



Australian Government



# Soundcheck: Insights into Australia's music festival sector



## Acknowledgement

Creative Australia proudly acknowledges all First Nations peoples and their rich culture of the country we now call Australia. We pay respect to Elders past and present. We acknowledge First Nations peoples as Australia's First Peoples and as the Traditional Custodians of the lands and waters on which we live.

We recognise and value the ongoing contribution of First Nations peoples and communities to Australian life, and how this continuation of 75,000 years of unbroken storytelling enriches us. We embrace the spirit of reconciliation, working towards ensuring an equal voice and the equality of outcomes in all aspects of our society.

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Young festival fan watching Cam perform live, CMC Rocks QLD 2023. Credit: Mitch Lowe MCH.

# Foreword

## Music connects us. It shapes our emotional states and our identities in ways that are both transitory and profound.

It offers influential forms of communication and expression that flow throughout our everyday lives. It unites human beings across cultures and time and holds significant benefits for health, wellbeing and community-building.

Despite the proliferation and popularity of recorded music, engagement with live music remains a popular pastime. In Australia, music festivals have been a key part of the live music ecology for over half a century. Results from Creative Australia's National Arts Participation Survey show that millions of Australians attend music festivals annually, boosting local economies and providing artists with invaluable performance opportunities.

Australia boasts a huge diversity of music festivals, from small gatherings in local community halls to stadiums and fields packed with tens of thousands of music fans. New festivals are continually springing up in cities and towns across the country, while many existing events have been in continuous operation for decades.

Since 2020, Australia's live music industry has been significantly impacted by the COVID-19 pandemic. Many popular music festivals have been cancelled or significantly downscaled, resulting in multi-million dollar losses for organisers and promoters. Further cancellations have been caused by escalating operational costs and lower ticket sales due to the cost of living, along with extreme weather events which continue to increase in scale and severity. These disruptions have prompted discussions about the future of the industry and how music festivals can thrive in a constantly shifting world.

Until now, the size and scale of the music festival sector across the country has not been well understood. We have also had a limited understanding of the social, cultural and economic impact of music festivals.

The Australian Government's National Cultural Policy, *Revive: A place for every story, a story for every place*, highlights the importance of ensuring that all branches of Australia's arts and cultural sector have the support and tools needed to succeed into the future. Pillar 4 of *Revive*, 'Strong Cultural Infrastructure', highlights the importance of research and data collection for demonstrating value, supporting effective policy development and facilitating informed decision-making. With this in mind, we are pleased to present this important body of research on Australia's music festival sector.

The results presented in this report enable us to better understand the scale of music festivals in Australia, providing a baseline upon which future research can build. The research deepens our understanding of the cultural, social and economic impact of music festivals and the place of music festivals in the broader live music industry, as well as the challenges that are facing festival organisers following the pandemic. The results will also inform the work of Music Australia and provide a critical source of intelligence for the sector as it aims to build on its collective success in the context of uncertain times.

### **Adrian Collette AM**

Chief Executive Officer, Creative Australia

### **Millie Millgate**

Director, Music Australia

# Executive summary

## About this research

Australia is host to a wide range of music festivals which play an important role in Australia's live music sector and provide positive benefits to our society and our economy. For artists, festivals offer opportunities to play alongside more experienced and better-known performers, gain exposure to new audiences and engage in professional development activities. For audiences, music festivals can provide opportunities to see new artists while connecting socially and emotionally with like-minded others. Festivals can also provide significant economic benefits, especially for regional and remote communities.

In recent years, music festival organisers have been faced with unprecedented challenges when planning and executing their events due to the impacts of the COVID-19 pandemic, extreme weather events, regulatory changes and rising operational costs. Greater knowledge is needed to understand these challenges and support the ongoing sustainability of the Australian music festival industry.

To this end, the Australian Government's National Cultural Policy, *Revive*, charged Creative Australia with the responsibility of conducting research to provide insights into the Australian music festival industry. This research provides a comprehensive overview of the scope and scale of the Australian music festival industry, as well as insights into the social, cultural and economic impacts of music festivals and the challenges that festival organisers currently face. It was commissioned with a view to support the work of the Australian Festival Association (AFA), its member organisations and others involved in the music festival industry.

Data collection for this research was conducted between June and December 2023. The project aimed to address the Australian music festival industry's needs by:

1. mapping the Australian music festival industry to understand its scope and characteristics across state and territories
2. compiling data on the economic, social and cultural impacts of music festivals through:
  - semi-structured interviews with music festival organisers, promoters, regulators and suppliers
  - an online survey of music festival organisers
  - aggregated music festival ticketing data from ticketing agencies
  - existing data on Australians' festival attendance and attitudes.
3. providing a comparative overview of the regulatory requirements of hosting music festivals in each state or territory.

## Key findings

### Characteristics of Australian music festivals

- **535 music festivals** were presented across Australia in the 2022–23 financial year, with **Victoria** and **New South Wales** presenting the highest number of festivals – 149 each. That is **almost 1.5 music festivals for every day of the year**.
- Australian music festivals represent a **diverse range of music genres**. Almost one in four music festivals in Australia is an **electronic music festival** (23% of festivals).<sup>1</sup> Other popular genres are **rock** (21%), **country** (19%) and **indie** (17%).
- Three quarters of all music festivals were **first held within the last 13 years** (75%); that is, between 2010 and 2023. One in ten music festivals have **been in operation for 30 years or more** in 2023 (9%), and more than one quarter of these were folk festivals or included a focus on folk music (28%).
- It is estimated that four out of five acts who play at Australian music festivals are **Australian** (80%). The remaining 20% of performances are **international acts**.<sup>2</sup>
- Festivals held between 2022-23 **most commonly attracted 1,000-10,000 attendees (42% of festivals)** followed by 10,000-20,000 attendees (19%).<sup>3</sup>

- The **average cost** to run a music festival is **\$3.9 million**. While more than half of festivals surveyed reported **a profit** (56%, with a median profit of \$731,579), more than one in three music festivals reported **a deficit** (35%, with a median deficit of \$470,000).<sup>4</sup>
- Ticket sales in 2022–23 indicate the industry is recovering from the impacts of the COVID-19 pandemic. In the 2022–23 financial year, **9,506 tickets per festival were sold** on average, up from 8,116 tickets in 2018–19.<sup>5</sup> 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**.
- **18–24-year-olds are purchasing tickets at lower rates than before the COVID-19 pandemic**. In 2018–19, before the COVID-19 pandemic, young Australians aged 18–24 were the primary consumer group for music festivals. However in 2022–23, **those in their mid-to-late 20s were purchasing tickets at greater rates**.

Emily Lubitz plays at the Nannup Music Festival, WA. Credit: Keith Mitchell.



1 Some music festivals represent more than one genre.

2 This data is drawn from the results of the online survey completed by a sample of 51 festivals. The sample included several larger commercial festivals with multiple international acts, so this figure may not be representative of the broader Australian festival industry. Note also that, while local artists may represent a significant majority of music festival acts, international artists are often given greater prominence in a festival program.

3 This includes ticketed, unticketed and free festivals. For multi-day festivals, attendees may be counted for each day they attended.

4 This data is drawn from the results of the online survey as completed by a sample of 51 festivals. The sample included several larger commercial festivals, so this figure may not be representative of the broader Australian festival industry.

5 This refers to ticketed festivals only, based on data from two ticketing agencies that together hold an estimated 60% market share of the music festivals ticketing market, and one major festival that manages its own ticketing.

## Impacts of Australian music festivals

- Festival organisers most commonly say that the key strengths of music festivals are that they:
  - **support local tourism** (53% of responses)
  - **create a sense of community among festivalgoers** (45%)
  - **create employment opportunities for locals** (41%)
  - **provide employment and engagement opportunities for music industry workers** (31%)
  - **give artists exposure to new and larger audiences** (27%).
- Festival organisers most commonly say the main objectives of their festivals are to:
  - **promote and support the Australian music industry** (29% of festivals ranked this as their most important objective)
  - **promote a community identity** eg, First Nations, LGBTQA+ (22% of festivals ranked this as their most important objective, and 47% as a top three objective)
  - **provide career development pathways for artists** (20% ranked this as a top three objective)
  - **contribute to the local economy** (18% ranked this as a top three objective).
- While the primary objective of many festivals is to promote and support the music industry, it is interesting to note that festival organisers are more likely to identify impacts on local tourism and community building as the strengths of music festivals rather than impacts on creative careers and audience development. This suggests that working towards the **objective of promoting and supporting the wider Australian music industry** creates **secondary economic benefits for local economies by supporting tourism and creating employment opportunities for locals**.

## Barriers and challenges to running music festivals in Australia

- The most significant barrier to running a music festival is **rising operational costs** (47% of festivals say this has a severe or major impact on their festival), followed by **lack of funding and grants available** (39% of festivals say this has a severe or major impact on their festival). Other significant barriers which have a severe or major impact on festivals include **insurance** (31%) and **extreme weather events** (22%).
- Festival organisers are challenged by **complex and inconsistent regulatory requirements** across states and territories. The two key regulatory barriers for festival organisers are **navigating planning and/or local government/council requirements** and **navigating police and/or security requirements** (both 27% of festivals).
- For most festivals, **health, medical and liquor licensing requirements** are the least challenging part of the regulatory framework, with only 6–7% reporting these factors having a major impact on their festival and none reporting a severe impact.
- **Additional funding and/or grants** and **extreme weather management support** are identified as strategic development priority areas by festival organisers. The most identified need for the music festival industry is **additional public funding and/or grants**, with four out of five festival organisers pointing to this need (80%). In interviews, some festival organisers called for specialised funding, or increased flexibility in existing funding.

# Introduction

**Each year, hundreds of music festivals are held across Australia. With attendees ranging from a few hundred to tens of thousands, music festivals are a popular form of musical entertainment for people of all ages and musical tastes.**

Festivals can offer a variety and breadth of entertainment and activities unrivalled by other music events and provide a social atmosphere in which attendees can engage with music and with each other.<sup>6</sup>

Music festivals make an important economic contribution to the Australian creative economy. More than \$234 million of revenue was attributed to contemporary music festivals in 2022, making up 11.7% of the total revenue of the Australian live performance industry (third highest behind contemporary music and musical theatre).<sup>7</sup> Music festivals can make a significant impact on the economy of the local areas in which they are held. In 2018, an estimated 3.5 million people took a daytrip to see a music festival or other cultural event, and 3.3 million stayed at least one night in the local area for the event.<sup>8</sup> This generates tourism expenditure and additional income for local businesses. Music festivals, especially those held regionally, also create employment opportunities for local workers and boost local suppliers and businesses.<sup>9</sup>

On a smaller scale, music festivals not only provide significant experiential value for those that attend, but international research suggests they also hold value as part of the region's cultural landscape for locals who do not attend.<sup>10</sup>

In addition to their value for regional economies, music festivals play an influential role in the

wider Australian music industry landscape. Festivals offer opportunities for artists to grow their careers by performing to new and diverse audiences alongside more recognised acts. For new and lesser-known artists, performing at a music festival can provide invaluable opportunities for networking, gaining exposure to new audiences, building transferable skills and opening doors for new opportunities.<sup>11</sup> For many artists, playing at a well-known and well-attended festival acts as a significant career milestone, adding to their market value in the industry and increasing their standing amongst their peers.

There is also increasing recognition of the importance of music festivals in growing individual and community wellbeing, fostering social inclusion, and developing cultural identity. Festivals are an important setting in which people can connect socially through shared experiences.<sup>12</sup> For young people, being part of a festival experience can not only contribute to improved short-term subjective wellbeing, but often plays a role in the development of an individual's identity and sense of self.<sup>13</sup>

Music festival organisers in Australia have been faced with an increasing number of challenges in recent years. Following significant growth in revenue and ticket sales between 2004 and 2019, attendance figures dropped 67% from 2019 to 2021 due to the impact of the COVID-19 pandemic.<sup>14</sup>

- 6 Pegg S and Patterson I 2010, 'Rethinking Music Festivals as a Staged Event: Gaining insights from understanding visitor motivations and the experiences they seek', *Journal of Convention & Event Tourism* 11:2.
- 7 Australia's live performance industry includes theatre, circus, contemporary and classical music, comedy, musical theatre, opera, dance, multi-genre festivals and special events. Ernst & Young 2023, *Live Performance Industry in Australia: 2022 ticket attendance and revenue report*.
- 8 Australia Council 2020, *Domestic Arts Tourism: Connecting the Country*.
- 9 Gibson C and Stewart A 2009, *Reinventing Rural Places: The extent and impact of festivals in rural and regional Australia*. University of Wollongong.
- 10 Andersson TD, Armbrecht J and Lundberg E 2012, 'Estimating Use and Non-use Values of a Music Festival', *Scandinavian Journal of Hospitality and Tourism* 12:3.
- 11 Chen Y 2023, 'Exploring the Career Development Issues of Young Musicians through Participation in Music Festivals: A case study of the Youth Music Culture Guangdong Festival', *International Journal of Music Education* 0:0. Montoro-Pons JD and Cuadrado-Garcia M 2020, 'Music Festivals as Mediators and Their Influence on Consumer Awareness', *Poetics* 80:3.
- 12 Pegg S and Patterson I 2010, 'Rethinking Music Festivals as a Staged Event: Gaining insights from understanding visitor motivations and the experiences they seek', *Journal of Convention & Event Tourism* 11:2.
- 13 Packer J and Ballantyne J 2011, 'The Impact of Music Festival Attendance on Young People's Psychological and Social Well-being', *Psychology of Music* 39:2.
- 14 Ernst & Young 2023, *Live Performance Industry in Australia: 2021 ticket attendance and revenue report*.

In 2022, the National Arts Participation Survey found that people were attending festivals less often than prior to the pandemic.<sup>15</sup> Bushfires, floods and other extreme weather events have impacted an increasing number of music festivals, causing a host of cancellations between 2019 and 2023.<sup>16</sup> Festival organisers and the broader industry are needing to make constant updates to harm reduction strategies and pay increasing costs for police and security personnel in attempts to prevent drug-related deaths and other harm to attendees. Ongoing financial, regulatory, and environmental challenges have caused a number of long-running festivals to temporarily or permanently suspend operations.<sup>17</sup> These challenges have caused some speculation about the ongoing sustainability of the music festival industry in its current form.<sup>18</sup> In light of these challenges, festival organisers have had to adjust their business models, including changes to ticketing models and festival timings, and work creatively to ensure the ongoing success of their festivals.

Despite these challenges, music festivals and similar events remain an important part of the cultural landscape for many Australians. The 2022 National Arts Participation Survey found that, while frequency of attendance has decreased, more than one in five Australians still attended at least one music festival in 2022, and almost half of Australians want to attend more creative, cultural and artistic events.<sup>19</sup> This suggests that attendance is recovering from the disruptive years of the COVID-19 pandemic. However, to support the Australian music festival industry now and into the future, it is important to understand the current state of the industry – what is going well, and the barriers and challenges currently being experienced by festival organisers and promoters.

## About this report

The Australian Government's National Cultural Policy, *Revive*, recognises the need for greater knowledge about Australian music festivals, including their social, cultural and economic impacts and the challenges that festival organisers currently face. The policy charged Creative Australia with the responsibility of conducting research to provide this information, with the view of supporting the work of the Australian Festival Association (AFA), its member organisations and others involved in the music festival industry.

This research was conducted by Creative Australia in collaboration with the AFA. The project aimed to consolidate data and insights on the scale, impact and characteristics of music festivals in Australia, including the differing regulatory requirements across states and territories.

## What is a music festival?

Definitions of a 'music festival' in previous research vary significantly, and there is no agreement on a blanket definition. For the purposes of this project, we adopted a variation of the definition by Strong and Cannizzo.<sup>20</sup> A music festival is defined as an advertised event that:

- was called a 'festival', and/or had music as the central element
- consisted of more than two artists/bands
- was not a 'gig' or a concert (ie, an event held for the purpose of promoting a headlining band or group of bands, in a traditional single-stage venue setting over a short time period such as one evening).

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

16 Green B and Strong C 2023. 'What if it rains? What if there are bushfires?': Extreme weather, climate change and music festivals in Australia', *Media International Australia* 0:0.

17 Cian S 2023, 'Falls Festival cancelled for 2023 as organisers take year off to 'recalibrate'', *The Guardian*, 17 May. AAP 2023, 'Dark Mof's 'Escalating Costs' Force 2024 Cancellation as it Pauses to "Reshape"', *SBS News*, 22 September. Newtown Neighbourhood Centre 2023, *Newtown Festival 2023 Update*. Varvaris M, 2024, 'Dinosaur Jr-Headlined Tent Pole Festival Cancelled', *TheMusic*, 23 January.

18 Geraets N 2023, 'Burning Man in a Burning World: Is this the end of music festivals?', *Sydney Morning Herald*, 8 September.

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

20 Strong C and Cannizzo F 2021, *Victorian Music Festivals 2018/19*.

## Research approach

This project addresses the Australian music festival industry's needs by:

1. **mapping the Australian music festival industry to understand its scope and characteristics across states and territories**
2. **compiling data on the economic, social and cultural impacts of music festivals through:**
  - semi-structured interviews with music festival organisers, promoters, regulators and suppliers
  - an online survey of music festival organisers
  - aggregated music festival ticketing data from ticketing agencies
  - existing data on Australians' festival attendance and attitudes.
3. **providing a comparative overview of the regulatory requirements of hosting music festivals in each state or territory.**

## Research phases

### 1. Mapping the Australian music festival industry

The first phase of the research was focused on mapping the music festival industry across Australia. The aim was to compile a database of all music festivals that were held in Australia in the 2022–23 financial year.

A desktop internet search was conducted to create a list of all music festivals that occurred in Australia between 1 July 2022 and 30 June 2023. This search was supplemented by lists of festivals provided by industry stakeholders.

The following characteristics were mapped for each festival:

- name of the festival
- month and year in which the festival was held
- state or territory and postcode in which the festival was held
- Australian Statistical Geography Standard (ASGS) regional classification for the postcode
- year in which the festival was first held
- music genre(s)
- number of days over which the festival ran
- number of performance stages at the festival
- ticketing platform used by the festival.

Festivals were included in the mapping if they met the definition of a music festival.<sup>21</sup> Festivals and other events that did not meet the definition of a music festival were excluded. In total:

- **535 music festivals were mapped** across Australia in the 2022–23 financial year. See figure 1 for a breakdown of state and territory location.
- **12 borderline cases were identified during the mapping process.** Borderline cases were those festivals or events that met the definition of a music festival, but which the researchers felt still did not strictly qualify as a music festival. Borderline cases were included in the mapping and highlighted for ease of identification.
- **335 festivals and events were reviewed and excluded** from the mapping as they did not meet the definition or other criteria for inclusion.

<sup>21</sup> See 'What is a music festival?' on page 8.

## 2. Qualitative research

The second phase of the research featured a series of in-depth interviews with music festival industry representatives, including festival promoters, regulators, and people working in logistics and supply.

The aim of the interviews was to explore participant views on the economic, social and cultural impact of music festivals in Australia, as well as the barriers and challenges experienced by the industry.

21 semi-structured interviews were conducted via Zoom with a range of music industry stakeholders representing all Australian states and territories during July 2023. Each interview was conducted by a member of the Creative Australia research team and the results of the interviews were analysed thematically. Qualitative data gathered from the interviews informed the design of the quantitative phase of the research, including the development of the online survey.

Role	Total interviewed
Festival organisers	12
Peak body representatives	3
Regulatory representatives	1
Logistics/operations	5

Stock Route Music Festival, Dubbo NSW.  
Credit: Dillon Price.



### 3a. Quantitative research – online survey

The third phase of the research consisted of an online survey to Australian music festival organisers. The 15-minute survey consisted of 45 questions on:

- festival details including location, genre, financial details and accessibility
- views on the social and cultural impact of music festivals on the Australian community
- challenges and barriers to running music festivals.

The survey was distributed during August 2023 via the AFA, Live Performance Australia (LPA) and the Australian Live Music Business Council (ALMBC). The survey invitation was also sent to individual festival organisers where contact details were available online, with a view to ensuring broad representation of the industry.

- 51 completed responses were received for festivals held in the 2022–23 financial year. A range of genres were represented including electronic, pop, rock, metal, hip hop, folk, country, blues and indie.
- Victoria had the highest representation (33%) followed by New South Wales (20%) and Queensland (20%), Western Australia (14%) and South Australia (8%). No responses were received from festivals held in the Northern Territory or Tasmania.
- Most festivals in the survey cohort (68%) were held in major cities. Approximately one quarter (23%) were held in inner regional Australia, and 7% were held in outer regional Australia. One festival (1%) was held in very remote Australia.

A comparison of the survey responses with the national festival dataset indicates that the survey provides a representative sample by state and territory, except for Northern Territory and Tasmania which are not represented.

**Figure 1:**

#### Festival Locations

State	Count – survey	Count – mapping	Festivals per 10,000 residents
ACT	2 (4%)	12 (2%)	0.26
NSW	10 (20%)	149 (28%)	0.18
NT	0	15 (3%)	0.60
QLD	11 (22%)	94 (18%)	0.17
SA	5 (10%)	41 (8%)	0.21
TAS	0	14 (3%)	0.24
VIC	16 (31%)	149 (28%)	0.22
WA	7 (14%)	61 (11%)	0.21

### 3b. Quantitative research – economic data analysis

Modelling the economic impact of music festivals in Australia is challenging. Direct and indirect economic impact can be measured internally (the value to the music festival industry and to organisers) or externally (the value to the wider local, state or national economy).<sup>22</sup> In addition, music festivals are often assessed as part of the broader tourism or arts tourism economy,<sup>23</sup> making it difficult to conduct isolated analysis of music festivals.

In this research, economic impact was assessed primarily by focusing on the health of the industry as indicated by ticket sales and revenue. Analysis was conducted using three data sources:

1. existing research (eg, LPA Ticket Attendance and Revenue Report)
2. aggregated financial data provided by festival organisers in the online survey
3. aggregated ticketing data for music festivals.

Aggregated ticketing data was purchased from two ticketing companies holding a majority share of the ticketing for Australian music festivals, and one major festival that manages its own ticketing. Data included year on year ticketing trends for the last five financial years (2018–19 to 2022–23 inclusive) covering:

- number of tickets sold
- number of days before the festival that tickets were bought
- average number of tickets per buyer
- demographics of ticket-buyers (where possible).

When combined across five financial years (2018–19 to 2022–23), the dataset contained 2,367,486 tickets sold to 1,488,133 customers across 334 music festivals.

### 4. Summary of regulatory requirements across jurisdictions

A desktop search of regulatory requirements that apply to music festivals nationally and in each state/territory was conducted between July and October 2023. Regulatory environments that were considered included:

- environmental and noise
- police and security
- liquor
- health, medical and safety
- accessibility.



Festival Signpost,  
Nannup Music  
Festival, WA.  
Credit: Wendy Slee.

<sup>22</sup> Behr A, Hamilton C, Rozbicka P and van der Hoeven A 2021, '1-2-3-4! Measuring the Values of Live Music: Methods, models and motivations', *Arts and the Market* 11:2.

<sup>23</sup> For example in Australia Council 2023, *Domestic Arts Tourism: Connecting the country*.

# Music festivals at a glance

## 535

music festivals were held in the 2022-23 financial year, including ticketed and free, commercial and community-run.

## 75%

of music festivals **were first held in the last 13 years**, that is, between 2010 and 2023.

## One in ten

music festivals have been in operation for **30 years or more**.

## 23%

of music festivals feature **electronic music**, making it the most popular genre. Other popular genres include **rock, country, indie** and **folk**.

## Half

of all music festivals are held **in major cities**.

## Almost one third

of all music festivals are held in **inner regional Australia**.

Meg Mac plays at Party in the Paddock, TAS.  
Credit: Claudia Ciapocha.

The average cost to run a music festival is

**\$3.9 million.**<sup>24</sup>

## 56% of festivals reported a profit.

The median profit in 2022-23 was \$731,579.

**35% of festivals reported a deficit.** The median deficit in 2022-23 was \$470,000.

Festivals held between 2022-23

## most commonly attracted 1,000 – 10,000 attendees (42% of festivals)

followed by 10,000 – 20,000 attendees (19%).<sup>25</sup>



<sup>24</sup> This data is drawn from the results of the online survey as completed by a sample of 51 festivals. The sample included several larger commercial festivals, so this figure may not be representative of the broader Australian festival industry.

<sup>25</sup> This includes ticketed, free and unticketed festivals. For multi-day festivals, attendees may be counted for each day they attended. This data is drawn from a subset (144 festivals for which attendance information could be sourced) of the overall sample of 535 festivals mapped across Australia).



Diana Doherty with Streeton Trio & Ensemble at the Blackheath Chamber Music Festival. Credit: Keith Saunders.

### 9,506 tickets

were sold on average per festival in 2022–23, up from 8,116 tickets in 2018–19 (pre-pandemic).<sup>26</sup>

### 74%

of festival staff are **paid**, with **41%** of all staff **contracted by companies or sole traders**.

### 26%

of festival staff are **unpaid volunteers**.

### 53%

of festival organisers say that a key strength of music festivals is that they **support local tourism**.

### 45%

of festival organisers say that a key strength of music festivals is that they **create a sense of community among festivalgoers**.

The main goal of festival organisers in preparing a music festival is to **promote and support the Australian music industry**.

### 47%

of festival organisers say **rising operational costs** have a severe or major impact on their festival.

### 39%

of festival organisers say **lack of funding and grants available** has a severe or major impact on their festival.

The two key regulatory barriers for festival organisers are **navigating planning and/or local government/council requirements and navigating police and/or security requirements**.

<sup>26</sup> This refers to ticketed festivals only, based on data from two ticketing agencies that together hold an estimated 60% market share of the music festival ticketing market, and one major festival that manages its own ticketing.

## Part 1:

# What do music festivals look like in Australia?

This section of the report provides a comprehensive overview of the scope and scale of the Australian music festival industry during the 2022–23 financial year.

It outlines key characteristics of music festivals including when and where they are held, longevity, genre representation and other characteristics of interest.

Data in this section is drawn from three sources:

1. existing research (eg, Live Performance Australia’s Live Performance Industry in Australia: 2022 ticket attendance and revenue report)
2. desktop mapping of Australian music festivals and associated characteristics
3. aggregated financial data provided by festival organisers in the online survey
4. aggregated ticketing data for music festivals.

Footnotes have been included in the text to specify where each dataset has been used.

## Key findings

- **535 music festivals** were presented across Australia in the 2022–23 financial year, with **Victoria** and **New South Wales** presenting the highest number of festivals – 149 each. That is **almost 1.5 music festivals for every day of the year**.
- Australian music festivals represent a **diverse range of music genres**. Almost one in four music festivals in Australia is an **electronic music festival** (23% of festivals).<sup>27</sup> Other popular genres are **rock** (21%), **country** (19%) and **indie** (17%).
- Approximately three quarters of all music festivals were **first held within the last 13 years** (75%); that is, between 2010 and 2023.<sup>28</sup> One in ten music festivals have **been in operation for 30 years or more** in 2023 (9%), and more than one quarter of these were folk festivals or included a focus on folk music (28%).
- It is estimated that four out of five acts who play at Australian music festivals are **Australian** (80%). The remaining 20% of performances are **international acts**.<sup>29</sup>
- Festivals held between 2022–23 **most commonly attracted 1,000 – 10,000 attendees (42% of festivals)** followed by 10,000 – 20,000 attendees (19%).<sup>30</sup>

<sup>27</sup> Some music festivals represent more than one genre.

<sup>28</sup> This data is drawn from the overall sample of festivals mapped across Australia. While the mapping sample covered 535 festivals, information on longevity was only found for 506 festivals, and so 29 festivals have been excluded from this longevity analyses.

<sup>29</sup> This data is drawn from the results of the online survey completed by a sample of 51 festivals. The sample included several larger commercial festivals with multiple international acts, so this figure may not be representative of the broader Australian festival industry. Note also that, while local artists may represent a significant majority of music festival acts, international artists are often given greater prominence in a festival program.

<sup>30</sup> This includes ticketed, free and unticketed festivals. For multi-day festivals, attendees may be counted for each day they attended. This data is drawn from a subset (144 festivals for which attendance information could be sourced) of the overall sample of 535 festivals mapped across Australia).

- The **average cost** to run a music festival is **\$3.9 million**. While more than half of festivals surveyed reported **a profit** (56%, with a median profit of \$731,579), more than one in three music festivals reported **a deficit** (35%, with a median deficit of \$470,000).<sup>31</sup>
- Ticket sales in 2022–23 indicate the industry is recovering from the impacts of the COVID-19 pandemic. In the 2022–23 financial year, **9,506 tickets per festival were sold** on average, up from 8,116 tickets in 2018–19.<sup>32</sup> 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**.
- **18-24-year-olds are purchasing tickets at lower rates than before the COVID-19 pandemic**. Before the COVID-19 pandemic in 2018–19, young Australians aged 18–24 were the primary consumer group for music festivals. However in 2022–23, **those in their mid-to-late 20s were purchasing tickets at greater rates**.

## The scale of the industry

### Numbers

Australia’s music festival industry is **substantial in size**.

In the 2022–23 financial year, a total of **535 music festivals** were presented across Australia. That is **almost 1.5 music festivals for every day of the year**. This is approximately 0.2 festivals per 10,000 population, compared to the United Kingdom’s 0.14 festivals per 10,000 population.<sup>33</sup>

In this context, ‘music festival’ is defined as an advertised event that was called a ‘festival’, and/or had music as the central element; consisted of more than two artists/bands; and was not a ‘gig’ or a concert. The total of 535 music festivals includes 12 borderline cases which, while they met the definition of a music festival, they do not strictly qualify, for example multi-genre festivals which include music alongside visual arts, dance or other art forms.<sup>34</sup>

**Figure 2:**

### Map of music festivals across Australia, 2022–23



31 This data is drawn from the results of the online survey as completed by a sample of 51 festivals. The sample included several larger commercial festivals, so this figure may not be representative of the broader Australian festival industry.

32 This refers to ticketed festivals only, based on data from two ticketing agencies that together hold an estimated 60% market share of the music festivals market, and one major festival that manages its own ticketing.

33 Calculations based on 975 festivals in 2019 in the United Kingdom. Digital, Culture, Media and Sport Committee 2021, *The Future of UK Music Festivals*.

34 See ‘What is a music festival?’ on page 8.

## Location

Music festivals take place in **every Australian state and territory**, enabling all Australian audiences the opportunity to immerse themselves in the electrifying atmosphere of music festival culture.

**Victoria** and **New South Wales** have the highest number of music festivals (each hold a 28% share of all music festivals in Australia).<sup>35</sup>

Almost one in five music festivals is held in **Queensland** (18%) and more than one in ten is held in **Western Australia** (11%). **South Australia** is home to 8% of festivals.

The lowest percentage of festivals are held in the three least populous states/territories: the **Northern Territory** (3%), **Tasmania** (3%) and the **Australian Capital Territory** (2%).

## Longevity

While some festivals can be one-off ‘pop up’ festivals, many strive for longevity and to become **mainstays in the festival calendar**. Longstanding music festivals can provide opportunities for **connection across generations** and **long-lasting positive social, cultural and economic impacts**.

*‘I know quite a few girls and women now who are called Meredith after the festival.’*

(Festival organiser)

- Three quarters of all music festivals were **first held within the last 13 years** (75%); that is, between 2010 and 2023.<sup>36</sup>
- One in ten music festivals have **been in operation for 30 years or more** in 2023 (9%). The oldest festivals that were still running in 2022–23 are the Nariel-Creek Folk Festival (VIC; first held in 1963), the Top Half Folk Festival (NT; first held in 1972) and the Uranquinty Folk Festival (NSW; first held in 1972).

