



# VALUING AUSTRALIAN COUNTRY MUSIC 2025



**Create NSW**  
Arts, Screen & Culture



**THIS REPORT HAS BEEN DEVELOPED ON THE UNCEDED LAND OF  
THE WURUNDJERI PEOPLE OF THE KULIN NATION.**

**WE PAY OUR RESPECTS TO ELDERS PAST AND PRESENT AND TO ALL  
ABORIGINAL AND TORRES STRAIT ISLANDER PEOPLE THROUGHOUT  
OUR STATES AND TERRITORIES, ACKNOWLEDGING THEY CONTINUE  
THE TRADITIONS AND CONTRIBUTION OF OUR FIRST MUSICIANS,  
PERFORMERS AND STORYTELLERS.**



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Travellin' Country Band  
Tamworth Country Music Festival

# EXECUTIVE SUMMARY

## INTRODUCTION

**GLOBAL COUNTRY MUSIC IN 2025 HAS A COMPELLING AND POWERFUL STORY TO TELL, WITH THE GENRE WELL AND TRULY TRANSCENDING THE STEREOTYPES THAT TRADITIONALLY FEATURED IN MUCH MEDIA COMMENTARY AND EXPANDING BEYOND NICHE STATUS TO BECOME AN IMPORTANT PART OF THE GLOBAL MUSIC MARKET.**

Building on the narrative and emotive strength of country songs to engage and motivate fans, recent genre-bending collaborations featuring stars from pop, rock, hip-hop and rap such as Beyonce, Morgan Wallen, Post Malone and Jelly Roll, have introduced the music to a new – and predominantly younger, audience.

Gen Z is embracing country in never before seen numbers as witnessed by global superstar Beyonce enjoying the most successful streaming week of her career following the release of her genre tribute album 'Cowboy Carter' in 2024.

With streamed audio on-demand continuing to grow and provide listeners instant access to millions of songs anywhere any time, country has surged in popularity.

As we shall see, the major challenge for all genres in our marketplace is to make sure that local fans have access to Australian voices telling Australian stories.

For the first time in history in 2023, four US country artists topped the all-genre Billboard Hot 100 chart for the year. A feat that was repeated in 2024.

Shaboozey's 'A Bar Song (Tipsy)' spent 9 weeks at No.1 on the Billboard Streaming Chart and was the most streamed song in the US for 2024.

★ **SPOTIFY'S AUNZ SENIOR EDITOR, AGAIN IDENTIFIED AUSTRALIA AS THE WORLD'S THIRD-LARGEST AND FASTEST-GROWING COUNTRY MUSIC MARKET.**

★ **SINCE 2023, COUNTRY MUSIC STREAMS HAVE INCREASED BY 115% WITH AUSTRALIA RECORDING THE WORLD'S HIGHEST PERCENTAGE (74%) OF NEW COUNTRY LISTENERS.**

★ **AUSTRALIA RANKS 2<sup>ND</sup> IN THE WORLD FOR LISTENERS UNDER 25 STREAMING COUNTRY. 92% OF THEM IN METRO AREAS.**

★ **AGAIN ACCORDING TO SPOTIFY, IN TERMS OF SONGWRITING AND RECORDING, AUSTRALIA RANKS AMONG THE WORLD'S LEADING EXPORTERS OF COUNTRY MUSIC.**

A number of recent, acclaimed performances on popular free-to-air and streamed television shows have introduced a new generation of Australian country artists to a whole new fan base and audience demographic.

★ **LIVE NATION REPORTED A 4.5-FOLD INCREASE IN COUNTRY SHOWS BOOKED IN AUSTRALIA IN 2024/25.**

Against this backdrop of market success, media exposure and the growing interest in the genre, it was therefore very timely to conduct the Country Music Census 2025 project which produced the data for this report.

## KEY FINDINGS

The key statistics for valuing our country music market in 2025, reflect the growth that will be identified and analysed throughout the report.

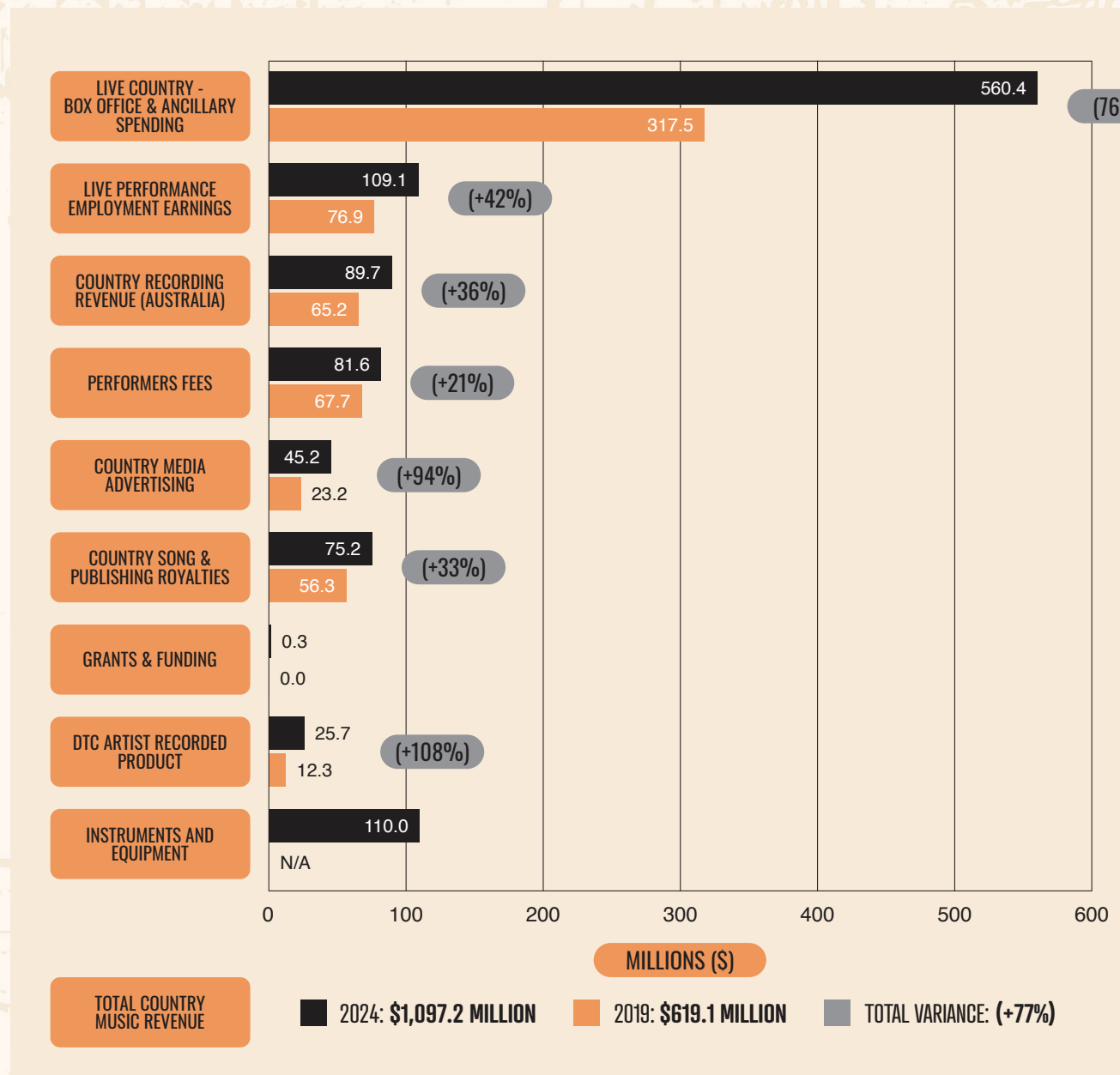
This is especially so, when we compare these findings to those we reported in 2019.

★ **IN THE 2024/2025 FINANCIAL YEAR, COUNTRY MUSIC GENERATED REVENUE OF \$AUD 1.09 BILLION.**

★ **THIS REPRESENTS A 77% INCREASE ON THE \$619 MILLION REPORTED IN 2019.**

★ **THIS IS A SPECTACULAR RESULT CONSIDERING THAT IT TOOK 20 YEARS (FROM 1997) FOR THE GENRE TO DOUBLE IN REVENUE AS REPORTED IN 2019.**

Live performances of country music at festivals, concerts and in small venues across the nation, generated over 50% of genre revenue, attracted 3.26 million fans and created over 2,000 Full Time Equivalent jobs for event and venue staff.



There were 137 dedicated country music festivals which attracted 684,000 patrons. There were 49 major concerts, including the first-ever stadium shows in Australia by a country artist – Luke Combs. They attracted 490,000 fans. An additional 488 concerts took place in theatres, performing arts centres and spaces. They attracted 216,000 patrons.

There were 542 small venues that regularly presented country music across the states and territories.

A total of 16,000+ gigs in small venues attracted 1.87 million patrons.

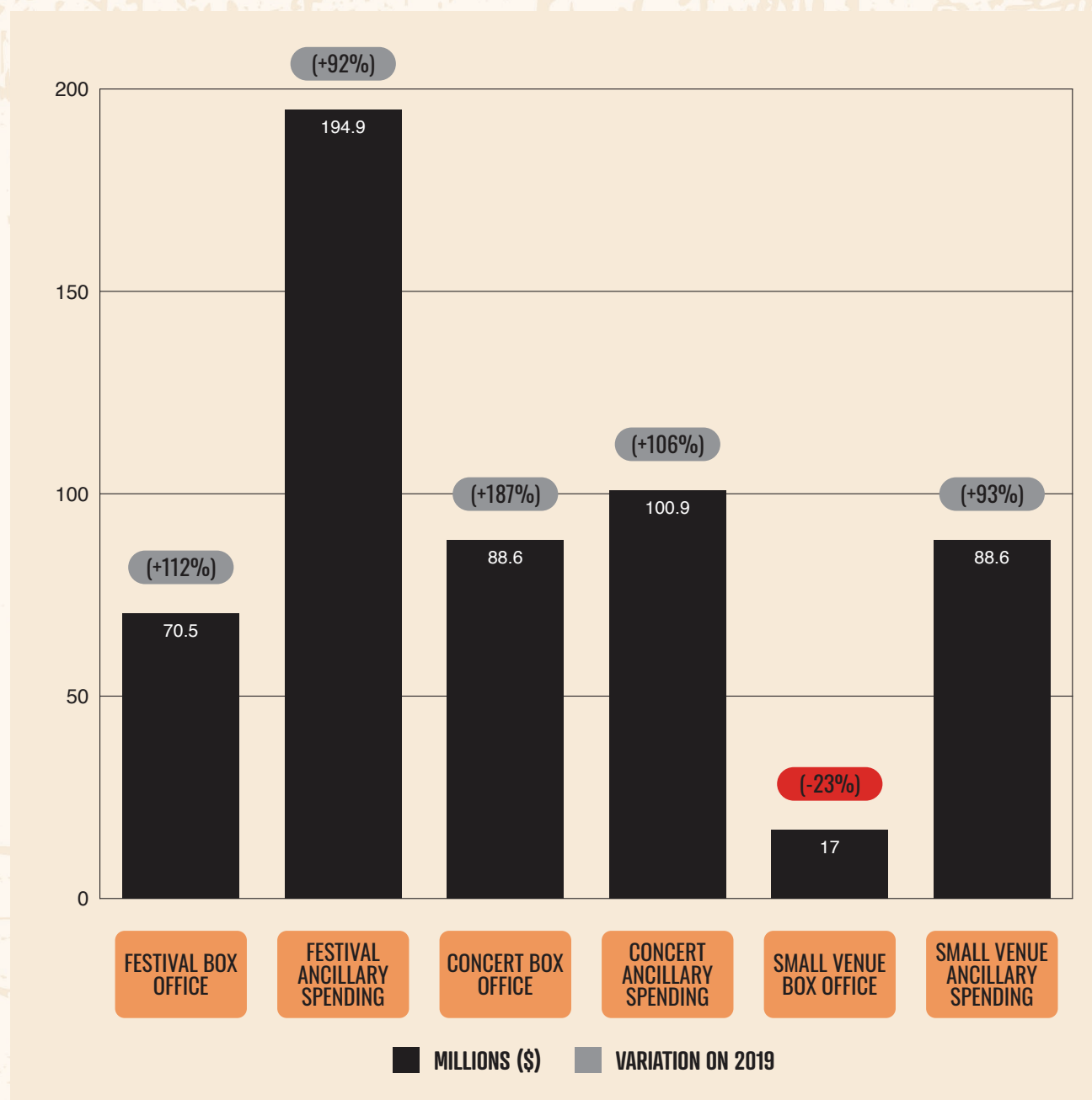
Revenue from box office and patron spending at country music festivals and concerts increased significantly, while small venues (hotels, clubs and bars) recorded a box office decline on 2019 figures, but an increase in patron spending.

Perhaps it's time to look to the UK, where a new initiative has been unveiled which will see \$2 from every arena and stadium concert ticket put into a LIVE trust fund to support grass-roots venues and events.

Based on the significant increase in concert revenue we have reported, this would have a significant impact on those presenters currently struggling with increasing operational costs – among other challenges.

★ **IN 2024/2025, COUNTRY MUSIC FESTIVALS EMPLOYED 15,000 PERSONNEL, CREATING 534 FULL TIME EQUIVALENT JOBS.**

★ **COUNTRY MUSIC CONCERTS CREATED 540 FULL TIME EQUIVALENT JOBS, WHILE PERFORMANCES IN SMALL VENUES CREATED 1,012.**



## SONGS AND SONGWRITING

In 2023/2024, APRA represented 110,000 writers who provided an Australian postcode. 16% of them identified as writing 'country'. This compared to 11% in 2019 and 6% when we conducted our first country research in 1997.

In 2023/2024 year, APRA AMCOS reported yet another year of revenue growth to \$AUD 740 million, including a record \$86 million from the use of Australian compositions in overseas territories (\$44 million in 2019).

As we have noted in every *Live Music Census* project conducted since 2017, and in our 2019 report on 'The Economic and Cultural Value of Australian Country Music 2018', metropolitan Melbourne continues to demonstrate its pre-eminence as the national 'writer capital'.

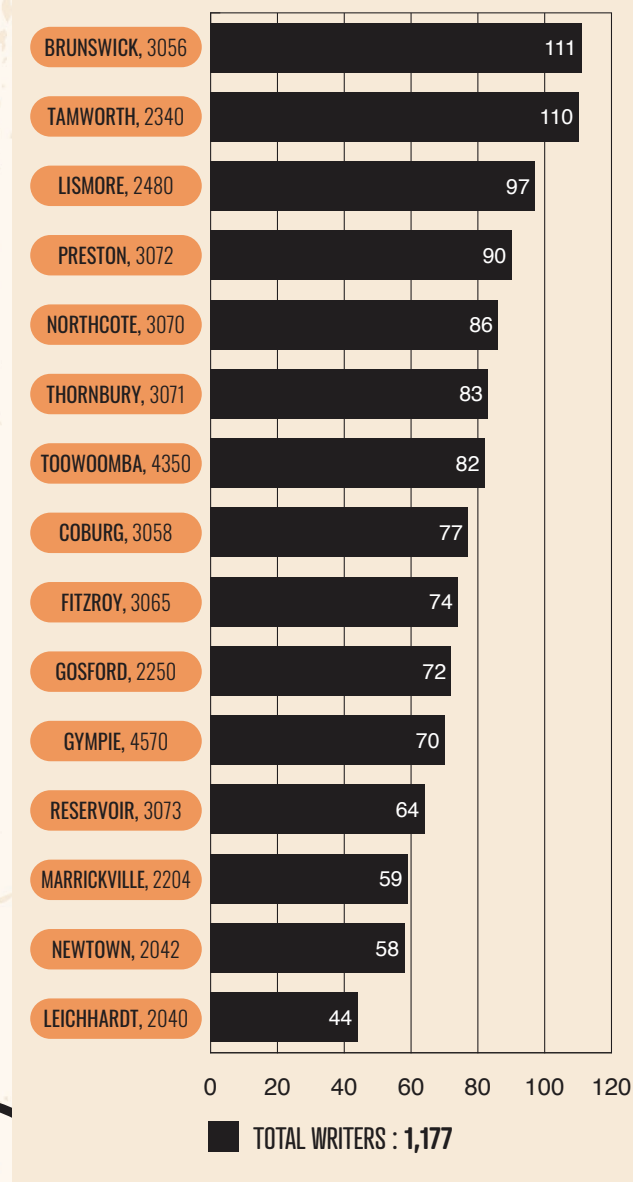
★ **COUNTRY WRITERS AND PUBLISHERS EARNED AN ESTIMATED \$75.2 MILLION. AN INCREASE OF 33% ON 2019.**

## COUNTRY WRITERS

Over the last decade the number of country writers in each state and territory has fluctuated, but percentage have remained consistent – NSW 4,309 (31%), Vic 3,757 (27%), Qld 3,297 (24%), WA 998 (7.2%), SA 768 (5.5%), Tas 279 (2%), NT 198 (1.4%), ACT 187 (1.4%)

★ **75% OF VICTORIA'S COUNTRY WRITERS ARE MELBOURNE-BASED IN THE ADJOINING CITIES OF DAREBIN, MERRI-BEK AND YARRA. SIX SUBURBS WITHIN THEIR BOUNDARIES ARE IN THE TOP 10 WRITER POSTCODES.**

★ **IN ALL OTHER STATES AND TERRITORIES, COUNTRY WRITERS ARE PREDOMINANTLY LOCATED IN REGIONAL CITIES AND TOWNS.**



## RECORDED MUSIC MARKET

In 2024, the Australian Recording Industry Association reported a sixth consecutive year of growth with revenue of \$AUD 717 million.

