019

14,200 primary workers

Occupations which carry out activities that are essential to live music e.g. musicians, technicians, stage managers

+

10,000 supporting workers

Occupations where a portion work involves live music e.g. music teachers, ticketing, security, entertainment/variety artists, media producers

+

16,800 auxiliary workers

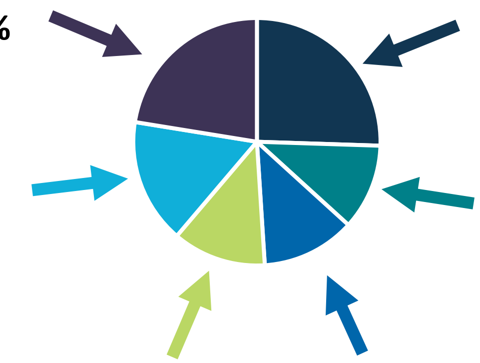
Occupations that indirectly support live music e.g. hospitality, professional services, sales and merchandise

=

An estimated
41,000 live music workers
in 2019-20

Source: BCARR analysis of ATO taxation data for 2019-20

Key industries in the live music ecosystem



Source: BCARR analysis of customised 2016 ABS Census data
Note: The sum of industry percentages does not add up to the total due to rounding

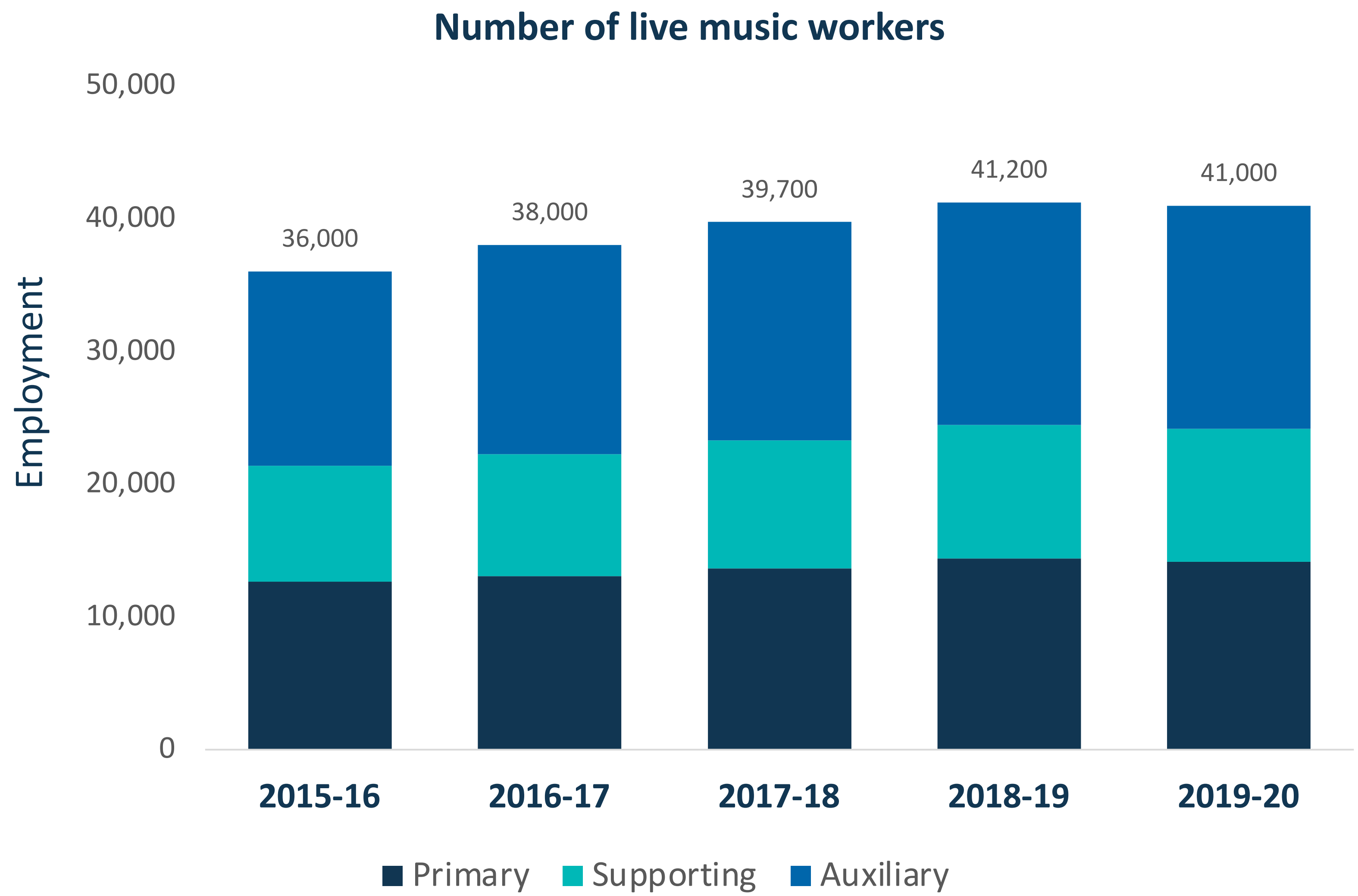
- The live music sector employs workers from a diverse range of industries
- These are the five main industries that contribute workers to the live music supply chain – adding up to roughly three quarters of live music workers