- Of the 46 music festivals that are more than 30 years old:
  - more than one quarter are **folk festivals** or included a focus on folk music (28%)
  - one quarter are country music festivals or included a focus on **country music** (24%)
  - 17% are **blues festivals** or included a focus on blues music
  - three quarters are based in **regional Australia** (74%).

Figure 3:

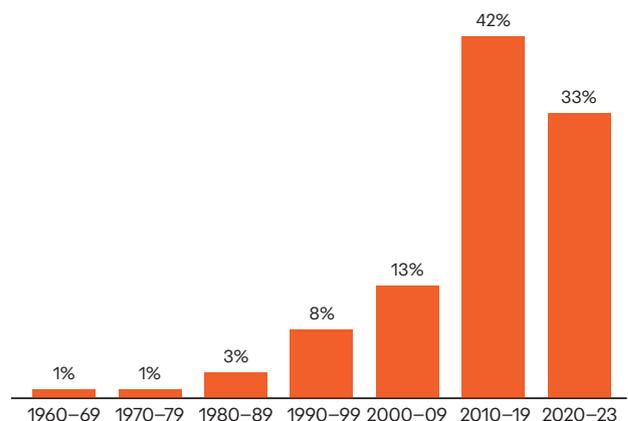
### Music festivals by state/territory, 2022–23



Base: All music festivals (n=535).

Figure 4:

### Period during which festivals were first held



Base: All music festivals for which longevity information could be located (n=506).

<sup>35</sup> The data in this section is drawn from the overall sample of 535 festivals mapped across Australia.

<sup>36</sup> The data in this section is drawn from the overall sample of festivals mapped across Australia. While the mapping sample covered 535 festivals, information on longevity was only found for 506 festivals, and so 29 festivals have been excluded from this longevity analyses.

## The set up

### The festival months

In Australia, the music festival calendar is all year long, **ranging from the hot summer months to chillier times of the year.**

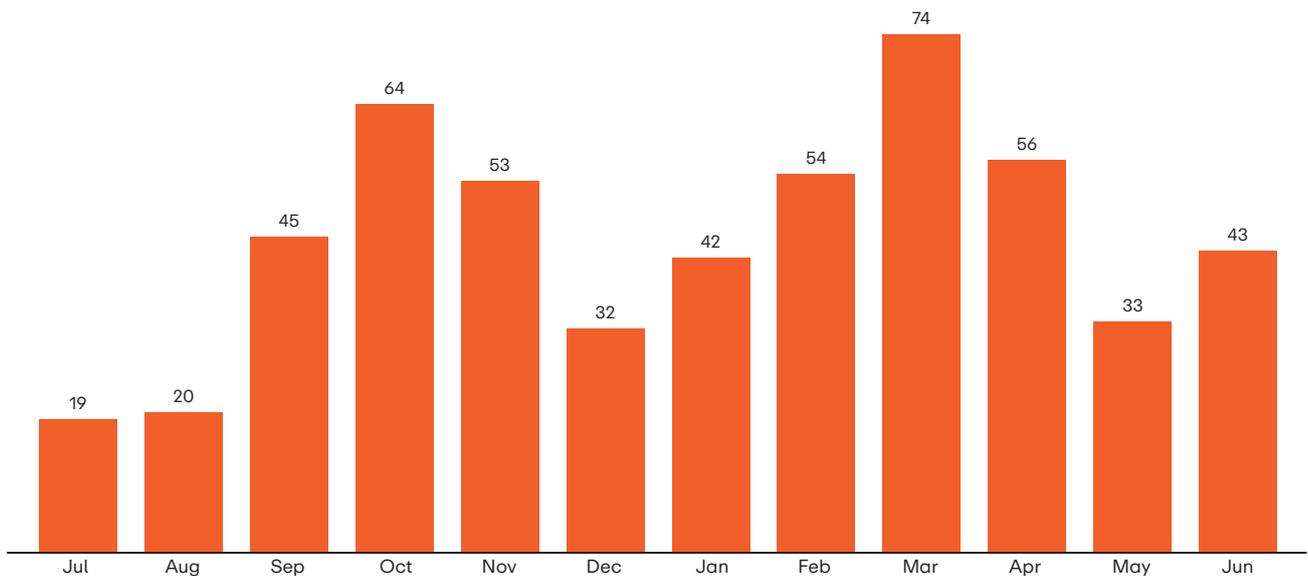
The average number of **music festivals per month** is **44.58**.

The **most popular months** in which to hold music festivals are **March** (14% of festivals) and **October** (12%), falling during autumn and spring.

**April, February** and **November** (10% each) are also popular, followed by **January, June,** and **September** (8% each). The winter months of **July** (4%) and **August** (4%) are the least popular time for music festivals.

**Figure 5:**

### Months in which music festivals were held



Base: All music festivals (n=535).



Big Red Bash 2023, QLD.  
Credit: Matt Williams.

## Duration

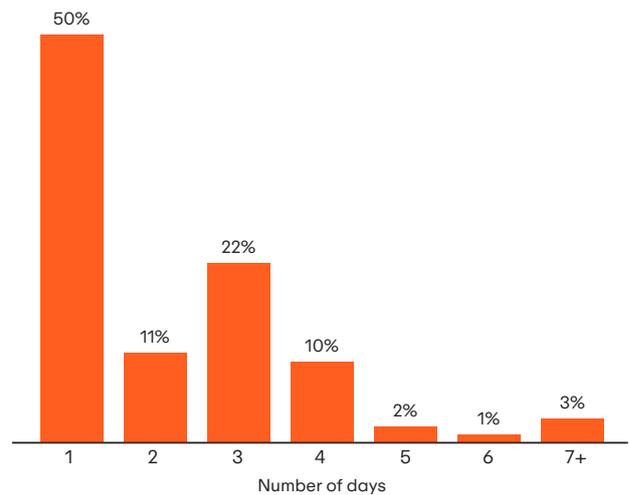
Music festivals range from **single-day events** to **longer multi-day events**, sometimes involving camping. The range of events on the festival circuit provides distinct experiences for every type of festival punter.

In Australia, half of all festivals are **single-day events** (50%).<sup>37</sup> Single-day festivals are far **more likely** to be held in **major cities** (73% compared to 27% held in regional or remote Australia).

Approximately one in five Australian music festivals run for **three days** (22%), 11% for **two days** and 10% for **four days**. A small number of festivals run for **five or more days** (6%). Three- and four-day festivals are **more likely** to be held in **inner regional Australia**.

Figure 6:

## Music festival duration



Base: All music festivals (n=535).

37 The data in this section is drawn from the overall sample of 535 festivals mapped across Australia.

## Location and venue

Music festivals help inject new life into our **cities, regions, culture and economy**. They play a powerful role in supporting small businesses, driving economic growth and community connectedness.

Australian music festivals are **held in a variety of locations** – from major cities to very remote Australia.

- Half of all music festivals are held in **major cities** (50%).
- Approximately one third are held in **inner regional** Australia (31%), and 14% are held in **outer regional** Australia.
- A small number of festivals are held in **remote** (3%) and **very remote** Australia (2%).

To view an interactive map of all festivals (with festival names and filters for festival characteristics), see the [project's online dashboards](#) on the Creative Australia website.

Local community infrastructure is vital to cultural participation, providing public spaces for communities to gather to share and celebrate culture. But music festivals can also be unique in that infrastructure can be trucked in and assembled on land where structures are not existing, for example on farmland.

In Australia, music festivals are held in a variety of **publicly-** and **privately-owned spaces, venues and properties**.

Each venue is equipped with differing levels of facilities. While some venues are all inclusive, some require planning and development of infrastructure including stages, bars, bathrooms and medical tents.

The survey for this project found that in 2022–23:<sup>38</sup>

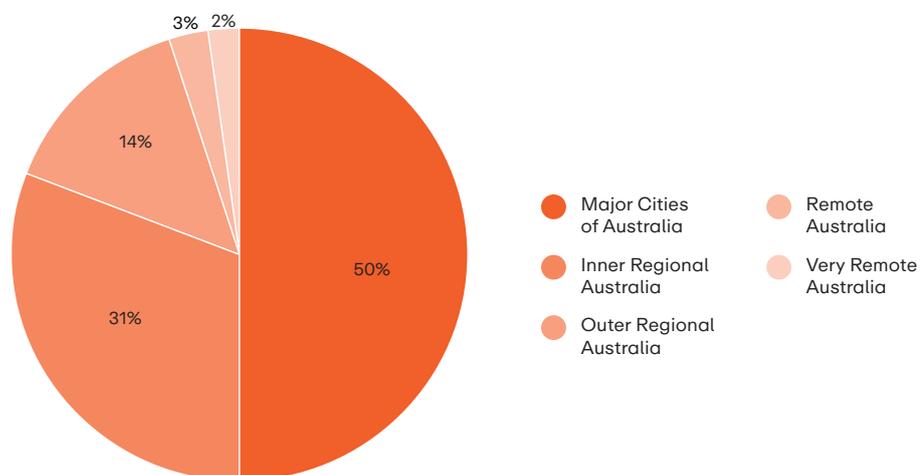
- over half of the festivals were held on land **owned by the local council** or other government-owned land (53%)
- one third were held on **private property** (33%). Of these, only three festival organisers/groups (18% of festivals held on private property) owned the private property on which their festival was held
- the remaining festivals were held either in a **stadium or arena** (8%) or **across multiple venues** (6%).

For detail on challenges and opportunities associated with venues see 'Part 3: What do festival organisers see as challenges and sector needs?'

The same survey found that:

- approximately three quarters of festivals required patrons to **travel to and from the venue** for the day/each day of the festival (71%)
- one in ten festivals offered patrons **camping or other accommodation** at the venue (10%)
- one in five offered a **combination** of travelling each day or staying at the venue (20%).

**Figure 7:**  
**Music festival regional classification**



Base: All music festivals (n=535).

38 The data in this section is drawn from the results of the online survey completed by a sample of 51 festivals.

## Performance stages

Music festivals are **uniquely designed** based on factors including the genre and number of acts, locations, expected attendance, and overarching theme of the event. Some tend to present acts on **one large-scale stage**, while others might cater for **multiple stages of differing sizes and experiences** where audiences pick and choose which artists to see and when.

In 2022–23:

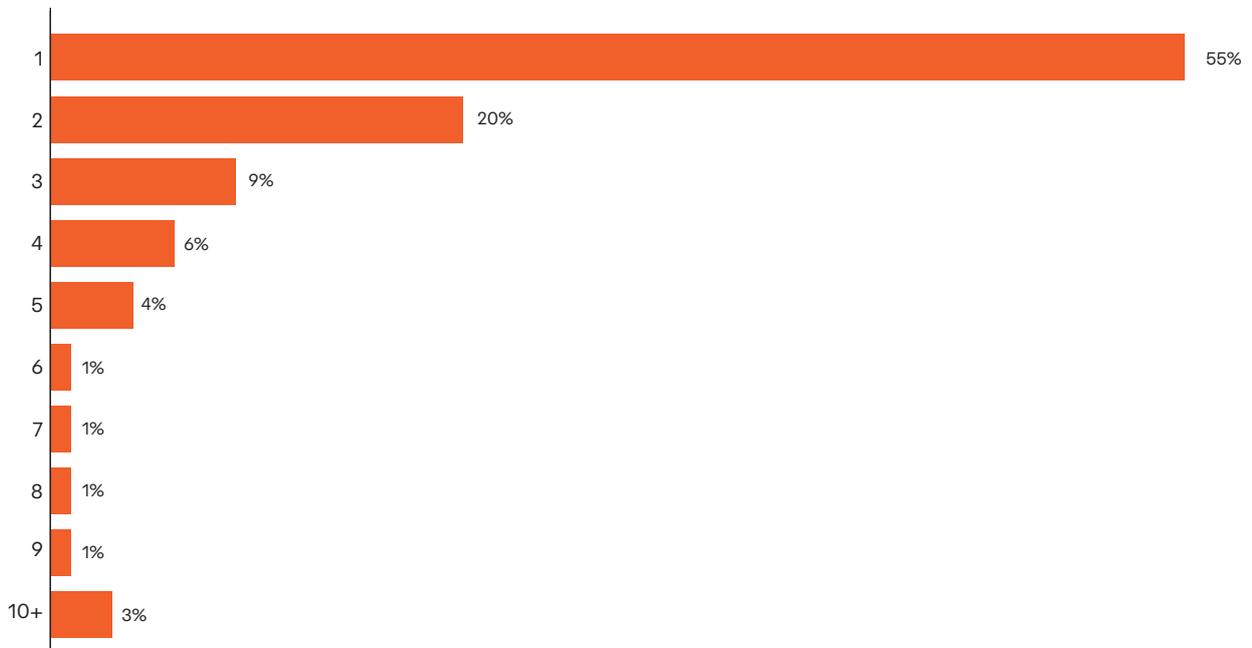
- most music festivals had **one stage** (55%)
- one in five had **two stages** (20%)
- one in ten had **three stages** (9%)
- the remaining festivals had **four or more stages** (17%).<sup>39</sup>

*‘...we have small local acts right through to big internationals, all on the one stage. All get presented the same way, in the same format.’*

– Festival organiser

**Figure 8:**

### Number of stages



Base: All music festivals for which stage information could be located (n=421).

<sup>39</sup> The data in this section is drawn from the overall sample of 535 festivals mapped across Australia. The number of stages could not be accurately determined for 114 festivals. These festivals are excluded from analysis in this section.

## The show

### Genre

Dynamic and broad in scope, Australia’s music festival scene entices audiences from all backgrounds and interests with a **variety and diverse range of musical genres** – from folk to rock, electronic to pop and indie to country. Many festivals also cut across genres and include bands and artists whose music is defined as a mix of musical genres.<sup>40</sup> In their quest to grow and remain relevant to new generations of festival-goers, long-running festivals that were started in a single genre (eg, folk or blues festivals) often diversify their artist line-up well beyond the genre that their name represents.

The **most popular music genre** for Australian music festivals is **electronic**. **Almost one in four** music festivals in Australia is an **electronic music festival** (23% of festivals),<sup>41</sup> which encompasses several subgenres including dance, electronic dance music (EDM), electronica, house, psychedelic, techno, and trance.

The **second most popular genre** is **rock** (21%), followed by **country** (19%) and **indie** (17%).

Other genres include **folk** (13%), **alternative** (10%), **hip hop** (9%), **blues** (8%), **pop** (7%), and **metal** (5%).

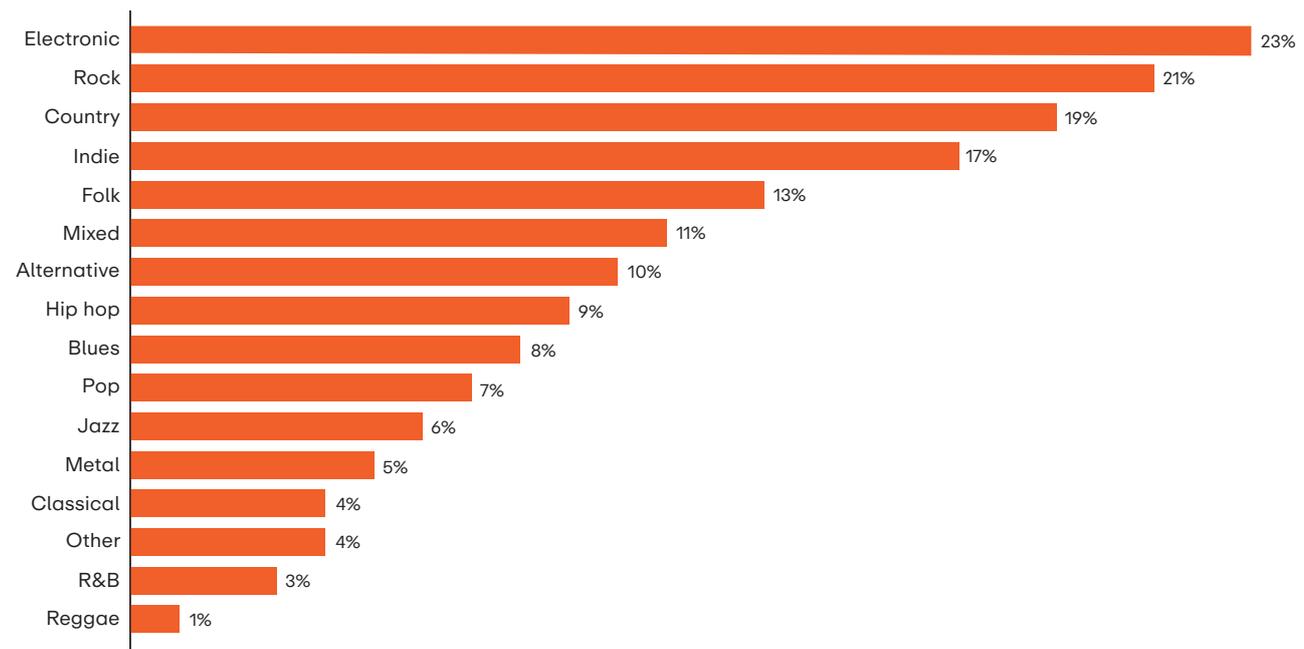
While some genres of music festivals are more likely to take place in **major cities**, others are more likely to help see **regional towns and remote areas** become thriving festival hubs.

**Electronic music festivals** are far more likely to be held in **major cities** (77% compared to 16% held in inner regional Australia and 7% held in outer regional/remote/very remote Australia). Similarly, **metal music festivals** are more likely to be held in major cities (76% held in major cities), as are **rock** (46% held in major cities).

**Country music festivals** are far more likely to be held in **regional areas** (83% compared to 11% held in major cities and 6% held in remote Australia). **Blues festivals** (69% held in regional areas) and **folk festivals** (75% held in regional areas) are also more likely to be held in **regional areas**. First Nations music as a genre is split across the musical genres as First Nations artists play, and First Nations music is presented, at many different types of music festivals.

**Figure 9:**

### Music festival genres



Base: All music festivals (n=535). Some music festivals represent more than one genre.

<sup>40</sup> Festival genres were classified as per the festival’s advertising, or according to the genre of the representing artists.

<sup>41</sup> Some music festivals represent more than one genre.

## First Nations music festivals

First Nations arts and cultural festivals serve as vital platforms for First Nations people to preserve, share and celebrate their rich cultural heritage, fostering community connection and wider cultural recognition. According to analysis of data from the 2022 National Arts Participation Survey, 5% of Australians attended an Aboriginal or Torres Strait Islander music festival in 2022.

The Barunga Festival, an annual event in the Northern Territory, is dedicated to honouring and showcasing the rich culture and heritage of the Katherine region and supporting remote First Nations communities.

Since 1985, the Barunga Festival has been held annually in June and, over the years, has evolved into a three-day event that attracts more than 4,000 attendees.<sup>42</sup>

The festival encourages people to come together to celebrate the Barunga culture through sports, art, dance and cultural programs. In particular, music plays a significant role at the festival, featuring a mix of traditional and contemporary sounds. Emerging community artists have played alongside nationally acclaimed musicians over the years, such as Gurrumul, Yothu Yindi, Archie Roach and Dan Sultan.

Other examples of First Nations music festivals in Australia include the Ngana Birrung festival in western Sydney and Now & Forever in Victoria.

Ngana Birrung  
Festival, Penrith.  
Credit: Ben Williams.

42 See [www.barungafestival.com.au/about](http://www.barungafestival.com.au/about)

## Bands and solo artists

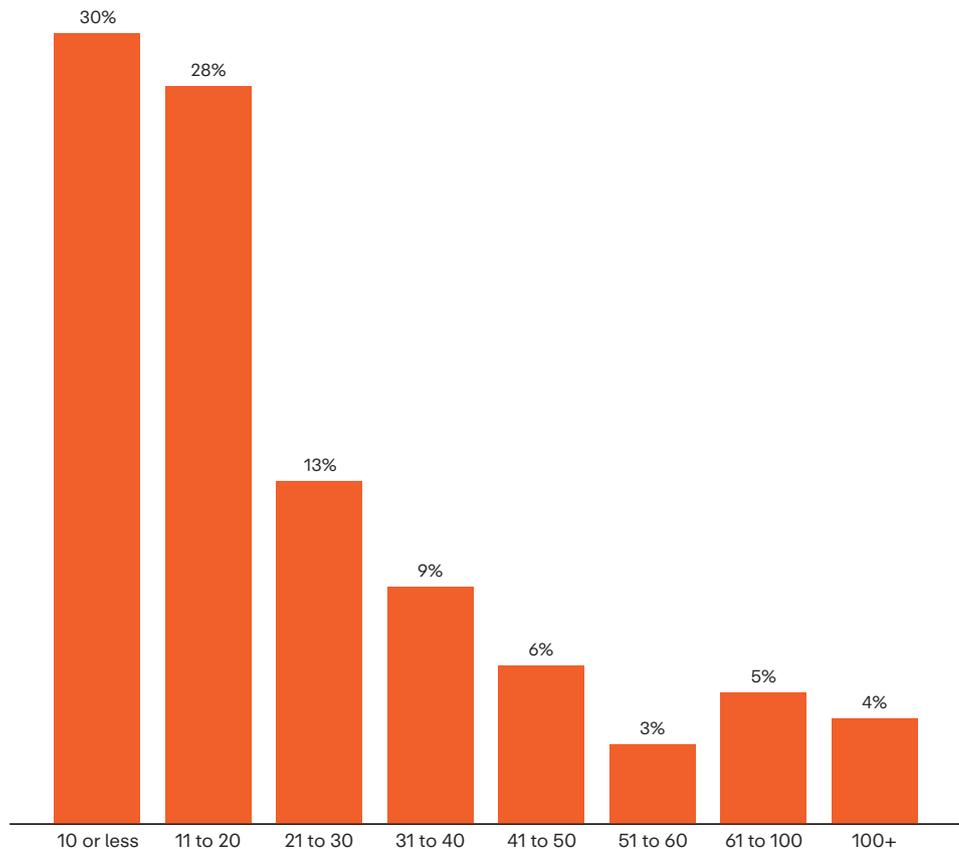
Australia's music festival industry provides a platform for **both Australian and international musicians** to perform on the local and global stage, while attracting audiences to engage with emerging talent, local stars and international heavyweights.

It is estimated that four out of five acts who play at Australian music festivals are **Australian** (80%). The remaining 20% of performances are **international acts**.<sup>43</sup>

The median number of bands per festival is **16**. While the average number of bands per music festival is 33, this is much higher than the median due to four outlier festivals presenting more than 500 artists/bands to audiences. The number of bands per festival ranged between 4 and 1200.<sup>44</sup>

**Figure 10:**

### Number of bands per festival



Base: All music festivals for which the number of bands/artists could be sourced (n=443).

<sup>43</sup> This data is drawn from the results of the online survey completed by a sample of 51 festivals. The sample included several larger commercial festivals with multiple international acts, so this figure may not be representative of the broader Australian festival industry. Note also that, while local artists may represent a significant majority of music festival acts, international artists are often given greater prominence in a festival program.

<sup>44</sup> This data is drawn from a subset (443 festivals for which band/artist information could be sourced) of the overall sample of 535 festivals mapped across Australia.

## The audience

### Attendance

Music festivals bring people together and help foster **community pride, social connection and joy**. They play a crucial role in reinvigorating and supporting local tourism and economic growth.

Attendance at music festivals varies in size – some festivals form small cities for a number of days; others are much smaller, intimate events.

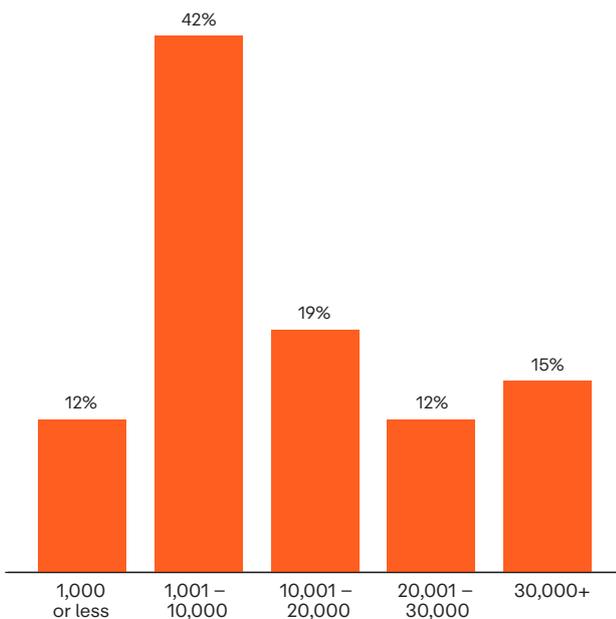
Festivals held in 2022–23 **most commonly attracted 1,000–10,000 attendees (42% of festivals)** followed by 10,000–20,000 attendees (19%). 12% of festivals were small, with less than 1,000 attendees. A further 12% of festivals had 20,000–30,000 attendees, while 15% attracted more than 30,000 attendees.<sup>45</sup>

In 2022–23:

- more than two in five people who attended music festivals were **from the local area of the festival** (43% of attendees)
- approximately one in three attendees were from the **same state as the festival** (35%)
- one in five were from **interstate** (19%)
- a small number of attendees were **visiting from overseas** (3%).<sup>46</sup>

**Figure 11:**

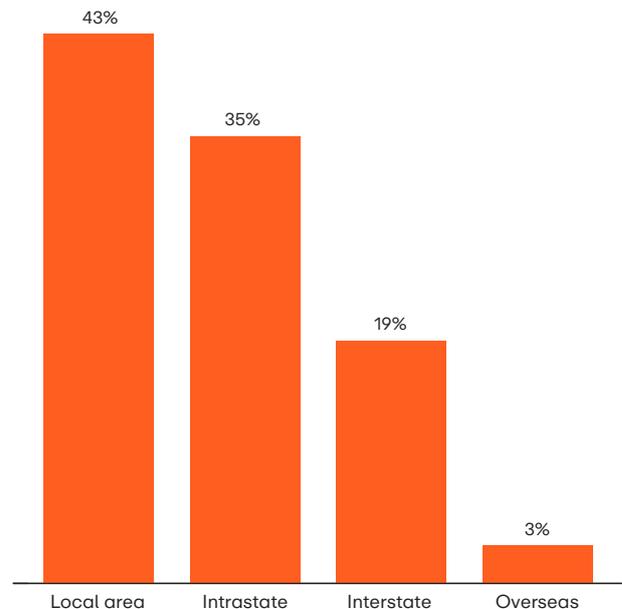
### Attendance per festival



Base: All music festivals for which attendance could be sourced (n=144).

**Figure 12:**

### Residence of music festival attendees



Base: Festivals in the survey sample (n=51).

<sup>45</sup> This includes ticketed, free and unticketed festivals. For multi-day festivals, attendees may be counted for each day they attended. This data is drawn from a subset (144 festivals for which attendance information could be sourced) of the overall sample of 535 festivals mapped across Australia.

<sup>46</sup> This data is drawn from the results of the online survey completed by a sample of 51 festivals.

## What else do we know about music festival audiences in Australia?

The National Arts Participation Survey provides triannual insights into Australians' engagement with arts and creativity. To investigate what the 2022 National Arts Participation Survey data can reveal about music festival audiences in Australia, Creative Australia conducted some specific analysis focused on music festival attendance and audiences. This box reports some results of interest from this analysis.

### Music festival attendance

According to the National Arts Participation Survey, more than one in five Australians aged 15 and over attended at least one music festival in 2022 (22%). Compared to those who do not attend music festivals, festival attendees are more likely to be male, aged under 39, living in a major city, a student or employed and with a household income of \$70,000 or more. Australians with a culturally and linguistically diverse background are also more likely to attend music festivals (31% compared to 20% of those who do not identify as a person with a culturally and linguistically diverse background).<sup>47</sup>

The 2022 National Arts Participation Survey found that:

- one fifth of music festival attendees are aged between 18–24 years (21%) and nearly two-fifths are aged between 25–39 years (38%)
- more attendees are male (56% compared to 43% female)
- 5% of music festival attendees identify as Aboriginal or Torres Strait Islander
- 25% of music festival attendees identify as being from a culturally or linguistically diverse background
- people living in major cities are more likely to attend music festivals (23% compared to 20% of those living in regional or remote areas).

### Other live attendance habits of festival attendees

Most music festival goers are not only attending music festivals, but other arts events as well. More than nine out of ten music festival goers attend free or paid events in-person (93%), most commonly music events (82%), followed by theatre (47%) and visual arts and crafts (46%). The most common reason music festival goers attend creative, cultural and artistic events/festivals is to have fun or be entertained (73%).

On average, music festival goers attend 10.5 music events in a year, with a third (33%) attending music events at least every month. Music festival goers aged 25–39 attend the most music events, with an average of 11.9 events per year. This is significantly higher than the other age groups. Men who are music festival goers attend more music events than women (11.6 music events compared to 9.0 music events attended by women).

<sup>47</sup> Of the overall sample size of 9,396 Australians in the 2022 National Arts Participation Survey, 18% self-identified as culturally and linguistically diverse by answering 'yes' to the survey question 'Do you identify as a person from a culturally and linguistically diverse background?'

### Impacts of COVID-19

Music festival goers were strongly affected by COVID-19. Music festival attendees were more likely to experience negative outcomes associated with their job, income, and connection with family/friends (59% compared to 51% of non-music festival attendees).

Young music festival attendees were more likely to be affected by COVID-19 than other age groups. Two-thirds of music festival goers aged 18–24 were negatively affected by COVID-19 and the stay-home restrictions (65%). This is driven by loss of connection to family/friends (41%) and loss of income (40%).

### Making their own music

Perhaps unsurprisingly, those who attend music festivals are more likely than those who don't attend to create music themselves (28% compared to 10% of non-attendees). The most common form of music created by music festival goers is playing a musical instrument, with one in five doing so within the last 12 months (19%). One in ten either sing (11%) or write songs, mix or compose music (11%). Music festival attendees also have high levels of digital engagement and are more likely than non-music festival attendees to use the internet for all forms of artistic engagement (81% compared to 50% of non-attendees).

Groovin the Moo, Bendigo VIC. Credit: Mackenzie Sweetnam.



Caloundra Music Festival, QLD. Credit: Bruce Haggie Photography.



## Ticketing demographics

Ticketing data shows the majority of music festival ticket buyers are **younger Australians** aged between 18 and 29 and are more likely to be female.

Before the COVID-19 pandemic in 2018–19, the group purchasing music festival tickets at the greatest rates were young Australians aged 18–24. However in 2022–23, this core attendee group had changed to **those in their mid-to-late 20s**. The percentage of ticket buyers **aged 18–24 decreased** from 41% of all ticket buyers in 2018–19 to 27% in 2022–23, while the percentage of buyers **aged 25–29 increased** from 23% in 2018–19 to 35% in 2022–23. While this data is based off those who purchase the tickets, rather than overall attendance, this suggests a need to better understand why younger Australians – who have typically been the primary audience for music festivals – are purchasing fewer tickets to music festivals. These trends can also be seen in the analysis of the 2022 National Arts Participation Survey data above.