This represented an increase of 36% on the \$526 million recorded in 2019.

Streaming generated \$640 million in 2024, which represented 89% of total revenue. In 2019 its revenue share was 71%.

★ **WE ESTIMATE THAT COUNTRY MUSIC IN 2024 GENERATED \$89.7 MILLION IN RECORDED MUSIC REVENUE.**

★ **THIS INCLUDES \$25.7 MILLION IN DIRECT TO CONSUMER SALES AND A 37% INCREASE ON THE \$65.2 MILLION TOTAL RECORDED IN 2019.**

## CHARTS AND AIRPLAY

Despite the fact that media platforms – ABC Country, KIX Country, CountryTown, AMRAP (community radio) and Sunburnt Country among them, report a significant increase in the production/release of Australian artist recordings, sales and airplay charts reveal a story of declining representation of locally produced recordings. This is not unique to country.

On the all-genre ARIA Top 100 Singles Charts between 2017 and 2022, Australian artists averaged 10 places. In 2023, they averaged 2.5.

On the Top 100 Album Charts between 2017 and 2022, Australian artists averaged 18 places. In 2023, they averaged 4.

**COUNTRY.COM.AU**

## IN TERMS OF COUNTRY –

In 2019, there were 10 Australian artists on ARIA's annual Top 50 Country Album Chart, including three in the Top 10.

In 2024, that number declined to 3, with none in the Top 10. The highest placed at 38.

Radio Monitors compiles our genre's most authoritative airplay chart.

During the pandemic year of 2020, Australian country artists understandably dominated airplay with 17 albums in the Country Top 50. In 2023, there were 18 with 4 in the Top 10.

In 2024, there were 13, but none in the Top 10.

Data analyst Luminate analysed the 10,000 most-streamed songs in Australia in 2024. 8% were by Australian artists, 56% by US artists and 15% by UK/Eire artists.

Australia has always been a net importer of music originating from other territories, but in view of recent streaming trends, it is little wonder that a number of major industry organisations lobbied the parties contesting the recent Federal Election to take immediate steps to increase the representation of Australian voices, including advocating quotas for streaming service providers similar to those which apply to terrestrial and digital radio.

★ **LEADING MEDIA PLATFORM COUNTRYTOWN RECORDED A 91% YEAR-ON-YEAR INCREASE IN WEBSITE VISITORS IN 2024.**



**Raechel Whitchurch**  
Patchewollock Hotel

## ABOUT THE PROJECT

The main focus of the research was to compile and analyse data which would enable us to document the growth of the genre and the extent to which it has recovered from the COVID-19 travel restrictions, border closures and the across-the-board loss of approximately 75% of festival, concert and small venue live performances in 2020, 2021 and into 2022.

We know from our previous report – ‘*The Economic and Cultural Value of Country Music in Australia 2018*’, that for established country performers in Australia live performance revenue accounts for some 60% of their music-related income.

★ **SO THE LIVE PERFORMANCE SECTION OF THE REPORT PROVIDES THE clearest indication of the current health of the genre, especially as large live music events are an important part of the social fabric and the economy of the regional communities where the majority of them take place.**

★ **THEY GENERATE EMPLOYMENT, BUSINESS REVENUE AND DRIVE TOURISM VISITATION.**

In the last 12 months, country concerts have boomed in Australia with US artist Luke Combs headlining the genre’s first (sold out) stadium shows, with six concerts in Brisbane, Melbourne and Sydney.

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★ **COUNTRY MUSIC FESTIVALS CONTINUE TO THRIVE AND, IN SOME CASES, INCREASED THEIR AUDIENCE IN AN OFTEN DIFFICULT CLIMATE.**

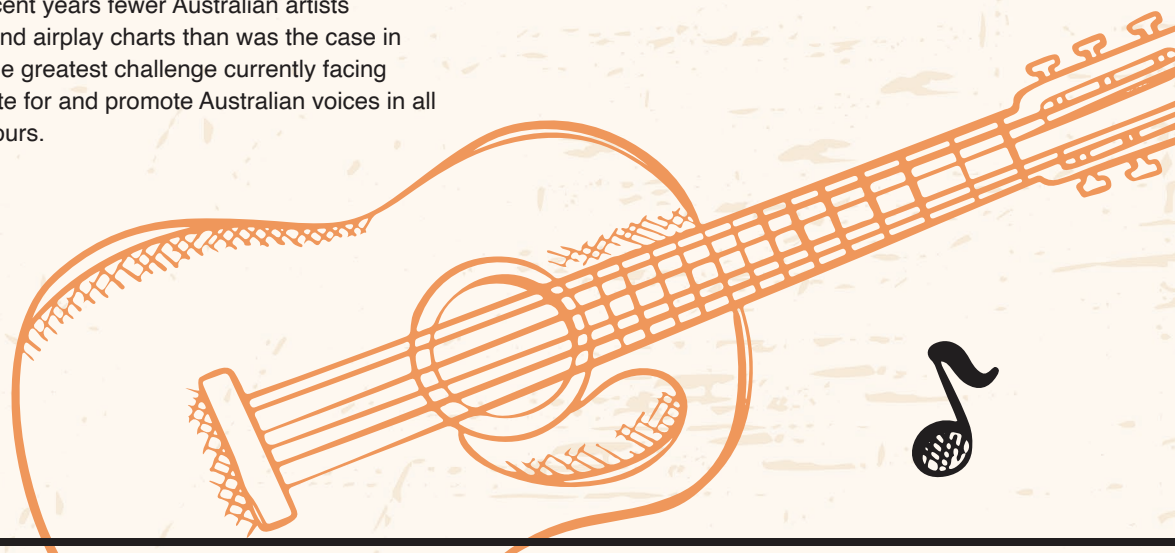
The small venue sector will also be a focus of our attention as owners continue to grapple with a range of challenges including rising operational costs.

All media sources interrogated and analysed confirmed that there has been a dramatic increase in the number of recordings produced by Australian artists since our last research.

However, the ‘democratization’ of distribution via Digital Service Providers and streaming platforms has not all been positive.

With an estimated 70% of Australian music fans having access to over 200 million unique streaming tracks, Luminate reports that in 2024, 87% of tracks received less than 1,000 streams per year. Only 5% of Spotify artists registered 1,000 monthly listeners – the minimum for payment.

The fact that in recent years fewer Australian artists featured in sales and airplay charts than was the case in 2019 is perhaps the greatest challenge currently facing those who advocate for and promote Australian voices in all genres, including ours.



## CONDUCT OF THE RESEARCH

A significant part of the data collection and analysis presented in the report relied on six months of work by a team of Music Entertainment Management undergraduates from JMC Academy's campuses in Brisbane, Sydney and Melbourne and Collarts in Melbourne.

My thanks to JMC staff and Felicity Rochester, Shannon Bone, Kelsea Bannan, Hannah Radcliffe, Micky Olm-Milligan, Jimmi Cady, Alexis Cleminson and Trish Suministrado, whose diligence and commitment have been vital to the project.

The methodologies they employed were primarily based on those developed and validated by a decade of Live Music Census projects conducted in Victoria and replicated in our 2018 country music analysis.

Where appropriate, a description of our approach and process has been outlined in the relevant sections.

Thanks to Chantal Pereira for contributing her excellent graphic and design skills.

Data was sourced from numerous published reports by academics, industry commentators and a range of organisations involved in documenting global and domestic contemporary and country music activity.

★ **WE ACKNOWLEDGE THEIR IMPORTANT WORK AND ARE GRATEFUL FOR THEIR GENEROSITY IN SHARING INFORMATION WITH THE RESEARCH TEAM.**

Among them were – Live Performance Australia, Chris O'Neill, APRA AMCOS, Geoff Bell, Frontier Touring, Ticketek, James Ellis, Moshtix, Ticketmaster, Commercial Radio and Audio, Radio Monitors, Stephen Green, Australian Recording Industry of Australia, AIR, KIX Country, iHeart Country, Tim Kelly, ABC Country, Kath Devaney, PPCA, Community Broadcasting Association of Australia, Australian Music Industry Network, Katie Rynne, Capital News, The Music Network, Lachlan Bryan, Creative Australia, Christen Cornell, CountryTown, Capital News/TCMF, Sophie Hamley, Music Australia, Tamworth Regional Council, Cheryl Brown, Tourism Research Australia, Raechel Whitchurch, Sunburnt Country, Christie Eliezer and a large number of industry operatives, venue owners and event organisers.

International context and domestic data was provided by analysis of annual reports and country music insights and commentary from the International Federation of Phonographic Industries, Luminate, Billboard, Edison, Duetti, Music Business Worldwide, Medium, MiDiA, Goldman Sachs, Forbes Magazine, Billboard, Digital Music News, Nielsen, Deloitte and Chartmetric.

As was the case in 2018, we have incorporated responses from the significant number of country music fans/event attendees and songwriter/artists who responded to our online surveys.

Some of the data sourced and analysed for this report was not available to us in the 2019 project.

We have therefore been careful to only provide comparative data where and when confident of reliability and verification.

Further research will reveal the ongoing impact of cost-of-living pressures and extreme weather events on the consumption of live and recorded country music in our marketplace.

The importance of this genre update was underlined by funding the CMAA received from the NSW Government through Create NSW and the Federal Government through Creative Australia.

Without their endorsement and support the project could not have been carried out with the diligence and accuracy required.

Finally, thanks to the Tamworth Regional Council for their ongoing support and cooperation and to my CMAA board colleagues for their encouragement and support.

★ **IT HAS BEEN A PLEASURE TO LEAD THIS PROJECT AND TO WORK WITH SO MANY COMMITTED AND PASSIONATE PEOPLE.**

Errors and omissions are my responsibility. I hope you enjoy the report.

**DOBE NEWTON**

**Project Manager**

July, 2025

# LIVE PERFORMANCE

FOR MANY YEARS AUSTRALIA HAS BEEN A TOURING DESTINATION FOR THE WORLD'S LEADING CONTEMPORARY MUSIC PERFORMERS. OUR PASSION FOR SPORT HAS CREATED WORLD-CLASS STADIUMS AND ARENAS WHICH, WHEN CONVERTED TO CONCERT VENUES, HAVE OFTEN ACCOMMODATED THE LARGEST SINGLE EVENT AUDIENCES MANY VISITING SUPERSTARS HAVE EVER PLAYED TO.

Recent reports by Creative Australia, Live Performance Australia and our own research for this study, confirms that the levels of revenue from ticket sales/entry, patron spending at gigs, attendance and job creation associated with live events have not only returned to, but have in fact exceeded pre-pandemic levels.

All recent commentaries on country music have highlighted two years of unprecedented interest and growth in the global marketplace, driven by significant increases in genre-bending collaborations featuring established country artists and stars from other genres who have brought the music to new and enthusiastic audiences.

Such has been the spike in popularity in the dominant US market that one veteran commentator described country as the 'new Hip-Hop' – a genre that has dominated growth in that market for the last decade.

★ AUSTRALIA HAS CONTINUED TO BE A SERIOUS PLAYER IN THE MARKET WITH SPOTIFY AUNZ RE-CONFIRMING ITS 2019 REPORTING OF AUSTRALIA AS THE **THIRD-LARGEST** AND **FASTEST-GROWING** COUNTRY MARKET.

★ SINCE 2023, COUNTRY MUSIC STREAMS HAVE **INCREASED** BY **73%** WITH AUSTRALIA, IN 2024, RECORDING THE **WORLD'S HIGHEST PERCENTAGE (74%)** OF NEW COUNTRY LISTENERS.

★ WE KNOW FROM **1,110** RESPONSES TO OUR ARTIST SURVEY THAT COUNTRY MUSIC ARTISTS RELY ON **LIVE PERFORMANCE** FOR **60% OF THEIR MUSIC-RELATED INCOME**.

★ WE ALSO KNOW FROM THE RECENT CREATIVE AUSTRALIA 'BASS LINE' REPORT THAT NEARLY **50%** OF THE ESTIMATED **\$8.8 BILLION** REVENUE GENERATED BY THE CONTEMPORARY MUSIC SECTOR IN 2024 WAS GENERATED BY **LIVE PERFORMANCE**.

## COUNTRY MUSIC FESTIVALS 2024

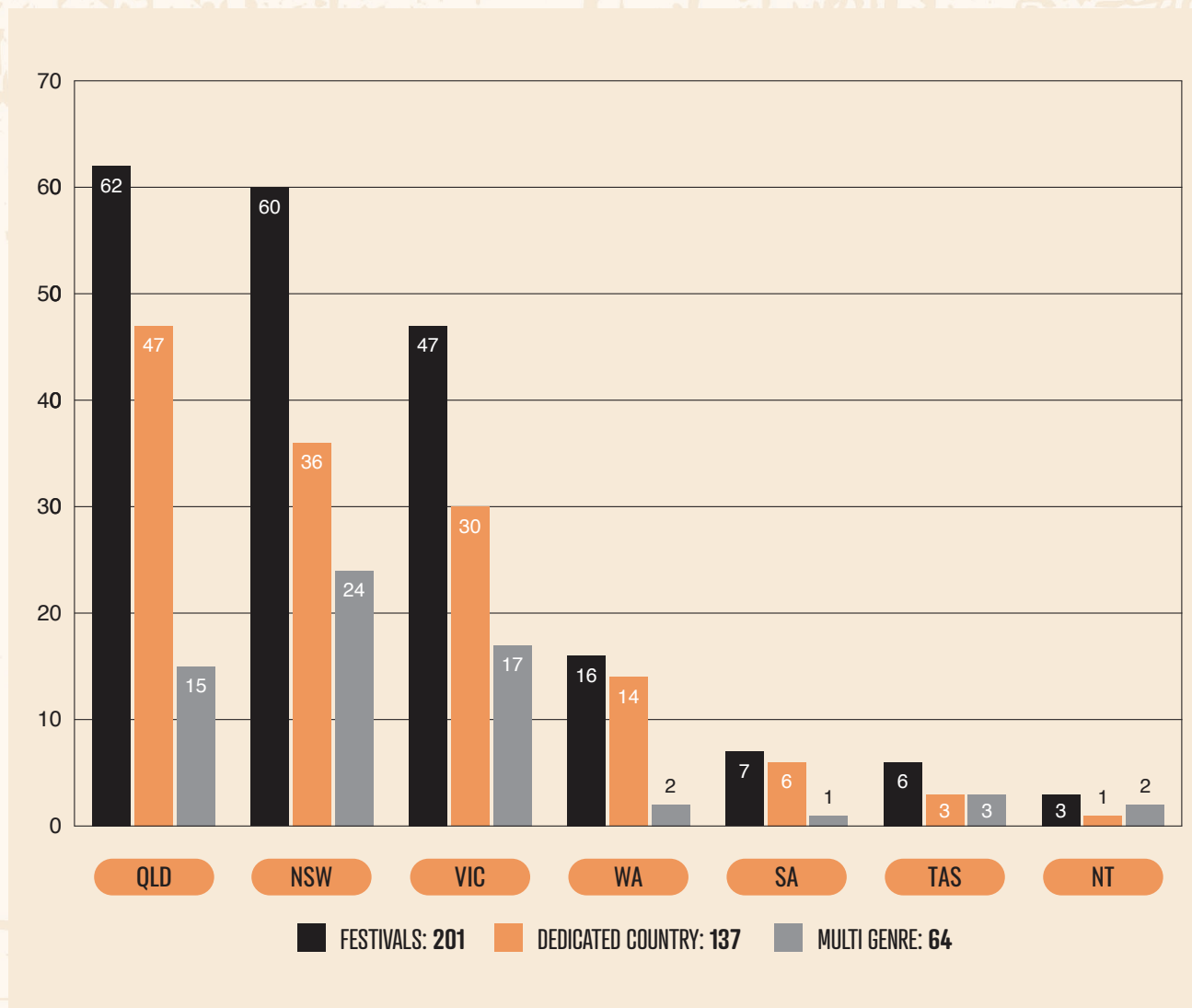
Creative Australia's 'Soundcheck' and 'Soundcheck 1' reports provided detailed information and insights into festival operations in 2024.