Employment growth in the live music sector over time

ATO data shows growth, followed by first impacts of the COVID-19 pandemic

- Employment for the sector grew by **4.6 per cent** a year (compounding) between 2015-16 and 2018–19 to reach 41,200
- Employment then fell slightly to 41,000 between 2018-19 and 2019–20, which may reflect impacts of the first three months of the COVID-19 pandemic
- The proportion of workers in each live music occupation group has remained relatively stable between 2015-16 and 2019-20
- In 2019-20, the primary occupation group contained around 35% of live music workers, the supporting group around 24%, and the auxiliary group was the largest at around 41%

BCARR analysis of ATO taxation data



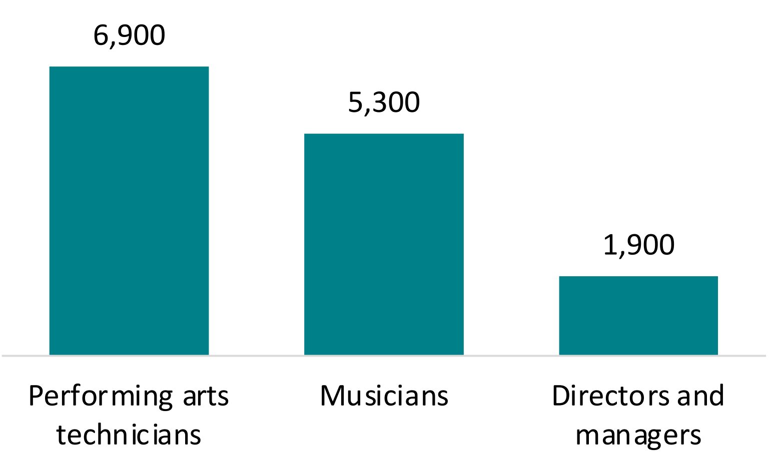
Source: BCARR analysis of ATO taxation data