A greater percentage of ticket buyers **identified as female** compared to male or another option. There was a slight decrease in the percentage of female ticket buyers between 2018–19 and 2022–23 (55% compared to 49%).<sup>48</sup>

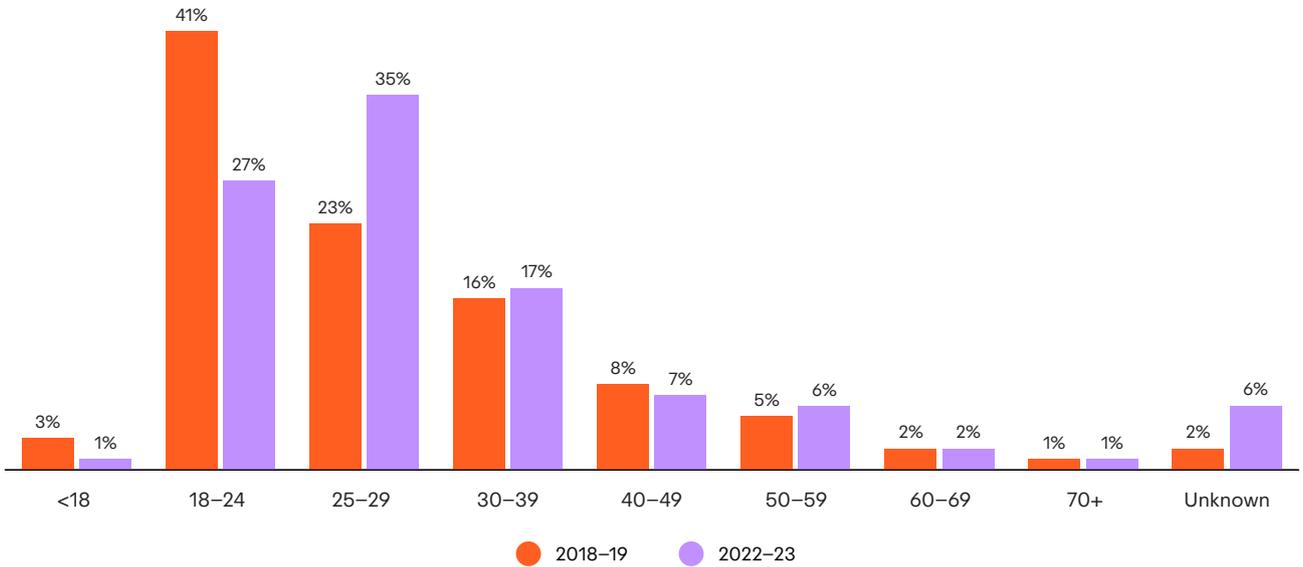
<sup>48</sup> Analysis of customer gender was based on data obtained from two ticketing agencies that together hold an estimated 60% market share of music festivals ticketing, and one major festival that manages its own ticketing. 'Another option' includes customers that selected an option alternative to male or female, and those that did not provide a response. Creative Australia acknowledges that best practice conventions for reporting sex and gender are rapidly evolving and that the limitations of this dataset did not allow for adequate representation of customers who identify as non-binary and gender diverse.



Crowds at the Port Fairy Folk Festival, VIC.  
Credit: Shoelace Creative.

**Figure 13:**

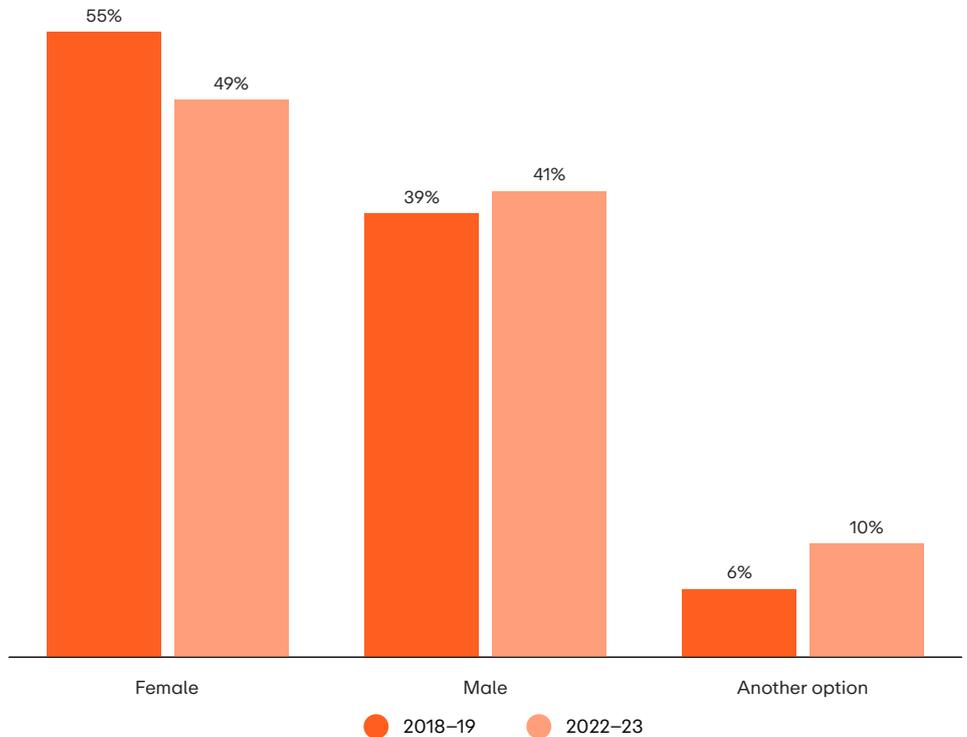
**Customer age by financial year**



Base: Ticketing data for 191 music festival events. Customer age is calculated based on self-reported data at the point of purchase and was not a mandatory or validated field.

**Figure 14:**

**Customer gender by financial year**



Base: Ticketing data for 191 music festival events. Customer gender is calculated based on self-reported data at the point of purchase and was not a mandatory or validated field.

## Cost as a barrier to attendance at music events

In addition to music festival audience demographics, the National Arts Participation Survey provides insights into attendance trends and audience perspectives on ticket pricing. Results from the 2022 survey show that music festival attendees are going to fewer music events than before the pandemic. Compared to 2019, music festival goers are attending nearly three fewer music events per year, eg, concerts, music theatre or cabaret, opera, art music (10.5 music events in 2022, down from 14.2 in 2019). A significant drop in attendance levels was found amongst 25–39-year-olds, from 16.7 music events in 2019 to 11.9 events in 2022. There was also a significant difference in attendance amongst 18–24-year-olds (11.0 events in 2022 compared to 14.1 events in 2019). In addition, there has been a decrease in frequent attendance (eg, weekly) and an increase in less frequent attendance (eg, every couple of months).<sup>49</sup>

One potential explanation for this drop is the impact of rising attendance costs for music events combined with the increasing cost of living in Australia. Contemporary music festivals had the highest average ticket price of all arts events in 2021,<sup>50</sup> and many come with additional costs for patrons such as travel and accommodation costs. While many Australians are keen to attend more arts events and festivals, the cost of tickets remains the most common barrier to attendance, impacting more than half of Australians (55%).<sup>51</sup> A third of music festival goers say they have not attended events in 2022 because of price increases (33%), and three in ten note that events are more expensive now compared to before the COVID-19 pandemic (58%).<sup>52</sup>



JYOTY plays at Listen Out, VIC. Credit: Jordan Munns.

Financial barriers are most pronounced amongst audiences aged under 35, who are also the most likely age group to attend live music events and festivals.<sup>53</sup> This is exacerbated by the increasing cost of living, with nine in ten young Australians experiencing financial difficulties in 2023.<sup>54</sup>

In addition to lower rates of attendance, the Audience Outlook Monitor shows that, across all arts and cultural events, financial concerns are causing audiences to delay the purchase of tickets until closer to the event. Last minute ticket buying is also most common among younger audiences, who are a key target audience for many music festivals.<sup>55</sup> For music festival organisers, this change in purchasing behaviour adds to the precarity of putting on an event.

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

50 Ernst & Young 2023, *Live Performance Industry in Australia: 2021 ticket attendance and revenue report*.

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

52 As above.

53 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey*. Hughes C, Barratt M, Ferris J and Winstock A 2019, *Australian Music Festival Attendees: A national overview of demographics, drug use patterns, policing experiences and help-seeking behaviour*. DPMP Bulletin N° 28, UNSW.

54 Walsh L, Gallo Cordoba B, Cutler B, Huynh TB and Deng Z 2023, *The 2023 Australian Youth Barometer: Understanding young people in Australia today*.

55 Patternmakers 2023, *Audience Outlook Monitor: Audiences 2023+*.

### Demographic groups of focus

Music festivals **market to different audiences** to sell tickets, boost local and global reputations and ensure the longevity of their festival.

**Audience strategies** can include tailored marketing campaigns, ensuring line-ups are representative of focus audiences and ensuring suitable facilities and festival infrastructure.

**Younger people** (61% of survey respondents) and **LGBTIQA+ people** (57%) are the most commonly identified groups towards which festival organisers target their marketing. Approximately half of the festivals focus on **First Nations communities** (53%). Only four music festivals were designed for **culturally and linguistically diverse communities** (8%).<sup>56</sup>

Many festivals purposefully program artists and activities that are of interest to, and representative of, these groups. Some festivals **offer complimentary tickets to certain groups** (eg, First Nations people or people with disability) while others **target advertising** to their chosen audiences through social media advertising.

The importance of supporting underrepresented groups was noted in the survey comments:

*‘We target these by including them, believing in them and supporting them. Why? Because they matter – their creative outlet matters and the impact for audience matters.’*

**(Festival organiser)**

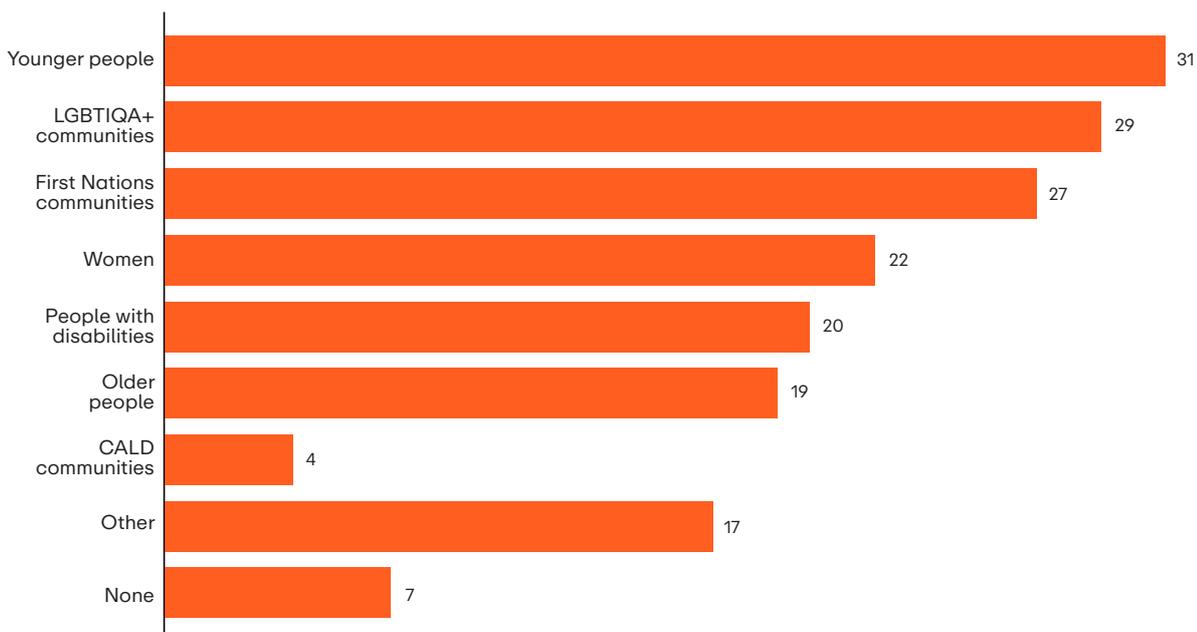
Other festivals do not focus on specific groups, but aim to be generally accessible:

*‘We don’t specifically target any individuals of community groups, rather we strive to be accessible for all people of the above community groups.’*

**(Festival organiser)**

**Figure 15:**

### Demographic groups of focus for music festivals



Base: All festivals that provided survey responses (n=51).

<sup>56</sup> The definition of a music festival used for this report excluded some cultural festivals where music was one of several main elements such as dance, art and cultural performance.

## Behind the scenes

### Costs, profit, loss and turnover

#### Costs to run a music festival

**The scale of costs to run a music festival varies widely across the music festival industry.** Music festivals can require significant budgets for infrastructure and equipment such as staging, sets, light and sound technology and utilities and waste disposal; for operational costs such as marketing and ticketing, insurance, permits and licences, and site hire; for artist fees for musicians, including flights and accommodation; for staffing costs, such as for lighting and stage designers, bar staff, security, photographers and videographers; user-pays policing; and much more.

The **average running cost to run a music festival is \$3.9 million.** The median cost is \$3.3 million.<sup>57</sup>

- While more than one in ten music festivals recorded **over \$6 million in costs** (13%), the highest recorded cost in this survey was \$15 million.
- On the other hand, less than one in ten recorded **\$1 million or less in costs** (8%), with the lowest cost to run a music festival recording at \$90,000.

#### Revenue, profit and loss

While most music festivals are **thriving businesses**, the nature of presenting a music festival **can be precarious.** The industry can be at the whim of changing audience behaviour, availability of artists and availability of sites and venues, and can be affected by external factors such as environmental and financial stresses and now surges in COVID-19 transmissions.

Music festivals in Australia have an **average revenue of just over \$5 million per festival.** The median revenue is \$3.1 million, ranging from \$90,000 to \$50 million in 2022–23. More than one in four music festivals reported revenue of **over \$6 million** in the 2022–23 financial year (29%).

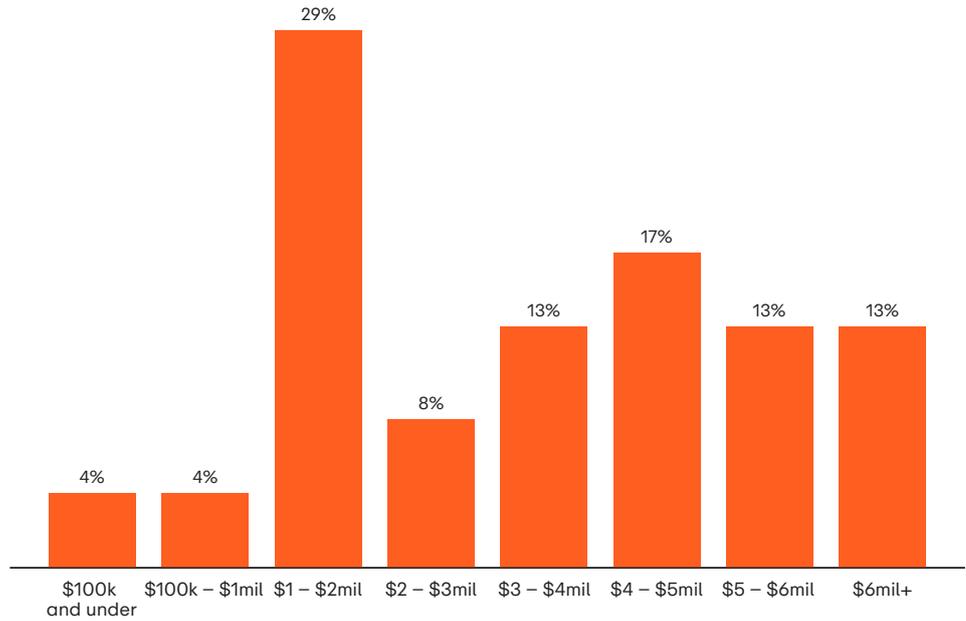
In the 2022–23 financial year:

- more than half of the festivals reported a **profit** (56%). While the average profit was approximately \$2.6 million, the **median profit was \$731,579**, indicating that while some festivals reap larger significant rewards (the highest profit was \$47.4 million), it is more likely that a music festival will secure profits lower on the spectrum (the lowest profit was \$20,000).
- more than one in three music festivals reported a **deficit** (35%). The average loss was \$778,849. However, the median deficit was \$470,000, indicating that while when some music festivals resulted in a significant loss (the highest loss was \$3 million), it is more likely a music festival resulted in a deficit lower on the spectrum (the lowest loss was \$22,000).
- 8% of festivals **broke even.**

<sup>57</sup> The data in this section is drawn from the results of the online survey as completed by a sample of 51 festivals. Three music festivals did not provide this data.

**Figure 16:**

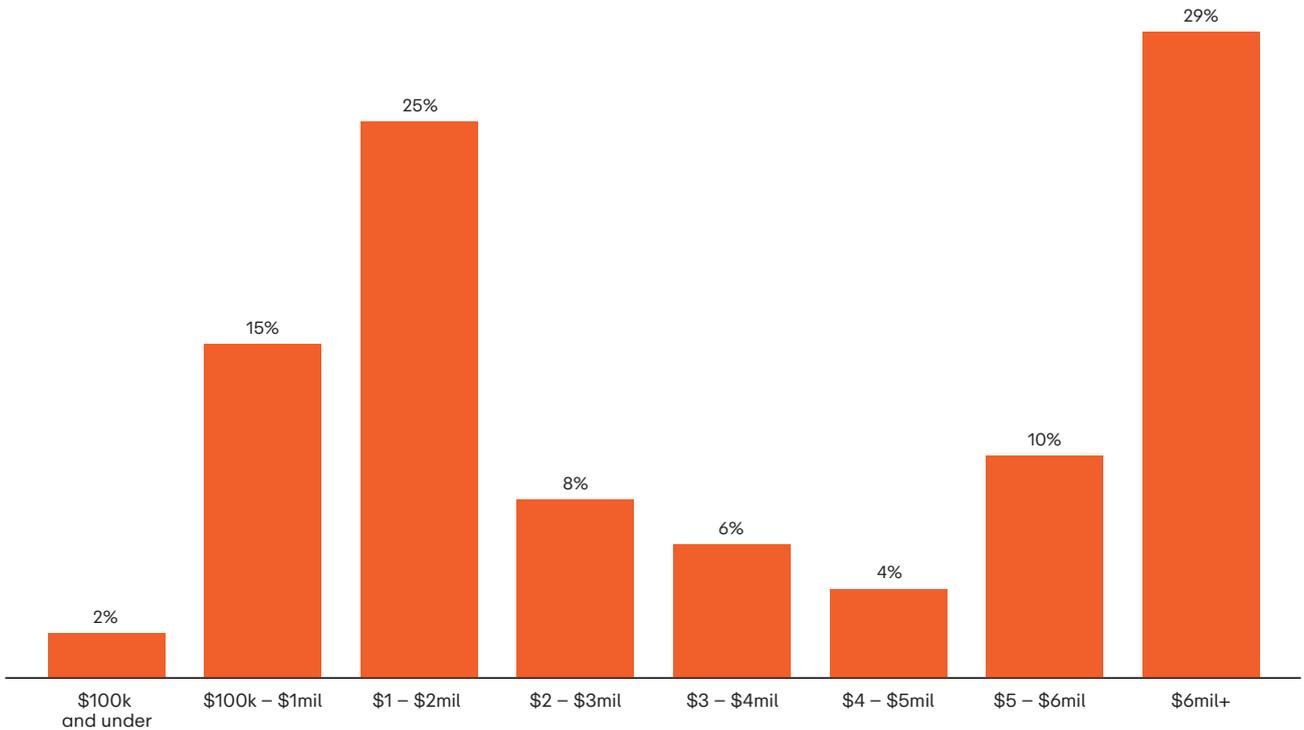
**Festival running costs**



Base: Festivals in the survey sample that provided financial data (n=48).

**Figure 17:**

**Total revenue**



Base: Festivals in the survey sample that provided financial data (n=48).



Brad Cox performing, CMC Rocks QLD 2022. Credit: Andrew Wilson Artist Collective Agency.

## Financing and funding

The music festival industry is **financed by a networked system** which includes commercial revenue such as ticket sales, merchandise and hospitality revenue; corporate sponsorship; government grants; and donations.

This section of the report includes data and analysis on ticket sales and other forms of funding including sponsorship and public and private funding.

## Ticket sales

### Ticket sales numbers

The number of tickets sold to music festivals around Australia was heavily impacted from early 2020 as events were cancelled, postponed or paused due to the necessary restrictions associated with COVID-19.

However, results from this research show that while ticket sales took a hit during 2020–21, and remained low in 2021–22, ticket sale figures show signs that **the industry was recovering from the impacts of the COVID-19 pandemic in 2022–23.**

This is supported by data from Live Performance Australia showing that contemporary music festival revenue increased in 2022 compared to 2019.<sup>58</sup>

In the 2022–23 financial year, **9,506 tickets per festival were sold** on average.<sup>59</sup> This is a strong increase from 8,116 tickets per festival in pre-COVID-19 financial years 2018–19, and 8,001 tickets per festival in 2019–20. This is supported by data from the 2022 National Arts Participation Survey which shows that overall music festival attendance was similar in the 2019 and 2022 calendar years (23% of Australians attended a music festival in 2019, and 22% attended in 2022).<sup>60</sup>

The average number of tickets per customer in the 2022–23 financial year was 1.78. This was an **increase on the previous financial year** (1.50 tickets per customer) but lower than before COVID-19 in the financial years 2018–19 (1.90) and 2019–20 (1.83). This suggests that while the average ticket sales per festival have increased, the number of ticket sales per buyer has not returned to pre-COVID-19 levels.

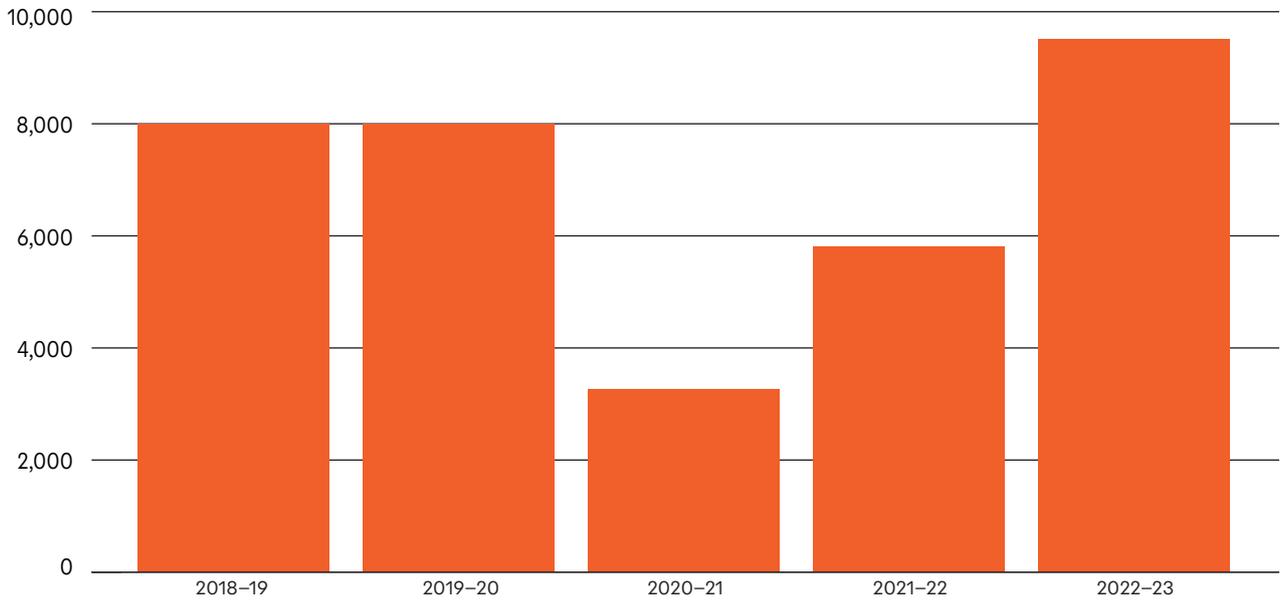
58 Ernst & Young 2023. *Live Performance Industry in Australia: 2019 and 2020 Ticket Attendance and Revenue Report*. Ernst & Young 2023. *Live Performance Industry in Australia: 2022 Ticket Attendance and Revenue Report*.

59 This refers to ticketed festivals only, based on data from two ticketing agencies that together hold an estimated 60% market share of the music festivals ticketing market, and one major festival that manages its own ticketing.

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

**Figure 18:**

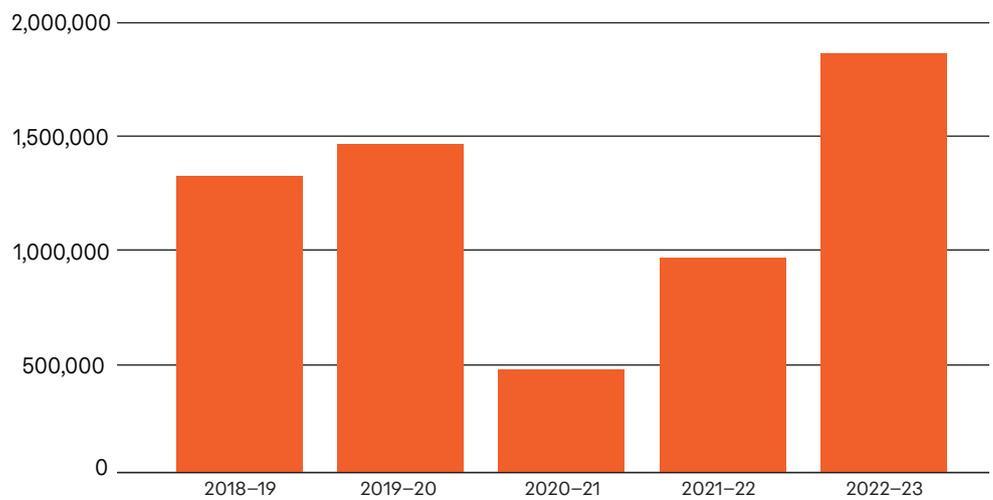
**Average tickets sold per festival**



Base: Ticketing data for 334 music festival events. Some music festivals may be represented in more than one financial year.

**Figure 19:**

**Average value of ticket sales per festival**



Base: Ticketing data for 333 music festival events. Some music festivals may be represented in more than one financial year. Average overall value was calculated based on average ticket prices and is therefore approximate.

### Ticket buying patterns

Over the past four financial years, there have been some **shifts in music festival ticket buying patterns**.

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. This may be an indication of the uncertainty felt in the immediate years following lockdowns, as COVID-19 persisted and cancellations occurred, from both patrons and event organisers.

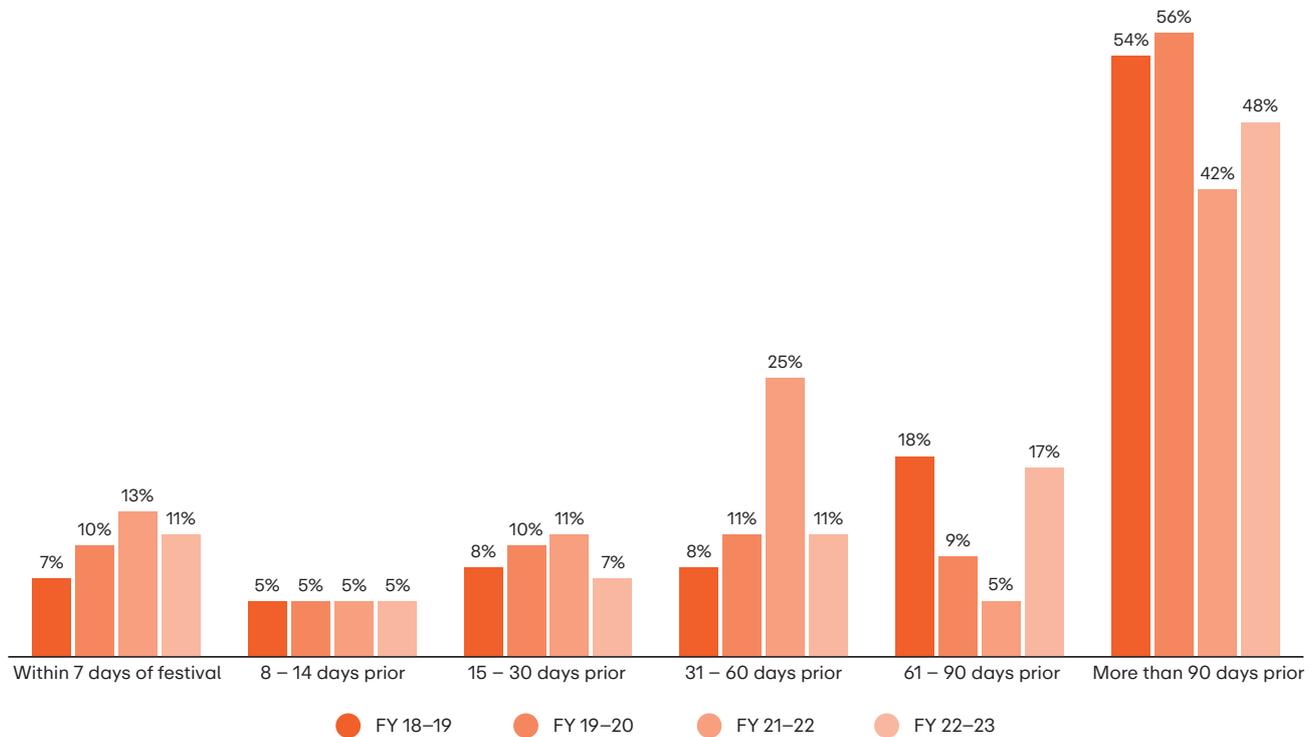
Data suggest that, **despite an increase in ticket sales in 2022–23 compared to the COVID-19 years, patterns of later ticket buying are continuing. However this was most pronounced in 2021–22, and 2022–23 saw a slight movement back toward buying tickets further in advance.**

Ticket purchasing trends from 2018–19 through to 2022–23 show that:<sup>61</sup>

- a greater percentage of customers purchased tickets **within one week of the date of the festival** in 2022–23 than before the pandemic (11% compared to 7% in 2018–19). However, there has **been a slight decrease in late-stage ticket buying** compared to last financial year (13% in 2021–22)
- in 2018–19, most customers purchased tickets **at least 61 days ahead of festivals** (72%), dropping to less than half by 2021–22 (47%). In 2022–23 this **increased** to around two-thirds (65%), though **still below 2018–19’s pre-pandemic level**.

**Figure 20:**

### Ticket buying trends over time



Base: Ticketing data for 309 music festival events. The 2020-21 financial year was not included due to low numbers of festivals.

61 This refers to ticketed festivals only, based on data from two ticketing agencies that together hold an estimated 60% market share of the music festivals ticketing market, and one major festival that manages its own ticketing.

### Ticket characteristics

While some music festivals offer only one type of festival access ticket to buyers, others sometimes choose to offer a suite of ticket package options which may include VIP access, camping or glamping options, or day pass tickets for multi-day events.

In 2022–23:<sup>62</sup>

- nine in ten music festivals had **paid tickets to access the entire festival** (92%)
- a small number of festivals offered **free** tickets for attendees or were **non-ticketed** (12%)
- one in ten offered **day passes/tickets** (10%)
- less than half of festivals offered **paid VIP tickets** (45%)
- a quarter of festivals offered patrons the option to **pay for on-site camping** (24%), with 18% offering **pre-set camping**.

The price of these ticket options varied from festival to festival.

### Single day ticket prices:

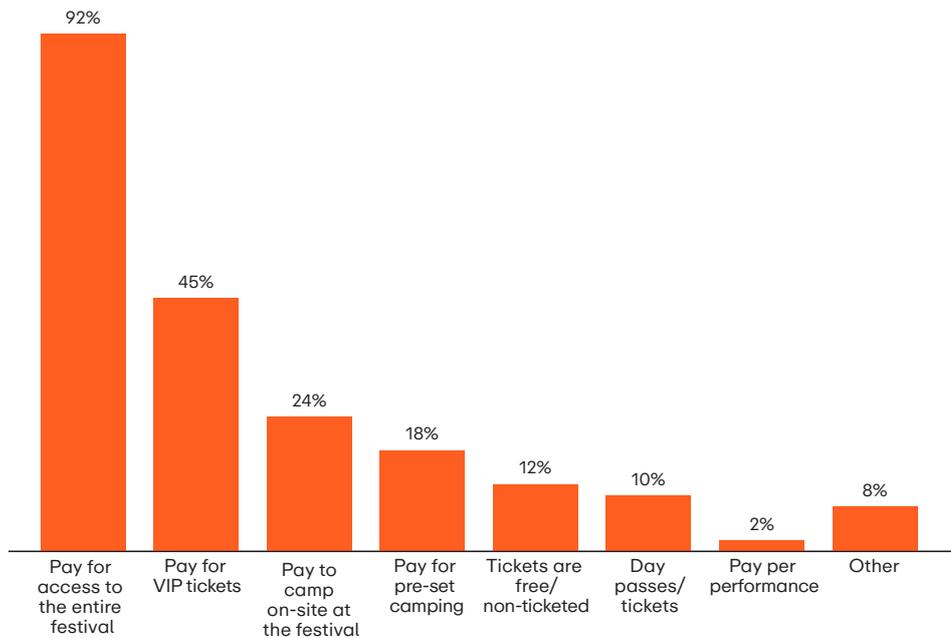
- The average price for a **single day adult ticket was \$146**. Prices ranged between \$109 and \$249.
- The average price for a **single day VIP ticket was \$233**. Prices ranged between \$149–\$336.
- Three festivals offered a **cheaper concession single day ticket**.

