

Response to Standing Committee on Social Issues Inquiry into live music in NSW

Question on notice regarding:

- What role does live music play in your research into how cities brand themselves for attracting talent and investment

Response:

The Committee's research benchmarking Sydney against global cities has typically referenced live music indirectly via global indices tracking nightlife or culture (e.g. Brand Finance GSPI/Global City Index, Kearney, Mori GPCI, Time Out, Resonance, Deloitte), rather than live music specific data. Both the most recent editions, *Beauty Runs Deep*¹ and *Beyond the Postcard*,² show Sydney's cultural strengths are stronger than international perceptions would suggest, and that the city is often understood too narrowly through its natural beauty and tourism assets. Both reports make the case for Sydney to better communicate the depth of its cultural and creative life as part of a more compelling global narrative, and that the opportunities and investment would follow. *Beyond the Postcard* quantifies Sydney's brand gap at \$3.3 billion, identifying culture as one of just two pillars where Sydney's performance far exceeds global perception, with the potential to close that economic gap by addressing the perception gap through branding.

Globally, live music has been a proven brand lever for attracting visitors, talent and investment. Key references and frameworks include:

- IFPI/Music Canada's *The Mastering of a Music City*³ (2015), which studied 22 cities and set out seven strategies and 31 recommendations for building a music economy. Its central talent/investment claim is that a strong music community attracts highly skilled young workers across all sectors for whom quality of life is a priority, which in turn attracts business investment – Berlin is cited as a case where a music economy helped attract and retain talent in other industries. It also collates headline figures cities use to brand themselves: Nashville's music industry at approx. 56,000 jobs and US\$5.5 billion, Melbourne's 2012 live music sector above AUD\$1 billion, UK music at £3.8 billion in 2013, Austin at about half the city's economic output from music.
 - NB: The Committee for Sydney hosted Shain Shapiro, who uses this framework in his global consultancy Sound Diplomacy, for a keynote event at AGNSW in 2025.
- UNESCO's *Urban Solutions: Culture-Driven Sustainable Urban Tourism*⁴ (2025), identifies music as a key catalyst for tourism, place identity and international recognition, and references Adelaide specifically as actively learning from global leaders including Austin, Nashville and Seattle on leveraging a music identity for creative-industry growth and economic diversification.

¹ Committee for Sydney (2025). *Beauty Runs Deep: Benchmarking Sydney's brand*. Available at: https://sydney.org.au/wp-content/uploads/2025/06/Committee-for-Sydney_Benchmarking-Sydney-Brand_June-2025.pdf

² Committee for Sydney (2026). *Beyond the Postcard: Benchmarking Sydney*. Available at: <https://sydney.org.au/wp-content/uploads/2026/05/FINAL-Beyond-the-Postcard.pdf>

³ IFPI/Music Canada (2015). *The Mastering of a Music City*. Available at: <https://www.ifpi.org/wp-content/uploads/2020/07/The-Mastering-of-a-Music-City.pdf>

⁴ UNESCO (2025). *Urban Solutions: Culture-driven sustainable urban tourism*. Available at: https://www.unesco.org/sites/default/files/medias/fichiers/2025/10/Urban%20Solutions_Culture-driven%20Sustainable%20Urban%20Tourism_EN.pdf

- UK Music's reports include data on music drawing visitors: *Here, There and Everywhere*⁵ (2023) found 14.4 million "music tourists" in 2022, including 1.1 million overseas visitors, with music tourism contributing £6.6 billion to the economy.
- A study of Austin's Red River Cultural District⁶ (2025), found live music generates "reputational rents" that cities use in interurban competition to attract investment and enhance city branding, with more than US\$2.3 billion in total economic impact over 2021-2025 from a stretch under a mile long, supporting 3,715 FTE jobs and 650+ musicians.
 - Austin's Chamber of Commerce now runs an annual program on the ways in which live music drives business growth, talent attraction and regional impact, positioning music as one of the top three reasons people travel to Austin.

Sydney's history of world-renowned music scenes, from pub rock to rave culture, hardcore, drill and ballroom, among so many others, has been bolstered by the platform created by a suite of progressive nightlife policy reform over the past five years. The live music sector faces profound challenges, but it's also clearly undervalued as an attractor for visitors, talent and investment.

The recommendations in our initial submission to this inquiry – venue protections, audience building, workforce support and so on – should be considered foundational investments for addressing this chronic under-valuing.

At a time when global conditions are driving our peer cities to compete fiercely for visitors, talent and investment, Sydney is leaving \$3.3 billion on the table – if we shift our thinking to consider live music as brand and economic infrastructure, not just cultural amenity (as important as that is), we can significantly strengthen our city's long-term performance on the world stage.

⁵ UK Music (2023). *Here, There and Everywhere*. Available at: <https://www.ukmusic.org/research-reports/here-there-and-everywhere/>

⁶ Angelou Economics (2025). *Red River Cultural District: Economic impact study*. Available at: <https://redriverculturaldistrict.org/economic-impact-report/>