Our approach recognises the range of occupations in the live music sector

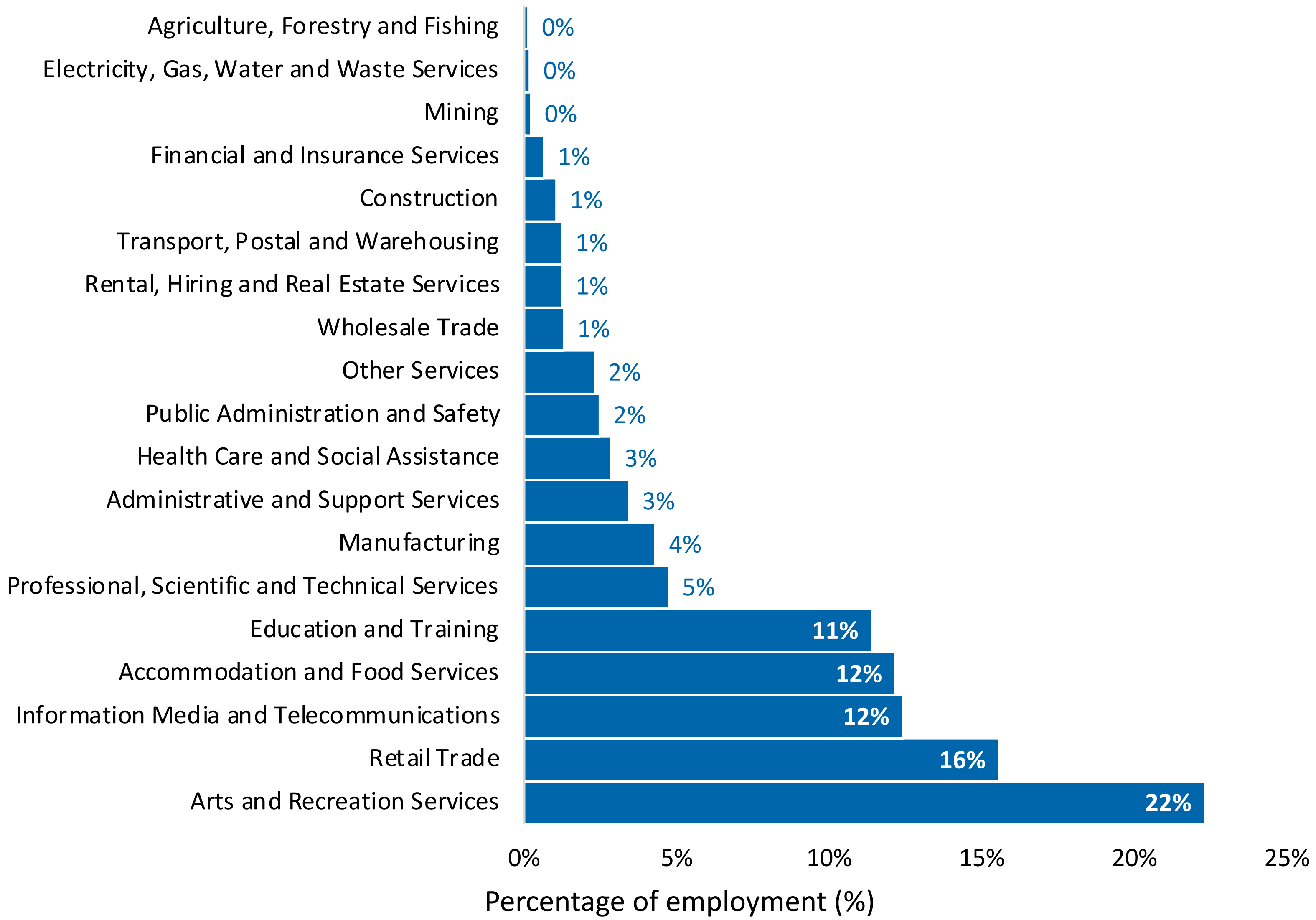
Using an occupation-based approach lets us unlock taxation and census data

- We aim to provide a holistic view of the live music ecosystem using three categories of workers
- **Primary occupations** – considered essential to the sector (100% attributed to live music sector)
- **Supporting workers** – occupations with explicit reference to either music, stage, performance or entertainment (25% attributed live music sector)
- **Auxiliary workers** – occupations with broader functions which enable live music performances (1.5% attributed to the live music sector)

No. of primary live music workers, 2019-20



Live music employment across industries



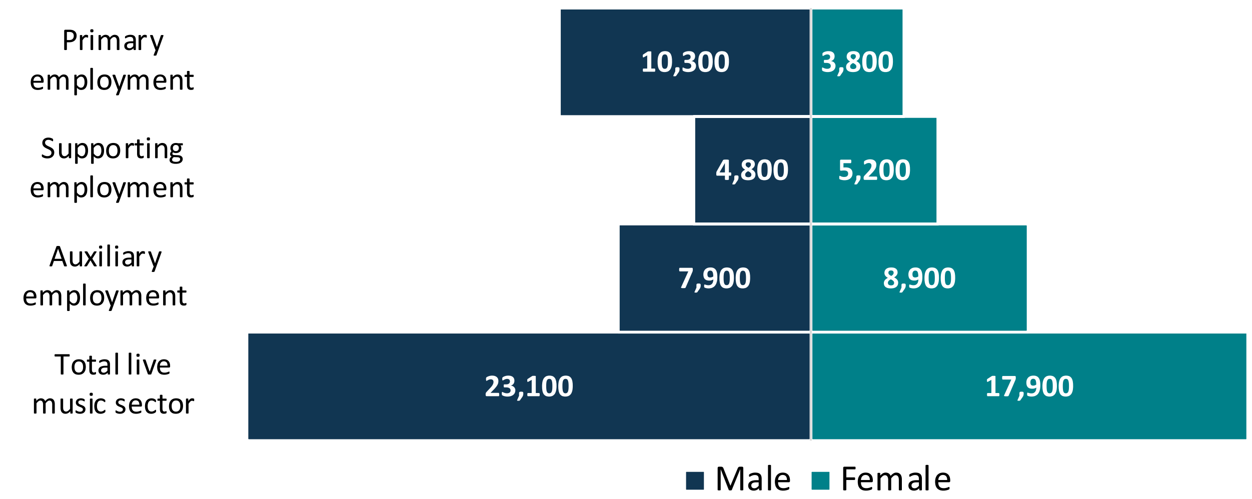
Source: BCARR analysis of customised 2016 ABS Census data