### Multi-day ticket prices:

- The average price for a **multi-day ticket was \$441**. Multi-day tickets ranged from \$245 to \$689, with four festivals offering discounted multi-day concession tickets.
- 45 festivals offered **complimentary tickets**. The number of complimentary tickets per festival ranged from 50 to 10,407. The average number per festival was 861, however the median per festival was 500, indicating that the number of complimentary tickets per festival sits slightly lower on the spectrum.

**Figure 21:**

### Festival ticket types



Base: Festivals in the survey sample (n=51).

62 The data in this section is drawn from the results of the online survey as completed by a sample of 51 festivals. Some survey respondents did not provide financial data.

## Funding

In addition to ticket sales and other commercial revenue, the **music festival financing model** often includes financial sponsorship, such as financial contribution in exchange for promotion; in-kind sponsorship, such as equipment or services in exchange for promotion; government funding through grants; and private donations of services, finances, or materials.

This research shows that in 2022–23 music festivals most commonly received external funding from financial sponsorships and state/ territory grants.

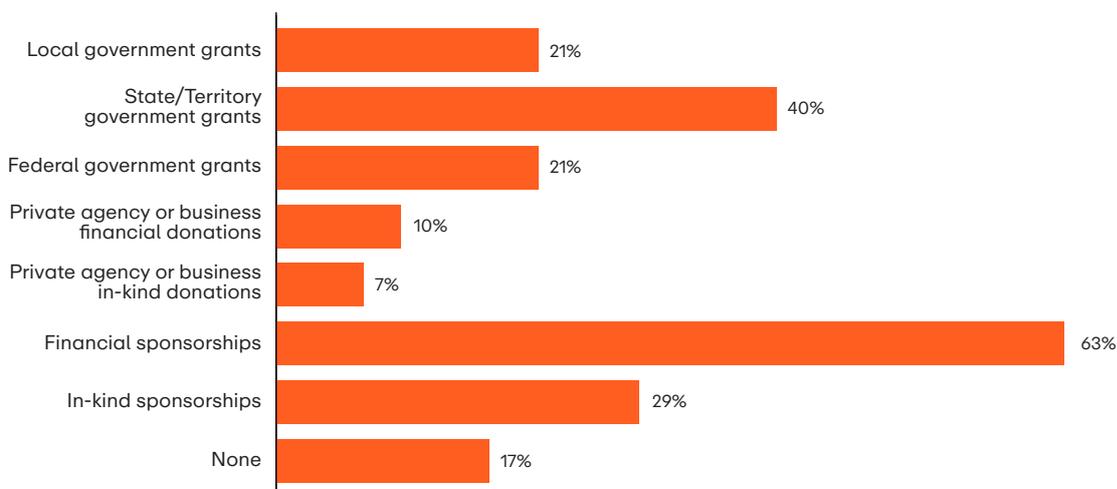
In 2022–23:<sup>63</sup>

- Almost two-thirds of music festivals received **financial sponsorships** (63%), making this the most common form of financing, while less than one third received in-kind sponsorships (29%). One in ten received **financial donations** (10%) and less than one in ten **received in-kind donations** (7%).
  - The average **amount of donations and/or sponsorships** per music festival was **\$176,707**. The total amount of donations and/or sponsorships across the 34 music festivals that received this form of income was \$4,843,047.

- More than two in five music festivals received **state/territory government grants** (40%). State/territory grants were the most common form of government funding. One in five music festivals sourced funding from **local government grants**, and the same proportion from **federal government grants** (each 21%).<sup>64</sup>
- Almost half of music festivals received **grant funding from federal, state and/or local government** (46%).<sup>65</sup>
  - While the average amount of public grant funding was \$388,724, the median amount was \$177,000, indicating music festivals are more likely to receive smaller grant amounts. The range of public grant funding was between \$750 and \$1,075,000.
- Nearly a fifth of music festivals received **no external funding support** (17%). While this sample is geographically representative of the industry at large, it may be slightly skewed towards more commercialised festivals due to the sample base.

**Figure 22:**

### Types of funding received



Base: Festivals that provided financial data in the survey (n=48)

<sup>63</sup> The data in this section is drawn from the results of an online survey completed by a sample of 51 festivals. Three music festivals did not provide this data.

<sup>64</sup> These figures may include one-off funding provided as part of COVID-19 industry support packages.

<sup>65</sup> As above.

## Staffing

Australian music festivals use a **range of staffing models to deliver their events**, including paid and volunteer arrangements.

Due to the nature of festivals as temporary events that often occur only once a year, most music festivals operate in a 'ramp-up' model, in which contractors, casual staff and sole traders are brought on board in the lead-up to the festival or for the festival's operating times only. It is common for full-time employees to represent a smaller proportion of the overall workforce needed to present a music festival. These roles may include managerial or administrative staff who oversee and coordinate specialist staff. Specialist contractors, such as production, installation, design and communications specialists may be more likely to be hired on short-term contracts, whereas hospitality and bar staff may be hired, and volunteer staff may be recruited, for the festival's duration.

Across a representative sample of Australian festivals:<sup>66</sup>

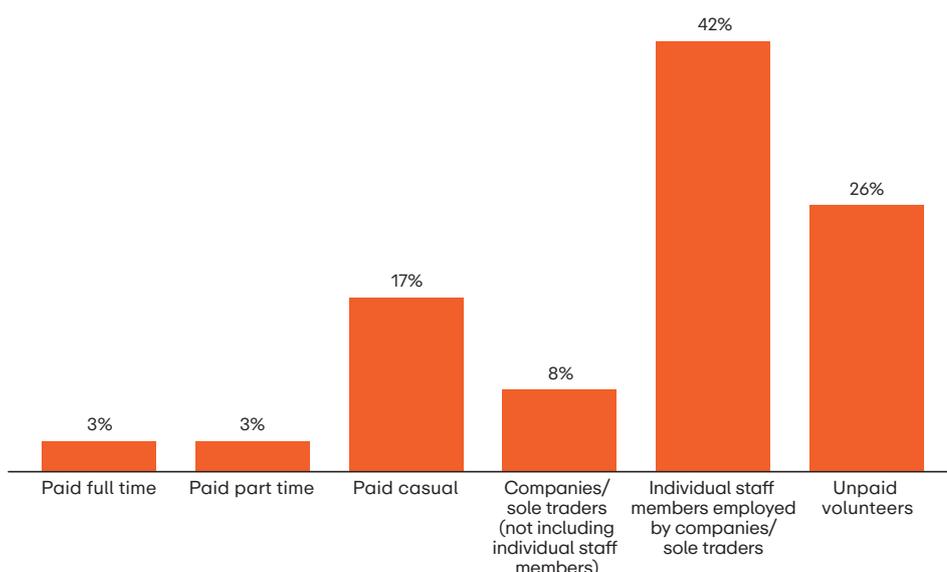
- three quarters of festival staff were **paid** (74%):
  - the highest percentage of staff were **contracted by companies or contracted by sole traders** to work on the festival (42%)
  - one in five were **paid casuals** (17%)
  - a small amount were **paid full-time staff** (3%) and **paid part-time staff** (3%).
- one in four were **unpaid volunteers** (26%).

Music festivals are likely to recruit staff and volunteers from the local area in which the festival takes place.

- On average, 57% of **music festival employees were locals** (people from the local government area in which the festival was held).
- **The proportion of local staff varies across festivals, with some more likely than others to use local staff.** For more than half of the festivals (54%), three quarters or more of their staff were locals. For approximately one third of festivals (33%), one quarter or less of the staff were locals.

**Figure 23:**

### Staff employment types across festivals



Base: All festivals that provided staffing data in their survey response (n=48).

<sup>66</sup> The data in this section is drawn from the results of the online survey as completed by a sample of 51 festivals. Three music festivals did not provide this data.



Audience members at Ability Fest, VIC. Credit: The Dylan Alcott Foundation.

## Accessibility

Approximately 4.4 million Australians, or 18% of the population, are **living with a disability**.<sup>67</sup>

Festivalgoers with a disability often report that **they struggle to attend and enjoy festivals due to inaccessible venues and lack of disability support options**.<sup>68</sup> As a result, people with disability are underrepresented in festival audiences overall compared to people without disability.<sup>69</sup> Creative Australia’s 2022 National Arts Participation Survey found respondents with disability are less likely to attend music festivals (23% compared to 19% of people living without a disability). However, the survey also found that a third of specifically-engaged respondents with intellectual disability attend music festivals (35%).<sup>70</sup>

To support Australians with disability to attend music festivals, the music festival industry is building capacity and skills to inform festival design and communications.

In 2022–23, more than three quarters of festivals had **at least one accessibility measure in place** prior to their festival (78%).<sup>71</sup>

**Figure 24:**

### Pre-festival accessibility measures

Item	% of festivals
Staff training for different ability needs	78%
Disability/inclusion action plan	76%
Access guide/information for attendees with disability	71%
Accessible program	57%

Base: All festivals in the survey sample (n=51)

A range of accessibility measures were put in place by festivals during the event. The most common included **accessible toilets** (offered by all festivals in the survey sample), **companion ticket discounts** (84%), **accessible parking** (73%), **viewing platforms** (71%) and **accessible seating/wheelchair and mobility vehicle zones** (65%).

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

68 Myers E 2022, 'Australia is behind on accessibility at music festivals and gigs and fans with a disability are missing out', ABC, 13 February.

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

70 Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey*. Based on a sample size of 93 specifically-engaged respondents with intellectual disability.

71 The data in this section is drawn from the results of an online survey completed by a sample of 51 festivals.

**Figure 25:****Accessibility measures during the festival**

Item	% of festivals
Accessible toilets	100%
Companion ticket discount	84%
Accessible parking	73%
Viewing platforms	71%
Accessible seating / wheelchair and mobility vehicle zones	65%
Staff training for different ability needs	57%
Warning about inaccessible terrain	51%
Accessibility guide	49%
Sensory spaces (ie, a quiet and safe room or other dedicated space where patrons can relax and recharge)	47%
Shuttle bus services for people with accessibility requirements	18%
Parent facilities	18%
Audio description (ie, auditory narration of the festival performances)	12%
Auslan interpretation	8%
Hearing loops (ie, assistive sound system for people with hearing aids)	4%
Accessible camping	2%

Base: All festivals in the survey sample (n=51)

During interviews, many festival organisers spoke of the work they have done to make their festivals more accessible and indicated **a desire to continue improving accessibility** at their festival.

*'For our major festivals [...] we always bring in Auslan interpreters, provided we've got a big screen because it's not really impactful without big screens. We try and have accessible viewing platforms at every show that we do, we try and have accessible, raised platforms, VIP viewing areas as well. We always have accessible bathrooms. You operate in temporary environments, there's always more that you can do. It's an infinite list of things that you can do to make a space more accessible. We need to weigh that up with budgetary considerations as well and making the show happen, but certainly from our perspective [...] I feel like we are advanced in the accessibility space.'*

**(Festival organiser)**

*'We've done a lot of work in accessibility in terms of showing what people with disability can do, you know. Last year, we had a person with disability who was DJ-ing, we had a lot of new physical accessibility additions. I think it just adds to really bringing community together in all forms, and allows people to really understand how broad the community is here.'*

**(Festival organiser)**

However, other organisers reported experiencing **challenges related to the temporary nature of festival events**, which makes it expensive and difficult to implement accessibility provisions. This is especially relevant for festivals located in rural areas without services.

*'Accessibility, we're constantly looking into, but we can never be everything to everyone. [...] there is honestly only so much we can do being in an outdoor, open air lawned venue. We always say we're accessible. [...] We have an accessible toilet on site. We offer companion card holders a free ticket. [...] I always think accessibility is something good for parents as well. We have brought in a new parenting tent, which I like for families, parents and caregivers. So within that tent, large lounges, a bit more of a quiet space. But if we go into you know, hearing, vision, we haven't really been able to touch on that any deeper. Like I said, it is so hard to be everything.'*

**(Festival organiser)**

*'It's expensive. That's the challenge. [...] Generally, to get it right for three days in the bush is expensive, depending on what the accessibility issue is. [...] It is a huge push for festivals to become more accessible. And it's expensive. And it's invariably temporary. So that's definitely a challenge.'*

**(Festival organiser)**

One organiser noted that despite the costs associated with some accessibility requirements, there are a lot of **small and inexpensive changes that festivals can make to improve the experience for patrons living with disability**.

*'I went to a big stand up and attended some panels on accessibility [which was] really helpful to understand the space. I realised that there's a lot you can do in the accessibility space that is reasonably low-hanging fruit. Like, for example, just providing really clear information in advance to people [...] how far apart things are, what's the terrain like, how do you get there, and what are the toilets like? Just so somebody can do journey planning and can make that decision for themselves about whether the event is going to work for them. [...] Sometimes I think events just get scared of accessibility, because they're like, oh, you know, we're going to have to put ramps in everywhere, we're going to have to have Auslan interpreters everywhere, and all that cost is going to be borne by the event. And there's some truth to that, but I think it's good to know that there's a lot that events can do that doesn't really cost much money.'*

**(Festival organiser)**

## Ability Fest (Untitled Group & the Dylan Alcott Foundation)

Ability Fest is a unique music festival organised by the Dylan Alcott Foundation and Untitled Group. The first event of its kind globally, Ability Fest aims to use the power of music as a platform to normalise disability. All people – regardless of age, gender or ability – are encouraged to come together in a celebration of live music.

The infrastructure at the festival is designed specifically to cater for people of all ability levels. Accessibility features include Auslan interpreters, quiet zones, guide dog accessibility and free tickets for carers.

Untitled Group manage the event on a pro-bono basis at a donated venue, and the artists who play at the event donate their time for free. All proceeds are donated to the Dylan Alcott Foundation, which helps young Australians with disabilities succeed and achieve their dreams. Since its inception in 2019, the festival has raised more than half a million dollars to support the work of the foundation.

Ability Fest, VIC.  
Credit: The Dylan Alcott Foundation.



## Sustainability

All festivals require resources to run, including water, food, power, equipment and other products, all of which **have associated environmental impacts**.

Most music festivals are temporary events which take over a specific site for a short, defined period of time. Large outdoor camping festivals with thousands of attendees can have the most significant environmental impacts. In the United Kingdom, camping music festivals generate 25,800 tonnes of waste and 24,261 tonnes of CO<sub>2</sub> emissions annually.<sup>72</sup> A study of outdoor festivals across Europe and the United Kingdom found that, on average, attendee travel is the largest emissions source for music festivals, accounting for 41% of a festival's carbon footprint.<sup>73</sup> In Australia, 50% of festival litter is generated from individual campsites, including broken tents that are discarded by attendees.<sup>74</sup>

Awareness of the environmental impact of the Australian music industry is growing. Green Music Australia, a registered charity established in 2013, has led several campaigns to promote cleaner festival campsites and other sustainability initiatives for Australian music festivals.<sup>75</sup>

Only 22% of festival organisers reported leadership in sustainability as a strength of music festivals, indicating that there is more work to be done to make music festivals as sustainable as possible. During interviews, festival organisers reported that there is a strong desire across the industry **to implement sustainable practices and reduce the environmental impact** of music festivals.

*'We're really trying to work on our reduction of plastics [...] we've brought in big hydration stations, which is all rainwater from the farm, which I love. And it's a big marketing message*

*now, where people bring in their own water bottles. Even things like how cups have changed, they're all completely reusable, which does cost the punter more. They're at most festivals now. But it means, all of a sudden, our single-use plastic is gone. We have 20 foodies there, they have to bring in everything bio, it can't be any single use plastic, which is actually South Australian law now anyway. We've finally brought in green and compostable bins, which has been with assistance from the council [...] we have local scouts that do all our recycling. So we support all the local communities and scouts and do a lot more recycling than we've ever done.'*

**(Festival organiser)**

*'We try and implement as many sustainable practices as we physically can [...] we implemented a no plastics policy, so we never serve plastic water bottles. We encourage people to bring their own refillable water bottles [...] we put the better part of 20 kilometres of pipe in the ground to run fresh drinking water to one of the main water tanks all the way through the campgrounds so that our festival patrons have access 24/7 to free drinking water through their own water bottles. [...] We do the usual upcycle and recycle methods, we're also looking into ways to upcycle our fencing scrim. We're working with a company now who's recycling all of our fencing scrim into tote bags, pencil cases, rather than our scrim going into landfill. We're also looking at a project with Monash University who are taking our discarded plastics, so cable ties, things like that, and upcycling them into reusable products made from recycled plastics all in the interest of reducing waste that goes to landfill.'*

**(Festival organiser)**

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*'We try and implement as many sustainable practices as we physically can [...] we implemented a no plastics policy, so we never serve plastic water bottles. We encourage people to bring their own refillable water bottles [...]*

<sup>72</sup> Powerful Thinking 2020, *The Show Must Go On: Environmental impact report for the UK festival and outdoor events industry*.

<sup>73</sup> A Greener Future 2023, *AGF Festival Carbon Footprint Report 2022/2023*.

<sup>74</sup> Kearney AT 2019, *Festival Littering*, Green Music Australia.

<sup>75</sup> Green Music Australia 2023, *Campaigns*.

Several organisers raised the **importance of educating patrons** on how they can personally contribute to a sustainable event. This was particularly relevant for multi-day camping festivals, which can generate significant amounts of waste from individual camping sites.

*'We try to make sure people don't use one off tents, because that's a huge waste. People just bring in their tents and leave them. We used to end up with loads, like potato bins full of rubbish. So that's something that we do put in our marketing now.'*

**(Festival organiser)**

*'Overall in our festival, 70% of the waste that went to landfill came from our campgrounds and of that, I think it was something like 14 tons of scrap metal. And that is essentially more or less people leaving over discarded camping gear - camping chairs... tents, discarded tables and things like that [...] we're working with Camping Buddy this year to really educate our patrons on leaving no trace. We do a lot of sustainability messaging throughout as well, the campaign to highlight the Leave No Trace aspect that we want. You know, it really does come down to individual responsibility as well. We feel like we have to educate our patrons on that a lot more.'*

**(Festival organiser)**

## Spotlight

## Sustainability initiatives at music festivals

Awareness of the environmental impact of music festivals is growing, and many Australian festivals are taking action to improve the sustainability of their events. National campaigns such as #byobottle and Party with the Planet have been launched to raise awareness and encourage festival patrons to act in a sustainable way when attending festivals.

Individual festivals are also taking action to reduce their impact. In regional Victoria, the popular Queenscliff Music Festival was a finalist in the 2020 Premier's Sustainability Awards for their sustainable waste practices, which include food salvage partnerships, a compostable waste system and recycling initiatives.<sup>76</sup> Tocumwal's Strawberry Fields Festival has eliminated many single-use items by introducing reusable crockery and using compostable plates and bowls.<sup>77</sup> It was also the site of a trial of Camping Buddy, a free planning app to help festivalgoers reduce unnecessary landfill when camping at festivals.<sup>78</sup>

In Western Australia, the Nannup Music Festival is using a targeted green sponsorship program and other waste minimisation



Q-Crew volunteers at the bin station at Queenscliff Music Festival. Credit: Lucinda Goodwin.

strategies to chase the goal of becoming the festival with the lightest environmental footprint in Australia. In 2017, the festival was the state winner of the Tidy Towns Awards in litter prevention and waste management.<sup>79</sup>

<sup>76</sup> Queenscliff Music Festival 2023, War on Waste. Sustainability Victoria 2023, Queenscliff Music Festival: 2020 Finalist – Community.

<sup>77</sup> Strawberry Fields 2023, Rewash Revolution.

<sup>78</sup> Green Music Australia 2023, *New Tool Camping Buddy to Reduce Waste at Australian Music Festivals*.

<sup>79</sup> Nannup Music Festival 2023, Green Sponsorship.

## Part 2:

# What are the impacts of music festivals?

This section of the report consolidates responses from festival organisers on what, from their perspective, the impacts of music festivals are and presents this with corresponding literature in the field.

It also presents findings on the main objectives of music festivals. The aim of this section is to demonstrate the impacts and goals of music festivals through the eyes of those who help drive our flourishing music festival industry.

Data in this section is drawn from the results of an online survey completed by a sample of 51 festivals and interviews with organisers and industry representatives.

### Key findings

- Festival organisers most commonly say that the key strengths of music festivals are that they:
  - **support local tourism** (53%)
  - **create a sense of community among festivalgoers** (45%)
  - **create employment opportunities for locals** (41%)
  - **provide employment and engagement opportunities for music industry workers** (31%)
  - **give artists exposure to new and larger audiences** (27%).
- Festival organisers most commonly say the main objectives of their festivals are to:
  - **promote and support the Australian music industry** (29% of festivals ranked this as their most important objective)
  - **promote a community identity** eg, First Nations, LGBTQA+ (22% of festivals ranked this as their most important objective, and 47% as a top three objective)
  - **providing career development pathways for artists** (20% ranked this as a top three objective)
  - **contributing to the local economy** (18% ranked this as a top three objective).
- While the primary objective of many festivals is to promote and support the music industry, it is interesting to note that festival organisers are more likely to identify impacts on local tourism and community building as the strengths of music festivals rather than impacts on creative careers and audience development. This suggests that working towards the **objective of promoting and supporting the wider Australian music industry** creates **secondary economic benefits for local economies by supporting tourism and creating employment opportunities for locals**.

## Strengths and objectives of music festivals

Music festivals are powerful forces that **support thriving communities and economies**. They provide moments for human expression and social cohesion, while also supporting income growth of musicians, creative workers and local supply chains, and boosting local and regional economies. While most music festivals are driven by a desire to support and promote the music industry, music festivals have the potential to create powerful economic and social impacts for local communities and businesses.

In response to this survey, festival organisers most commonly say a major strength of music festivals is that they **support local tourism and help foster a sense of community among festivalgoers**.<sup>80</sup>

- More than half of festival organisers say that a key strength of music festivals is that they **support local tourism** (53%).
- Almost half of festival organisers say music festivals **create a sense of community among festivalgoers** (45%).
- More than two in five festival organisers say that a key strength of music festivals is that they **create employment opportunities for locals** (41%).
- Nearly two in five festival organisers say that a key strength of music festivals is that they **foster a sense of community between locals and festivalgoers** (37%).
- Nearly one third of festival organisers say that a key strength of music festivals is that they **provide employment and engagement opportunities for music industry workers** (31%).
- More than one quarter of festival organisers say that a key strength of music festivals is that they **give artists exposure to new and larger audiences** (27%).

- One quarter of festival organisers say that a key strength of music festivals is that they are **inclusive spaces where festivalgoers feel safe and can express themselves freely** (24%).
- One in five festival organisers say that a key strength of music festivals is that they **show leadership in implementing environmentally friendly practices** (eg, waste reduction, educating patrons in sustainability) (20%).

The objectives of a music festival, as determined by festival organisers, can vary depending on the nature and scale of the festival and the targeted audience. Some festivals prioritise community cohesion, artist growth, economic output or developing community infrastructure.

Festival organisers were asked to rank the five most important objectives for their festival from a list of options.

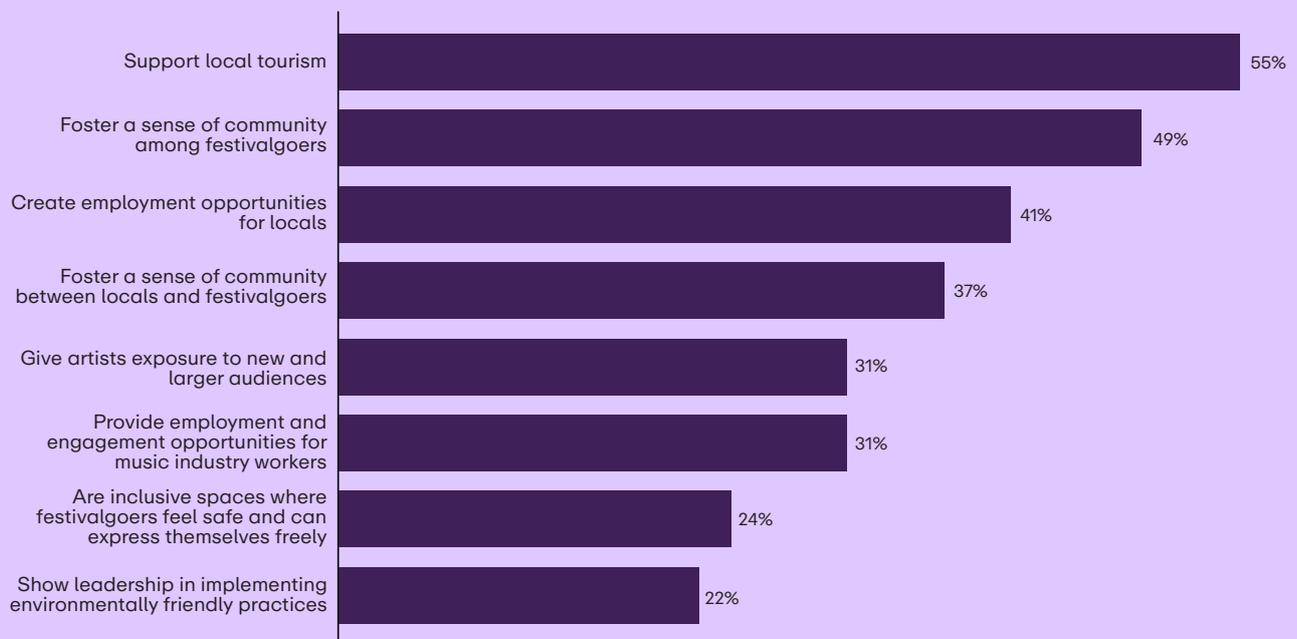
- Festival organisers most commonly say the main aim of their festivals first is to **promote and support the Australian music industry**, with almost one third of festival organisers ranking this as one of the most important objectives (29% of festivals). 57% say this is in their top three objectives.
- While the primary objective of many festivals is to promote and support the music industry, it is interesting to note that festival organisers are more likely to identify impacts on local tourism and community building as the main strengths of music festivals rather than impacts on creative careers and audience development. This suggests that **while the primary objective of many festivals is to promote and support the wider Australian music industry**, working towards this objective creates **secondary economic benefits for local economies by supporting tourism and creating employment opportunities for locals**.

<sup>80</sup> Festival organisers were asked to select the top three strengths of music festivals from a list of provided options (based on interview responses).

- One third of festival organisers (31%) rate **providing employment and engagement opportunities for music industry workers** as a key objective.
- More than one in five festival organisers say **promoting a community identity** (eg, First Nations, LGBTQA+) is their most important objective (22%), and almost half of the music festivals in the survey say this is in their top three priorities (47%).
- Nearly one in five focus on **contributing to the local economy** (18%) as a key objective.
  - It is interesting to note that contributing to the local economy is the main objective for less than one in five festival organisers, while this is the main strength identified by this group (53%). This indicates that while music festivals produce broad economic benefits for local communities and businesses, it tends to be a byproduct of music festivals rather than the main objective.
- Almost one third of responses say the second most important objective of their festival is to **encourage social interaction and a sense of belonging amongst audiences** as (29%).
- For one in five festival organisers, **providing career development pathways for artists** is one of their top three priorities (20%). This suggests that while some festivals focus on providing opportunities for artists, other organisers place higher priority on supporting the music sector more broadly and engaging communities. Although music festivals would not exist without artists, ensuring the viability of festivals and the broader music industry are apparently a more pressing priority for organisers.
- The least common objectives are to **generate industry business and product sales and utilise existing creative infrastructure** (both not ranked by 88% of festivals).

**Figure 26:**

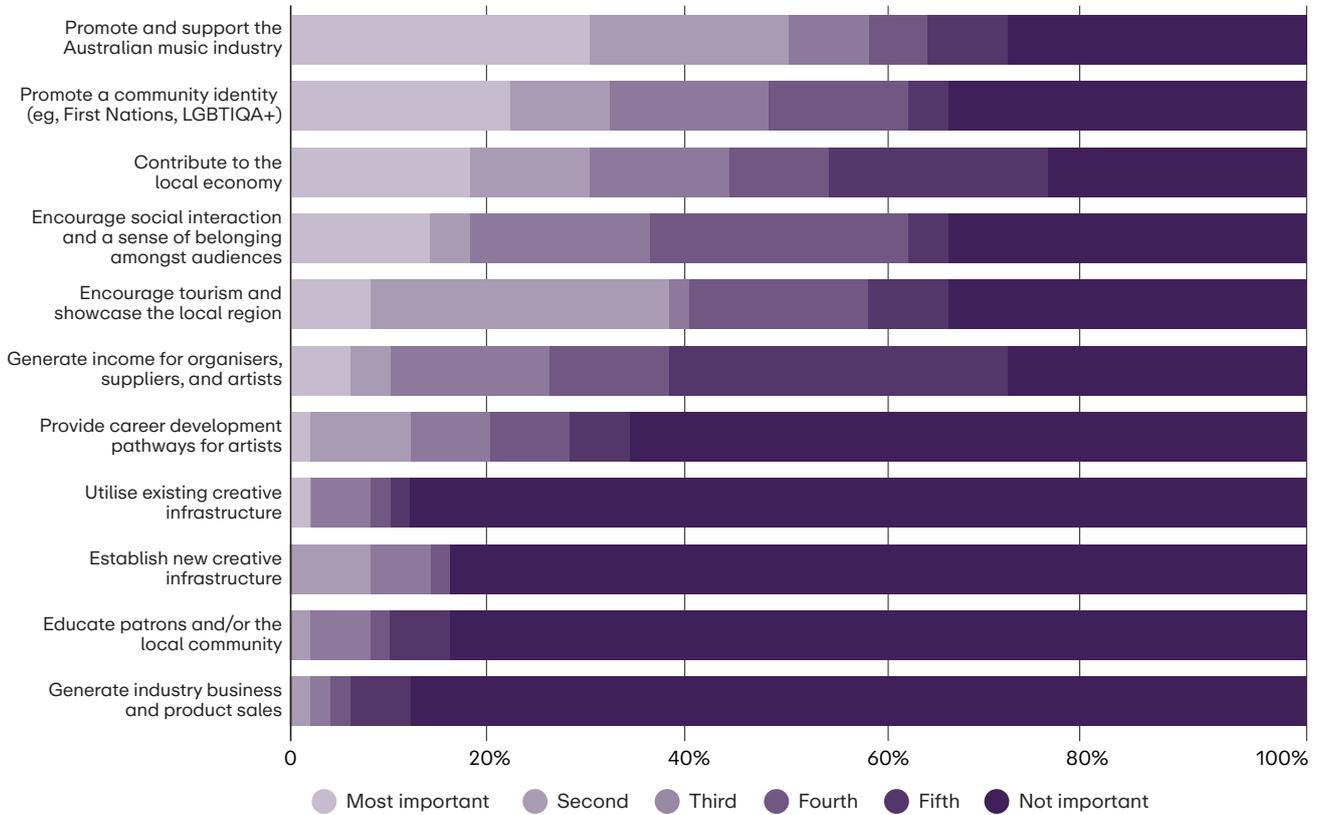
**Top strengths of music festivals according to festival organisers**



Base: Festivals in the survey sample (n=51). Festival organisers were asked to select the top three strengths of music festivals from a list of provided options.