★ THEY IDENTIFIED **535** CONTEMPORARY MUSIC FESTIVALS, WITH COUNTRY RECORDING THE **THIRD HIGHEST** TOTAL (**100**) AFTER ELECTRONIC (121) AND ROCK (112). THIS WAS OUR STARTING POINT.

USING INDUSTRY EVENT LICENCE LISTS AND GENRE-SPECIFIC GIG GUIDES, WE ADDED ANOTHER **37 DEDICATED COUNTRY FESTIVALS** THAT TOOK PLACE IN 2024.

**52%** OF ALL COUNTRY FESTIVALS TOOK PLACE IN INNER-REGIONAL LOCATIONS, **31%** IN OUTER-REGIONS AND **4%** IN REMOTE LOCATIONS. THE REMAINING **15%** TOOK PLACE IN INNER AND OUTER METRO LOCATIONS.

Many of the multi-genre festivals had a country music component, but we have not attempted to estimate a revenue share.



## MAJOR COUNTRY FESTIVALS 2024

The list of 137, included a number of the genre's established marquee events – The Deni Ute Muster, Tamworth Country Music Festival, Dashville Skyline, Gympie Music Muster, Groundwater, Way Out West Fest, CMC Rocks Queensland and Out On The Weekend. Two new major events – Ridin' Hearts and The Bend Classic successfully debuted in 2024.

★ **THEY ATTRACTED AN ESTIMATED AUDIENCE OF 479,000.**

## BOX OFFICE

Based on an analysis of general admission ticket prices and information shared with us, we have apportioned 10% of sales to junior/youth tickets and discounted total sales by 2% to account for FOC/Complimentary tickets.

★ **MAJOR COUNTRY MUSIC FESTIVALS IN 2024 GENERATED \$54.5 MILLION IN TICKET REVENUE.**

★ **THIS REPRESENTED A 124% INCREASE ON THE \$24.3 MILLION REPORTED IN 2019.**

## ANCILLARY SPENDING

In calculating this additional spending by attendees, we have relied on a decade of research, here and internationally, which confirms that ticket purchase accounts for 40-50% of spending associated with event attendance.

We have also included an analysis of 3,000 responses to our 2019 attendee survey and over 1,000 responses associated with this project.

Patrons attending major country music festivals in 2024 spent an average of \$125 per day on food and beverage, \$64 on merchandise and \$80 on transport.

In calculating the total spend, we have discounted the attendance by 10% to allow for those patrons who reported \$0 additional spend and allocated 30% of the adult F&B outlay to junior/youth tickets.

In order to err on the side of caution, we have doubled the F&B outlay for multi-day events, but have not done so for merchandise and transport spend.

★ **WE ESTIMATE THAT \$117.3 MILLION WAS GENERATED BY ANCILLARY PATRON SPENDING AT MAJOR COUNTRY MUSIC FESTIVALS IN 2024.**

★ **THIS REPRESENTED A 91% INCREASE ON THE \$61.3 MILLION REPORTED IN 2019.**

### Note on Accommodation:

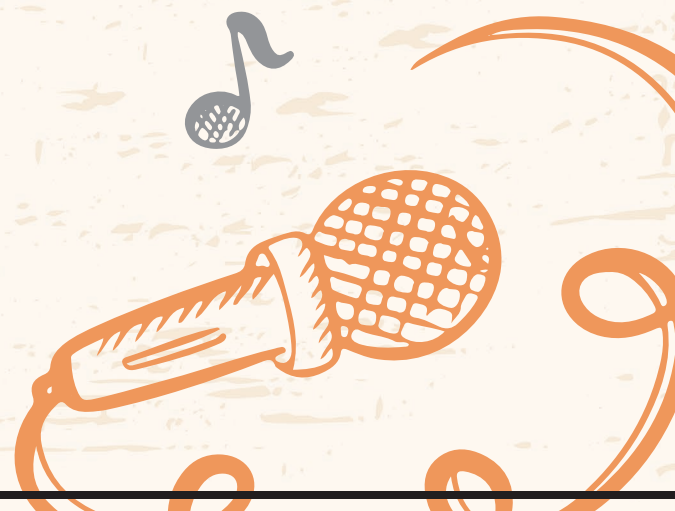
With the exception of Groundwater (Broadbeach), Ridin' Hearts (Sydney and Melbourne) and one of the three Out on The Weekend events (Melbourne), the other major festivals took place in regional cities and locations, where patrons rely on a number of accommodation options – camping, caravan parks, motels, hotels, home-stays, staying with friends and relatives.

Based on information shared with us by organisers, survey responses by attendees and allowing for a sharing of facilities, we estimate an additional outlay of \$12.3 million on accommodation.

## SMALL COUNTRY MUSIC FESTIVALS

The 116 dedicated small country festivals held in 2024, varied significantly in size.

★ **THEY ATTRACTED A COMBINED AUDIENCE OF 205,000.**



## BOX OFFICE

A small number were community celebration events with free entry, while the majority were single day, ticketed events. Where they were ticketed, the average for general admission was \$85.

★ USING THE AUDIENCE 'DISCOUNT' FIGURE OUTLINED ABOVE, WE ESTIMATE THAT SMALL COUNTRY MUSIC FESTIVALS IN 2024 GENERATED BOX OFFICE REVENUE OF **\$15.7 MILLION**.

★ THIS REPRESENTED A **76% INCREASE** ON THE **\$8.9 MILLION** RECORDED IN 2019.

## ANCILLARY SPENDING

According to our attendee responders, there was very little variance in the ancillary spending outlay between major and small festivals.

★ APPLYING THE FORMULA OUTLINED ABOVE, WE ESTIMATE THAT ANCILLARY SPENDING AT SMALL COUNTRY FESTIVALS IN 2024 WAS **\$65.3 MILLION**.

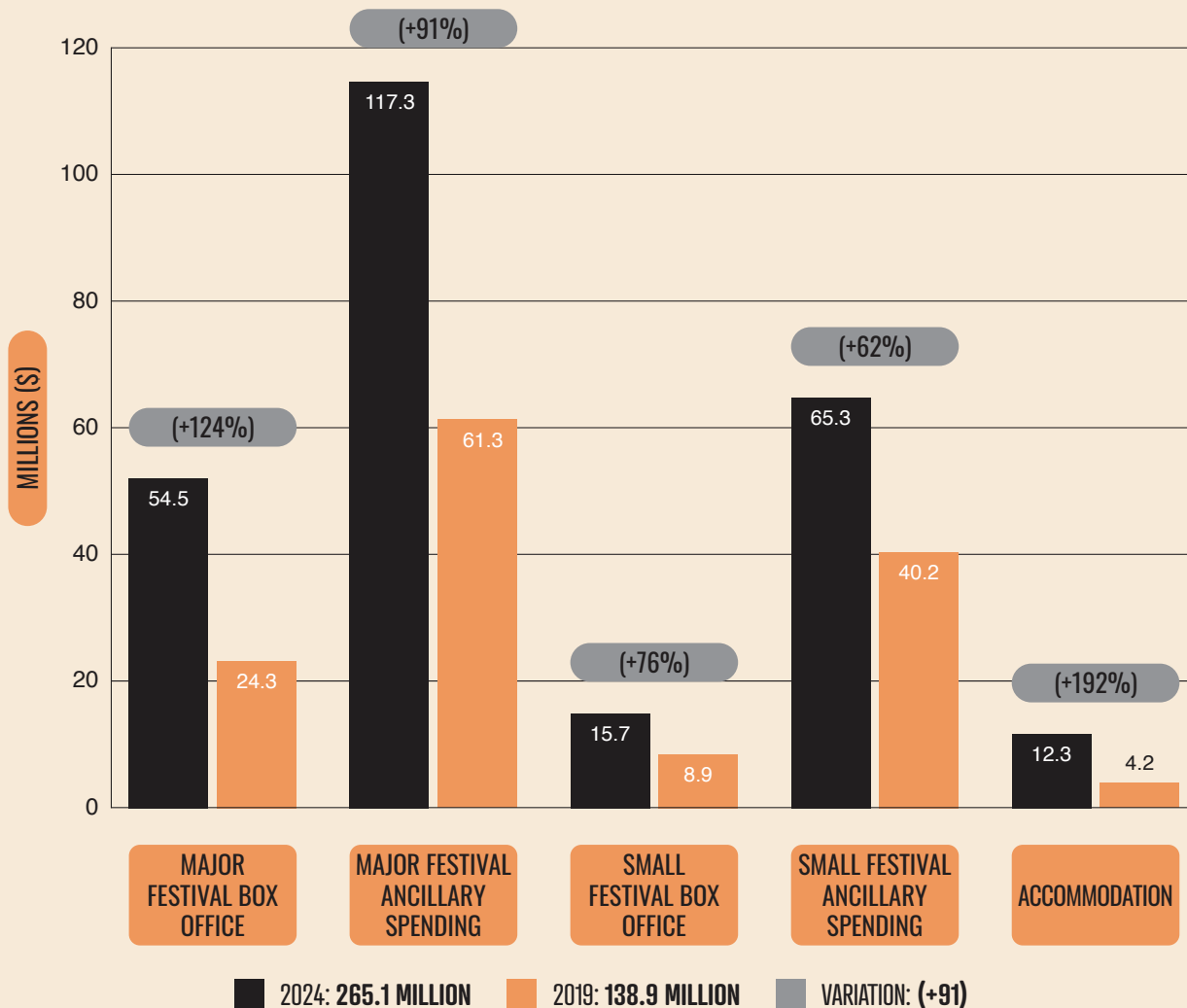
★ AN INCREASE OF **62%** ON THE **\$40.2 MILLION** RECORDED IN 2019.

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Zac and George  
Tamworth Country Music Festival

## COUNTRY MUSIC FESTIVAL REVENUE SUMMARY



## LIMITATIONS

We know from the 'Soundcheck' reports that small commercial and not-for-profit festivals rely on sponsorship and grant funding for approximately 20% of their income. This percentage obviously increases for those community events with free entry.

However, we do not have access to detailed information.

According to the same reports, festivals also rely on fees paid by a variety of vendors, but we do not have access to that information.

Most major country music festivals are destination events attracting significant attendance from regions outside the event location, including interstate.

Local councils and tourism bodies regularly report the significant revenue injected into a range of businesses away from the event site.

Anecdotally, many businesses in communities which attendees pass through on the way to and from events, report their busiest weekend of the year around these event windows.

★ **ALTHOUGH WE DO NOT HAVE SUFFICIENT DETAIL TO ACCURATELY REPORT THE REVENUE, WE NOTE THAT LOCAL COUNCIL'S ESTIMATE THAT THESE MAJOR FESTIVALS ANNUALLY INJECT \$140+ MILLION INTO LOCAL AND REGIONAL BUSINESSES.**

## COUNTRY MUSIC FESTIVAL EMPLOYMENT 2024

Festivals large and small provide employment opportunities for a range of workers – construction and staging, audio and lighting, event staff, food and beverage staff, performers, police and security and management.

A small number are employed on a part-time basis, but the majority are part of the casual 'gig economy'.

★ WE CALCULATE THAT COUNTRY MUSIC FESTIVALS IN 2024 GENERATED **638,304 EMPLOYED HOURS** FOR **15,000 PERSONNEL**.

★ EMPLOYING THE FORMULA ADOPTED BY THE BUREAU OF STATISTICS AND THE FAIRWORK OMBUDSMAN - **1,610 HOURS = 1 FULL TIME EQUIVALENT JOB**, THESE FESTIVALS CREATED **408 FTE JOBS**.

Smaller festivals (especially) rely on volunteers to help deliver their events.

★ IN 2024, WE ESTIMATE THAT **4,500 VOLUNTEERS** CONTRIBUTED **203,000 HOURS** FOR AN ADDITIONAL **126 FTE JOBS**.

We do not have sufficient information to document the earnings with any certainty.

## MAJOR COUNTRY MUSIC CONCERTS

Many reports rely on reporting by Live Performance Australia in documenting revenue generated by contemporary music concerts

★ THEIR ANNUAL *TICKET AND REVENUE SURVEY* REPORTED THAT CONTEMPORARY MUSIC CONCERTS IN 2023 WERE RESPONSIBLE FOR GENERATING **47.4% OF TICKET REVENUE (\$1.48 BILLION)** AND **40% OF ATTENDANCE (12 MILLION)** ACROSS ALL THE PERFORMING ARTS.

Over the years of our live music research, we have determined that there are shortcomings in LPA reporting that underestimates activity and therefore revenue and attendance across the contemporary music sector. Particularly as there is no genre breakdown.

We have therefore relied on a detailed analysis of event licences and publicly available event information.

We have however, utilised the LPA's average concert ticket price of \$128 in order to report conservatively.

In 2023, international touring returned to pre-pandemic levels with a significant number of US stars led by Morgan Wallen performing arena and theatre shows.

The influx continued unabated in 2024 and 2025, with a significant milestone achieved.

★ US SUPERSTAR **LUKE COMBS** BECAME THE FIRST COUNTRY MUSIC ARTIST TO **HEADLINE AND SELL OUT** STADIUM SHOWS IN AUSTRALIA.

HIS SIX CONCERTS IN BRISBANE, SYDNEY AND MELBOURNE ATTRACTED AN ESTIMATED **250,000 FANS**.

HE WAS JOINED BY ACCLAIMED AMERICANA STAR **CHRIS STAPLETON** WHOSE ARENA SHOWS ATTRACTED **100,000+ FANS**.

## MAJOR COUNTRY MUSIC CONCERT BOX OFFICE

Based on publicly available data and information directly shared by promoters and ticketing agencies, we estimate that major country concerts attracted 490,326 fans.

We have utilised the LPA average concert ticket price of \$128, mainly in order to provide an ability to make direct comparison with 2019.

We note that this is significantly less than the advertised cost of general admission tickets.

★ WE THEREFORE CONSERVATIVELY ESTIMATE BOX OFFICE REVENUE OF **\$76.2 MILLION**.

★ THIS REPRESENTS A **292% INCREASE** ON THE **\$25.8 MILLION** REPORTED IN 2019.

## MAJOR CONCERT ANCILLARY SPENDING

Based on responses from concert attendees, 90% of patrons spent an average of \$89 on food and beverage and \$57 on transport. 75% reported spending an average \$41 on merchandise.