We estimated that there is a gender pay gap in the live music sector

Demographics of the live music sector

- Women in the live music sector were estimated to earn, on average, $11,100 less than men – this equates to a **gender pay gap of 18 per cent**
- Men were more likely to work in the live music sector than women in 2019–20 – this was driven by the primary occupation group, with almost three quarters (73%) male employment
- Performing arts technicians are the biggest contributors to the imbalance, with more than seven times more male workers (6,100) than female workers (860)
- For supporting and auxiliary workers, the demographic profile from the overall economy is taken as representative for each occupation.
- Supporting occupations with gender disparities were ‘arts administrators and managers’ (3 times more women than men) and ‘crowd controllers’ (7 times more male workers)
- Gender disparities in auxiliary occupation employment existed in ‘retail’ (twice as many female workers) and ‘building and logistics’ (eight times more men)
- ATO data does not allow further demographic breakdowns within the live music sector

Gender breakdown of live music workers



Occupation group	Average Total Income	Male Average Total Income	Female Average Total Income	Pay gap (%)
Primary	$64,500	$67,100	$57,600	14%
Supporting	$62,200	$65,800	$58,800	11%
Auxiliary	$49,300	$54,600	$44,500	18%
Total Live music	**$57,700**	**$62,500**	**$51,400**	**18%**
Total economy	*$66,500*	*$77,800*	*$54,900*	*29%*

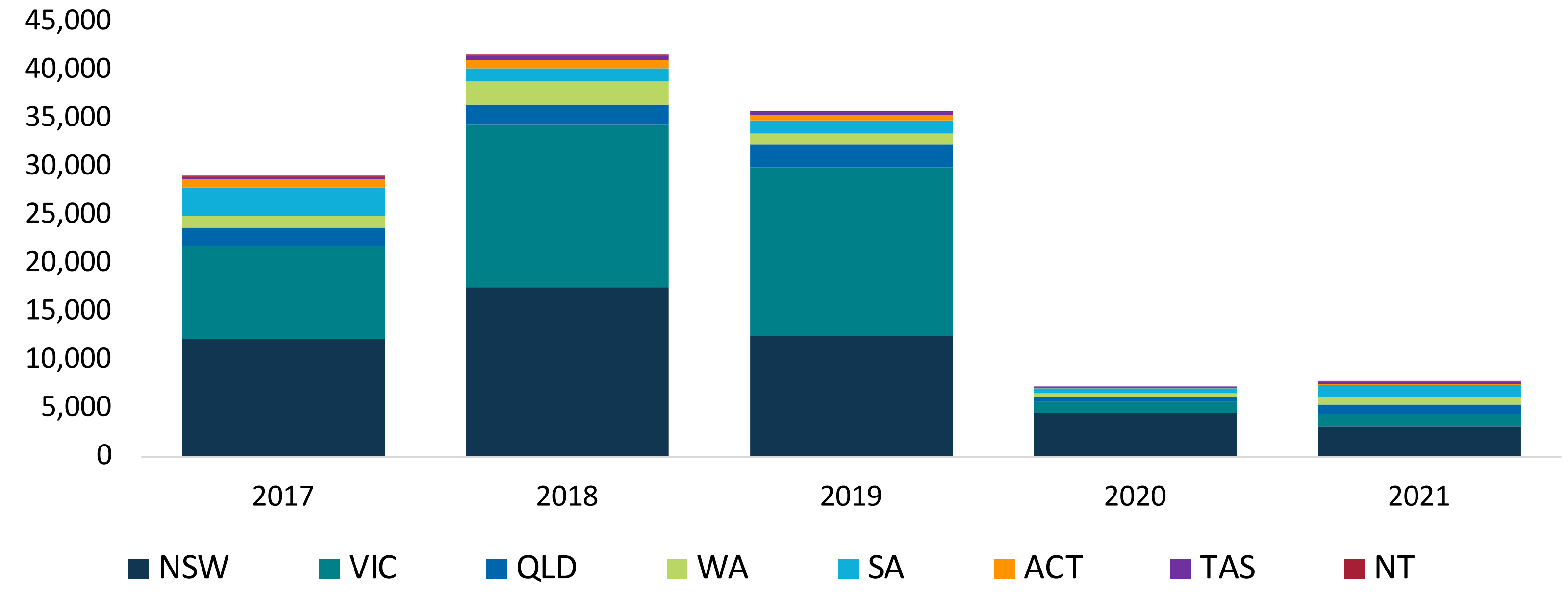
Source: BCARR analysis of ATO taxation data