**Figure 27:**

**Top five festival objectives according to festival organisers**



Base: Festivals in the survey sample (n=51). Festival organisers were asked to select the top five objectives of music festivals from a list of provided options.



Camping at the Meredith Music Festival, VIC.  
Credit: Mike Ridley

## Promoting and supporting the Australian music industry

Music festivals are a vital component to the music industry, **providing opportunities for artists to showcase their work and talents and grow their artistic career.**

For many artists, music festivals and touring are a major source of income to support their creative practice. Music festivals can provide unique opportunities for musicians to network with those in industry – from other artists to festival organisers and record labels – supporting industry connections and career growth. Importantly, music festivals provide a platform for artists to showcase their work to their fans and to engage new audiences.

Festival organisers most commonly say the main objective of their festivals is to **promote and support the Australian music industry**, with almost one third of respondents ranking

this as one of the most important objectives (29% of festivals). Half of all survey responses identified **promoting and supporting the Australian music industry** as their first or second priority objective (49%), indicating this is a major objective for most festivals.

In interviews, several organisers spoke of the **unique role of music festivals in the broader music industry ecosystem.**

*‘Culturally, festivals are one of the backbones of the music industry.’*

**(Peak body representative)**

While the primary objective of many festivals is to promote and support the music industry, it is interesting to note that this is not reflected in the top observed strengths of music festivals, which are focused around supporting local tourism and engaging communities.

## What does other research tell us about the importance of music festivals to a thriving music industry?

The distribution of music has changed significantly since the arrival and innovation of digital distribution methods. Rather than render music festivals irrelevant, however, music festivals have continued to prove their merit as audiences crave moments to experience live music.

Music festivals have unique characteristics compared to other forms of live music events. They can offer a wide range of entertainment in one event and can be attractive to demographic groups who may not feel comfortable attending other types of musical performances, such as opera or musical theatre.<sup>81</sup> Music festivals also have some financial advantages over other types of music events.

They do not have ongoing operational costs for a fixed venue, and their size and recurring nature can often attract extra media coverage compared to smaller events.

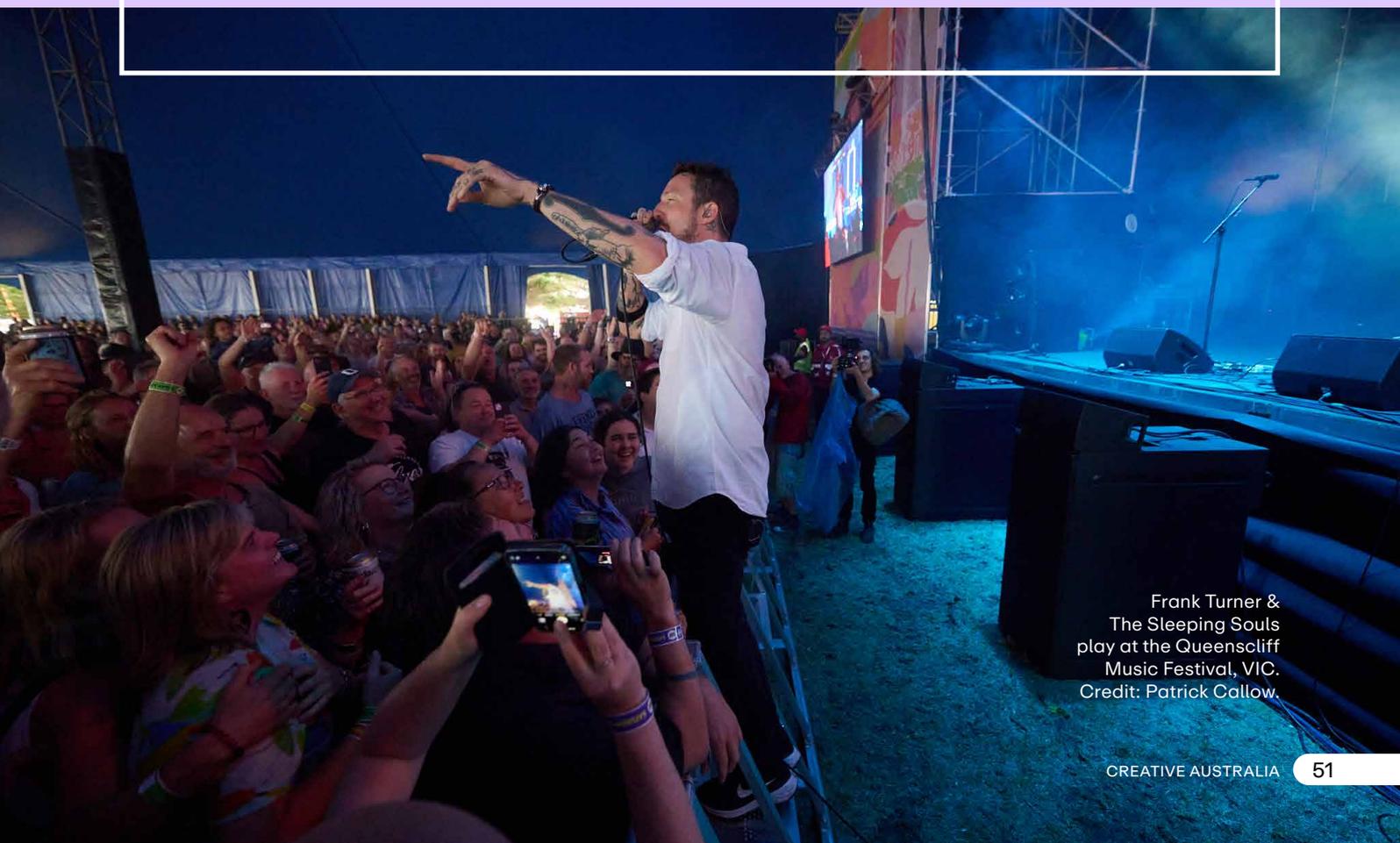
Research shows that for most artists, playing live is part of their daily routine of being in the music business and that it is the main source of their livelihood.<sup>82</sup> Some researchers argue that the festival is becoming the primary form for the staging of live music.<sup>83</sup> By showcasing multiple artists in one event, music festivals can operate as vital cultural mediators that make music more accessible for fans and help musicians gain recognition. Being part of a music festival lineup significantly boosts a musician's public awareness, evidenced by an initial surge in online searches following the festival that diminishes over time.<sup>84</sup>

81 Frey B 2019, *Economics of Art and Culture*.

82 Zhen Y 2022, 'Career Challenges Facing Musicians in the United States', *Journal of Cultural Economics* 46:3. Connolly M and Krueger AB 2006, 'Rockonomics: The economics of popular music', *Handbook of the Economics of Art and Culture*.

83 Mulder M, Hitters E and Rutten P 2021, 'The Impact of Festivalization on the Dutch Live Music Action Field: A thematic analysis'. *Creative Industries Journal* 14:3.

84 Montoro-Pons J and Cuadrado-Garcia M 2019, 'Music Festivals as Mediators and their Influence on Consumer Awareness', *Poetics*. 80:3.



Frank Turner & The Sleeping Souls play at the Queenscliff Music Festival, VIC. Credit: Patrick Callow.

## Promoting a community identity, eg First Nations, LGBTIQ+

Music festivals help connect us through **shared experiences**, can play a powerful role in building social cohesion, and provide safe spaces for festivalgoers to **express themselves through style, singing and dancing**. In doing so, they can help boost self-esteem and self-acceptance, as well as community pride. This can be particularly important for First Nations people, people from culturally and linguistically diverse backgrounds, those from the LGBTIQ+ community and those living with disability.

Almost half of festival organisers say that a key strength of music festivals is that they **create a sense of community among festivalgoers** (45%). In addition, nearly two in five festival organisers say music festivals foster a **sense of community between locals and festivalgoers** (37%).

Aligning with these recognised impacts, more than one in five festival organisers say **promoting a community identity** (eg, First Nations, LGBTQA+) is their most important objective (22%), and almost half of the music festivals in the survey say this is in their top three priorities (47%).

During interviews, some organisers discussed the way in which their festivals **provide a space to celebrate different communities and identities** and provide a safe space for people to express themselves and connect with like-minded others.

*'The other part of that show that is super unique and super special is the whole community program that that is embedded in it. In each regional centre, we work with a queer group. We work with accessibility, we work with First Nations groups and also at-risk youth. And there's a community overlay at the show, and in the lead up to the show, with all those different groups [...] you can actually feel the community aspect of the show at all of our shows, which is super special.'*

**(Festival organiser)**

## Providing career development pathways for artists

Music festivals are distinctive for **fostering professional development opportunities for musicians and creative workers**. They provide unique opportunities for musicians to meet industry peers, including big international acts and music distribution industry professionals, and to perform to new and large audiences.

More than one quarter of festival organisers say music festivals **give artists exposure to new and larger audiences** (27%).

For one in five festival organisers, **providing career development pathways for artists** is one of their top three priorities (20%). This figure suggests that while some festivals focus on providing opportunities for artists, other organisers place higher priority on supporting the music sector more broadly and engaging communities. Although music festivals would not exist without artists, ensuring the viability of festivals and the broader music industry are apparently a more pressing priority for organisers.

In interviews, festival organisers spoke of how music festivals create opportunities for connection between diverse artists by **bringing a range of acts together in a single event and showcasing smaller local acts to new audiences alongside bigger touring artists**. Organisers commented on the importance of music festivals as a platform for **new artists to reach new audiences and progress their careers to the next level**.

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*'I think for artists, it's a way of getting seen on a larger scale. There's the pubs and clubs and whatever but that that's quite limited, and that doesn't really get you interstate. I think for us, it's massive for them. It's how they make it or break it.'*

*'A good example is Tash Sultana. They were an artist that I put on the main stage as an unknown, and I got a lot of flack. Initially it was like, I've never heard of this. Who is this? And then [...] they did an incredible show. The sound crew, this old sound man that we had there was standing on the stage clapping, and he never clapped at anyone before. I booked them again for the following year because they were really excited... they sell out stadiums now. They were a really good example to the people that question who they are coming to see. We don't have to wait until they're on a jukebox to like them, you know, we can just check them out.'*

**(Festival organiser)**

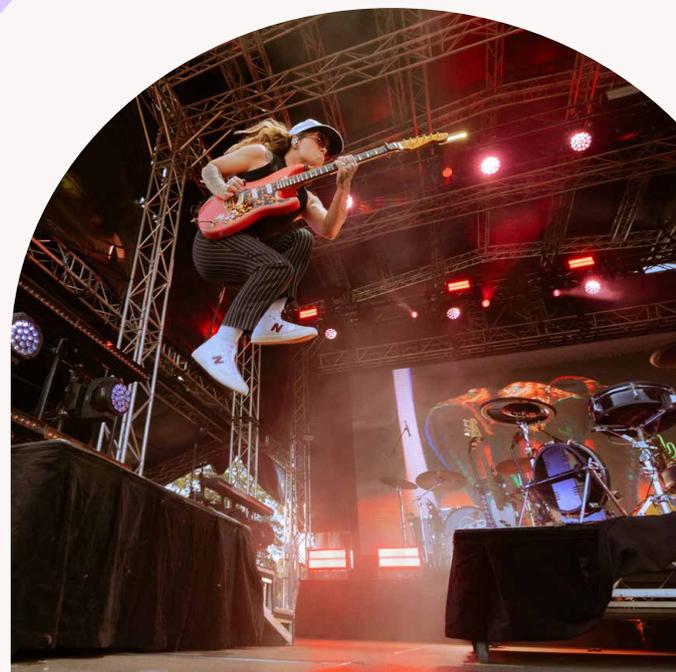
**Spotlight**

## The career of Tash Sultana

Tash Sultana's rise to fame stems from their standout performances at music festivals across Australia. They initially gained traction at homegrown events such as Splendour in the Grass and Byron Bay Bluesfest, where their skilful live-looping and blending of instruments received considerable attention.

The turning point came in 2011 when Lemon Tree Music, a Melbourne-based artist management company, discovered Tash Sultana's talent at Buckley festival and were 'blown away' by their performance.<sup>85</sup>

Lemon Tree Music signed Sultana in 2016 which, together with significant social media traction, propelled them into international stardom. Their performances at large international music festivals, like Glastonbury in the United Kingdom and Coachella in the United States, further exposed Sultana's unique music to audiences worldwide. Following their world tour, they went on to win the ARIA Music Award for Best Blues and Roots Album in 2018.



Tash Sultana performing at Lazy Mountain Music and Arts Festival in Berry 2023. Credit: Ben McFadyen

<sup>85</sup> Earp J 2018, 'The Making of Tash Sultana – an oral history', *The Music Network*, 22 August.

## Encouraging tourism and showcasing the local economy

### Shared experiences of music festivals draw Australians to urban and regional centres and their restaurants, shops, bars and cafes.

The flow on economic benefits of music festivals are countless – from festivalgoers paying for transportation (eg, public transport, parking, taxis and rideshares) to purchasing food and beverages from local vendors. For festivals hosted in regional towns and remote areas, local economies benefit from patrons booking accommodation, dining in local restaurants and engaging in other tourist activities.

More than half of festival organisers say that one of the top strengths of music festivals is that they **support local tourism** (53%) and more than two in five say that a strength of music festivals is **creating employment opportunities for locals** (41%). While nearly one in five festival organisers say their main festival objective is to focus on **contributing to the local economy** (18%), the least common objectives are to **generate industry business and product sales** and **utilise existing creative infrastructure** (both not ranked by 88% of festivals). This indicates that while music festivals produce broad economic benefits for local communities and businesses, it tends to be a byproduct of music festivals rather than the main objective.

Several organisers commented on the value of regional music festivals in attracting tourists to areas that may otherwise not be seen as desirable tourist destinations. In addition to revenue for the festival itself, the increase in

tourist numbers **brings an accompanying injection of money into local businesses and suppliers.**

*‘For us anyway, being in a small town, you can absolutely see the benefits of bringing 7000 people into a town that they are more than likely not going to visit. And you could say that with surrounding towns as well. So to us, because it's quite a distance, a lot of people stay in town. They camp or alternatively use our coaches that we put on. So our hotels, motels, caravan parks are booming, and are normally completely booked out. Our bakeries, our restaurants, our cafes [...] so that is monstrous.’*

**(Festival organiser)**

*‘It's an industry unto itself. And in the city, that means one thing, but in a regional area, it's dramatic. So [regional town] is not exactly one of Australia's best known locations, it has population of 2000 people, but for five days, it has a population of 12,000 people. It's obviously a really popular camping spot for public holidays, and school holidays and stuff like that. But this is a bit different. It's an off-season hardcore injection of funds into the fuel station, the supermarket and pubs and cafes and stuff that they wouldn't otherwise see. [...] It's to the tune of millions every year in regional economic impact, which is pretty incredible.’*

**(Festival organiser)**

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*‘It's an off-season hardcore injection of funds into the fuel station, the supermarket and pubs and cafes and stuff that they wouldn't otherwise see. [...] It's to the tune of millions every year in regional economic impact, which is pretty incredible.’*

Some festivals also make an effort to **utilise local businesses** in order to give them direct income from selling/supplying their products at the festival, as well as exposure to potential new customers amongst festival patrons.

*'We work with various like suppliers, I think the vast majority of our bar is all [local] produce. We work with a small, like family run craft brewery for our beers, and our cider is brewed on site. We work in wineries and [local] distilleries. So, we're kind of providing that business [with] brand contact for patrons who will come and have that interaction with that product, and then take that into their lives.'*

**(Festival organiser)**

Regional festivals can also **contribute to the development and improvement of local infrastructure**, both directly and through advocacy to local councils and government.

*'We have come into [regional area], which thankfully, they are used to running festivals [...] so that was a big advantage for us. But regional roads aren't equipped to cater for 35+ thousand people coming in and over the course of six or seven thousand cars. So we've had to spend quite a lot of money to upgrade regional roads. [...] Our economic impact statement shows we injected over \$17 million of economic impact into the into the region. Yeah, really, really, really beneficial show, that one, for the region.'*

**(Festival organiser)**

## What does other research tell us about the importance of music festivals to a thriving music industry?

Live music, performance and arts events play a critical role in reinvigorating our tourism and hospitality. Australians increasingly recognise the positive impacts that arts and culture can have in driving financial growth for small businesses. The 2022 National Arts Participation Survey found two in five Australians say the arts have a 'big' or 'very big' impact on bringing customers to local businesses (43%).<sup>86</sup>

Half of the music festivals held in Australia are located in regional or rural areas. A significant proportion of the \$243 million in revenue for contemporary music festivals in 2022 was driven by festivals such as Splendour in the Grass, Bluesfest, CMC Rocks QLD, and Spilt Milk – all regional or remotely-held music festivals.<sup>87</sup> Regional festivals can hold a significant economic and cultural value for the local area and play an important role in regional development. Many of these festivals, particularly smaller community-based events, are heavily reliant on the volunteer economy and are inextricably tied to local identity.<sup>88</sup>

Prior to border closures, music festival tourism and other arts and cultural tourism had become a substantial – and growing – driver for domestic and regional tourism, drawing 'high-value' travellers (those likely to spend more, go further and stay longer).<sup>89</sup> The arts were also increasingly on the itinerary for international visitors.<sup>90</sup> A 2018 report by Creative Victoria found that more than one third of attendees travel to festivals from overseas or other parts of Australia (35%) and those who attend festivals travel beyond metropolitan areas.<sup>91</sup>

<sup>86</sup> Creative Australia 2023, *Creating Value: Results of the National Arts Participation Survey*.

<sup>87</sup> Live Performance Australia 2023, *Live Performance Industry in Australia: 2022 ticket attendance and revenue report*.

<sup>88</sup> Gibson C and Connell J 2012, *Music Festivals and Regional Development in Australia*.

<sup>89</sup> Australia Council 2020, *Domestic Arts Tourism: Connecting the country*.

<sup>90</sup> Australia Council 2018, *International Arts Tourism: Connecting cultures*.

<sup>91</sup> Creative Victoria 2018, *Victoria's Creative Industry Festivals Review*.

## Economic contribution in the regions: Regional festivals in North Queensland

Surrounded by diverse natural beauty and home to many popular regional towns, North Queensland plays host to a range of music festivals that make important contributions to the local and state economy.

First held as the 'Festival of the Tableland' in 1981, the Tablelands Folk Festival is the longest running folk festival in Queensland. The community-run festival is held annually in Yungaburra, located in the Cairns hinterland on the traditional lands of the Yidinji people and neighbouring Ngajanji people. In 2022, the Tablelands Folk Festival hosted 2,884 attendees across three days, generating 5,832 visitor nights to the Tablelands region.

In total, the festival generated almost \$1 million in direct and incremental expenditure for the region. In addition, almost three quarters of attendees agreed that their visit to the festival enhanced their image of the Tablelands region as a destination.<sup>92</sup>

Slightly north of Yungaburra, the town of Mareeba plays host to the Savannah in the Round festival in October. In 2022, the festival attracted a total of 6,677 individual attendees, with 82% visiting from intrastate and 6% from interstate. Economic analysis found that the festival generated direct and incremental expenditure of over \$4.4 million attributable to the Mareeba Region economy and over \$1 million attributable to the Queensland economy. The festival also generated 23,369 visitor nights in the Mareeba region and almost \$5.5 million in overnight visitor spend. 95% of visitors agreed that Savannah in the Round adds to the appeal of the Mareeba region, and that locals should be proud of the festival.<sup>93</sup>

<sup>92</sup> Tablelands Folk Festival 2022, Economic Impact Infographic.

<sup>93</sup> Savannah in the Round 2023, Economic Impact Infographic.

Kasey Chambers plays at Savannah in the Round, QLD. Credit: John Elliot.



## Encouraging social interaction and a sense of belonging

Cultural participation at music festivals benefits Australian audiences by providing avenues to **connect with others, to socialise and to have fun**. The vibrant atmospheres combined with communal experience of singing and dancing together can help us deal with stress, anxiety and depression, improve our wellbeing and help foster a sense of belonging and community.

One quarter of festival organisers say a strength of music festivals is that they are **inclusive spaces where festivalgoers feel safe and can express themselves freely** (24%). More than one third of festival organisers identified encouraging **social interaction and a sense of belonging** as one of the top three objectives for their festival (35%), with 29% of respondents identifying this as their festival's second most important objective.

In interviews, festival organisers spoke of the way in which festivals bring people together for a **shared experience with other like-minded people**, and the importance of this community experience for fostering social inclusion and belonging.

*'I think festivals are about people getting together collectively to have an experience [...] I'm very interested in that emotional experience that people have when they're together. I try and build a space that allows that moment where people can forget about their everyday lives and just be absorbed in a space, where it's multi art forms as well. It is critical that we, as an industry, keep this particular division alive. I think it brings a lot of value.'*

**(Festival organiser)**

Some organisers felt that festivals **provide a space for self-expression**, especially for young people, and to be themselves without judgment.

*'It's a feeling that, that, you know, you've helped to deliver that event and seeing people enjoy it so much is quite rewarding. [Making sure people] can express themselves in whatever manner that they want within reason is quite a great thing to see on the day. When the gates open and people come in and they're in front of the stage dancing like no one's watching.'*

**(Logistics/operations)**

*'Music festivals broadly create this sense of community that in my mind is unmatched across any other events space. You know, it's a completely non-judgmental space. It's a space where people can express themselves in any way that they want. And especially in this post-COVID world that social cohesion is really, really important. It's also a bit of a rite of passage for out of high school and before you become a fully-fledged adult.'*

**(Logistics/operations)**

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*'Music festivals broadly create this sense of community that in my mind is unmatched across any other events space. You know, it's a completely non-judgmental space. It's a space where people can express themselves in any way that they want. And especially in this post-COVID world that social cohesion is really, really important.'*

Festivals can support belonging and community **not only through attendance, but also through the volunteering.** Volunteer culture – that is, the community that is developed through volunteering – is common in the industry, particularly for regional and rural festivals. Volunteering can connect people and open doors for conversations that may not occur as freely in other settings.

*‘The site is put together by a hundred old blokes over 70. And they just love it. I’m sure they’re sore for the rest of the year. But, you know, it just provides such a social outlet for them. And some of the things that we’ve instigated around mental health in the last two years, and talking to those old blokes about mental health has been really key as well.’*

**(Festival organiser)**

Some organisers gave examples of how their **festivals brought people together, inspired people and have had profound impacts on attendees’ lives.** For some festivalgoers, this impact is so great that they feel moved to pay tribute to the festival in significant ways.

*‘I can’t tell you how many people have contacted us and told us that they met their husband or wife at one of our shows, and you know, it kind of changed their life. But I think it’s one of those one of those things, like when I talk to people about what I do for work, the fact that the end result is a collective coming together that is a celebration of friendship and music.’*

**(Festival organiser)**

*‘I know quite a few girls and women now who are called Meredith after the festival, and parents have written to say they’ve had a baby called Goldie, named after Golden Plains. Tattoos, heaps of tattoos, asking to get married there [...] People asking to get buried there or have their ashes get there, or have a memorial there. Parents who’ve written to us telling us, I don’t want to say saved their kid’s life, but sometimes they write to us and tell us that. But similar, like people find themselves. I don’t know what it is, and it’s probably not unique to our thing but festivals generally.’*

**(Festival organiser)**

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*‘I can’t tell you how many people have contacted us and told us that they met their husband or wife at one of our shows, and you know, it kind of changed their life.’*

## What does other research tell us about how music festivals help create a sense of community and belonging?

Arts and creativity can help forge a more inclusive national identity and highlight and build our success as a diverse multicultural nation. Creative engagement can be harnessed to promote a more inclusive cultural identity – an identity that brings together the many identities that make our unique Australian community. In 2022, one in two Australians say creativity and the arts have a ‘big’ or ‘very big’ impact on shaping and expressing Australian identity (51% compared to 52% in 2019).<sup>94</sup>

Data from the National Arts Participation Survey shows that one fifth of Australians aged 15 and over attended music festivals in 2022.<sup>95</sup> For many of these attendees, the joy of connecting with like-minded others and opportunities for socialisation are among the primary motivators for attending a music festival.<sup>96</sup> Music festivals create new temporary communities which unite and connect attendees, briefly transcending social inequalities such as class or ethnicity.<sup>97</sup> Away from the expectations and demands of everyday life, attendees can immerse themselves in the festival’s culture and experiment with new identities.<sup>98</sup> This sense of connection and collective emotion can continue long after the festival has concluded, as attendees share their memories and experiences with each other on social media.<sup>99</sup>

Some music festivals can also connect people across generations. A popular sub-genre of festival is known as a ‘nostalgia festival’ – those that focus on music and other accessories from a particular time period.<sup>100</sup> Australian examples include the Parkes Elvis Festival and Cooly Rocks On. These festivals bring together old and young rock ‘n’ roll fans to celebrate the sights and sounds of the era.

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

95 As above.

96 As above.

97 Little N, Burger B and Croucher SM 2017, ‘EDM and Ecstasy: The lived experiences of electronic dance music festival attendees’, *Journal of New Music Research* 47:1.

98 Bennett A, and Woodward I 2014, ‘Festival Spaces, Identity, Experience and Belonging’, *The Festivalization of Culture*.

99 Wood EH, Kinnunen M 2020. ‘Emotion, Memory and Re-collective Value: Shared festival experiences’, *International Journal of Contemporary Hospitality Management* 32:3.

100 Bennett A, and Woodward I 2014, ‘Festival Spaces, Identity, Experience and Belonging’, *The Festivalization of Culture*.

## Generating income for organisers, suppliers and artists

The economic benefits of music festivals are broad and far-reaching. Importantly, they **provide crucial income for those immediately involved**: artists, creative workers and suppliers.

Nearly one third of festival organisers say that one of the top strengths of music festivals is that they **provide employment and engagement opportunities for music industry workers** (31%) and one in four festivals say the **generation of income for the organisers, suppliers and artists involved in the festivals** is one of their top three objectives (25%).

For organisers, income generation is crucial to **ensuring the ongoing viability of their festival**.

*'Promoters in my mind are essentially high-stake gamblers that have a lot of money on the line to bring artists into the country or to put on these events and all of the risk of trying to sell enough tickets to make their money back. They need to do well for the industry to survive, or they need to have enough wins in their gamble to the industry to keep going.'*

**(Logistics/operations)**

One interviewee noted that the role of festivals in generating income for artists has **become more important in light of the increase in streaming and decline of other income streams for musicians**.

*'So when we see a decline in record stores, or art galleries, or bookstores, artists actually do have to make, generate some income somewhere. We've noticed a shift and festivals having to pick up that activity, having to really think creatively about the income generation opportunities that they do create for artists.'*

**(Peak body representative)**

Some organisers spoke of the way in which festivals **create employment opportunities for staff working in the music and event industries**. Many of these people are on casual or short-term contracts, creating a 'gig economy' within these industries. Music festivals are an important source of employment for these people, with some larger festivals employing thousands of people to work across the various parts of the festival.

*'There is a whole gig economy that festivals create, you know. [...] We engaged with, I think it was over 350 small to medium businesses, Australian businesses. Everything from permitting to advisory, to companies that we just engaged to work on the festival. And we created something like 5,000 full time, part time and casual jobs, across the entire planning, pre-event, post event and on ground campaign. So if you talk about financial impact, it's not just the money that we generate for the council, it's also the money that swirls around within the gig economy.'*

**(Festival organiser)**

*'I think we employ ... there's about 200 people on the crew in total, it's only a small contract-based work but it's something as a part of the season of work for those kinds of people.'*

**(Festival organiser)**

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*'We created something like 5,000 full time, part time and casual jobs, across the entire planning, pre-event, post event and on ground campaign. So if you talk about financial impact, it's not just the money that we generate for the council, it's also the money that swirls around within the gig economy.'*

**Part 3:**

# What do festival organisers see as challenges and sector needs?

This section of the report provides insights into the challenges faced by festival organisers in putting on a music festival.

It explores the impacts of various aspects of the event management process including operational costs and funding, insurance, weather and climate, regulatory requirements, securing artists and staffing. It also explores festival organiser perspectives on what is needed to ensure the ongoing sustainability of the Australian music festival industry now and into the future.

Data in this section is drawn from the results of an online survey completed by a sample of 51 festivals and interviews with organisers and industry representatives.

## Key findings

- The most significant barrier to running a music festival is **rising operational costs** (47% of festivals say this has a severe or major impact on their festival) followed by **lack of funding and grants available** (39% of festivals say this has a severe or major impact on their festival). Other significant barriers which have a severe or major impact on festivals include **insurance** (31%) and **extreme weather events** (22%).
- Festival organisers are challenged by **complex and inconsistent regulatory requirements** across states and territories. The two key regulatory barriers for festival organisers are **navigating planning and/or local government/council requirements** and **navigating police and/or security requirements** (both 27% of festivals).
- For most festivals, **health, medical and liquor licensing requirements** are the least challenging part of the regulatory framework, with only 6–7% reporting these factors having a major impact on their festival and none reporting a severe impact.
- **Additional funding and/or grants** and **extreme weather management support** are identified as strategic development priority areas by festival organisers. The most identified need for the music festival industry is **additional public funding and/or grants**, with four out of five festival organisers pointing to this need (80%). In interviews, some festival organisers called for specialised funding, or increased flexibility in existing funding.

Mundi Mundi Bash 2023, NSW.  
Credit: Matt Williams.



## Challenges and barriers to running music festivals

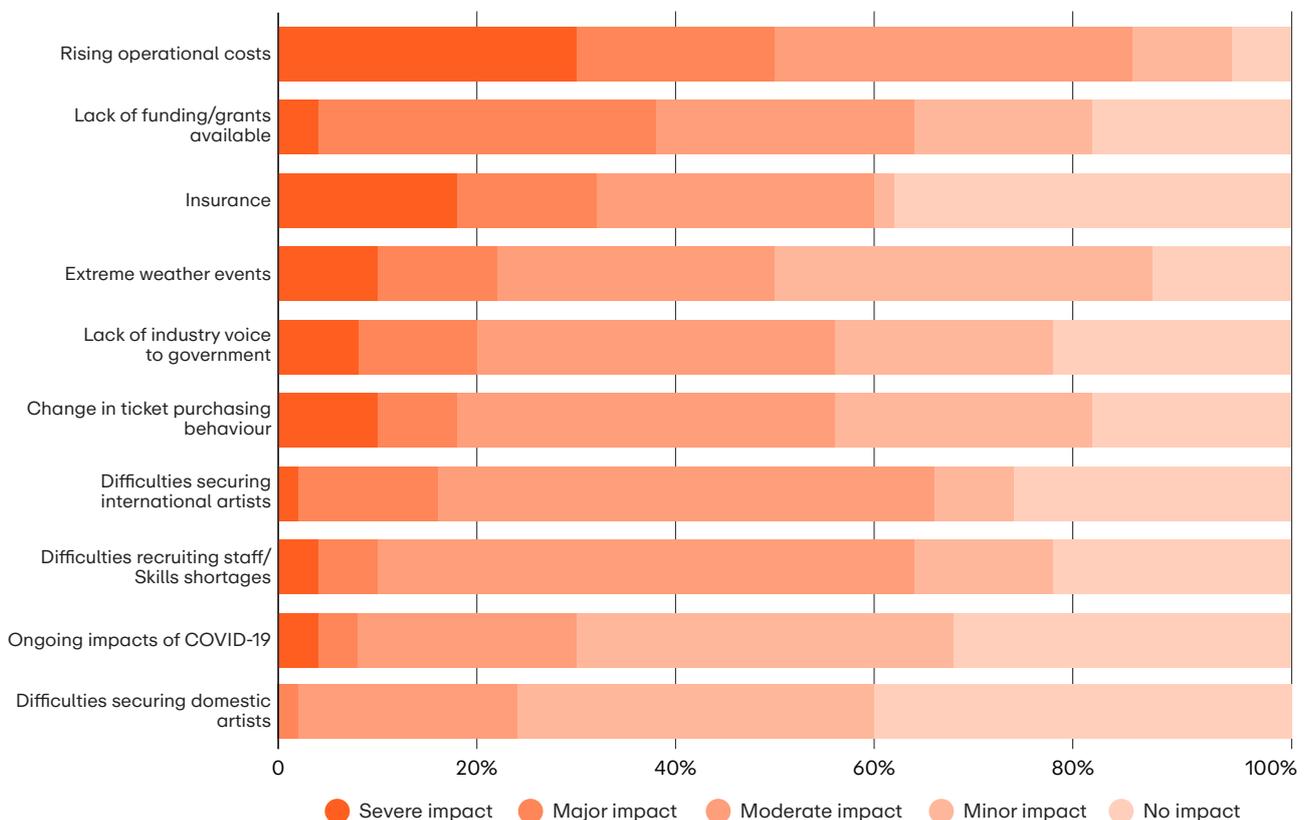
The music festival industry can be a precarious business. There can be **risks, challenges and barriers associated with financing events and managing external factors such as weather and audience behaviour.**

Festival organisers were asked to specify the extent to which their festival was impacted by various barriers and challenges.