★ WE ESTIMATE THAT ANCILLARY PATRON SPENDING AT MAJOR COUNTRY MUSIC CONCERTS GENERATED **\$83.9 MILLION**.

★ THIS REPRESENTED A **95% INCREASE** ON THE **\$43 MILLION** GENERATED IN 2019.

## MINOR COUNTRY MUSIC CONCERT BOX OFFICE

We have analysed a range of gig guides and 6,000+ event licences issued by APRA.

In the last 12 months, there were 488 country music concerts across a range of smaller concert venues – performing arts spaces, theatres and community facilities.

They involved Australian artists and visiting touring artists.

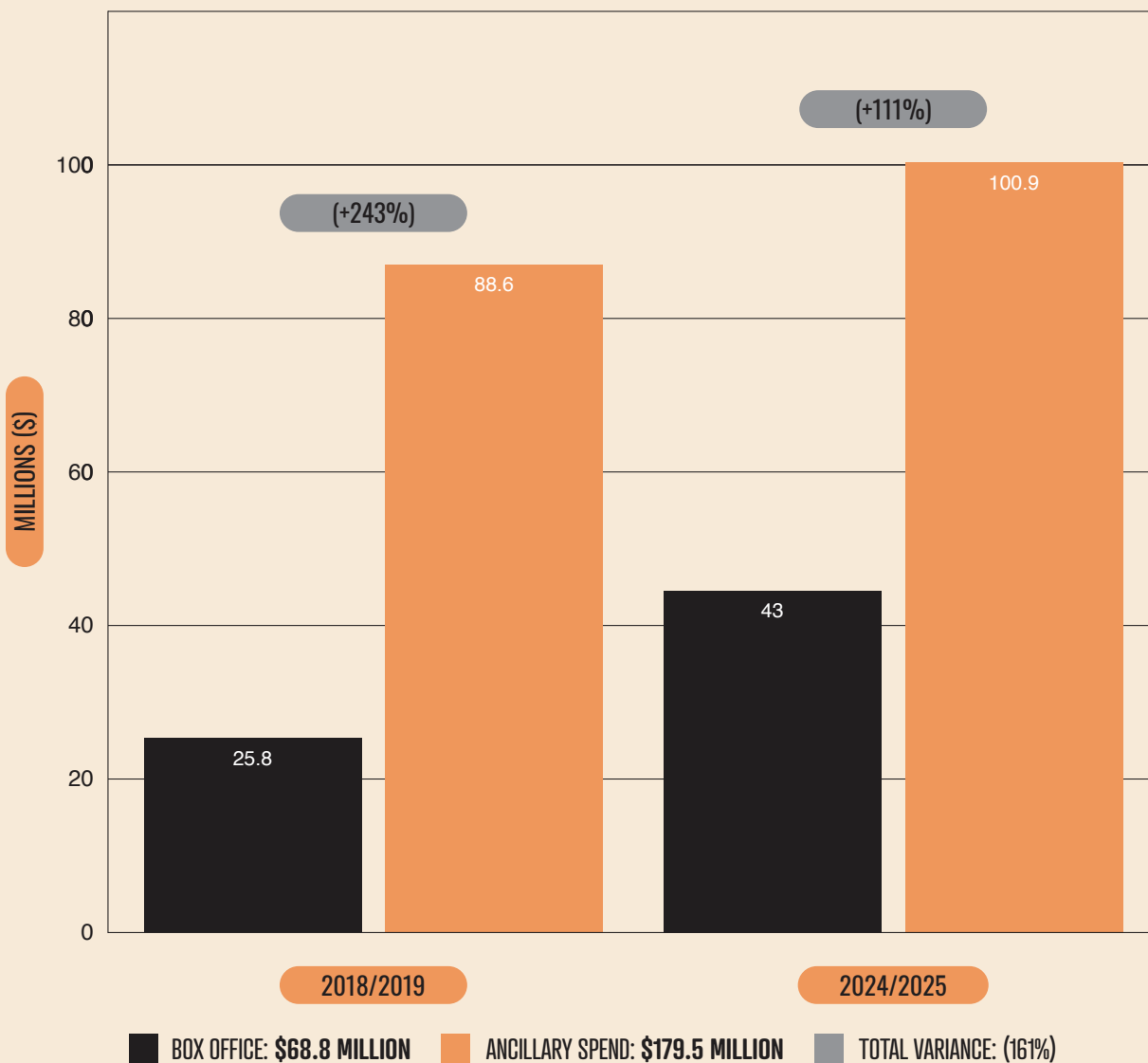
These events attracted an estimated 216,184 patrons who paid an average general admission of \$65.

★ DISCOUNTING THE AUDIENCE BY **10%** TO ALLOW FOR FOC/COMPLIMENTARY TICKETS, THE BOX OFFICE REVENUE WAS **\$12.6 MILLION**.

## MINOR COUNTRY MUSIC ANCILLARY SPENDING

Our attendee survey responses confirm that patrons, on average, spent 35% less on ancillary items than those attending major concerts.

★ DISCOUNTING AUDIENCE NUMBERS AS DETAILED ABOVE, WE ESTIMATE THAT ANCILLARY SPENDING REVENUE AT MINOR COUNTRY MUSIC CONCERTS GENERATED **\$17 MILLION**.



#### Concert Revenue Note;

A number of authoritative studies – ‘Live Performance in Australia’ (University of Tasmania, 2014), UK Live Music Report (2017), plus a decade of Live Music Census reports (Melbourne/Victoria 2014, 2021, 2022, 2024), have confirmed that 40% of spending associated with major concert attendance occurs off-site – eg. hospitality, general retail, accommodation etc. However, we do not have access to enough granular data to accurately estimate revenue.

An indication of the potential impact was provided by an analysis of spending associated with Taylor Swift record breaking Era’s tour.

RMIT University reported that the National Australia Bank estimated that spending on their credit/debit cards increased by an amazing 25% on the weekends of her Australian concerts. It was estimated that the tour generated \$550+ million in patron spending.

## COUNTRY MUSIC EMPLOYMENT 2024

★ **MAJOR AND MINOR COUNTRY MUSIC CONCERTS GENERATED 869,162 EMPLOYMENT HOURS FOR WORKERS IN 2024. THIS REPRESENTED 540 FULL TIME EQUIVALENT JOBS.**

## COUNTRY MUSIC PERFORMANCES IN SMALL VENUES 2024

A decade of Live Music Census projects have confirmed that a significant percentage of live music revenue is generated by performances in thousands of pubs, clubs, bars and small community spaces across the nation.

As we have previously done, we have used as a starting point the OneMusic licences issued by APRA/PPCA for the performance of live music in small venues.

From a total of 4,255, we eliminated shopping centres, museums, galleries, recreational facilities etc, and ended up with 3,500 small venues with the potential to host country music events gigs.

This list was divided into states and territories and supplied to the research team.

They utilised local gig guides, venue websites and social media platforms to identify those 'likely' to present country gigs.

These refined lists were then distributed to a number of booking agents and active country artists in each state to confirm country music venue providers and add any not on the lists.

★ **THESE EFFORTS RESULTED IN A DEFINITIVE LIST OF 542 SMALL VENUES THAT PRESENTED COUNTRY MUSIC IN 2024. SOME ON A REGULAR BASIS – ONCE PER WEEK, AND OTHERS ON A MORE OCCASIONAL BASIS.**

### Note on 'lost Venues':

In the last 12 months, many industry commentators, including the authors of the most recent 'Bass Line' report, have repeated the suggestion that since the pandemic the small venues sector (especially) has 'lost' some 1,300 live music venues and stages across Australia.

The figure was originally reported in APRA AMCOS's 2023 'Year In Review'.

We believe it needs to be treated with caution.

In the recently completed 'Victorian Live Music Venue Audit 2024', the research team found that what had been 'lost' in the majority of cases was not the venue but rather the OneMusic licence issued for the performance of live and recorded music.

In that audit, we cross-referenced the licence information supplied to us with a detailed analysis of advertised small venue presentations. We concluded that in 2024, 48% of venues identified as presenting live music did so without a licence.

Although we only examined Victorian venues, we would anticipate that result would be reflected in other states and territories.

That said, there is no doubt that many small venues did not recover from the shutdowns, capacity restrictions and operational impacts post-pandemic. Some shut, while others ceased to offer live music.

## SMALL VENUES AND COUNTRY MUSIC IN 2024

With regard to the 542 small venues on our starting list, the nature of the gigs and the venues themselves vary significantly across the sector.

Some large clubs, which are a feature of the NSW and Queensland venue mix, have dedicated auditoriums which present higher-priced ticketed shows. Many pubs and bars on the other hand, do not have dedicated performance spaces and present a greater percentage of free entry gigs.

Variations also exist in the levels of ancillary patron spending, but we are confident in our calculations as survey respondents were asked to differentiate ticket outlays and spending in the different types of small venues.

★ IN SMALL VENUES IN 2024, ACROSS ALL STATES AND TERRITORIES, WE RECORDED **16,961 COUNTRY MUSIC GIGS** WHICH ATTRACTED **1.87 MILLION PATRONS** AND CREATED SOME **42,000 PERFORMANCE OPPORTUNITIES** FOR PERFORMERS AND MUSICIANS.

★ PERCENTAGES VARY ACCORDING TO THE VENUE MIX, BUT WE ESTIMATE THAT **20% OF GIGS** TOOK PLACE IN **REGISTERED CLUBS**, **59% IN HOTELS** AND **21% IN BARS**.

## SMALL VENUE BOX OFFICE 2024

Our calculations are based on detailed analysis of advertised ticket/entry, frequency of gigs, capacity information from licencing regulators, audience estimates from operators and online survey responses by attendees.

Approximately 43% of gigs that take place in clubs are free entry. For hotels the figure is 50% and for Bars 57%.

Where venues have a ticket or entry charge, the average was \$22 for a club gig, \$20 for a bar gig and \$12 for a hotel gig.

★ WE ESTIMATE THAT IN 2024, COUNTRY MUSIC GIGS IN THE NATION'S SMALL VENUES GENERATED **\$17 MILLION IN BOX OFFICE REVENUE**.

★ THIS REPRESENTS A **19% DECLINE** ON THE **\$22.2 MILLION** RECORDED IN 2019.

Our research suggests that in some cases the total reflects fewer attendees, but is mainly due to the fact that there were more free entry shows presented in 2024 in an effort to encourage patrons to return to pre-pandemic levels of attendance. This assumption is confirmed by the ancillary spending below.



Loren Ryan Audience  
Ngaarda Media

## SMALL VENUE ANCILLARY SPENDING 2024

Based on over 4,000 responses to our 2019 and 2014 attendee surveys, 81% of patrons attending a live music performance in a small venue reported ancillary spending on food and beverage.

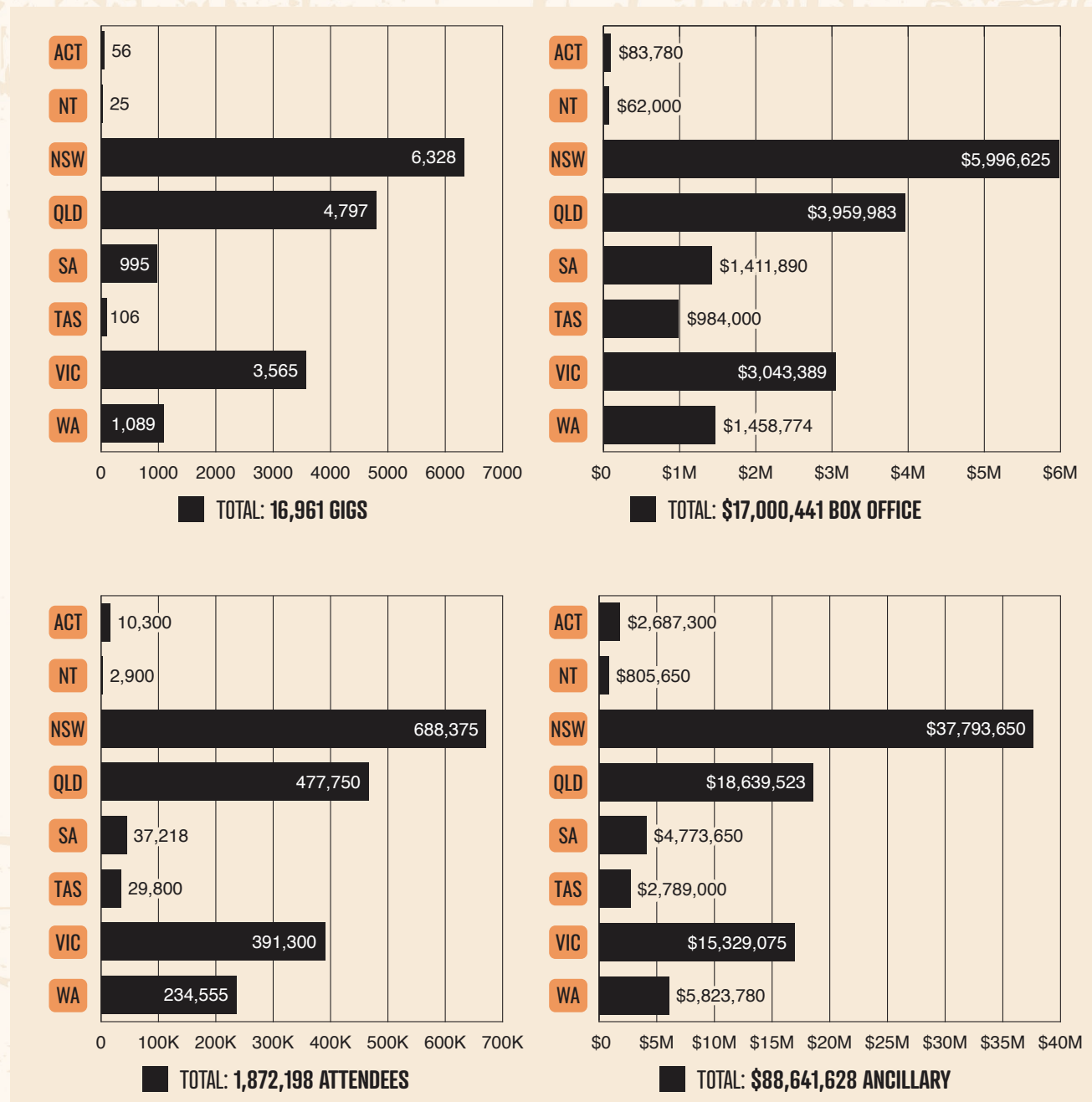
The average was \$52 per patron per gig at a licenced club, \$43 at a bar gig and \$38 at a pub gig.

51% of patrons attending a club gig reported purchasing a merchandise item, spending an average \$22. 30% of those attending a pub gig spent an average \$20 as did 12% of those attending a bar gig.

30% of those attending a small venue gig reported transport costs averaging \$31.

★ **BASED ON OUR ANALYSIS, WE CALCULATE THAT ANCILLARY SPENDING AT COUNTRY MUSIC GIGS IN SMALL VENUES IN 2024 GENERATED ADDITIONAL REVENUE OF \$88.6 MILLION.**

★ **THIS REPRESENTED A 93% INCREASE ON THE \$45.7 MILLION REPORTED IN 2019.**



## SMALL VENUE EMPLOYMENT SUMMARY 2024

Obviously the nearly 17,000 gigs created significant employment for performers, production personnel, security and venue staff involved in presenting the live performances.

Our calculations are based on venue survey responses across a number of live music census projects we have conducted.

Where gigs take place in venues with multiple entertainment spaces, we have been careful to only calculate employed hours in the relevant gig space.

We also note that the majority of hours generated are casual/shift-based and predominantly involve workers from the local community.

However, we also note that many small venue operators across the contemporary music sector have reported difficulty in sourcing qualified staff with many 'gig economy' workers leaving the industry during lockdowns, restrictions, gig and event cancellations etc.

In many regions, sourcing suitable/affordable accommodation for staff has also proven a challenge.