COVID-19 was extremely disruptive for the live music sector

Other sources of information showing the impact of COVID-19

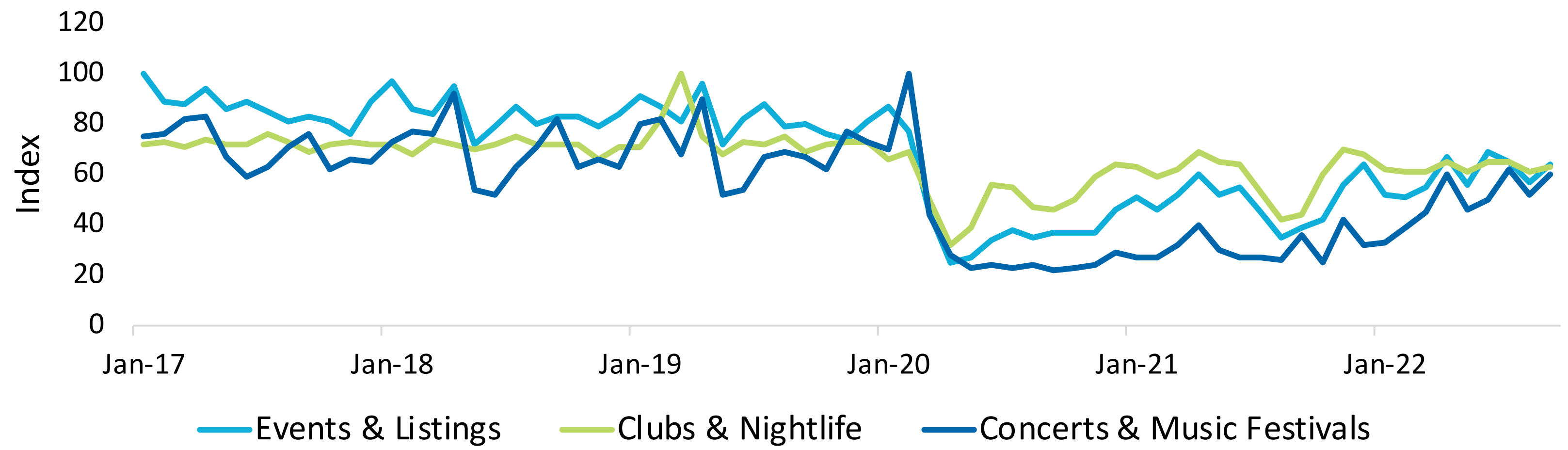
- According to Ernst & Young jobs in the live music sector decreased from 42,000 to 5,900 in 2020
- Attendance to ticketed live music events dropped from 9.7 million in 2019 to 3.3 million in 2020, a decline of 66 per cent, according to data from the LPA Ticket Attendance and Revenue report
- The number of Australian live music promoted events **fell by nearly 80 per cent** – from 35,800 in 2019 to 7,300 in 2020
- Google trends data shows searches on selected live-music related categories fell dramatically at the beginning of 2020 and have remained lower than pre-pandemic levels
- Payroll jobs in the 'creative and performing arts' industry remained far lower than the overall economy throughout the pandemic – falling by as much as 30 per cent in April 2020 and 17 per cent in September 2021 (compared to the base period, week ending 14 March 2020)

Number of promoted live events



Source: APRA-AMCOS promoted events data.

Google search interest



Source: Google Trends,
Note: the index score of 100 indicates the point at which each category was most searched over the period commencing January 2017 to September 2022.