- Almost half of festivals say **rising operational costs** have a severe or major impact on their festival (47%), making this the most significant barrier to running a music festival. A further 35% report rising costs have a moderate impact on presenting music festivals.
- Two in five festivals say a **lack of funding or grants available** have a severe or major impact on their festival (39%). A further 25% report this has a moderate impact on their festival.
- Almost one third of festivals say **insurance** can have severe or major impact on their festival (31%). A further 27% report this has a moderate impact on their festival.
- More than one in five festivals say **extreme weather events** can have a severe or major impact on their festival (22%). A further 27% report this has a moderate impact on their festival.
- More than a quarter of festivals say **navigating police and/or security requirements** (27%) and **navigating planning and/or local government/council requirements** (27%) has a moderate to severe impact on their festival (see regulatory barriers towards the end of this section for more details).

**Figure 28:**

### Impact of general barriers to running a music festival in Australia



Base: Festivals in the survey sample (n=51).

## Rising operational costs

The **rise in cost of living** in Australia in recent years has impacted the costs associated with presenting music festivals. Across the board, rising prices for energy, goods and equipment are threatening the viability of the industry.

The **rising costs associated with running a festival** are most often reported as having a moderate to severe impact on festivals. Almost half of festivals report that rising operational costs can have a **severe or major impact** on their festival (47%). A further 35% report rising costs have a moderate impact on presenting music festivals.

Many organisers spoke of the **challenges caused by these increased costs**:

*‘Operational costs have increased significantly post-COVID. We have seen an increase of 40–50% on some supplier estimates between the time of drafting our initial budget for the event to the time the event was on sale. Equipment and resources have become more difficult to source due to a number of reasons, such as companies folding and skilled workers leaving the industry during COVID, as well as having to compete with the construction industry and equipment required to manage extreme weather events. Insurance costs for outdoor events have also been heavily impacted due to the 2022/23 weather events. The greatest challenge continues to be the growing list of requirements and associated costs for key stakeholder groups such as health, licensing & police.’*

**(Festival organiser)**

Some organisers expressed concern that rising costs **could lead to the loss of smaller and more niche festivals** which are less financially able to weather increasing costs and unable to compete with bigger and better resourced festivals.

*‘I think that the biggest players in the market, the international conglomerates, are going to potentially phase out the more boutique and smaller events. Because they're going to have the deeper pockets when it comes to these costs that are rising astronomically.’*

**(Logistics/operations)**

Increasing costs were raised as a particular challenge for **regional and remote festivals** which are operating in areas with limited infrastructure and local suppliers.

*‘Wages have gone up incredible amounts for labour. All of a sudden, if you're spending 30 grand to put a stage up and have it run, it's gone up to 40, 45, 50 grand just to have enough crew and hands on deck to manage the stage. [...] Transport to and from events is going to kill our punters this year. We haven't yet released it, but prices have almost doubled for us. We put on buses, like coaches, because we are out of town. So if you were paying your \$15 to get to our event from a small country town, you're absolutely paying \$30 [this year]. And I suppose this is just across the board, like inflation is very real. But I think it is still coming down to those hard labour costs. And there's a lot of people involved in putting together a festival. It's not something we can get robots for.’*

**(Festival organiser)**

*‘Even from a logistics perspective, like, to put on that kind of show, nothing is here. We have to source it all from somewhere else. From a timing perspective, and a willingness perspective, from contractors anyway, you've got to get people to want to want to do their shows. And then, you know, the cost of freight nowadays from Queensland, it's like \$25,000 to get one truck. But we'll have, you know, 20 trucks that need three, and the same weekend only, you know, there's only so much infrastructure here. So, again, we've got bring stuff in Queensland.’*

**(Festival organiser)**

Many organisers, particularly those running smaller or more niche festivals, also reported that **it is costing more to secure artists and bands**, particularly bigger names that will attract more patrons. They reported that the number of festivals across Australia is increasing, which in turn **increases competition for performers and associated costs to secure them**.

*'The biggest barrier is still always going to be getting top quality musicians that sell tickets for an affordable price. We get pushed out of the market constantly because we're dealing with nationwide festivals. And I get it, they can afford to pay a lot more than we can ever pay.'*

**(Festival organiser)**

### Rising insurance costs

Music festivals require insurance such as event cancellation insurance and property insurance to safeguard their businesses. With the rising cost of living, **the expense of festival insurance has experienced a steep incline**. ArtsHub reported that Australian live music venues saw their public liability insurance policies increase 10-fold in the twelve months to August 2023: 'a policy that may have cost [venues] \$20,000 per year, could now be worth \$120,000'.<sup>101</sup>

Almost one third of music festivals report that in 2022–23 **rising insurance costs** had a **major to severe impact** on their festivals (31%). A further 27% report rising insurance costs have a **moderate impact** on presenting music festivals.

Many festival organisers confirmed in interviews that a rise in festival cancellations and other factors had led to **significant increases in the cost of insurance**:

*'Event cancellation insurance since the pandemic has pretty much doubled. So the premium itself has doubled and you have to secure it. [We] used to be able to secure it like two months out. Now you pretty much just go for it as far out as you can. So we've already done ours. But the main thing that's changed other than the price doubling is the excess. So the excess used to be like a standard commercial policy, which is like \$4,000 or \$5,000. Our excess for this year is \$250,000 [...] before, your maximum loss used to be your premium. And now it's your premium plus excess. So you might not lose like millions of dollars, but you're committing to losing at least \$300,000 or \$400,000.'*

**(Festival organiser)**

Festival organisers also felt that insurance requirements and paperwork have become more complex and difficult to navigate:

*'We had to make the challenging call to cancel. With that comes a whole range of challenges, the insurance industry is an absolute minefield there. We had to wait until the morning of the show to make the final determination to cancel, otherwise there's the possibility that the insurance company could have said we could have worked out other alternatives [...] you're left with this real balancing act of do you let your patrons know [...] who may have been booking accommodation, may have been getting drivers, getting babysitters, outlaying some money to attend the festival? You're making them wait another 12 or so hours before they get notice of cancellation [...] and probably 50% of our patrons are saying please don't cancel and the other 50% are saying please cancel. So you know, it's challenging, but insurance just does not make it any easier.'*

**(Festival organiser)**

<sup>101</sup> Pickup J 2023, 'On the Brink: Why has music venue insurance gone through the roof?', ArtsHub, 8 August.

## Extreme weather events

Climate extremes in Australia, such as **extreme heat, heavy rainfall, coastal floods, extreme fire risk and drought**, are becoming more common and are projected to stay on this path as the climate warms.<sup>102</sup>

These **climate extremes are having a serious impact on music festivals**. In the summer of 2021–22, over a dozen music festivals across the country were postponed or cancelled due to record floods. One of the most notable examples was Splendour in the Grass in Byron Bay (NSW), which was cancelled on its first day due to heavy rain, causing challenges for the organisers and for tens of thousands of festivalgoers.<sup>103</sup> The previous summer festival season in 2019–20 was also impacted by large-scale weather events. Coinciding with the devastating Black Summer fires, festivals such as Falls and Day on the Green in VIC and Lost Paradise in NSW were cancelled due to threats from fire or dangerous smoke.

Half of music festivals in the survey sample identified **extreme weather events** as having a **moderate to severe impact** on their festival (49%). Several festival organisers reported in interviews that they were forced to cancel events in the previous financial year due to flooding or bushfires, usually at a late stage when the financial cost of the cancellation was significant.

*'We're on a river. It floods. It's quite normal for it to flood, not every year but you know, maybe every other year. But last year, the winter flood happened in like July, and it just didn't go. Our venue was underwater, inaccessible from July till December. So, yeah, we had to cancel [...] we didn't want to cancel - a lot of supplies that already bumped in. In fact, almost all suppliers had bumped in because we were show ready by the time we had to cancel. And then suppliers, which are predominantly labour force, like security and medical, we basically had all their labour force on standby. So we had to pay them out in some respects there as well. So yeah, it's a real battle. It really does impact relationships. It adds an extreme amount of stress and anxiety to the industry as a whole. Especially, you know, we deal in temporary environments, and we don't shy away from that.'*

**(Festival organiser)**

## Lack of industry voice to government

Avenues for industry to **speak to government** are critical to ensure effective government responses to industry needs.

However, more than half of music festivals identified a **lack of industry voice to government** as having a **moderate to severe impact** on their festival (55%).

*'We don't really have a voice to council and a voice to government. We've got the Australian Festivals Association who are great. But as a sector, I don't feel like we get given the time of day that is commensurate with the amount of financial impact that we have across the board. [...] That key voice the government is really important for us.'*

**(Festival organiser)**

Some organisers, though, spoke positively of the level of **collegiality and cooperation in the industry**, especially since COVID-19, and were hopeful that this would lead to change and progress.

*'I think that we as an industry have really consolidated into a quite a collegiate sector ever since the AFA. So despite being competitors, there really is a very united front. And I think while many of us are competitors, we're also supportive of each other, and I think also very committed to best practice. So that, you know, if someone does have an event, and [there's an] incident at an event, it does actually affect everyone else that works in this sector. So making festivals safe is in all of our interests.'*

**(Festival organiser)**

*'Previous to COVID, the industry was cutthroat. Promoters weren't speaking to each other; they weren't as open as probably they were now. But the festival associations have done a great job in that, as well as bringing everyone together and sort of trying to get that sort of mentality that yes, we are competing against each other, but we need to work together to make sure that we're adhering to the legislation, and there's no one sort of taking any shortcuts around that, because then the whole industry suffers.'*

**(Logistics/operations)**

<sup>102</sup> CSIRO and Bureau of Meteorology 2020, *State of the Climate*.

<sup>103</sup> Elias M 2022, 'Splendour in the Indoor Venue? Our changing climate could mean musical festivals start to look different', SBS, 31 July.

## Change in ticket purchasing behaviour

Ticketing data in part 1 of this report shows there have been some shifts in music festival ticket buying patterns over the past four financial years. In the early years of the pandemic, **consumers moved away from purchasing tickets well in advance and towards purchasing tickets closer to the festival opening date.** While patterns of later ticket buying are continuing, data from 2022–23 suggests that there has been a slight shift back toward advance purchasing. See part 1 of this report for more information.

Festival organisers spoke of this issue in interviews, reporting that **patrons are waiting until much later to purchase their tickets, and many attendees are purchasing single-day tickets over multi-day tickets.** Some speculated that this is due to the cost of living and the price of multi-day festival tickets, especially when combined with travel costs to attend festivals out of the local area. Consumer uncertainty, primarily caused by festival cancellations and headliners pulling out at the last minute, was also raised as a potential cause of later ticket buying. These factors make it difficult for organisers to predict attendance early enough to effectively budget, plan and cater appropriately.

*‘That’s a real challenge for us to determine numbers on site and to properly cater for the numbers that are going to be there. It’s a real balancing act between making sure that you’ve got enough services on site to facilitate everyone that’s going to be there, but not spending so much money where you break the budget and the show loses money and can’t come around again. So yeah, that late run home is really challenging for festival operators across the board.’*

**(Festival organiser)**

*‘[...] most people are opting to buy single day tickets rather than three day tickets. So in some ways, if you put a ratio on three day event tickets to single day tickets, we’ve sold, I’m going to say, a quarter to a third of the amount of three-day that we would normally, but the same amount of singles now. So there’s lots of individuals coming, but they’re not coming for the whole time because they can’t afford to.’*

**(Festival organiser)**

*‘I think consumers have probably been burned by artists cancelling very late, festivals cancelling very late.... There’s still that COVID hangover. I think people are going, well, maybe the lineup that I see on the announced flyer isn’t the lineup that I’m going to see on site, so I’ll just wait a bit later to buy my ticket.’*

**(Festival organiser)**

## Difficulties securing artists

With over 500 music festivals a year, festivalgoers are spoiled for choice and can be selective when planning their festival calendar. In this landscape, **festival organisers can be in competition** to secure artists to perform at their music festivals that may draw larger crowds. It can also be challenging to secure international acts due to Australia’s location and increasing costs incurred with touring to the region.

Some festivals also reported having **difficulties securing domestic and international artists** for their festivals, though this had a lower impact across the board than other challenges. The impacts of difficulties associated with securing international artists are similar to the impacts of difficulties securing domestic artists (65% of festivals say difficulties securing international

artists has a moderate to severe impact on their festival, and 63% report these levels of impacts when attempting to secure domestic artists).

Festival organisers spoke of **increasing international artist fees and costs**, and that many international artists are reluctant to tour Australia due to distance and higher associated costs.

*'Securing talent has never been more difficult. [...] The Aussie dollar is really weak, freight and logistics and travel costs have gone through the roof. Either you're paying like 30 or 40% above what you have paid previously, or they're not coming. And fair enough. They're not coming because the agents go, I lose my job if I bring that down. So it's a really tricky moment. I think every festival in Australia has had a pretty challenging post the summer process of securing talent [...] people love to tour Australia, it punches so far above its population weight. But at the same time, artists are running businesses, and they can't just roll in and hand money out while they're playing, so it's tough.'*

**(Festival organiser)**

*'The risk on promoters has shifted significantly. And so part of that is obviously what was happening around COVID and cancellations and uncertainty, inability to get artists overseas, big major headlining artists [...] it's almost at the beginning of the conversation when you're negotiating with your talent, because they want to know, particularly for Australia, because it's so remote [...] they feel there's a lot of risk in coming to Australia.'*

**(Festival organiser)**

For local artists, organisers reported **significant competition between festivals** to secure artists who will attract audiences for a price they can afford. This particularly affects organisers of smaller festivals who are not always able to compete on artists' fees and name recognition.

*'We do get support, a smidge of funding to support local artists and I'm all for supporting local artists. But the financial landscapes are very important. And if a local artist sells you 20 tickets versus a big artist selling you 2,000, who are you going to book? This year, I haven't been able to announce yet because I keep losing artists to different festivals.'*

**(Festival organiser)**

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*'We do get support, a smidge of funding to support local artists and I'm all for supporting local artists. But the financial landscapes are very important. And if a local artist sells you 20 tickets versus a big artist selling you 2,000, who are you going to book?'*

## Recruitment issues and staff/skills shortages

In recent years, Australia's creative industries have been **heavily impacted by workforce and skills shortages**. Australia's music festival industry has been no exception.

In the years when COVID-19 was rife, many festivals were cancelled or postponed due to cast, crew and staff contracting the virus and audiences cancelling their tickets as they were hesitant to attend events. These cancellations impacted the music festival workforce as they sought employment elsewhere. Labour market shortfalls are putting pressure on the creative workforce to work harder and longer to make up the shortfall and to spend time chasing talent, recruiting and training.

Almost three quarters of festivals say they are currently moderately to severely impacted by **labour shortages and difficulties recruiting qualified staff** (63%).

Festival organisers commented on the high number of staff who left the music festival industry during the pandemic. They noted that this was a time when festival work dried up due to COVID-19 restrictions, and **many casual and temporary workers were either forced to seek other employment or left the industry for more secure forms of work or higher wages**.

*'I think through the hiatus of COVID, we lost a lot of them to film [...] a lot of the skills for some people do relate to film, and films picked up quite a lot in Australia through COVID. [...] So the challenges have been with staff, that they can just make better money elsewhere. We used to be a well-paid industry, because a lot of it is casual labour. People used to like work in the industry, because, they thought it was good money. But that's not so much the case anymore. I think it's improved quite a lot from last year, but it's still a long way to go to get back to where we were before COVID. So skilled professionals have definitely moved on, or had COVID epiphanies and changed their life and their lifestyle.'*

### (Logistics/operations)

*'Production assistants, operations managers, you name it. Just your festival go-getting types. I emailed them all, and they were all off doing other stuff. I think we're still a fair way from that being righted. And then along that line as well, those people that stepped out of the industry to go and do something else, we've been stepping back in now, realizing that the pay and the conditions are sh\*t. So why do they want to come and work in the arts for 50 to 55 to 60 grand a year when they can literally work at Safeway for 80?'*

### (Festival organiser)

Some organisers attributed the staff shortage partly to a **lack of defined education and training pipelines** for people wanting to join the industry.

*'We don't have that many people. And we don't have very strong pipelines, which is a really big challenge. And with that comes the public perception around the precarity of work in the arts more broadly, but festivals more specifically. That's going to be a major long-term challenge that we're going to be facing and tackling. What we're experiencing is the need to actually contract people from interstate at the last minute, kind of import people in that way, and import suppliers.'*

**(Peak body representative/festival organiser)**

*'There's been a pause in the pathways, so those kids that were coming out of Collarts, or whatever, they just didn't come out at that end. And then at the other end [...] 25% of the industry probably needed to move on, retire [...] I reckon that when I look at my production team of 85+ people, like the bottom 25% now are not good. Because the skills just aren't there.'*

**(Festival organiser)**

Increasing numbers of festivals and events, and **increasing competition**, has also impacted recruitment for some organisers, particularly those working in regional areas.

*'Where we've seen the resources being hindered is, you know, you've got a Harry Styles concert, World Pride event. And then other small events happening on the same day, the pool of staff is just depleted completely.'*

**(Logistics/operations)**

*'We're essentially for one weekend, I think there's 600 casual staff. So everyone's fighting over staff to put on. We're always just trying to balance having enough staff and security [...] because everyone needs everything at the same time.'*

**(Festival organiser)**

Record crowds embrace the music by G Flip at a sold out BASSINTHEGRASS 2022, held at Mindil Beach, Darwin. Credit: BASSINTHEGRASS.



## Ongoing impacts of COVID-19

COVID-19 has had long-lasting impacts on Australia's cultural and creative industries. While one of the first and hardest hit industries by necessary COVID-19 restrictions, the music festival industry has continued to experience financial, workforce, and regulatory stresses.

Approximately one third of festivals report **ongoing impacts of the COVID-19 pandemic** as moderate to severe (29%). Many expressed that COVID-19 **exacerbated other barriers** to producing music festivals, including increasing costs and labour shortages.

Several festival organisers noted that while running festivals has always been a high risk, high reward profession, **the pandemic has increased the risks without increasing the rewards.**

*'I'm like a professional gambler insofar as it's high risk, high return. And I think the main difference is that those stakes have just been completely turned, the volume has been turned up [...] you can obviously still make a lot of money, but the margins are so much tighter than they were before. To be honest with you, if I was coming into this industry now, I don't know if I would put my money on the line like I did when I when I first came in. Break-evens are so much higher.'*

**(Festival organiser)**

Some felt that the pandemic lockdowns **broke the habit of festival attendance for many people** and left a younger generation with limited exposure to festivals. When combined with the increased cost of living, organisers are finding it challenging to encourage audiences back into the festival scene.

*'I think people are traumatised, really looking for confidence as they recover. A lot has changed, you know. People sat at home in their active wear [...] watching streaming services, they didn't really engage with music, and so trying to get younger people who have never been exposed to the live sector back into that scene is really hard. They've got to be inspired by it, and excited by it. And apart from the fact they have no money, [...] it's almost like a re-education piece.'*

**(Peak body representative)**

### Regulatory barriers

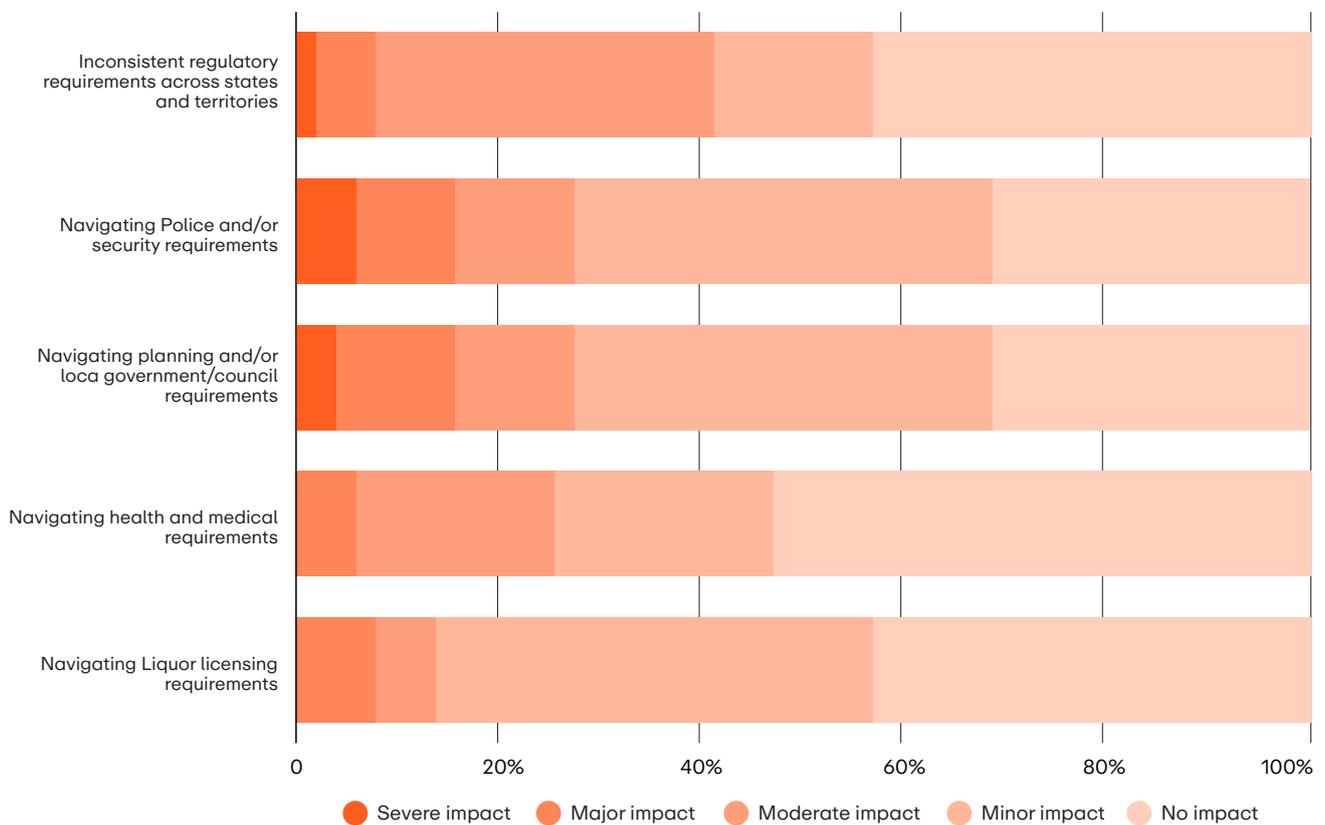
Planning a music festival in Australia can require knowledge and understanding of the **diverse regulatory environments across states and territories**. While some regulations for the music industry are regulated by the federal government, Australia’s regulatory landscape can differ state to state. Appendix A of this report consolidates and highlights the differences in legislation/regulation across Australia’s states and territories.

In both the survey and the interviews, **complex and inconsistent regulatory requirements were raised as a significant barrier to running a music festival**. Survey respondents were asked to identify the severity of the impact of regulatory requirements on the organisation process for their festival.

- More than a quarter of festivals say **navigating police and/or security requirements** has a moderate to severe impact on their festival (27%).
- More than a quarter of festivals say **navigating planning and/or local government/council requirements** has a moderate to severe impact on their festival (27%).
- **Inconsistent regulatory requirements** are described as a challenge for organisers running festivals across multiple states (8% identifying this as having a severe or major impact).
- For most festivals, **health, medical and liquor licensing requirements** are the least challenging part of the regulatory framework, with only 6–7% reporting these factors having a major impact on their festival and none reporting a severe impact.

**Figure 29:**

**Impact of regulatory barriers to running a music festival in Australia**



Base: Festivals in the survey sample (n=51).

## **Navigating police and/or security requirements**

Police and security can be vital to **ensuring Australians are safe while attending music festivals**. However, police and security requirements for music festivals can vary across states and territories and can be challenging for festival organisers to navigate.

In 2022–23, **police and security requirements** had a severe impact on more festivals than any other regulatory factor. More than a quarter of festivals say **navigating police and/or security requirements** has a moderate to severe impact on their festival (27%).

In interviews, festival organisers spoke of changes to security requirements following COVID-19 which has in turn heightened costs and added challenges for staffing.

*'A lot of the licences require a certain ratio of security for an event, and that is being challenging to meet that number. Because for a large festival, you can be talking about 300, 400 security guards. And that can be quite a challenge to get that many people. And if it's a condition on your licence, and that can become quite crucial to meet that number based on 10 days, and so on. Policing and dealing with police is very much like compliance [...] and that varies from LGA [local government area] to LGA. One area has a completely different approach, or they'd not necessarily have commanders familiar with working with large crowds or large festivals. And that can be challenging, and it really can dictate how events run.'*

### **(Logistics/operations)**

**Inconsistency within state jurisdictions** was raised as a significant challenge, especially for organisers and security professionals operating across multiple jurisdictions.

*'I think there's just not enough consistency. I'm talking specifically from New South Wales here. There's not enough consistency, whether you do an event in the metro area, or you do an event in Newcastle, or you do an event down the South Coast, or whatever the case may be, all these authorities have*

*different expectations in regards to what they want from security, and from the event and that makes it hard because some of the implications are more costs for the event promoter. A policeman or the person that runs things in [one area] might say I want another 50 guards on the roster, or I think you've got enough, and that impacts the event quite significantly. Whereas in Sydney, or another area, they might have the opposite opinion.'*

### **(Logistics/operations)**

*'The other thing as well is consistency with government workers, police, ambulance, it changes a lot. We'll do an event in [outdoor location] one year, but next year, the whole police operation or the commander and the whole precinct will have moved everyone out and moved a lot of people in [...] And then you've got to go through that whole rigmarole again.'*

### **(Logistics/operations)**

Some organisers pointed out that **increased police and security regulation has improved patron safety and is a net positive for the industry**, despite the increased costs and requirements for organisers.

*'At the very start, it was unregulated, really unregulated, and that was mostly a bad thing. Certainly, some of the things that festivals did [...] back in the early nineties to just get the event up and operational wouldn't be anywhere near considered safe or professional these days. Not perilously unsafe, you know, there was no catastrophic outcomes for us, but particularly for camping festivals.'*

### **(Festival organiser)**



Fleurieu Folk Festival, SA.  
Credit: Sam Pickering.

### **Navigating planning and/or local government/council requirements**

Australian music festivals are held in **a variety of locations – from major cities to very remote Australia**. Each local government may have unique requirements to plan and present a music festival in their council which can prove challenging for festival organisers to navigate.

More than a quarter of festivals say **navigating planning and/or local government/council requirements** has a moderate to severe impact on their festival (27%). **Inconsistent regulatory requirements** are also described as a challenge for organisers running festivals across multiple states (8% identifying this as having a severe or major impact).

However, **experiences of working with local council jurisdictions varied across festival organisers**. Several reported having positive working relationships with local councils, even if it took some time for the relationship to become established.

*'When we first started, I felt like the council were a bit more all over us about how we were going to do things [...] and we had to kind of work really hard and sort of hold our ground a bit. But once our event was a bit more established, and word spread that we were really organized and that we ran a safe and an important event, like now we've been around for like 10 years, I feel like the council appreciate us, and so it feels a bit easier now.'*

**(Festival organiser)**

Other organisers spoke of the **challenges involved in working with local councils**, even for festivals that have been operating in the local area for a number of years.

*'It was a bit challenging dealing with the local council. Probably a lot of it is political, being a small town with small local councillors. If they're not on board with something like the music festival that does shake up the town for a few days, there's plenty of people that don't like that. Suddenly the town is full of, you know, more than double the capacity of people there. So those councillors don't feel so supportive.'*

**(Festival organiser)**

*'The biggest hurdle, the one that takes me such a lot of so much time to organise and finalise is actually working with the local council to get the approvals. I've asked for an extended memorandum of understanding for three to five years. Currently, we're on a year basis, so every year I have to reapply. And a lot of the venues are council venues [...] I always go into panic mode if I haven't heard back from them by December, because if someone wants to get married in the beautiful community hall or something similar, and they book it for that weekend, that's us gone. That's ruined our festival and would ruin their wedding to try and fit it into the middle of a festival. So it's hard not to have that local support.'*

**(Festival organiser)**

One organiser raised the **difficulty of securing venues for outdoor festivals**, noting that supply is frequently limited, and spaces are in high demand. Severe weather can further hamper availability of green spaces, and alternative spaces can be challenging to locate.

*'We're always looking for those kinds of opportunities, you know, we're always contacting commercial developers and landowners and councils and seeing who's got space available. Because in a time where grass is quite limited, and when it has been raining for so long, you don't want to come in and tear everything up and make it a mud pit. So, hardstand opportunities [festival venues on a hard surface as opposed to grass] for us are really exciting. But they are few and far between, they're really, really limited.'*

**(Festival organiser)**

At a state level, inconsistent regulatory requirements were identified as a significant barrier, both within each state and between states and territories. This was seen as a **particular challenge for organisers running multiple festivals across regions or states**. In some cases, stricter regulatory frameworks have caused festival organisers to reduce the number of shows and festivals they run in certain states compared to others.

*'I think the lack of consistency across state borders is pretty challenging. There's no general consistent way of working, you've just got to really make your own way to find out what you can and can't do. We're probably in a pretty fortunate position, because we're one of the larger ones, but certainly, if you're a younger festival promoter, a younger touring operator, it's really a minefield of information out there that is really challenging to pull together. You add things like private spaces versus council-owned spaces and things like that, there's just a mountain to climb in terms of information that you need. And that's just for one city. And then if you multiply that by five or six shows, in five different, five or six different states, it's really cumbersome. So not having consistent processes across state lines is a challenge from a regulatory perspective.'*

**(Festival organiser)**

*'With any of the regulatory bodies [...] everything else varies from state to state, what's required. There's still not quite like a checklist or a guide as to what to actually do, and obviously access is one thing but there's still not like a perfect roadmap for us to understand what we need to do where and when. So there's a lot of guessing in that space and then hoping that you meet criteria.'*

**(Logistics/operations)**

Organisers operating **festivals in New South Wales** raised difficulties and inconsistencies with planning and/or navigating local government/council requirements as a particular issue, mostly in relation to the *Music Festivals Act 2019*.

The *Act* was introduced in November 2019, following an inquest into the deaths of six patrons at NSW music festivals between 2017 and 2019, and provides additional oversight of music festivals that are identified as high-risk, or 'subject', with the specified goal of achieving safer events in NSW.

Festivals determined to be subject to the *Act* must submit a Safety Management Plan for approval by the Independent Liquor and Gaming Authority, which often requires additional user-pays medical and policing arrangements.<sup>104</sup> This adds to the operational costs of the festival and serves as a significant barrier to festival operators in the state.