★ **IN THE LAST 12 MONTHS WE ESTIMATE THAT COUNTRY MUSIC GIGS IN SMALL VENUES GENERATED 1.63 MILLION EMPLOYMENT HOURS, CREATING 1,012 FULL TIME EQUIVALENT JOBS.**

## OTHER COUNTRY MUSIC PERFORMANCE REVENUE

When we reported in 2019, Cruisin' Country was feature of the scene with 2,400 country fans spending seven days cruising the Pacific on a dedicated vessel, entertained by 100-odd artists in multiple venues. It obviously generated significant revenue, but last sailed in 2023.

★ **THERE ARE STILL A NUMBER OF CRUISE AND LAND-BASED TOURS HOSTED BY PROMINENT COUNTRY ARTISTS TO A VARIETY OF INTERNATIONAL AND DOMESTIC DESTINATIONS.**

It is not possible to accurately calculate revenue.

Also in recent times, a number of artists have developed a range of 'exclusive' touring experiences. Groups of fans follow an artist's tour, camping, attending shows and interacting with the performers in a variety of social settings.

★ **IN 2019, WE ALSO REPORTED THAT HOUSE CONCERTS WERE BECOMING A REGULAR FEATURE OF THE COUNTRY/FOLK SCENE.**

Locally, they tend to be organised by 'super fans' and typically involve 70-100 paying fans. In Europe and the US, they have evolved into regular touring circuits run by entrepreneurs. Especially in those latter territories, they have allowed Australian country artists to generate additional revenue which has allowed them to accept festival and showcase invitations which would otherwise would not be financially viable.

★ **AND LASTLY, THE COUNTRY GENRE WHICH READILY LENDS ITSELF TO THEMED EVENTS WITH SET DECORATION AND COSTUMING, HAS LONG BEEN POPULAR IN THE CORPORATE WORLD OF FUNCTIONS AND CONFERENCES.**

We know from artist survey responses that these events are usually well paid, but we have not attempted to quantify revenue.

## COUNTRY MUSIC LIVE PERFORMANCE SUMMARY

In the last twelve months, 137 dedicated country festivals, 537 major and minor concert events and 16,961 gigs in small venues attracted 3.26 million patrons.

★ **THEY GENERATED REVENUE OF \$560.4 MILLION FROM TICKET SALES, DOOR ENTRY AND ANCILLARY SPENDING INCLUDING ACCOMMODATION.**

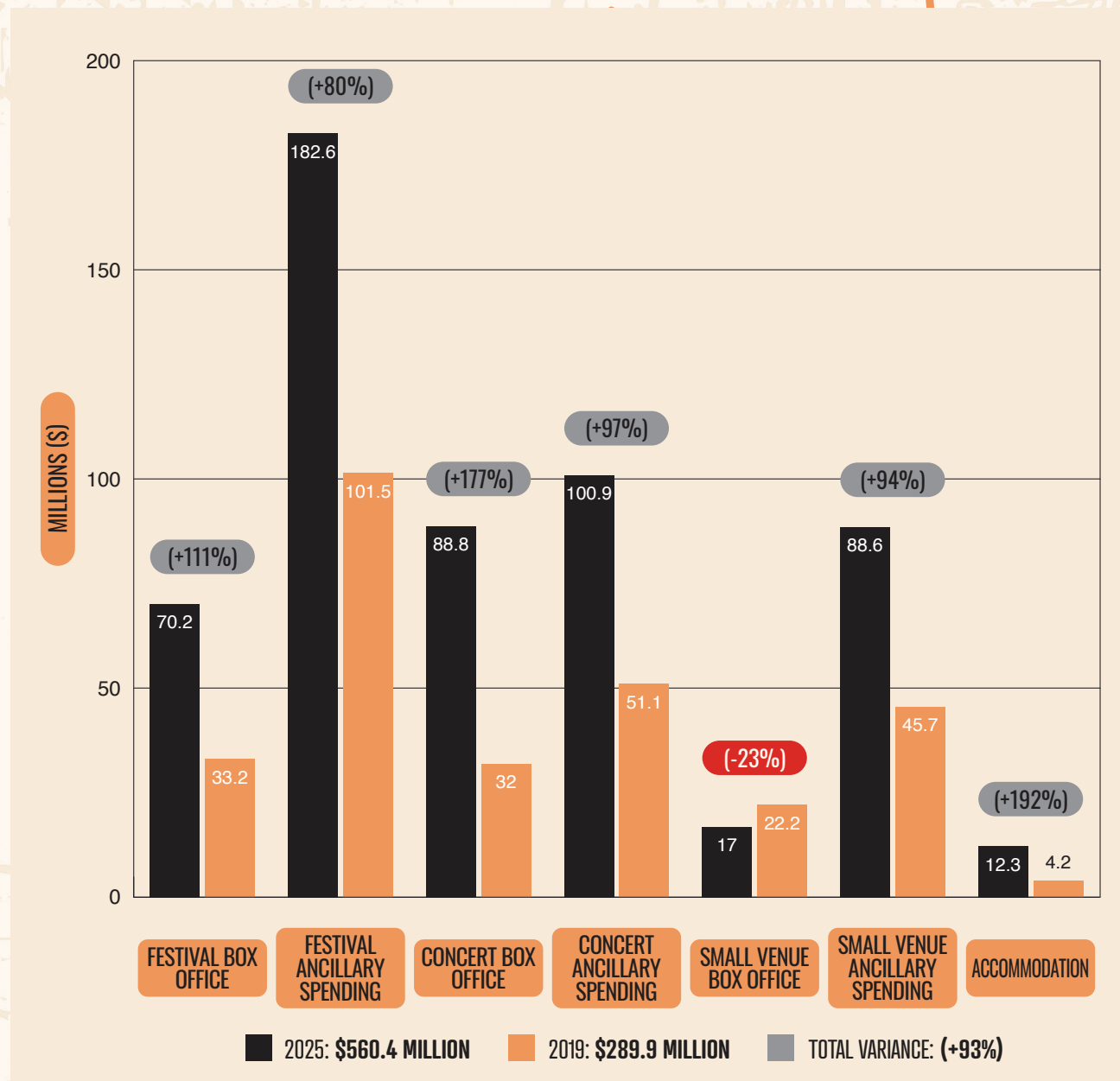
The significant increase in concert box office revenue reflects the scale of recent events and the significant increased attendances already noted.

Country music festivals have continued to thrive.

The one negative is the decline in small venue box office, which reflects the experience of small venue operators across all live music areas.

Fortunately, their challenges have become a recent focus of policy development, regulatory reform and funding support at all levels of government and agencies.

Perhaps we could follow the lead of UK, who have just announced a major funding initiative which will see \$2 per ticket from arena and stadium shows put into a LIVE trust to support grass-roots venues and events.



## COUNTRY MUSIC LIVE PERFORMANCE EMPLOYMENT

Finally, we estimate that live country music performances at festivals, concerts and in small venues created 2,257 Full Time Equivalent jobs.

★ EXCLUDING PERFORMERS, AND UTILISING THE CURRENT AWARD **HOURLY RATE OF \$31.15** FOR A HOSPITALITY WORKER – TO ERR ON THE CONSERVATIVE SIDE, WE ESTIMATE THESE PERFORMANCES GENERATED **\$109.1 MILLION** FOR INDUSTRY WORKERS.

★ AN **INCREASE OF 42%** ON THE **\$76.9 MILLION** RECORDED IN 2019.

### Live Performance Footnote:

Goldman Sachs reported that In 2024 global live music revenue was estimated at \$USD 34.6 billion. It is expected to increase by 10% in 2025, and a further 37% to reach \$52.6 billion by 2030.

The increases have been driven by Gen Z and Millennial fans who place 'the highest relative importance on live experiences' compared to prior generations.

With significant ticket price increases averaging 38% across events and gigs, live music has proven more resilient than other forms of entertainment.

Goldman Sachs also notes that additional revenue will be generated by the increased integration of live music ticketing with streaming platforms, particularly as 'super fan' numbers grow.

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Shannon Noll  
Harness Racing NSW

# SONGWRITING AND APRA – AN INSIGHT INTO CREATIVE PRACTICE

NO MATTER THE MUSIC GENRE, VENUES AND EVENTS RELY ON LIVE MUSIC PERFORMANCES TO ATTRACT THE PATRONS WHO GENERATE THE REVENUE WHICH SUSTAINS THEIR OPERATIONS.

Those presentations are built on the performance of the songs – many being original compositions created by Australian songwriters.

The activities of those songwriters provide important and informative insights into the creativity which underpins our genre and industry.

★ **THE AUSTRALASIAN PERFORMING RIGHT ASSOCIATION (APRA) AND THE AUSTRALASIAN MECHANICAL COPYRIGHT OWNERS SOCIETY (AMCOS) ARE NON-PROFIT, MEMBER-BASED ORGANISATIONS WHO CURRENTLY REPRESENT 124,000 AUSTRALIAN AND NEW ZEALAND SONGWRITERS, COMPOSERS AND PUBLISHERS.**

In conjunction with the Phonographic Performance Company of Australia – representing the owners of master recordings, they issue OneMusic licences to a variety of businesses wishing to present works (songs) and/or the recording of songs as part of their business operations. (See Live Performance section – small venues).

The licences cover the live performance of works and recordings in pubs, clubs, concerts, festivals, various business settings and the communication of those works and recordings to the public via a number of media platforms (radio, TV, internet, cable etc). APRA AMCOS and the PPCA collect licence fees and distribute them to copyright owners based on usage.

Through reciprocal agreements with an international network of similar PROs (Performing Rights Organisations), works earning royalties from licenses in overseas territories are channelled through APRA to its Australian and New Zealand members.

Likewise, APRA collects monies earned from the use of overseas registered works by Australian businesses and remits them to the appropriate national organisation representing those songwriters and composers.

The member information APRA has provided for this report, provides a fascinating insight into a most important aspect of creative practice. Especially as 92% of 1,000+ artists surveyed for the *'Economic and Cultural Value of Country Music in Australia 2018'* and for this study reported being APRA members.

## APRA AMCOS ANNUAL YEAR IN REVIEW REPORTS

In the years since we last reported, royalties distributed by APRA AMCOS to registered writer and publisher members have consistently increased. This, even during the pandemic years of 2020/2021, when the loss of an estimated 75% of live performance revenue from the domestic market was offset to some extent by increased earning from digital performance and a significant boost in international earnings.

What has become increasingly obvious from the annual reporting is that performance royalties from free-to-air television and terrestrial radio have effectively been replaced by those from digital platforms.

This is of course in line with developments across all contemporary music industry sectors.

## 2023/24 YEAR IN REVIEW

In terms of overall revenue, APRA's latest 'Year In Review' for the 2023/24 Financial Year, recorded a year-on-year increase in revenue of 7.2% to \$740 million

★ **THIS REPRESENTED A 40% INCREASE ON THE REVENUE REPORTED IN 2019.**

Digital revenue (\$369 million) accounted for 50% of the total – in 2019 it was 25%. Public performance revenue increased y-o-y by 10.5% to \$132.4 million from a 30% y-o-y increase in live performance submissions.

★ **REVENUE FROM THE USE OF AUSTRALIAN COMPOSITIONS IN OVERSEAS TERRITORIES REACHED A RECORD \$86.1 MILLION – A Y-ON-Y INCREASE OF 22.5%.**

★ **A 97% INCREASE ON THE \$43.7 MILLION TOTAL REPORTED IN 2019.**



Hussy Hicks  
Rae Mitchell Photography

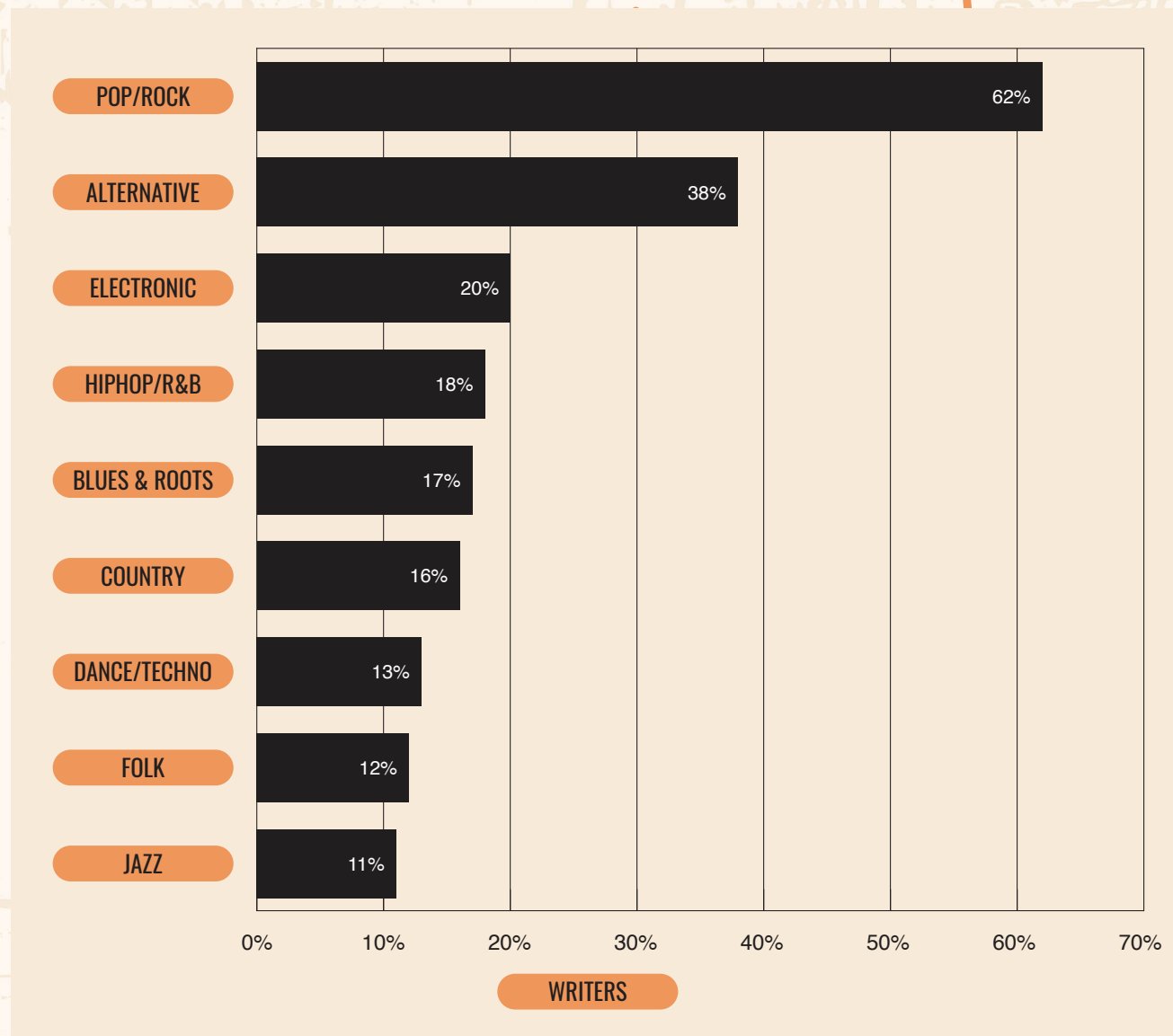
## APRA NATIONAL WRITER PROFILE

★ IN 2023/24, APRA HAD **110,064 REGISTERED WRITER MEMBERS** WHO PROVIDED AN AUSTRALIAN POSTCODE. THIS REPRESENTED A **15% INCREASE** ON THE FIGURE RECORDED IN 2021.

★ **35,419** OF THOSE WERE IN NSW (**32%** OF THE NATIONAL TOTAL), **33,852** IN VICTORIA (**31%**) AND **20,023** IN QUEENSLAND (**18%**).

★ BETWEEN 2017 AND 2023, NATIONAL MEMBERSHIP HAD **INCREASED BY 57%**, WITH THE STATE PROPORTIONS CONSISTENTLY MAINTAINED.

Although some writers concentrate on creating works in a single genre, a great many compose across multiple genres. Based on member data for 2023, the most popular genres were –



## NATIONAL POSTCODE ANALYSIS 2024 ALL GENRES

As we have noted in every *Live Music Census* project conducted since 2017, and in our 2019 report on 'The Economic and Cultural Value of Australian Country Music 2018', metropolitan Melbourne continues to demonstrate its pre-eminence as the national 'writer capital'.

★ THE CITIES OF MERRI-BEK (FORMERLY MORELAND), DAREBIN AND YARRA ACCOUNT FOR A REMARKABLE **56% OF THE APRA WRITER MEMBERS** RECORDED IN THE TOP 21 POSTCODES IN 2024.

★ **75% OF VICTORIAN WRITERS ARE MELBOURNE-BASED**, ESPECIALLY IN ADJOINING INNER-NORTHERN SUBURBS OF THE CAPITAL CITY, WHEREAS THOSE IN **NSW ARE MORE EVENLY SPREAD** BETWEEN THE CAPITAL AND REGIONAL AREAS. THOSE IN **QUEENSLAND ARE MORE LIKELY TO RESIDE IN REGIONAL CITIES.**

## APRA COUNTRY WRITER DATA – 2024

★ THOSE IDENTIFYING AS 'COUNTRY' WRITERS WERE **16% OF THE TOTAL AUSTRALIAN APRA MEMBERSHIP** AS OF MAY, 2024.

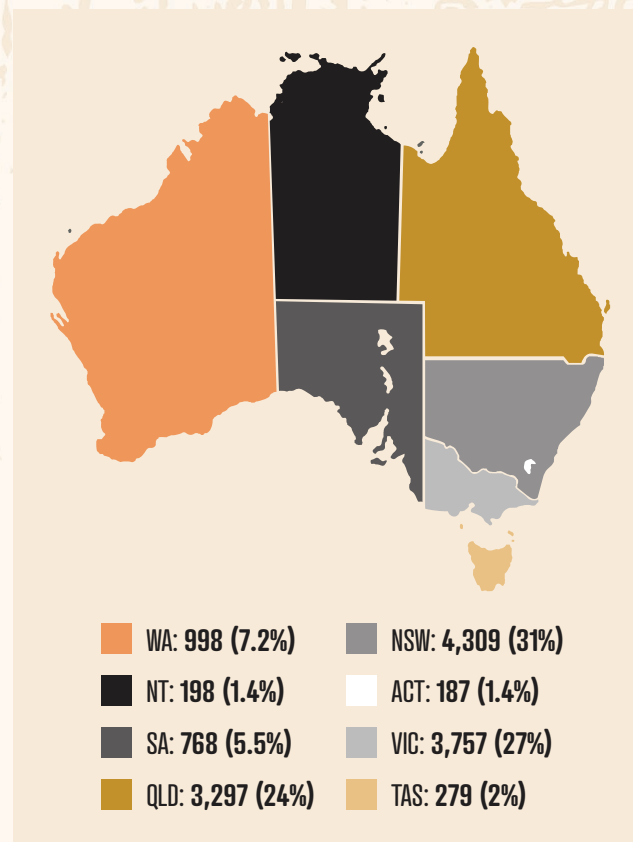
This was an increase from the 11% share we figure recorded in 2019, and a very significant increase on the 6% share we recorded in our very first economic profile of the country sector in 1997.

NSW, with the largest population, has always recorded the largest total. However, country writer members in NSW and Queensland are geographically much more broadly spread as opposed to Victorian writers who are very much concentrated in metropolitan Melbourne.

★ BASED ON MEMBER DATA SUPPLIED BY APRA, THERE WERE **2,891,336 SONGS AND COMPOSITIONS** REGISTERED BY AUSTRALIAN WRITERS – AS AT JUNE, 2024.

★ THOSE IDENTIFYING AS COUNTRY WRITERS WERE RESPONSIBLE FOR **471,005 (16%)** OF THAT TOTAL.

An analysis of member data suggests that country writers – especially those based in rural/regional areas, are less likely to create works in multiple genres than those identifying primarily as rock/pop/alternative writers.



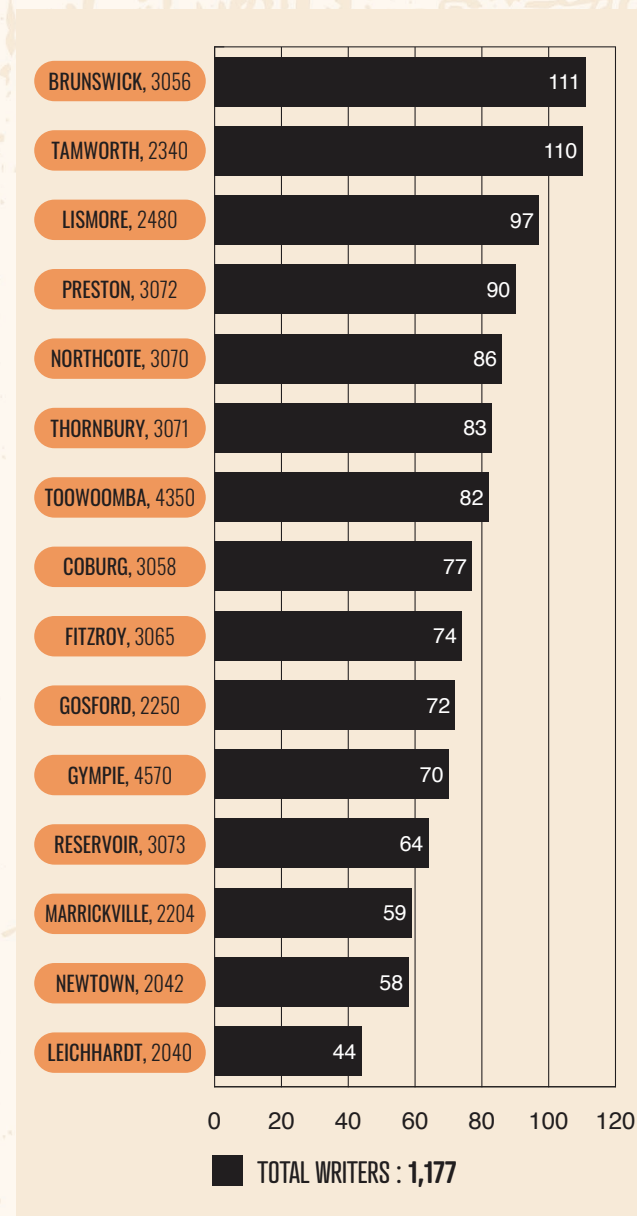
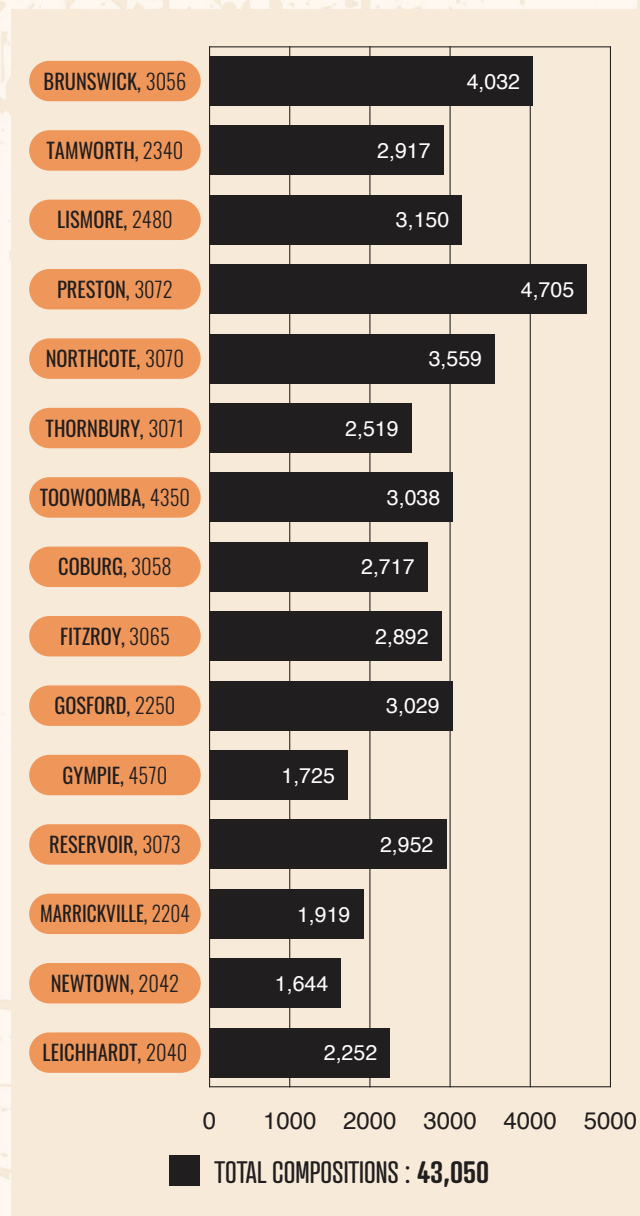
## TOP COUNTRY WRITER POSTCODES 2024

When we conducted our last major country research (2019), we were somewhat surprised to see the top postcodes for country writers mirroring the results for overall APRA member locations. That is, the dominance of Melbourne's inner-northern suburbs.

★ **IN 2024, WRITERS BASED IN THESE ADJOINING SUBURBS ACCOUNTED FOR 50% (585) OF THE 1,177 COUNTRY WRITERS IN THE TOP 15 POSTCODES AND 54% (23,376) OF THE 43,050 REGISTERED COMPOSITIONS.**

Not a great deal has changed since we recorded the Top Ten country writer postcodes in 2019, although Brunswick has claimed top spot from Tamworth – by one!

	2019	2024
1	TAMWORTH	BRUNSWICK
2	NORTHCOTE	TAMWORTH
3	LISMORE	LISMORE
4	BRUNSWICK	PRESTON
5	GOSFORD	NORTHCOTE
6	COBURG	THORNBURY
7	PRESTON	TOOWOOMBA
8	THORNBURY	COBURG
9	TOOWOOMBA	FITZROY
10	GYMPIE	GOSFORD



## COUNTRY MUSIC'S SHARE OF WRITER/PUBLISHER ROYALTIES

Without access to specific data it is not possible to identify specific royalty distribution of songwriting and publishing revenue.

★ **HOWEVER, WE ESTIMATE THAT BASED ON INFORMATION SHARED AND PUBLICLY REPORTED, COUNTRY WRITERS AND PUBLISHERS EARNED AN ESTIMATED \$75.2 MILLION IN 2024**

★ **THIS REPRESENTED A 33% INCREASE ON THE \$56.3 MILLION RECORDED IN 2019, AND REFLECTS THE GENRE GROWTH REPORTED THROUGHOUT THIS REPORT.**

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## THE NASHVILLE CONNECTION

Australia's country music artists and writers have long sought success on the world stage, particularly in the USA.

Even the most 'Australian' of performers, Slim Dusty, who traditionally avoided the capital cities in his own country, accepted an invitation (1997) to perform at the iconic Grand 'Ole Opry in Nashville.

Keith Urban was the first of our modern crop of country artists to relocate to Nashville in 1992. After a number of lean years he achieved success. He was inducted into the Australasian Country Music Roll of Renown in January 2025, and a month later was honoured at the 60th Academy of Country Music Awards, as only the tenth artist and the first born outside the US to achieve the rare 'Triple Crown' – Best New Talent, Male or Female Artist of the Year and Entertainer of The Year.

Kylie Sackley, who departed for Nashville 20+ years ago following a Star Maker win and a Golden Guitar for Best New Talent, was honoured at the 2025 APRA Awards as co-writer of Cooper Allan's 'Take Forever (Hally's Song)', the most performed country work in Australia in 2024.

Joining in these recent successes were Jordan Dozzi and Lindsay Rimes who achieved Billboard Hot 100 Country and Country Airplay #1's as co-writers of hits for Morgan Wallen and Post Malone/Blake Shelton.

In 2016, APRA AMCOS opened a dedicated Nashville office and launched the first SongHubs program in Nashville, partnering Australian writers with local writers and Australians resident in Nashville. It notably partnered Morgan Evans and ex-pat writer/producer Chris DeStefano.

Their collaboration produced the songs for Morgan's stunningly successful US and Australian #1 album and single debut.

At any one time, there are 100+ Australian ex-pats resident in Nashville which is currently booming as a residential and tourist destination. In 2024, Kaylee Bell, recently re-located to Nashville, was awarded International Artist of the Year by the US Country Music Association.

Sounds Australia, our national music export agency, first targeted 'Music City USA' in 2010, presenting showcase and networking events including the famous AUSSIE BBQ as part of the annual Americanafest event.

Recently, it has extended its event partnership to include Nashville's largest event – CMAFest, jointly hosting the Global Showcase and AUSSIE BBQ events which have seen performances by many of our genre's stars including, Alyce Simmonds, Travis Collins, Troy Kemp, Mark and Jay O'Shea, Morgan Evans, Jasmine Rae, Troy Cassar-Daley, Kirsty Lee Akers, The McClymonts, Sinead Burgess, Kristy Cox, Kasey Chambers, Tommy Emmanuel, Dianna Corcoran, Joe Robinson, Adam Harvey, Jordie Lane, Sam Hawksley, Jedd Hughes, Kasey Barnes, James Johnston, Blake O'Connor, Tori Forsyth, Kaylee Bell, Sara Berki, Tyla Rodrigues, Dylan Wright and dozens of others.

Current immigration policy and visa issues are presenting a range of challenges, but our artists show no signs of giving up on their dream!

# RECORDED MUSIC

THE COMMON FACTOR IN ALL COMMENTARY ON GLOBAL AND AUSTRALIAN RECORDED MUSIC MARKETS IS THAT RECENT GROWTH IS DRIVEN BY EVER-INCREASING REVENUE FROM ON-DEMAND AUDIO AND VIDEO STREAMING.

## GLOBAL CONTEXT

In 2014, the value of the global recorded music market was at all time low \$USD 12.9 billion.

By 2019, the sector's recovery was well underway, with streamed audio and video on-demand the substantial contributor to a reported sector revenue total of \$USD 18.5 billion.

The 2025 *Global Music Report* by IFPI reported the sector's value had increased for the tenth consecutive year to reach \$USD 29.6 billion. This represented a year-on-year increase of 4.8% on 2023, and a 60% increase on 2019.

The increase was entirely due to the fact that in 2018, IFPI and other sources reported there were 242 million global music streaming subscribers.

★ BY 2024, THE GLOBAL TOTAL WAS 752 MILLION. A 210% INCREASE.

Paid subscriptions generated 51% of revenue with 17.7% from ad-supported.

Streamed music's 2024 share of revenue at \$USD 20.4 billion, exceeded the total recorded music market value for every year between 2004 and 2020.

Global streaming revenue is now responsible for 69% of the global total. Although, as we shall see, the streaming percentage is much higher in certain markets – including ours.

## GLOBAL PREDICTIONS

While still predicting increasing revenue growth from streaming, most researchers agree that the rate of growth is showing signs of plateauing. Particular in more 'mature' markets.

Industry data analyst Luminate, in their 2024 end-of-year analysis reported that the US, the world's premier market responsible for 40% of the global revenue total, recorded modest revenue growth of 2.1% from 6.4% growth in streaming numbers.

At the same time however, they recorded 20+% streaming revenue growth in Latin America, Sub-Saharan Africa, the Middle East and North Africa.

The latest Goldman Sach's '*Music in The Air*' report predicts that 75 million new streaming subscribers will be added in 2025, taking the global total to 827 million, with 60% of those new subscribers added in emerging markets where they currently represent only 8% of the internet population, compared to 38% in developed markets.

Despite the growth in subscriber numbers, emerging markets will continue to contribute a smaller share of streaming revenue due to the fact that the average user in those markets pays USD \$8 per year, compared to the average of USD \$31 per year paid by those in developed markets.

Other reasons for optimism include the fact that standard subscriptions to audio-on-demand platforms are still a relative 'bargain' compared to the cost of video-on-demand subscription. Goldman Sachs reported that the average cost per US audio subscriber was \$14 per month, compared to \$69 per month for video subscription.