*'New South Wales is the glaring outlier in the high-risk festival act that they have, the Subject Music Festival Act. I think that is a real determining factor as to how many shows we do in New South Wales. We're actively looking to do less in New South Wales, because of the high probability that we're going to just get slammed with a subject festival licence, which adds tens of thousands of dollars to the bottom line before you've even started. It's a real challenge to operate in New South Wales. [...] It's really clear evidence of a decision that's made without industry consultation having a real impact for years to come.'*

**(Festival organiser)**

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*'We're actively looking to do less in New South Wales, because of the high probability that we're going to just get slammed with a subject festival licence, which adds tens of thousands of dollars to the bottom line before you've even started. It's a real challenge to operate in New South Wales.'*

<sup>104</sup> NSW Government 2020, *Review of the Operation of the Music Festivals Act 2019*.

*'New South Wales is a completely different kettle of fish to anywhere else in Australia. The music festival regulation that gets applied to subject music festivals, which used to be called high risk festivals, make the operating costs of the shows so much higher. [...] It filters down through every single system. It's the total aversion to any level of risk. And it's not like Victoria Police aren't risk-averse, but they value events. It feels like Victorian Police value events, whereas it feels like New South Wales Police see them as a coronal inquiry waiting to happen. It's really quite profound, the difference. That doesn't mean that there aren't amazing supportive cops in New South Wales – there are, but the whole philosophy is about not ending up in the coroner's court.'*

**(Festival organiser)**

Some organisers spoke of a **lack of clarity on regulatory requirements and decision-making criteria for festival permits**. They suggested that decisions by regulatory bodies can often appear arbitrary and inconsistent, making it difficult for organisers to properly understand and meet the requirements.

*'I think broadly, the regulatory space having determining authority over whether or not a festival goes ahead or not is a real challenge for us. I think there's a lot of work to do in that regulatory space to make the process a lot clearer and a lot more comfortable. I think the idea of a regulatory body turning around and saying, I don't feel your plan is acceptable, therefore, I'm not approving the event, has a huge impact on this sector. [...] It's a real roadblock, for younger operators. I think there needs to be a real discussion around just exactly what regulatory authorities can and can't do by way of denying a festival permit to be approved.'*

**(Festival organiser)**

*'I was doing a small event last year with 5,000 people. Police in NSW for that area told me that the artists weren't allowed to drink alcohol while they were performing on stage. Because if they get intoxicated, they might incite a riot against the police. That was literally what they said. And I was just like, is that a new NSW police requirement or that's just you deciding to do that? I went to the commissioner and said this is what I've been told. [...] But if a new promoter who hadn't done a show before got told that by the head of licensing from their area, they would just agree to it. [...] It affects new people coming through, which is what I think is super unfair.'*

**(Festival organiser)**

## Local council support for major events

In light of the challenges posed for festival organisers in NSW and other regions, some local councils have proactively taken steps to support organisers of festivals and major events in their local government area.

The coastal city of Wollongong is located approximately 80km south of Sydney and has played host to many music festivals including Yours and Owls, SummerSalt and For the Love. To reduce the administrative burden on festival organisers planning events in the area, Wollongong City Council (WCC) has established a selection of pre-approved event sites around the city. Each site has an established development approval for major events, as well as generic site plans, traffic management plans and other documentation.<sup>105</sup>

These pre-approvals save event organisers having to submit development and event applications, which in turn saves significant time and money during the planning process. WCC also has a dedicated events team to provide advice and support to festival organisers.

The Sunshine Coast is located north of Brisbane and hosts some of Australia's biggest music festivals, including the Caloundra Music Festival and Groovin the Moo. The Sunshine Coast Council (SCC) has committed to supporting major events through their Sunshine Coast Major Events Strategy 2018–27 and the Sunshine Coast Events Board.<sup>106</sup> A Council-funded sponsorship program is available to provide financial support for major events on the Sunshine Coast.

Flight Facilities play at the Yours and Owls Festival, Wollongong.  
Credit: Ruby Boland.

<sup>105</sup> Wollongong City Council 2023, *Organise an Event*.

<sup>106</sup> Sunshine Coast Council 2023, *Sunshine Coast Major Events Strategy 2018-2028: 2023 refresh*.

### Health, medical and liquor licensing

States and territories impose **varying regulations for health, medical and liquor licensing**, proving challenging for some festivals, however to a much lesser extent than other regulatory requirements.

The process of navigating regulations related to health and medical matters and liquor licensing was categorised by most organisers as having a minor impact or no impact on their festivals. For most festivals, **health, medical and liquor licensing requirements** are the least impactful part of the regulatory framework, with only 6–7% reporting these factors having a major impact on their festival and none reporting this as having a severe impact.

Some organisers commented on the **improvements in harm reduction strategies** across the industry, such as patron education and first aid training for staff, and the resulting improvements in patron safety and audience behaviour.

*'We've had a lot less presentations to the actual medical team [...] rather than having 200 presentations to St. John's that are getting marked as like a medical intervention, I think it was something like 60% of them got downgraded to the peer support service. So it just means that the burden potentially on your medical teams or your medical resources to deal with more significant things, is alleviated.'*

**(Festival organiser)**

*'The festivals are leading the way in regards to how they manage and how they present the harm in strategy. Everyone's now involved with that process. There's training that we will send out to our staff, for them. And look, it's by no means in depth, as you know, becoming a GP on the day. But it's more around being able to identify and being able to manage a scenario, a small scenario, or be able to assist the medical people on site if needed for an overdose or someone that's not feeling well. So it's a great initiative, and it's a great program.'*

**(Logistics/operations)**

However, qualitative data from interviews suggests that **liquor licensing remains a challenge for some organisers**, particularly in relation to regulatory changes and lack of clarity on what is required to meet the regulations and licensing conditions.

*'We've had a liquor licence, a temporary liquor licence for 47 years, or whatever it is. Seems to get harder every year. There seem to be more conditions on it every year. Nobody seems to want to talk to us about it. So liquor licensing stuff is really tricky. Similarly, all forms of permits are slow and more challenging, and there just seems to be more red tape.'*

**(Festival organiser)**

## South Australia, the festival state

South Australia is often referred to as ‘the festival state’. It is currently the only state with a peak body for festivals (Festivals City Adelaide) and has won the State or Territory Award (recognising the state or territory where the largest number of high-quality events have occurred) at the Australian Event Awards three times – 2015, 2016 and 2020. The state also has a focus on educating and upskilling the creative workforce, with the University of South Australia and Flinders University both offering a Bachelor of Creative Industries with a major in festivals.<sup>107</sup>

The South Australian Government was the first in the country to set up a Music Development Office in 2014, which has facilitated a productive relationship between music festivals and the government over the past decade. The state government also commits millions of dollars annually to support music events and festivals through the Live Music Events Fund and Major Events Fund.<sup>108</sup>

Festival organisers operating in South Australia commented positively on the government support for festival events and the positive festival culture that exists in the state. Because South Australia does not have a user-pays policing model, festival organisers also save significant amounts on security costs for their events. This is underpinned by a set of consistent and well-coordinated harm reduction policies across government, which have helped to create a culture of safety and enjoyment amongst festivalgoers.

*‘The support from the South Australian police is amazing. Support from Health. It’s fantastic. The support from the [Department of the Premier and Cabinet] and the government, both former and present, has been exceptional. The funding that goes in to help the ability to problem solve if you’re having a challenge [...] there is no other government in the country that’s doing that at this point. The accessibility and their engagement and their interest in the sector is second to none.’*

(Festival organiser)

*‘You can go into a music festival here and you won’t see glass or needles [...] there’s absolute public peer pressure for that to not happen. [...] We have a very strong volunteering culture here as well. The way that they help to direct audiences, help them choose which recycling bin to put their item in, it all contributes to that key difference. And again, festivals here tend to be much more multi-generational. You have grandparents, parents, kids, you have people who have been going to the same festival for over 30 years and now bring their kids. So there’s a festival legacy and heritage environment here that I haven’t heard of in other states.’*

(Peak body representative)

<sup>107</sup> University of South Australia 2023, *Majors, Sub-majors & Minors: Festivals*. Flinders University 2023, *Bachelor of Creative Industries (Festivals and Arts Production)*.  
<sup>108</sup> SA Government Music Development Office 2023, *Live Music Events Fund*. Government of South Australia 2023, *Major Events, Sports and Arts*.



Crowds at WOMADelaide.  
Credit: Frankie the Creative.

## Potential areas for support and development

To support a thriving music festival industry in Australia, festival organisers identified a number of **strategic development priority areas**, including targeted funding and support for creative businesses to operate and grow under resourced business capability.

When asked what would make it easier to run festivals in future:

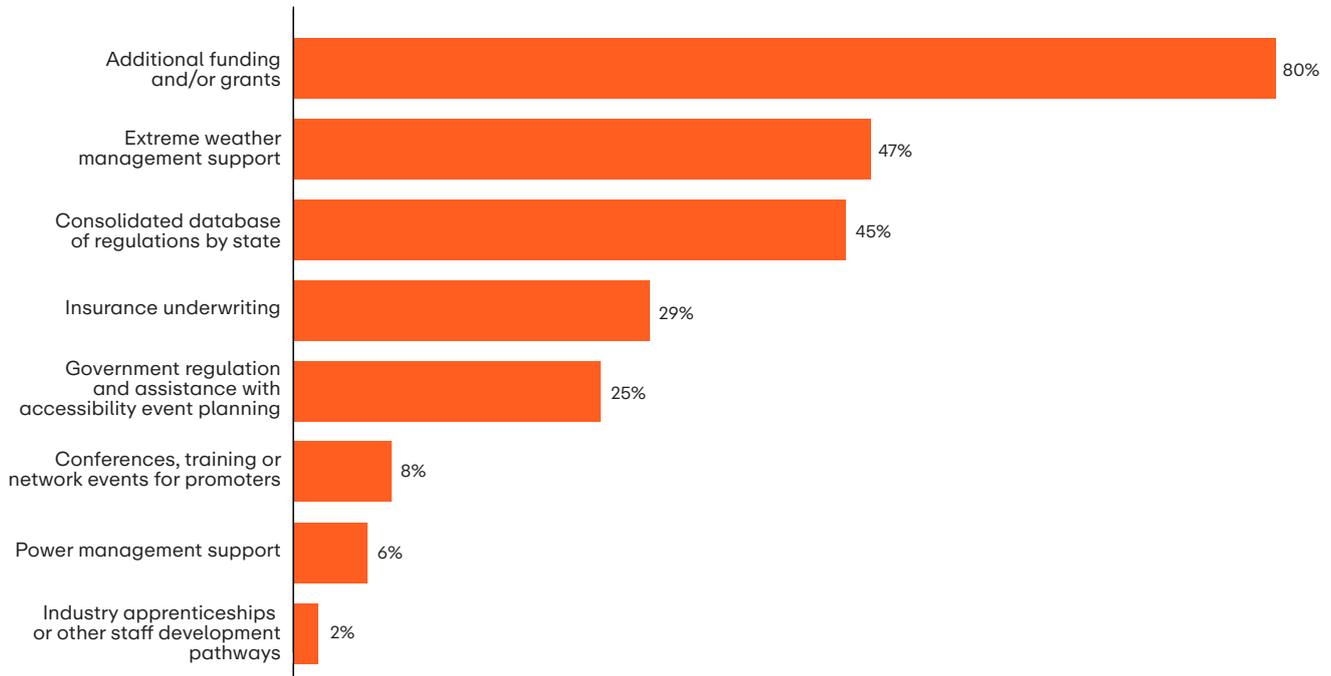
- Most festival organisers say that **additional public funding and/or grants** would be most valuable (80%). This aligns with **rising operational costs** being reported as the most significant barrier to running a music festival, with almost half of festivals identifying this as having a severe or major impact on their festival (47%).
- Almost half of festival organisers say **support for extreme weather management** should be a priority (47%). This corresponds with the more than one in five festivals who say **extreme weather events** can have a severe or major impact on their festival (22%). A further 27% report this has a moderate impact on their festival.
- Almost half of festival organisers say a **consolidated database of regulations by state** should be a priority (45%). In response, this report has attempted to consolidate these differing requirements in Appendix A.
- More than one quarter of festival organisers say **support for insurance underwriting** is needed (29%).
- One quarter of festival organisers say **support with government regulations and assistance with accessibility event planning** should be a priority (25%).

- Less than one in ten festival organisers say **support for training networking opportunities** (8%), **power management** (6%) and **industry apprenticeships or other staff development pathways** are needed (2%). It is curious that training is not ranked more highly, particularly given almost three quarters of festivals say they are currently moderately to severely impacted by labour shortages and difficulties recruiting qualified staff (63%) (see page 68).

The most identified need for the music festival industry is **additional public funding and/or grants**, with four out of five festival organisers pointing to this need (80%). In interviews, some festival organisers called for specialised funding, or increased flexibility in existing funding, to support festivals to employ specialist staff and provide competitive payments for larger international acts, not only local artists.

*'Easier access to government grants and easier access to funding to allow for small festivals to pay for specialist staff or international artists, or even named Australian artists [would be helpful]. For example, our performer budget is \$50,000 total. We were offered [a popular Australian artist] for \$45,000. Our executive staff are all volunteers but if we were to pay them, our wages bill would be \$75,000 plus. Major festivals who are able to attract commercial sponsorship also receive significant government funding, allowing them to expand and develop. Whilst in reality, the smaller festivals are the ones that discover new acts and promote emerging artists, and should be the ones who are financially assisted. These festivals employ more up-and-coming artists and are the backbone of the music industry.'*

**(Festival organiser)**

**Figure 30:****Priority areas for additional support**

Base: Festivals in the survey sample (n=51).

## Breakdown of state cultural strategies

Australia's national cultural policy, *Revive*, outlines a five-year plan to revive the arts in Australia. In addition to *Revive*, each state and territory has developed, or is developing, a state-based cultural policy to support arts and culture in their region. Many of these strategies have items focused on music festivals. Below is a list of these cultural strategies for further reading.

Please note that links provided in this section may become outdated over time.

- Australia: [National Cultural Policy—Revive: a place for every story, a story for every place | Office for the Arts](#)
- Australian Capital Territory: [Canberra: Australia's Arts Capital – Arts, Culture and Creative Policy 2022–2026](#)
- New South Wales: [New South Wales Arts, Culture and Creative Industries Policy: Creative Communities](#)
- Northern Territory: [Northern Territory Creative Industries Strategy 2020 – 2024](#)
- Queensland: [Creative Together 2020-2030: A 10-year Roadmap for arts, culture and creativity in Queensland](#)
- South Australia: [South Australia Cultural Policy – currently under public consultation](#)
- Tasmania: [Tasmania Cultural and Creative Industries Recovery Strategy: 2020 and Beyond](#)
- Victoria: [Creative State 2025: Placing creativity at the heart of Victoria's recovery and prosperity](#)
- Western Australia: [10 Year Vision for Culture and the Arts in Western Australia](#)

## Appendix A:

# National and state regulatory frameworks

**This appendix contains a list of regulatory documents that may apply to Australian music festivals, organised by state and territory.**

The aim is to present a picture of the regulatory landscape across the country and highlight some unique legislation/regulation related to music festivals in certain states.

A list of permits and licences required in each state/territory can be found in Appendix B. Links to online documents provided in these appendices were current as of January 2024. Please note that these lists are not exhaustive, and links may become broken and outdated over time.

## Australia-wide

While many relevant regulations are established at a state/territory level, there are several national laws, regulations and guidelines that are relevant to music festival operators.

Area	Policy name	Description	Associated documents
Event management	<a href="#"><u>Australian Consumer Law</u></a>	National law outlining the rights of consumers when purchasing products and services.	<a href="#"><u>Live Performance Australia Ticketing Code of Practice</u></a>
	<a href="#"><u>Guide to Traffic Management</u></a>	Provides comprehensive traffic management guidance for practitioners involved in traffic engineering, road design and road safety.	
	<a href="#"><u>National Cultural Policy: Revive</u></a>	Includes best practice suggestions for ticketing and protecting audiences from scalpers.	
Health, medical and safety	<a href="#"><u>Work Health and Safety Act 2011</u></a>	National framework to secure the health and safety of workers and workplaces.	
	<a href="#"><u>Australia's Strategy for Protecting Crowded Places from Terrorism</u></a>	A national strategy to protect the lives of people working in, using, and visiting crowded places by making these places safer.	<a href="#"><u>Guided self-assessment tool</u></a>
	<a href="#"><u>Safe and Healthy Places Handbook</u></a>	Provides managers of crowded places an overarching framework for risk management, communication and incident and emergency planning.	<a href="#"><u>Crowded Places Checklist</u></a> <a href="#"><u>Crowded Places Further Resources</u></a>
Accessibility	<a href="#"><u>Disability Discrimination Act 1992</u></a>	Makes it unlawful to discriminate against another person on the grounds of disability, and provides a legal framework to guide best practice.	
	<a href="#"><u>Disability (Access to Premises — Buildings) Standards 2010</u></a>	Specifies the requirements for disability access in public buildings.	
	<a href="#"><u>Inclusive language style manual</u></a>	A guide to using language that is culturally appropriate and respectful of the diversity of Australia's peoples.	

## Australian Capital Territory (ACT)

The ACT plays host to several large music festivals, including the Canberra International Music Festival and the National Folk Festival. Standard regulatory frameworks exist for music festivals running in the ACT, and the Access Canberra Event Coordination Guide provides advice and direction on relevant regulations for festival organisers wishing to run an event.

As the home of the nation's capital, the ACT has played a unique role in the development of policies regarding drug harm minimisation at Australian music festivals. In 2018 and 2019, an Australian-first drug checking service was piloted at the Canberra edition of Groovin the Moo, which informed the development and launch of the Festivals Pill Testing Policy in 2020 and a fixed pill testing site in the city.<sup>109</sup>

Area	Policy name	Description	Associated documents
Environment and noise	<u><i>Environment Protection Act 1997</i></u>	Provides the regulatory framework to help reduce and eliminate the discharge of pollutants into the air, land and water.	
	<u><i>Environment Protection Regulation 2005</i></u>	Sets out conditions on emissions into the air, noise, water, waste, and other environment protection topics under the Act.	
	<u><i>Waste Management and Resource Recovery Act 2016</i></u>	Provides the regulatory framework for waste transportation, storage, collection and disposal in the ACT.	
Health, medical and safety	<u><i>Work Health and Safety Regulation 2011</i></u>	Details the regulations for ensuring healthy and safe workplaces.	
	<u><i>Dangerous Substances (Explosives) Regulation 2004</i></u>	Outlines regulations for access and use of explosives and dangerous substances.	
	<u><i>The Festivals Pill Testing Policy</i></u>	Provides guidelines for event organisers to incorporate pill testing and other harm reduction measures into event planning to promote patron health and safety.	
	<u><i>Food Stall Guidelines</i></u>	Outlines food safety requirements for temporary food stalls.	
Liquor	<u><i>Liquor Act 2010</i></u>	Aims to reduce alcohol related harm.	
	<u><i>Liquor Regulation 2010</i></u>	Aims to reduce alcohol related harm under the Act.	
	<u><i>Liquor Amendment Bill 2017</i></u>	Makes changes to the ACT's liquor legislation aimed at reducing alcohol related harm, improving the vibrancy of Canberra's nightlife precincts, and removing unnecessary regulation for the liquor and hospitality industry.	

<sup>109</sup> ACT Health 2023, Pill Testing.

Area	Policy name	Description	Associated documents
Accessibility	<u><a href="#">Discrimination Act 1991</a></u>	An Act to promote and protect the right to equality and eliminate discrimination to the greatest extent possible.	
Other	<u><a href="#">Access Canberra Event Coordination Guide</a></u>	Aims to inform and assist event organisers holding public events in the ACT.	

## New South Wales (NSW)

As the most populous state in Australia, NSW hosts many metropolitan and regional music festivals throughout the year. However, the state also has the strictest regulatory framework for the operation of music festivals within its borders. Following a coronial inquest into a number of drug-related deaths at music festivals during 2017 and 2018, the *NSW Music Festivals Act 2019* was implemented by the NSW Government, imposing a strict new set of licencing conditions for festivals deemed 'high-risk'. These changes were colloquially referred to as a 'war on live music' by media outlets in the wake of the decision.<sup>110</sup> Following a review of the Act in 2019 and in light of significant criticism from the industry,<sup>111</sup> the Act was amended to remove the term 'high-risk festival' and reduce the burden on organisers.

Area	Policy name	Description	Associated documents
Environment and noise	<u><a href="#">Environmental Planning and Assessment Act 1979</a></u>	Governs development and issuance of approvals for building work.	
	<u><a href="#">Traffic and transport management for special events</a></u>	A multi-agency guide to managing traffic and transport for special events in NSW.	
	<u><a href="#">Protection of the Environment Operations Act 1997</a></u>	Aims to achieve the protection, restoration and enhancement of the quality of the NSW environment.	
	<u><a href="#">Waste Avoidance and Resource Recovery Act 2001</a></u>	Promotes waste avoidance and resource recovery to achieve a continual reduction in waste generation.	
Event management	<u><a href="#">NSW Music Festivals Regulatory Guidance Checklist</a></u>	A checklist to assist music festival organisers in NSW plan a successful event.	
	<u><a href="#">Event Starter Guide</a></u>	Assists people in the community to navigate the many issues involved in organising events.	

<sup>110</sup> Thompson A 2019, *Forcing music out 'crippling for the people of NSW'*, Sydney Morning Herald, 14 February.

<sup>111</sup> NSW Government 2020, *Review of the Operation of the Music Festivals Act 2019*.

Area	Policy name	Description	Associated documents
Health, medical and safety	<u><a href="#">Music Festivals Act 2019</a></u>	Aims to promote a safer environment at music festivals by requiring organisers to comply with approved safety management plans.	<u><a href="#">Subject Festival Guidance Fact Sheet</a></u>
	<u><a href="#">Guidelines for music festival event organisers</a></u>	NSW Health guide for music festival harm reduction.	
	<u><a href="#">NSW Police cost recovery and user charges policy</a></u>	Outlines the cost recovery and user charges that apply to music festivals and other events.	
	<u><a href="#">Work Health and Safety Regulation 2017</a></u>	Outlines the requirements for work health and safety in NSW under the Act.	
Liquor	<u><a href="#">Liquor Act 2007</a></u>	Governs the sale, supply, service, promotion and consumption of all forms of liquor and alcohol products.	
	<u><a href="#">Liquor Regulation 2018</a></u>	Specifies the regulations and conditions on sale, supply, service, promotion and consumption of all forms of liquor and alcohol products under the Act.	
Accessibility	<u><a href="#">Anti-Discrimination Act 1977 (NSW)</a></u>	An Act to render unlawful racial, sex and other types of discrimination in certain circumstances and to promote equality of opportunity between all persons.	
	<u><a href="#">Toolkit for accessible and inclusive events</a></u>	A toolkit to assist event organisers in creating an event that is accessible to all members of the community.	
Other	<u><a href="#">Local Government Act 1993 No 30</a></u>	Legal framework for NSW local government. Sets out responsibilities and powers of councils and councillors.	

## Northern Territory (NT)

As Australia's least populous state, the NT has the highest number of music festivals per 10,000 population. In particular, the state hosts many popular First Nations-led festivals including the Garma Festival and the Barunga Festival. Due to the wet season occurring during summer and early autumn, NT has a greater percentage of winter festivals than other states.

Area	Policy name	Description	Associated documents
Environment and noise	<u><i>Environment Protection Act 2019</i></u>	Provides for the protection of the environment and for related purposes.	
	<u><i>Environment Protection Regulations 2020</i></u>	Regulations under the <i>Environment Protection Act 1998</i> .	
	<u><i>Traffic Act 1987</i></u>	Outlines requirements for special traffic provisions for events.	
	<u><i>Waste Management and Pollution Control Act 1998</i></u>	Provides for the protection of the environment through encouragement of effective waste management and pollution prevention and control practices and for related purposes.	
	<u><i>Waste Management and Pollution Control (Administration) Regulations 1998</i></u>	Regulations under the <i>Waste Management and Pollution Control Act 1998</i> .	
Event management	<u><i>City of Darwin Event Planning Guide</i></u>	Guide to assist event organisers planning events in the City of Darwin.	
	<u><i>Event Management Plan Template</i></u>	Event management plan template from NT Police, Fire and Emergency Services.	
	<u><i>Dangerous Goods Regulations 1985</i></u>	Outlines regulations for access and use of explosives and dangerous substances.	
	<u><i>Risk Management Plan Template</i></u>	Risk management plan template from NT Police, Fire and Emergency Services.	
	<u><i>Severe Weather Plan</i></u>	Severe weather plan template from NT Police, Fire and Emergency Services.	
Liquor	<u><i>Liquor Act 2019</i></u>	Governs the sale, supply, service, promotion and consumption of all forms of liquor and alcohol products.	
	<u><i>Liquor Regulations 2019</i></u>	Specifies the regulations and conditions on sale, supply, service, promotion and consumption of all forms of liquor and alcohol products under the Act.	
Accessibility	<u><i>Anti-discrimination Act 1992</i></u>	An Act to promote and protect the right to equality and eliminate discrimination to the greatest extent possible.	

## Queensland (QLD)

In the 2022–23 financial year, Queensland hosted the third highest number of music festivals amongst Australian states and territories. The Sunshine State is also home to several unique festivals, including the world’s most remote festival (Birdsville Big Red Bash) and the Woodford Folk Festival, one of the largest gatherings of artists and musicians in the country. It was the second Australian jurisdiction to introduce pill testing at festivals,<sup>112</sup> and has a unique legislation, the *Major Events Act 2014*, that specifies the requirements for major events held in the state.

Area	Policy name	Description	Associated documents
Environment and noise	<u><i>Environmental Protection Act 1994</i></u>	Provides a legal framework for the protection of Queensland’s environment.	
	<u><i>Environmental Protection Regulation 2019</i></u>	Prescribes the detail for environmental processes contained in the <i>Environmental Protection Act 1994</i> .	
	<u><i>Transport Operations (Road Use Management) Act 1995</i></u>	Governs the management of road use in QLD.	
	<u><i>Transport Operations (Road Use Management – Accreditation and Other Provisions) Regulation 2015</i></u>	Provides the framework for schemes under the <i>Transport Operations (Road Use Management) Act 1995</i> .	
	<u><i>Waste Reduction and Recycling Act 2011</i></u>	Aims to reduce waste generation and landfill disposal and encourage recycling.	
	<u><i>Waste Reduction and Recycling Regulation 2023</i></u>	Provides for the effective operation of the <i>Waste Reduction and Recycling Act 2011</i> .	
Event management	<u><i>Best Practice Guidelines for event delivery in QLD</i></u>	Provides guidance for running an event in QLD.	
	<u><i>Major Events Act 2014</i></u>	Governs the requirements for major events held in QLD.	
	<u><i>Brisbane City Council Event guide</i></u>	Outlines the permits required to run a music festival or other event in Brisbane city.	
	<u><i>Work Health and Safety Regulation 2011</i></u>	Outlines the requirements for work health and safety in QLD under the Act.	
	<u><i>Event Safe Registration</i></u>	Enables event organisers to register their event with QLD police.	

112 Queensland Government 2023, *Pill Testing Gets the Green Light [Media Release]*, 25 February.

Area	Policy name	Description	Associated documents
Liquor	<u><i>Liquor Act 1992</i></u>	Governs the sale, supply, service, promotion and consumption of all forms of liquor and alcohol products.	
	<u>Guideline 33: High risk community and commercial public events</u>	This guideline is issued in accordance with Section 42A of the Liquor Act 1992. Outlines requirements for high-risk events, including music festivals.	
Accessibility	<u><i>Anti-Discrimination Act 1991 (Qld)</i></u>	Aims to protect people in Queensland from unfair discrimination, harassment and other objectionable conduct.	

### South Australia (SA)

Known as the ‘festival state’, South Australia is home to a wide range of popular music festivals. For a detailed description of South Australia’s festival culture, please see the Spotlight – South Australia, the festival state on page 79.

Area	Policy name	Description	Associated documents
Environment and noise	<u><i>Environment Protection Act 1993</i></u>	An Act to provide for the protection of the environment; to establish the Environment Protection Authority and define its functions and powers; and for other purposes.	
	<u>Environment Protection Regulations 2009</u>	Prescribes the detail for environmental processes contained in the <i>Environmental Protection Act 1993</i> .	<u>Noise management for outdoor events</u>
	<u><i>Single-use and Other Plastic Products (Waste Avoidance) Act 2020</i></u>	An Act to restrict and prohibit the manufacture, production, distribution, sale and supply of certain single-use and other plastic products and for other purposes.	
Event management	<u>SA Regulatory Framework Guide</u>	Regulatory framework guide from MusicSA – published in 2016.	
	<u>Waste and Recycling Guide for Events and Venues</u>	SA Government guide to help South Australian events and venues minimise waste and maximise recycling.	

Area	Policy name	Description	Associated documents
Health, medical and safety	<u><i>Security and Investigation Industry Act 1995</i></u>	An Act to regulate security and investigation agents, process servers, security industry trainers and security industry training providers; and for other purposes.	
	<u><i>Security and Investigation Industry Regulations 2011</i></u>	Regulations under the <i>Security and Investigation Industry Act 1995</i> .	
	<u><i>Work Health and Safety Act 2012 (SA)</i></u>	National framework to secure the health and safety of workers and workplaces.	
	<u><i>Work Health and Safety Regulations 2012 (SA)</i></u>	Outlines the requirements for work health and safety in SA under the Act.	
Liquor	<u><i>Liquor Licensing Act 1997</i></u>	An Act to regulate the sale, supply and consumption of liquor; and for other purposes.	
	<u><i>Liquor Licensing (General) Regulations 2012</i></u>	Regulations under the <i>Liquor Licensing Act 1997</i> .	
Accessibility	<u><i>Equal Opportunity Act 1984</i></u>	An Act to promote equality of opportunity between the citizens of this State; to prevent certain kinds of discrimination based on sex, race, disability, age or various other grounds; to facilitate the participation of citizens in the economic and social life of the community; and to deal with other related matters.	

## Tasmania (TAS)

Tasmania, located off Australia's southern coast, hosts vibrant and diverse music festival experiences amidst breathtaking natural landscapes. For example, A Festival Called PANAMA, nestled within the scenic surroundings of Golconda, has curated an eclectic mix of local and international artists across various genres. Similarly, the Cygnet Folk Festival, held in Cygnet within the majestic Huon Valley, offers a unique celebration of Tasmania's folk heritage.

Area	Policy name	Description	Associated documents
Environment and noise	<a href="#"><u>Environmental Management and Pollution Control Act 1994</u></a>	Aims to prevent environmental harm from pollution and waste.	
	<a href="#"><u>Environmental Management and Pollution Control (Noise) Regulations 2016</u></a>	Limits the amount of community noise in residential neighbourhoods, among other objectives.	
	<a href="#"><u>Environmental Management and Pollution Control (Waste Management) Regulations 2020</u></a>	Regulates and manages controlled waste and some aspects of the general waste disposal within Tasmania.	
	<a href="#"><u>A Guide to Preparing an Event Waste Management Plan</u></a>	A guide to assist Tasmanian event organisers to reduce or avoid creating landfill rubbish and recover more resources for recycling and reuse.	
	<a href="#"><u>Sustainable Event Guidelines</u></a>	Guidelines to assist event organisers to make their events more sustainable.	
Event management	<a href="#"><u>Building Act 2016</u></a>	Provides the legislative framework for all building, plumbing and demolition work in Tasmania.	
	<a href="#"><u>Building Regulations 2016</u></a>	Regulations under the <i>Building Act 2016</i> .	
	<a href="#"><u>Roads and Jetties Act 1935</u></a>		
Health, medical and safety	<a href="#"><u>Work Health and Safety Act 2012</u></a>	National framework to secure the health and safety of workers and workplaces.	
	<a href="#"><u>Work Health and Safety Regulations 2022</u></a>	Outlines the requirements for work health and safety in TAS under the Act.	
	<a href="#"><u>Public Health Act 1997</u></a>	Protects and promotes the health of communities in Tasmania and reduce the incidence of preventable illness.	<a href="#"><u>Smoke free events: a guide for event organisers</u></a>
	<a href="#"><u>Guidelines for Mobile Food Businesses</u></a>	Provides an overview of the food safety requirements that apply to mobile food businesses, and information to help food businesses meet those requirements.	
	<a href="#"><u>Dog Control Act 2000</u></a>	Provides the legislative framework for the management of dogs in Tasmania.	