Also noted, and discussed later, is the emergence of music 'super fans' who spend considerably more on live and recorded music and merchandise than general music listeners.

★ AUSTRALIA'S STREAMING GROWTH RATE IN 2024 WAS REPORTED BY LUMINATE AS A YEAR-ON-YEAR 10.3% INCREASE.

## THE AUSTRALIAN RECORDED MUSIC MARKET

ARIA's 2024 end-of-year statistics showed that the wholesale value of our recorded music market increased by 6.1% to \$AUD 717 million. It was the sixth consecutive year of growth, representing a 36% increase on the \$AUD 526 million recorded in 2018.

The increase was almost entirely due to the growth in the streaming revenue share which increased from the 71% recorded in 2018 to 89% in 2024.

The continuing decline in the overall percentage value of CD sales and Downloads and the increase in Vinyl sales is consistent with previous ARIA and IFPI reporting.

In terms of the breakdown in the 2024 streaming revenue of \$640.7 Million –

	MILLION (\$)	PERCENTAGE (%)
SUBSCRIPTION STREAMING	SAUD 509.4	79% OF TOTAL
AD-SUPPORTED STREAMING	SAUD 69.6	11% OF TOTAL
VIDEO STREAMING	SAUD 61.7	10% OF TOTAL

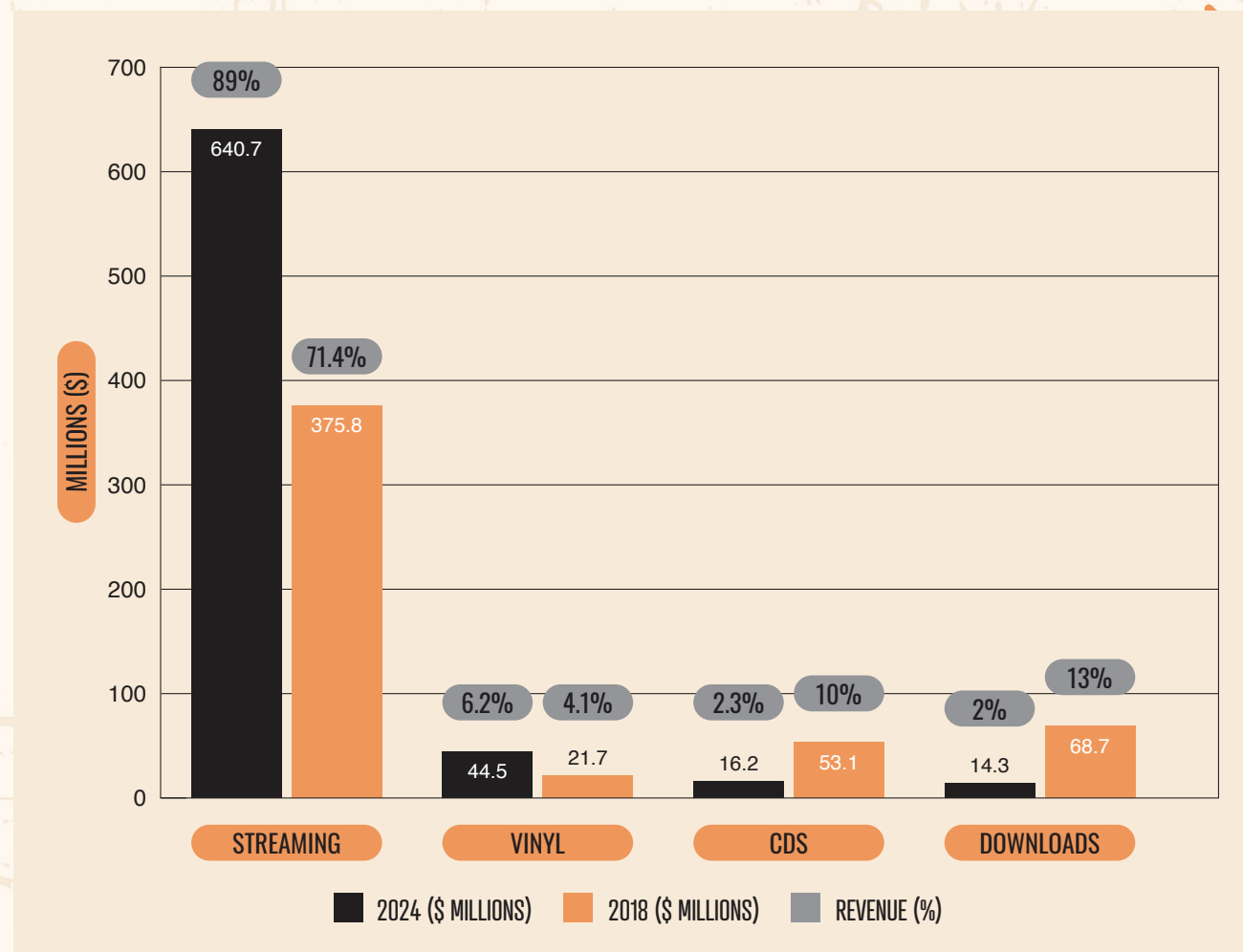
At 89%, the revenue percentage generated by streaming's market share in Australia is one of the highest in the world, surpassing the largest US market (84%), and well above the global average of 69% reported by IFPI.

Despite that growth, Australia in 2024 was replaced by Mexico as it dropped from 10<sup>th</sup> to 11<sup>th</sup> in terms of the world's most valuable recorded music markets.

In 2018, it was in 8<sup>th</sup> position.

The change is only likely to continue as countries with much larger populations continue to become more digitally connected.

However, according to Luminate, Australia remained in 8<sup>th</sup> place in terms of the world's leading music export nations.



## THE RISE AND RISE OF STREAMING – WHAT WE'RE LISTENING TO

According to data from the Australian Communications and Media Authority (ACMA), Roy Morgan Research and others, in 2018, 9 million Australians over the age of 12 (47% of the population) accessed a streaming platform.

That percentage has steadily increased to an estimated 70% of the population in 2024 (16.6 million).

In the days of an all-physical-product recording sector, Australia was a net importer of overseas material, with international artists and songs dominating our airwaves and sales charts.

Nothing has changed.

If the ARIA charts and other analyses are anything to go by, the trend has only been exacerbated by streaming's growth.

Spotify's *'Loud and Clear'* report for 2023 reported that more than 4,000 Australian artists were added to its editorial playlists and discovered by first-time listeners 2.7 Billion times. That sort of market exposure was once only achievable by expensive, relentless and speculative touring.

However with an estimated 99,000 tracks with a unique ISRC (International Standard Recording Code) identifier being uploaded to Digital Service Providers per day in 2024, the ability for any but the most high profile artists to cut through, presents an enormous, increasing challenge.

As noted elsewhere, in order for local artists to 'crack' search and recommendation algorithms utilised by various DSPs, they need their tracks to be 'mapped' in overseas territories.

★ IN 2024, LUMINATE ANALYSED THE 10,000 MOST STREAMED SONGS IN AUSTRALIA. IT FOUND THAT MUSIC BY **AUSTRALIAN ARTISTS WAS THE THIRD LARGEST COMPONENT BUT ACCOUNTED FOR ONLY 8.4% OF LOCAL CONSUMPTION.**

★ AUSTRALIAN STREAMING SUBSCRIBERS SOURCED **56.2% OF THEIR LISTENING CONTENT FROM THE US AND 15.2% FROM THE UK/EIRE.**

In terms of export to the markets which consume most streams by Australian artists, the US was followed by the UK with Canada third. Royalties generated by streams in these markets accounted for 80% of all royalties generated by streams originating from Australia in 2023. Brazil, Mexico and Germany are emerging as new export markets for Australian music.

We are still very long way behind markets which support local artists – Japan 71% of all streams, India 70% and Indonesia 40%.

★ **92% OF AUSTRALIA'S COUNTRY STREAMS COME FROM METRO AREAS**

## NEW MUSIC DISCOVERY

★ ACCORDING TO CREATIVE AUSTRALIA'S *'LISTENING IN: INSIGHTS ON MUSIC DISCOVERY AND ENGAGEMENT'*, **98% OF AUSTRALIANS DISCOVER NEW MUSIC VIA STREAMING SERVICES, 66% THROUGH SOCIAL MEDIA AND 62% BY ATTENDING LIVE EVENTS.**

The vast majority (82%) of those using streaming for new music discovery utilise genre playlists.



## AUSTRALIAN VOICES

An analysis of the annual ARIA sales charts demonstrates the dramatic impact of global consumption patterns on our domestic market.

At a recent 'Music Data and Insights Summit', organised by the Victorian Music Development Office, Dr Tim Kelly from Sydney's University of Technology, presented a comprehensive analysis of ARIA's singles and album charts from 2000 to 2023.

It showed –

★ **BETWEEN 2000 AND 2016, AUSTRALIAN NEW ZEALAND ACTS ACCOUNTED FOR AN AVERAGE OF 16% OF SONGS ON THE ANNUAL TOP 100 SINGLES CHART.**

★ **THAT AVERAGE FELL TO 10% BETWEEN 2017 AND 2022. IN 2023, IT WAS 2.5%.**

★ **LIKewise, AUSTRALIAN AND NEW ZEALAND ARTISTS OCCUPIED AN AVERAGE OF 29% OF POSITIONS ON THE ANNUAL TOP 100 ALBUM CHART.**

★ **IN THE YEARS 2017 TO 2022, THAT FELL TO 18%. IN 2023, IT WAS 4%.**

The analysis also explored the content nature of chart data.

In 2014, an estimated 70% of recorded music revenue was generated by 'new' material released in the previous four years. The balance was made up of back catalogue releases (older than four years).

In 2024, that figure has been turned entirely on its head with 70% of recorded product revenue now generated by back catalogue.

Since 2018, back catalogue releases featuring on the ARIA Top 100 Singles chart have gone from 0% to 17%.

On the Top 100 Album chart they've gone from 13% to 64%.

## AUSTRALIANS ON THE COUNTRY CHART

In 2019, US artists dominated the annual ARIA Country Chart with Luke Combs spending 32 weeks at No.1. Australian artists Keith Urban, Lee Kernaghan, Amber Lawrence, Morgan Evans and Christie Lamb recorded a total of 9 weeks at No.1.

In 2024, the dominant artist was Morgan Wallen who spent 34 weeks at No.1, with Beyonce, Post Malone and Luke Combs all occupying No.1.

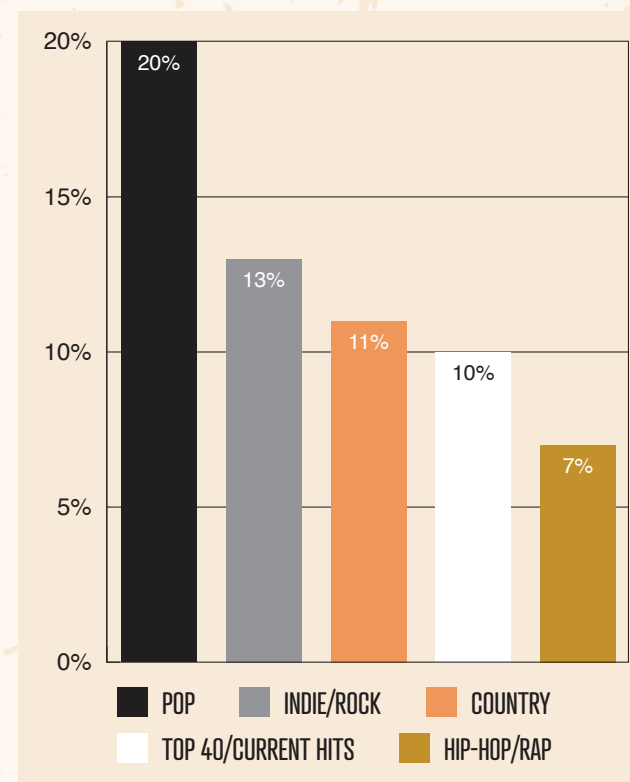
Australian artists Keith Urban, Kasey Chambers and Troy Cassar-Daley recorded a total of 3 weeks at No.1.

Little wonder then that recently elected Labor Government and Federal Arts Minister Tony Burke have signalled their support for local content quotas applying to Digital Service Providers operating in Australia.

## MUSIC GENRES

The Victorian Music Development Office's 'Music Habits' research has reported findings which have been confirmed by data from a number of the sources identified in the introduction to this section.

In terms of Australian consumers' favourite genres –

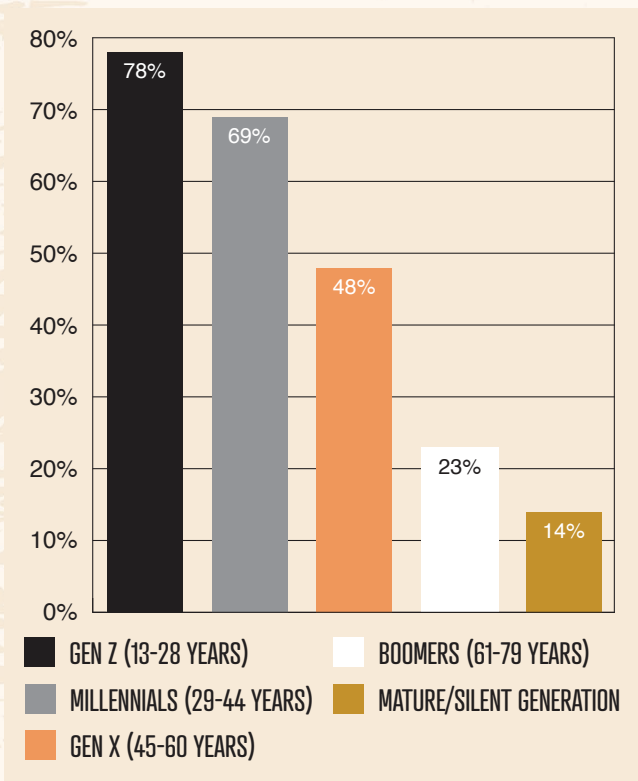


★ **OF THOSE IDENTIFYING COUNTRY AS THEIR FAVOURITE GENRE, 65% WERE REGIONALLY BASED AND 35% FROM METRO AREAS.**

## SO WHO EXACTLY IS LISTENING?

Of the 70% of the adult Australian population accessing an online streaming platform, 47% reported having at least one paid audio on-demand subscription in 2024.

Not surprisingly, the generations differ in percentage who are streaming subscribers –



What is most interesting are the changes in listening behaviours.

Country listening, especially in the US, was long dominated by terrestrial radio broadcasts on literally thousands of stations with localised audience reach.

Streaming has changed all that with significant increases in country consumption evident across all age groups.

In 2024, DeLoitte issued a comprehensive report – ‘Media and Entertainment Consumer Insights 2024’.

In terms of audio consumption, the spend and the rate of subscription drops off significantly from the age of 45, as does the preference for music as the driver/main focus of engagement, as the older demographic increase their video consumption of sport and movies primarily.

This is broadly in line with other domestic and international market reporting.

Australian Listening Summary

	GEN Z	MILLENNIALS	GEN X	BOOMERS	MATURE
HOURS PER WEEK VIDEO	17	18	22.5	28	27.5
PREFERRED VIDEO CONTENT	MUSIC	MUSIC	MOVIES	SPORT/MOVIES	SPORT/MOVIES
HOURS PER WEEK AUDIO	11	10	10	7	6
PREFERRED AUDIO CONTENT	MUSIC	MUSIC	MUSIC/RADIO	RADIO/PODCAST	RADIO/BOOKS
PAID SUBSCRIPTION	78%	69%	44%	22%	13%
MONTHLY SUBSCRIPTION SPEND	\$88	\$82	\$55	\$48	\$42
CONSUME CONTENT VIA SOCIAL RECOMMENDATION	65%	52%	34%	11%	9%

## COUNTRY LISTENING

Much of the genre's current popularity has been driven by the genre-bending explorations which began with New Orleans rapper Lil Nas X's 'Old Town Road' in 2018, and has seen a growing exchange between fans of country, contemporary pop, rap and hip-hop.