Area	Policy name	Description	Associated documents
Liquor	<u><a href="#">Liquor Licensing Act 1990</a></u>	An Act to regulate the sale, supply and consumption of liquor; and for other purposes.	
	<u><a href="#">Liquor Licensing Regulations 2016</a></u>	Regulations under the <i>Liquor Licensing Act 1990</i> .	
Accessibility	<u><a href="#">The Anti-Discrimination Act 1998</a></u>	To eliminate discrimination and harassment on the basis of personal characteristics.	<u><a href="#">Checklist for Accessible Events</a></u>

## Victoria (VIC)

Victoria is Australia's second most populous state and alongside NSW, plays host to the most music festivals of any Australian state. In particular, Victoria has some of the longest running community-based festivals, including Nariel-Creek Folk Festival which first began in 1963, and Port Fairy Folk Festival which started in 1977. These festivals promote a strong sense of community engagement, participation and collaboration through workshops, forums and masterclasses. Victorian festival organisers are usually required to submit a Place of Public Entertainment (POPE) permit to meet their obligations under the *Building Act 1993*.

Area	Policy name	Description	Associated documents
Environment and noise	<u><a href="#">Environment Protection Act 2017</a></u>	Aims to prevent and minimise the risks of harm to human health and the environment from pollution and waste.	
	<u><a href="#">Environment Protection Regulations 2021</a></u>	Provides for activities and other matters for the purposes of permissions under the <i>Environmental Protection Act 2017</i> .	
	<u><a href="#">Circular Economy (Waste Reduction and Recycling) Act 2021</a></u>	Aims to maximise the continued use of products and waste material over their life cycle and accounts for their environmental impacts through a circular economy.	

Area	Policy name	Description	Associated documents
Event management	<a href="#"><u>Business Victoria Event Planner</u></a>	A guided planning tool to help anyone organise an event or festival in Victoria.	
	<a href="#"><u>Building Act 1993</u></a>	Governs requirements for building construction, building standards and maintenance.	
	<a href="#"><u>Building Regulations 2018</u></a>	Governs requirements for building construction, building standards and maintenance under the <i>Building Act 1993</i> .	
Health, medical and safety	<a href="#"><u>Code of practice for running safer music festivals and events</u></a>	Assists organisers of music festivals and events to plan, run and manage events safely, and meet legal requirements, government standards and safety obligations.	
	<a href="#"><u>Victorian Guidelines for Planning Safe Public Events</u></a>	A multi-agency guide that presents best practice for event organisers and agencies involved in the planning of events within Victoria.	
	<a href="#"><u>Occupational Health and Safety Act 2004</u></a>	Sets out the principles, duties of employers and rights of workers relating to occupational health and safety.	
	<a href="#"><u>Occupational Health and Safety Regulations 2017</u></a>	Outlines the requirements for work health and safety in Victoria under the Act.	
Liquor	<a href="#"><u>Liquor Control Reform Act 1998</u></a>	Regulates the supply and consumption of liquor in Victoria.	
	<a href="#"><u>Liquor Control Reform Regulations 2023</u></a>	Complements the Act and provides further detail to give effect to the intentions of the Act.	
Accessibility	<a href="#"><u>Equal Opportunity Act 2010</u></a>	Protects people from discrimination on the basis of their individual attributes.	<a href="#"><u>Accessible events guidelines and checklist guide</u></a>

## Western Australia (WA)

As Australia's largest state, Western Australia showcases unique biodiversity, remote wilderness areas and untouched natural beauty. A variety of music festivals are held across the state, including Nannup Music Festival, which is held amidst the forests to the southwest, the Red Country Music Festival located in the Pilbara region to the north, and the Perth International Jazz Festival which takes centre stage in Perth's vibrant urban landscape.

Area	Policy name	Description	Associated documents
Environment and noise	<u><i>Environmental Protection Act 1986</i></u>	Governs the prevention, control and abatement of pollution and environmental harm, for the conservation, preservation, protection, enhancement and management of the environment.	
	<u>Environmental Protection (Noise) Regulations 1997</u>	Sets limits on noise emissions under the Act.	
	<u><i>Waste Avoidance and Resource Recovery Act 2007</i></u>	Sets out requirements for sustainability, the protection of human health and the environment in Western Australia.	
	<u>Waste Avoidance and Resource Recovery Regulations 2008</u>	Regulations under the Act.	
	<u>Traffic Management for Events Code of Practice</u>	Describes traffic management requirements for events that impact on normal usage or the operation of the road.	
Event management	<u><i>Building Act 2011</i></u>	Provides for building permits and standards.	
	<u>Building Regulations 2012</u>	Regulations under the Act.	
	<u>Resource for Events in Western Australia</u>	Document to assist in safe and efficient event planning and conduct.	

Area	Policy name	Description	Associated documents
Health, medical and safety	<u>Guidelines for concerts, events and organised gatherings</u>	Prescribes requirements for concerts, events and organised gatherings to ensure that places are safe for patrons, do not disturb neighbouring people and provide uniformity throughout WA.	
	<u>Guidelines for Safer Moshing Environments</u>	Sets out recommendations to improve the safety of mosh pits.	
	<u>Health (Public Buildings) Regulations 1992</u>	Sets out requirements for public safety in public buildings.	
Liquor	<u>Liquor Control Act 1988</u>	Regulates the supply and consumption of liquor in Western Australia.	
	<u>Liquor Control Regulations 1989</u>	Complements the Act and provides further detail to give effect to the intentions of the Act.	
Accessibility	<u>Equal Opportunity Act 1984</u>	To eliminate discrimination and harassment on the basis of personal characteristics.	<u>Guidelines for accessible events</u>

## Appendix B:

# Permits and licences by state

Licence/ permit	Governing body	Required?							
		ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Special event permit or approval/development applications	Various	<a href="#">NCA Event Permit</a>	<a href="#">Music festival early notification form</a>	<a href="#">Permits for functions, activities or meetings in parks</a>	<a href="#">Approval to conduct a temporary entertainment event</a> (by local council)	<a href="#">Event agreement</a> (for events on national parks land)	<a href="#">Temporary Occupancy Permit</a>	Place of Public Entertainment Occupancy Permit (POPE-OP)	<a href="#">DCBA licence</a>
Copyright licence	OneMusic Australia	<a href="#">Copyright licence</a>	<a href="#">Copyright licence</a>	<a href="#">Copyright licence</a>	<a href="#">Copyright licence</a>	<a href="#">Copyright licence</a>	<a href="#">Copyright licence</a>	<a href="#">Copyright licence</a>	<a href="#">Copyright licence</a>
Explosives/fireworks permit	Various	<a href="#">Fireworks display permit</a>	<a href="#">Fireworks (single use) permit</a>	<a href="#">Northern Territory pyrotechnics licence</a>	<a href="#">Fireworks operator licence</a>	<a href="#">Pyrotechnician licence</a>	<a href="#">Pyrotechnician permit</a>	<a href="#">Permit to use fireworks</a>	<a href="#">Fireworks discharge notification</a>
Liquor licence/permit	Various	<a href="#">Liquor licence</a>	<a href="#">Liquor licence</a>	<a href="#">Liquor licence</a>	<a href="#">Liquor licence</a>	<a href="#">Liquor licence</a>	<a href="#">Liquor licence</a>	<a href="#">Liquor licence</a>	<a href="#">Liquor licence</a>
Road/transport	Various	–	–	–	–	–	<a href="#">Permit to advertise a community event using temporary signs</a>	–	–

Licence/ permit	Governing body	Required?							
		ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Public health	Various	–	–	<a href="#">Environmental Health notification of a public event</a>	–	–	Place of Assembly Licence from local council (required if 1000 people present for at least 2 hours)	–	<a href="#">Department of Health event registration</a>
Noise	Various	–	Local council	Local council	Local council	Local council	<a href="#">Permit to Make a Noise in a Public Place</a> (local council)	<a href="#">Outdoor Music Noise and Event Permit</a>	Local council
Policing	Various	<a href="#">ACT Police Event Registration Form</a>	–	<a href="#">NT Police Major Event Planning</a>	<a href="#">QLD Police Event Safe</a>	–	–	<a href="#">Victoria Police Guide - Events</a>	<a href="#">Policing major events application form</a>

## Appendix C:

# List of mapped festivals for FY2022–23

The list of festivals below was compiled through a combination of desktop research and key stakeholder consultation.

This list is provided for information only. While every effort has been made to ensure accuracy, it is possible that errors and omissions may be present.

Please note that some festivals occurred more than once in the same state in the 2022–23 financial year and may therefore be duplicated in the list below.

Festival Name	State/Territory
A Day On The Green	VIC
A Festival Called PANAMA	TAS
Ability Fest	VIC
Adelaide Cabaret Festival	SA
Adelaide Wind Band Festival	SA
Adl 500 - Bands on Track	SA
Age of Love Winterdaze	VIC
Agnes Blues, Roots & Rock Festival	QLD
Aireys Inlet Open Mic Music Festival	VIC
Airlie Beach Festival Of Music	QLD
All Waves Festival	QLD
Alpine Valley Vibes	NSW
Ardlethan Country Music Festival	NSW
Arockalypse Now	VIC
Australasian World Turbojugend Days (AAWTJD)	QLD
Australian Blues Music Festival	NSW
Australian Festival of Chamber Music	QLD
Backyard Fest	VIC
Bad Friday	NSW
Balit Narrun Festival	VIC
Bamfest	NSW
Bangalow Country Music Festival	NSW
Barunga Festival	NT
Bass in the Grass	NT
Be Social Fest	QLD
Beechworth Music Festival	VIC

<b>Festival Name</b>	<b>State/Territory</b>
Bellingen Muse	NSW
Bendigo Blues and Roots Festival	VIC
Bendigo Chamber Music Festival	VIC
Beyond the Valley	VIC
Big Country Festival	NSW
BIGSOUND	QLD
Birdsville Big Red Bash	QLD
Black Mountain Unplugged	QLD
Blacken Open Air Festival	NT
Blackheath Chamber Music Festival	NSW
Blackheath Choir Festival	NSW
Blue Mountains Music Festival	NSW
Blues at Bridgetown Festival	WA
Blues on Broadbeach	QLD
Bluesfest	VIC
Bluesfest	NSW
Bluesfest	WA
Bluestone Blues Festival	VIC
Bohemian Beatfreaks	NSW
Bony Mountain Folk Festival	QLD
Boogie	VIC
Boolarra Folk Festival	VIC
Boots & Beach Country Music Festival	NSW
Borderline Destruction Festival	NSW
Borderline Destruction Festival	QLD
Borderline Destruction Festival	VIC
Bouldy Bush Ballad Bash	QLD
Bowral Autumn Music Festival	NSW
Boyne Valley Country Music Campout	QLD
Boyup Brook Country Music Festival	WA
Breakfest	WA
Bright Cabaret Festival	VIC
Brighter Days Festival	VIC
Brunswick Music Festival	VIC
BruteFest	NSW
Burleigh Ball Festival	QLD
Burning Seed	NSW
Butter Factory Blues & Roots	NSW
By The C	NSW
By The C	WA

<b>Festival Name</b>	<b>State/Territory</b>
Caloundra Music Festival	QLD
Caltowie Chilled Out & Fired Up Music Festival	SA
Cambridge Farewell Festival	NSW
Canberra International Music Festival	ACT
Canberra Metal Fest	ACT
Capella Country Music Festival	QLD
Casino Cow Country Music Muster	NSW
Castaway	WA
Castlemaine Jazz Festival	VIC
Charters Towers Country Music Festival	QLD
Cigar Box Guitar Music Festival	VIC
Clarence Jazz Festival (CJF)	TAS
Clarence Valley Camp Oven Festival	NSW
Clarence Valley Country Muster	NSW
Cleve Harvest Music Fest	SA
CMC Rocks QLD	QLD
Coastal Jam Series	VIC
Cobargo Folk Festival	NSW
Cobby Riverland Music Festival	SA
Cooly Rocks On	QLD
Cotton Capital Country Music Muster	NSW
Country by the Bay	VIC
Country by the River	SA
Country Fest	QLD
Country Sounds Music and Art Festival	WA
Cradle Country Music Festival	TAS
Creekfest	QLD
CresFest	VIC
Cronulla Jazz & Blues Festival	NSW
Crows Nest Country Music Festival	QLD
Cullulleraine Music Festival	VIC
Cvltfest	VIC
Cygnets Folk Festival	TAS
Dalrymple Country Music Festival	QLD
Darwin Pride Music Festival	NT
Dashville Skyline Cosmic Country weekend	NSW
De Ja Vu Music Festival	QLD
Deni Ute Muster	NSW
Desert Festival	NT
Desert Harmony Festival	NT

<b>Festival Name</b>	<b>State/Territory</b>
Devil Country Muster	TAS
Devouring the Flesh Fest	NSW
Digi Culture and Music Festival	ACT
Dorrigo Folk & Bluegrass Festival	NSW
Downunder Country Music Weekend	WA
Dream State	VIC
Dream State	NSW
Dreamland	NSW
Drover's Run Country Music Weekend	NSW
Earth Frequency Festival	QLD
East Arnhem Live	NT
EchoFest	NSW
El Palmo Pacificano	NSW
Electric Gardens Festival	WA
Elements Festival	QLD
Elevate	NSW
EMC FESTIVAL	NSW
Esoteric	VIC
Euroa Music Festival	VIC
Falls Festival	NSW
Falls Festival	VIC
Falls Festival	WA
Family and Friends Festival	NSW
Festival of Jewish Arts and Music	VIC
Festival of King Island	TAS
Festival of Small Halls	NSW
Festival Of Voices	TAS
Festival X	NSW
Festival X	SA
Festival X	WA
Festival X	QLD
Festival X	VIC
Festivale	WA
Field Day	NSW
First & Forever	VIC
Fleurieu Folk Festival	SA
Flinders Ranges Country Music Muster	SA
Floriade Night Fest	ACT
Flow Festival	NSW
Folk by the Sea	NSW

<b>Festival Name</b>	<b>State/Territory</b>
Folk Rhythm and Life Festival (Bilyana)	VIC
For The Love	QLD
For The Love	NSW
For The Love	VIC
For The Love	WA
Forth Valley Blues Festival	TAS
Four Winds Festival	NSW
Free the Noise Festival	NSW
Free the Noise Festival	QLD
Free the Noise Festival	VIC
Garma Festival	NT
Garrmalang Festival	NT
Gaytimes	VIC
Gidgestock Music Festival	WA
Gin & Jazz Festival	NSW
Gippsland Country Music Festival	VIC
Girgarre Moosic Muster	VIC
Girrakool Blues Festival	NSW
Glam Fest	NSW
Glam Fest	QLD
Glam Fest	SA
Glam Fest	VIC
Golden Plains Festival	VIC
Good Day Sunshine- Music Festival	WA
Good Gumnuts Festival	TAS
Good Things	NSW
Good Things	VIC
Goulburn Valley Country Music Festival	VIC
Grampians Grape Escape	VIC
Grapevine Gathering	SA
Grapevine Gathering	QLD
Grapevine Gathering	NSW
Grapevine Gathering	WA
Great Escape Music Festival	TAS
Groovin the Moo	WA
Groovin the Moo	ACT
Groovin the Moo	VIC
Groovin the Moo	NSW
Groovin the Moo	QLD
Groovin the Moo	SA

<b>Festival Name</b>	<b>State/Territory</b>
Groundwater Country Music Festival	QLD
Group Therapy Weekender	NSW
Group Therapy Weekender	VIC
Guildford Banjo Jamboree	VIC
Gulgong Folk Festival	NSW
Gum Ball	NSW
Gympie Music Muster	QLD
Habitat Garden Party	WA
HallyuPopFest Sydney	NSW
Harbourlife	NSW
Hartwood Campfires & Country Music	NSW
Harvest Rock	SA
Hats Off (To Country)	NSW
Healesville Music Festival	VIC
Heaps Good Festival	SA
Here Comes The Sun Festival	WA
High Voltage Festival	WA
Hinterland Music Festival	VIC
Home Grown Music Festival	WA
Hyper Festival	WA
Ice Cream Factory Summer Festival	WA
Illawarra Folk Festival	NSW
Illuminate The River	VIC
In Clouds	VIC
In the Pines	WA
Infinity Worm	ACT
Inland Sea of Sound	NSW
Inner Varnika	VIC
International Women's Day Festival	QLD
Inverloch Jazz Festival	VIC
Inward Goods	VIC
Island Vibe Festival	QLD
Jamaican Music and Food Festival	VIC
Jammin Festival	NSW
Jammin Festival	NSW
Jammin Festival	WA
Jazz Blues and Koalas	QLD
Jazz by the Beach	WA
Jazz In The Square	VIC
Juicy Fest	NSW

<b>Festival Name</b>	<b>State/Territory</b>
Juicy Fest	WA
Kalgoorlie Country Music Festival	WA
Kangaroo Valley Folk Festival	NSW
Karnival Outdoor Festival	VIC
Kickass Music and Camping Festival	QLD
Knockout Outdoor Music Festival	NSW
Knotfest	NSW
Knotfest	VIC
Knotfest	QLD
Kyabram RV Country Music Festival	VIC
Lake Charlegrark Country Music Marathon	VIC
Lameroo Country Music Festival	SA
Laneway Festival	QLD
Laneway Festival	NSW
Laneway Festival	VIC
Laneway Festival	WA
Laneway Festival	SA
Last Light: Wollongong Small Bar & Arts Festival	NSW
Lazy Mountain Music Festival	NSW
Leaps and Bounds	VIC
Let Them Eat Cake	VIC
Lighthouse Country Music Festival	QLD
Lighthouse Rock Festival	QLD
Liquid Kandy Electronic Music Festival	WA
Listen In	SA
Listen Out	VIC
Listen Out	NSW
Listen Out	QLD
Listen Out	WA
Live at the Park	VIC
Live at Warrawee	VIC
Live in the Vines	VIC
Loch Hart Music Festival	VIC
Lost City u18s Music Festival	NSW
Lost City u18s Music Festival	QLD
Lost Lands	VIC
Lost Paradise	NSW
Loudfest	NSW
Lucky Day Out Frankston	VIC
Luliepalooza	VIC

<b>Festival Name</b>	<b>State/Territory</b>
Luminous Art After Dark	NSW
Macedon Ranges Music Festival	VIC
Macksville Music Muster	NSW
Majors Creek Festival	NSW
Malandarri Festival	NT
Maldon Folk Festival	VIC
Maleny Music Festival Summer Warm Up	QLD
Mandurah Country Music Festival	WA
Marrickville Music Festival	NSW
Marysville Music Weekend	VIC
Meadow Music Festival	VIC
Melbourne Celtic Festival	VIC
Melbourne International Jazz Festival	VIC
Meredith Music Festival	VIC
Merimbula Jazz Festival	NSW
Mi Casa Su Casa	NSW
Middleton Jazz in the Park	SA
Midnight Mafia	NSW
Mildura Country Music Festival	VIC
Mitchell Creek Rock N Blues Festival	QLD
Mode Festival, Cockatoo Island	NSW
Monolith Festival	WA
Mordialloc Food, Wine & Music Festival ("Mordi Fest")	VIC
Mornington Peninsula Blues Festival	VIC
Mornington Winter Music Festival	VIC
Mount Beauty Music Festival	VIC
Mountain Goat Valley Crawl	QLD
Mountaingrass	VIC
Mundi Mundi Bash at Broken Hill	NSW
Munna Creek Country Music Walkup	QLD
Murgon Music Muster	QLD
Mushroom Valley Festival	QLD
Music in the Mulga	QLD
Music in The Vines	VIC
Muster Rodeo and Music Festival	WA
Nambung Country Music Muster	WA
Nanango Country Muster	QLD
Nanga Music Festival	WA
Nannup Music Festival	WA
Nariel-Creek Folk Festival	VIC

<b>Festival Name</b>	<b>State/Territory</b>
National Folk Festival	ACT
Natural Bridge Festival	VIC
Neurum Creek Music Festival	QLD
New England Bach Festival	NSW
Newcastle Jazz Festival	NSW
Newcastle Music Festival	NSW
Newport Folk Festival	VIC
Newstead Live	VIC
Ngana Birrung Hip-Hop Festival	NSW
Nimbin Roots Festival	NSW
Ninchfest	VIC
Nine Lives Festival	QLD
No One But Us	WA
Northern Sydney Symphonic Wind Ensemble Spring Festival	NSW
Now & Again	VIC
NQ's Rock'n Country	QLD
NYE in the Park	NSW
NYE On The Hill	VIC
NYX Festival	QLD
Ocean Sounds	VIC
Offbeat Music Festival	QLD
OK Motels Charlton	VIC
One Electric Day	VIC
Oracles of the Bush	NSW
Orange Chamber Music Festival	NSW
Orange Winter Jazz Festival	NSW
Out & Loud & Proud: Sydney World Pride Choir Festival	NSW
Out On The Weekend	VIC
Palm Tree Festival	NSW
Palm Tree Festival	QLD
Palm Tree Festival	VIC
Parkes Elvis Festival	NSW
Party in the Paddock	TAS
PASIFIX	VIC
Pastime	NSW
Patchewollock Music Festival	VIC
Pathways Music Festival	NSW
Paynesville Music Festival	VIC
Peak Festival	NSW
Peninsula Picnic	VIC

<b>Festival Name</b>	<b>State/Territory</b>
Peninsula Summer Music Festival	VIC
Perth Firewater Festival	WA
Perth International Jazz Festival on Tour	WA
Phillip Island Jazz Festival	VIC
PigSty in July	NSW
Pineapple Club	WA
Pioneer Valley Country Music Festival	QLD
Pitch Music and Arts Festival	VIC
Port Broughton Country Music Festival	SA
Port Fairy Folk Festival	VIC
Port Fairy Jazz Festival	VIC
Port Fairy Spring Music Festival	VIC
Port Noarlunga Blues Festival	SA
Port Pirie Country Music Festival	SA
Promiseland Festival	QLD
Pure Festival	NSW
Pure Festival	QLD
Pure Festival	VIC
Pyrenees Hideout Festival	VIC
Queenscliff Music Festival	VIC
Ravo Blues & Roots Festival	WA
Red Country Music Festival	WA
Red Hot Summer Tour	VIC
Red Hot Summer Tour	NT
Red Hot Summer Tour	NSW
Red Hot Summer Tour	WA
Reggaetown	QLD
Reminisce House	VIC
Reminisce Trance	VIC
Rhyme Festival	QLD
Rhythm and the Reef	QLD
Ride the Sound Wave Festival	NSW
River Folk Festival	VIC
Riverboats Music Festival	VIC
Riverland Rock and Roll Festival	SA
RNB Fridayz Live	NSW
RNB Fridayz Live	QLD
RNB Fridayz Live	SA
RNB Fridayz Live	WA
Rock On Riverside	QLD

<b>Festival Name</b>	<b>State/Territory</b>
Rock The Clock	VIC
Rock the Ranges	SA
Rockin on East Festival	NSW
Rolling Hills Festival	QLD
Rootbound Festival	QLD
RTR FM's Fremantle Winter Festival	WA
Safe Sounds Music Festival	NSW
Sandford Bush Music Festival	VIC
Savannah in the Round	QLD
Scots In The Bush	QLD
Scouted	SA
Seaside Sounds	NT
Sharkfest	VIC
Smalltown	VIC
Snack Festival	WA
So Frenchy So Chic	VIC
So Pop	VIC
Soft Centre	NSW
Someday Soon	NSW
Sonica Music Festival	VIC
Sounds of Rock Festival	NSW
South Coast Country	NSW
Southbound MusicFest	SA
Spaced Out Festival	QLD
Spilt Milk	VIC
Spilt Milk	QLD
Spilt Milk	ACT
Splendour in the Grass	NSW
Spliffs & Riffs	WA
Spring Loaded	SA
Spring Loaded	QLD
Spring Loaded	NSW
Springtime	QLD
St Kilda Festival	VIC
St Kilda Latin Festival	VIC
Stanmore Music Festival	NSW
Stock Route Country Music Festival	NSW
Stonefest	ACT
Storyland	NSW
Strawberry Moon Festival	QLD

<b>Festival Name</b>	<b>State/Territory</b>
Streaky Sounds Music Festival	SA
Strings Attached: The West Australian Guitar Festival	WA
Subculture	VIC
Subtropics Festival	QLD
Sue and Geoff's Country Music Campout	QLD
Summer Block Party	SA
Summer Camp Festival	NSW
Summer Camp Festival	VIC
Summer Sundays	VIC
SummerSalt	TAS
SummerSalt	ACT
SummerSalt	NSW
SummerSalt	VIC
SummerSalt	VIC
SummerSalt	VIC
SummerSalt	NSW
SummerSalt	WA
SummerSalt	WA
SummerSalt	QLD
SummerSalt	QLD
Sun Burn	ACT
Sun Cycle	VIC
Sunshine Coast Chamber Music Festival	QLD
Sunshine Sounds Festival	QLD
Super Fun Day	QLD
Surflife Festival	NSW
Swirl Fest	SA
Sydney Folk Festival	NSW
Sydney Sacred Music Festival	NSW
Tablelands Folk Festival	QLD
Tamworth Country Music Festival	NSW
Tanamon Valley Music Festival	NSW
Tanglewood Festival	VIC
Telegraph Point Blues and Roots	NSW
Temora Country Music Weekend	NSW
Tent Pole: A Musical Jamboree	VIC
Terara Country Music Campout	NSW
Texas Country Music Festival	QLD
The Big Bonanza	NSW
The Drop	NSW

<b>Festival Name</b>	<b>State/Territory</b>
The Long Sunset	QLD
The Other Festival	QLD
The Saltwater Music Festival	WA
The Wild Campout	WA
Thirroul Music Festival	NSW
Thrashville	NSW
Thredbo Blues Festival	NSW
Tidal Sounds Music Fest	NSW
Tone City Records Festival	WA
Top Half Folk Festival	NT
Touch Bass Festival	WA
Touch Bass Festival	NSW
Touch Bass Festival	SA
Touch Bass Festival	QLD
Townsville Folk Festival	QLD
Transmission Festival	NSW
Transmission Festival	VIC
Treaty Day Out Bendigo	VIC
Treaty Day Out Naarm	VIC
Tunes on the Turf	NSW
Tyalgum Music Festival	NSW
Ultra Festival	VIC
Umbrella Festival	SA
Undara Outback Rock And Blues	QLD
UNIFY Gathering	VIC
Unify Off The Record	QLD
Unify Off The Record	TAS
Unify Off The Record	SA
Unify Off The Record	NSW
Unsound Adelaide	SA
Uranquinty Folk Festival	NSW
Utopia Beach Festival	WA
ValleyWays	NSW
Verandah Music Festival	TAS
Vintage Vibes	SA
WA Classical Guitar Ensemble Festival	WA
WA Day Festival	WA
Wallaby Creek Festival	QLD
Wanderer Festival	NSW
Wangaratta Country Music Festival	VIC

<b>Festival Name</b>	<b>State/Territory</b>
Wangaratta Festival of Jazz & Blues	VIC
Warren Chamber Music Festival	NSW
Wave Rock Weekender	WA
Weethalle Country Music Muster	NSW
West End Fest	NSW
Whitehorse Australia Day Concert	VIC
Whittlesea Country Music Festival	VIC
Wide Open Space Festival	NT
Wild Horses Festival	VIC
Wildlands	SA
Wildlands	QLD
Wildlands	WA
Wine Machine	NSW
Wine Machine	ACT
Wine Machine	WA
Wingham Music Festival	NSW
Winter Blues Festival (Echuca Moama)	VIC
Winter Sounds	VIC
Winter Wine Festival	NSW
Winton's Way Out West Festival	QLD
Wirrina Bluegrass & Acoustic Roots Festival	SA
WOMADelaide	SA
Wonder Mountain	VIC
Woodford Folk Festival	QLD
Yackandandah Folk Festival	VIC
Yarnin Pangari	SA
Yarra Junction Fiddlers Convention	VIC
Yirrkala Yarrapay Music and Dance Festival	NT
Zenith Gathering	NSW

## Appendix D:

# Cancelled festivals

This research presents a snapshot of the Australian music festival industry during the 2022-23 financial year.

Several festivals that ran during FY2022-23 and are included in this research were cancelled in the period between July 2023 and the time of publication of this report (April 2024). A list of these festivals is included below.

Festival Name	State	Comments
Coastal Jam	VIC	2024 event cancelled
Groovin the Moo	Touring	2024 events cancelled
Goulburn Valley Country Music Festival	VIC	Not announced for 2024
Heaps Good	Touring	2024 Brisbane event cancelled
Inner Varnika	VIC	2023 was the final edition
Meadow Music Festival	VIC	2024 event cancelled
Ninchfest	VIC	2023 was the final edition
Splendour in the Grass	NSW	2024 event cancelled
SummerSalt	VIC	2024 event cancelled
Tent Pole Music Festival	VIC	2024 event cancelled
Unify Gathering	VIC	Main event cancelled but small regional tour went ahead
ValleyWays	NSW	2024 event cancelled
Vintage Vibes	SA	2024 event cancelled

Many other festivals were scheduled to occur during the 2022-23 financial year, but were cancelled for a variety of reasons. These festivals were excluded from this research but are listed below.

Festival Name	State	Comments
2 Degrees Festival	VIC	2023 event cancelled
Almost Summer	VIC	2022 event cancelled
Asteria Gathering	QLD	2023 event cancelled
Babylon Festival	VIC	2023 event cancelled
Big Pineapple Festival	QLD	2022 and 2023 event cancelled, returning in 2024
By the Pier	VIC	2023 event cancelled
Country on Keppel	QLD	2022 event cancelled, returned in 2023
Fairbridge Festival	WA	2023 and 2024 events cancelled
Fairgrounds Festival	NSW	2022 event cancelled
Falls Festival	Multiple	2023 event cancelled
Festival of the Sun	NSW	2022 event cancelled
Full Tilt Festival	Touring	2022 event cancelled

<b>Festival Name</b>	<b>State</b>	<b>Comments</b>
Grapevine Gathering	NSW	2022 event cancelled, returned in 2023
Grass is Greener	Touring	2022 events cancelled, no further festivals planned
Handpicked Festival	SA	2022 event cancelled, returned in 2023
Hopkins Creek Festival	VIC	2022 event cancelled
Jungle Love Festival	QLD	2023 event cancelled
Kelly Country Pick	VIC	2022 event cancelled, returned in 2023 as the Cobargo Country Pick
Land of Plenty	VIC	2023 event cancelled
Lunar Electric Festival	QLD	2023 event cancelled, no further festivals planned
More NRG Music and Arts Festival	NSW	2023 event cancelled
Myrtleford Festival	VIC	2023 event cancelled
New Shoots Festival	SA	2023 event cancelled
Play on the Plains	NSW	2023 event cancelled, returned in 2024
Rabbits Eat Lettuce	QLD	2023 event cancelled, returned in 2024
Relish Music and Arts Festival	NSW	2022 event cancelled
ROAM Festival	WA	2023 event cancelled
Strawberry Fields Festival	VIC	2022 event cancelled, returned in 2023
This That Festival	NSW and QLD	2022 and 2023 events cancelled
VanFest	NSW	2023 event cancelled
Wildflower Festival (NSW, 2022)	NSW	2022 event cancelled
Yellowbelly Country Music Festival	QLD	2023 event cancelled, returning in 2024
Yours and Owls Festival	NSW	2022 event cancelled, returned in 2023



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