According to Luminate's 'Fans and Listening Habits' (2024) report, 62% of country fans had listened to Beyonce before the release of 'Cowboy Carter', but it was the dive into country by her established fan base that produced her largest ever single streaming week (281 million) on the album's release. Contributions by Post Malone, Jelly Roll and others have introduced country to a whole new audience.

★ **THE GROWTH IN COUNTRY LISTENING IS BEING DRIVEN BY GEN Z.**

★ **ACCORDING TO LUMINATE, IN 2022, 28% OF GEN Z REGULARLY LISTENED TO COUNTRY. BY THE END OF 2024 IT WAS 38%, WITH 20% DESCRIBING THEMSELVES AS 'DIE-HARD FANS'.**

★ **22% OF SPOTIFY COUNTRY LISTENERS ARE UNDER 25, MAKING AUSTRALIA THE WORLD'S 2<sup>ND</sup> BIGGEST MARKET FOR GEN Z.**

The importance of the age group was highlighted recently in The Music by CMC Rocks promoter Michael Chugg as forming the core audience for their perennially sold-out event.

## SO, WHO'S GETTING PAID?

When recording revenue and royalties were based totally on physical product sales, recording and associated costs were covered by an advance given by labels to artists. Until that advance was recouped through sales, artists were not entitled to royalties specified in their contract. Hugely popular artists made significant sums, others much less.

Industry estimates were that the percentage of recordings that fully recouped costs was traditionally in the vicinity of 5-10%.

The development of technologies enabling independent artist to make and own their recordings coincided with the growth of streaming and, together, they have revolutionised the means of production and distribution. The world's recorded music markets are increasingly dominated by independent releases, estimated by IFPI to account for 71% in 2024.

And although the almost total transformation in revenue and royalties generated by single track and album equivalent tracks on audio and video streaming platforms has had something of a democratising effect in spreading more royalties more widely, the top of the earnings pyramid bears a striking resemblance to the historical model.

US industry analytics company Duetti analysed streaming revenue generated in 2024 by a number of Digital Service Providers – Amazon, Tidal, Apple, YouTube, Deezer, Pandora, Spotify and Tik Tok.

All, with the exception of TikTok pay a royalty from the overall revenue pool in a particular territory based on streaming activity. Tracks streamed on paid subscription are worth approximately five times as much as those on ad-supported subscriptions.

Royalty rates are constantly under review but, in December 2024, earnings varied from \$US 8.80 per 1,000 streams on Amazon to \$USD 3 per 1,000 on Spotify. Duetti suggests that since 2021, Spotify's payout per stream has declined by 14% while the price of a subscription has increased by 20%.

TikTok does not pay per stream but per 'video creation' based on a track -\$US 0.50 per 1,000 views.

Approximately 1% of videos go viral on TikTok – a minimum of 250,000 creations, but only 15% of those tracks in 2024 experienced any growth on the other major DSP music streaming platforms.



## THE PAYMENT PYRAMID

According to Luminate, 33% of tracks (2,591,833) uploaded to DSPs in 2024 recorded 1 million+ streams. 5% of those recording 1 billion+ streams.

87% of 228 million tracks analysed recorded less than the 1,000 annual streams that Spotify recently declared as the minimum threshold for payment.

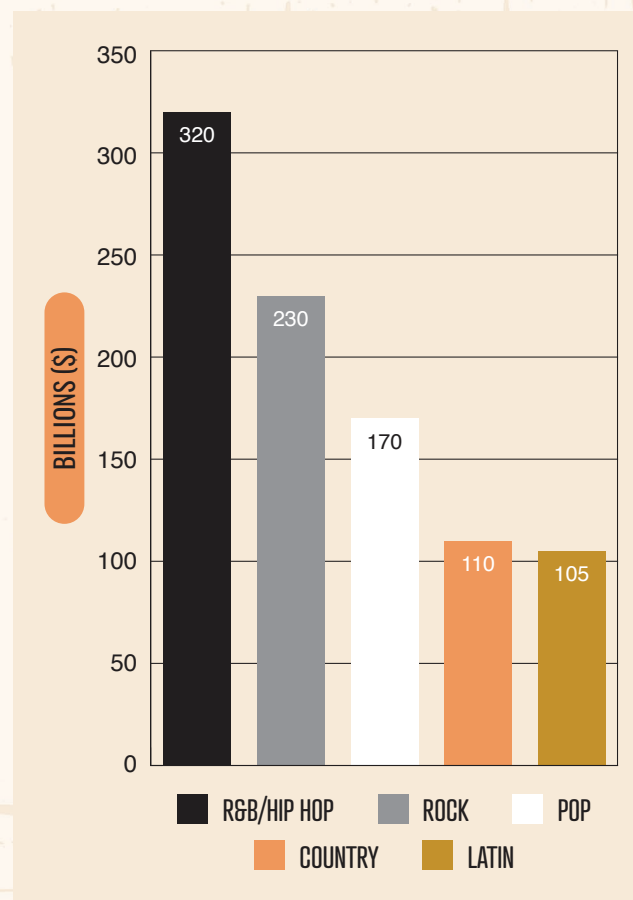
These royalties are referred to as 'black box' and along with those where the rights holders in a track cannot be identified, are returned to the revenue pool and distributed proportionately to those already receiving revenue payouts.

This will obviously mostly benefit those at the top of the pyramid who are contracted to majors Universal, Sony and Warners.

★ **50% OF ARTISTS ON SPOTIFY HAVE LESS THAN 100 LIFETIME STREAMS AND 80% HAVE LESS THAN 50 MONTHLY LISTENERS.**

## COUNTRY'S STREAMING SHARE

According to Luminate's 2024 End of Year and 'All That Matters' reports, of the 935 billion streams recorded in the US, the breakdown was –



★ **COUNTRY'S GENRE SHARE WAS 11.7% WITH 92% GENERATED BY US ARTIST RECORDINGS. THE 8% BALANCE WERE RECORDINGS FROM CANADA, AUSTRALIA AND THE UK.**

US data analyst Medium, reported that country in 2023, was the fastest growing genre, recording 23.8% increase in year-on-year streams. Country fans who traditionally favoured radio as their preferred listening platform, had now elevated streaming to the same status.

Much of that growth was driven by Morgan Wallen's album 'One Thing At a Time' which was that year's best selling album on the all-genre Billboard chart, with the single 'Last Night' spending an unprecedented 16 weeks at No.1 on the Billboard Top 100 chart.

The #CountryTok tag had over 950 million views and country was the third most popular genre on YouTube with 70+ billion views.

Spotify reported that in 2024, Australia ranked third in the world for country 'discovery' with a y-o-y 73% increase in streams.

★ **IN 2024, THE TOP 10 AUSTRALIAN COUNTRY ARTISTS RECORDED 2.17 MILLION ACTIVE MONTHLY LISTENERS AND 502,000 FOLLOWERS ON SPOTIFY.**

## AUSTRALIAN ARTISTS AND STREAMING REVENUE

In terms of identifying and allocating the revenue generated by country music streaming in Australia in 2024, there are things we can be absolutely certain of and others that we need to estimate based on detailed analysis of genre market share, using a number of reliable and credible sources.

Not in doubt is the wholesale value of streaming revenue generated in Australia in 2024 and reported by the Australian Recording Industry Association at \$AUD 717 million.

★ **BASED ON COMPREHENSIVE ANALYSIS BY IFPI, LUMINATE, DUETTI AND OTHER ANALYSTS, WE ARE CONFIDENT IN ASCRIBING A 10% SHARE OF THAT REVENUE TO THE STREAMING OF COUNTRY TRACKS - \$AUD 71.7 MILLION.**

As these sources also report, the majority of this revenue will be diverted to overseas rights holders given Australia's reliance on the import of country music from other countries – notably the US (61% of total streams), Canada and the UK.

This is line with the finding we report in the Airwaves & Airplay section noting that Australian produced country recordings accounted for 26% of new releases in 2024.

### A Note on Streaming Revenue Distribution:

Negotiations on the value and distribution of streaming royalties is ongoing and DSPs guard their information closely. However, we know from analysis by the sources mentioned above, and many others, that DSPs keep between 30-35% of every streaming dollar generated to cover their costs.

The remaining 65-70% is divided between –

The owners of the master recording – 80% (record label and/or independent artist)

The owners of the copyright in the work performed -10% (songwriters and/or publishers)

The owners of the mechanical rights for the works (songs) inclusion on a commercial recording – 10% (songwriters and/or publishers). The division of revenue shares between the various rights holders is often based on contract agreements they have in place.



## DIRECT TO CONSUMER (DTC) RETAIL IN THE COUNTRY MIX

One of the long-standing features of the Australian country music marketplace has been a strong bond between country artists and fans in terms of direct retail transactions.

When we surveyed 4,000 fans in 2019 and 1,000+ for this study, the purchase of physical recorded product was strong across all age groups.

- ★ **83% OF FANS REPORTED HAVING BOUGHT AT LEAST ONE CD IN THE PREVIOUS TWELVE MONTHS. EVEN IN THE 18-35 YEARS GROUP – THE MOST ENTHUSIASTIC AND ENGAGED STREAMERS, THE FIGURE WAS 70%.**
- ★ **76% BOUGHT A RECORDING AT AN ARTIST GIG AND 21% FROM AN ARTIST WEBSITE.**
- ★ **52% OF THOSE WHO BOUGHT AT LEAST ONE CD, SPENT A MONTHLY AVERAGE OF \$30.**

Considering how the industry has changes in terms of our whole-hearted embrace of streaming, we were interested to see what had changed when we analysed this year's responses.

## FAN SURVEY UPDATE 2024

Surprisingly, when we analysed 1,000+ responses from fans surveyed for this report, we found that the direct artist-to-consumer transaction was still a significant feature of our genre..

- ★ **70% OF FANS REPORTED BUYING A PHYSICAL RECORDING IN THE LAST 12 MONTHS. THE DIFFERENCE WAS THAT CDS FELL TO 62%, WITH VINYL ACCOUNTING FOR 14%, REFLECTING THE GENERAL MARKET TREND.**
- ★ **THOSE WHO BOUGHT CD/VINYL REPORTED AN AVERAGE SPEND OF \$23.50 PER MONTH.**

How do we account for the consistency of these results across the years?

Our surveys have consistently confirmed that one of the most powerful motivators for country fans attending gigs has been the prospect of interaction with the artist, as Australian country artists have always shown a willingness to engage face-to-face with their fans at gigs, not just online.

Another notable development has been technological.

In 2018, Direct-To-Consumer (DTC) transactions were almost entirely cash-based. Very few artists had access to an EPTPOS machine for debit or credit card purchases.

When we emerged from the pandemic, there was much less cash in use and QR Codes and simple Square Readers enabled direct funds transfers from cards. At the recent Tamworth Country Music Festival, almost half of the 400 registered buskers in Peel Street, had a QR Code for donations/product sales.

This has simplified the artist to fan transaction significantly, especially for the many, many hundreds of unsigned independent artists operating across our sector.

In allocating a value to this DTC retail activity, we have utilised the latest reporting by fans, but we will only focus on small venue transactions in order to avoid the possibility of double-counting festival and/or concert sales through a third-party retailer. We will also halve the size of the audience to err on the side of caution.

- ★ **SO, BASED ON ALL THE INFORMATION AVAILABLE TO US, WE ESTIMATE THAT DIRECT ARTIST-TO-FAN RETAIL TRANSACTIONS INVOLVING PHYSICAL RECORDED PRODUCT, GENERATED \$25.7 MILLION IN 2024.**

## THE FUTURE – THE EMERGENCE OF SUPERFANS

While all analysts and commentators expect audio streaming to continue to drive revenue growth, it will do so at a reduced rate, especially in more digitally mature markets where the number of current subscribers approaches saturation point.

So recently, the DSPs have turned their attention to the potential of enrolling certain subscribers in a 'VIP' tier.

Their target is a growing number of those being referred as 'super fans'.

These are identified as having a much more significant emotional and financial investment in the personality and music of a particular artist than a normal music fan.

Melbourne recently experienced the impact of the 'Swifties' – many of them super fans, when Taylor Swift played three sold-out concerts at the iconic Melbourne Cricket Ground. The 96,000 who packed the stadium each night, was the largest single audience she had ever played to.

RMIT University reported that spending by consumers on its credit cards increased by 33% across the weekends of Swift concerts. The total revenue associated with her Australian concerts was estimated at \$558 million in box office, on-site F&B and merch and off-site travel, retail, hospitality and accommodation.

Engaging and establishing an ongoing relationship with super fans has obvious benefits for all involved in the revenue chain.

### Streaming Footnote:

At a recent Creative Australia/Music Australia data symposium to launch the 'Bass Line' and 'Listening In' reports, a number of commentators highlighted the difficulty for Australian artists who, in order to 'crack' the various search algorithms locally, need to be 'mapped' in overseas territories/markets. Back to the future!

Interestingly, 42% of music consumers surveyed for the 'Bass Line' suggested they would be prepared to pay for an Australian only streaming subscription. A further 37% said they might pay.

Luminate, who estimates that approximately 20% of music listeners are 'super fans', has provided some extremely interesting metrics on their US consumption, but there is no reason to doubt that the behaviour will basically be replicated in our market where like country everywhere, loyalty is a hallmark of the fan base.

In 2024, US super fans –

★ SPENT AN AVERAGE **\$USD 113 PER MONTH ON LIVE EVENTS** (AVERAGE MUSIC LISTENER \$68)

★ SPENT AN AVERAGE **\$USD 39 PER MONTH ON PHYSICAL PRODUCT** (AVERAGE LISTENER \$19)

★ **73% BOUGHT MERCHANDISE** (26%)

★ **81% TALK ABOUT ARTISTS WITH FRIENDS AND FAMILY** (41%)

The first of the DSPs to make a move was Tencent, the world's second largest streaming platform with a 14% share of the global market.

In 2024, they launched a 'Super VIP' tier which includes rewards such as exclusive content, access to concert tickets and deals on merchandise.

Subscribers to the tier pay approximately 2.5 times as much as those with a normal paid subscription.

Parent company Bytedance identified the take-up of these subscription as a significant contributor to its 2024 financial result.

Speculation has been rife for months that the world's largest audios streaming DSP, Spotify with 32% of the global market, would soon release a premium tier subscription.

Tentatively dubbed 'Platinum' or 'Music Pro', it is expected to include enhanced 'hi-fi' audio, ticket and merch access and perhaps an AI-assisted re-mix function.

Most in the industry believe the release is imminent.



# AIRWAVES AND AIRPLAY AND COUNTRY MUSIC

THE RELATIONSHIP BETWEEN COUNTRY MUSIC AND BROADCAST MEDIA HAS BEEN LONG AND ENDURING, PROMOTING OUR ARTISTS AND THEIR MUSIC FOR SOME 80 YEARS.

With audio streaming exerting a powerful influence in all sectors of the music industry, traditional radio has adapted, and indeed continued to thrive in 2024, recording its most successful year in two decades.

The 'Infinite Dial 2024' report by research company Edison, reported that radio (broadcast and streamed) reached 81% of the Australian population aged over 10. Overall, 83% of Australians accessed an online audio stream, compared to 76% in the US.

In any single week in 2024, Edison reported that 77% (17 million) of adult Australians accessed streamed audio (including radio), compared to 66% in 2021.

The 'broadcast' sector in 2024 bears little resemblance to its historic configuration and is now a mix of commercial AM and FM stations, the ABC network, the Community Broadcast radio network and a number of dedicated DAB+ digital channels.

Industry website RadiolInfo.com estimated that through dedicated websites and Apple and Android Apps, some 360 stations are available for streaming by Australian listeners.

In terms of audio consumption patterns, radio has increasingly benefited from the increased connectivity of new model cars. In-car radio streaming has increased by 28% in the last two years, accounting in 2024 for 35% of all radio streams.

According to Edison, 84% of in-car audio is broadcast radio, 50% music streaming and 37% podcasts. Interestingly, CDs still account for 30% of in-car music listening.

Increasing ownership of smart speakers has also played a role.

In 2019, 13% of Australian households owned a smart speaker compared to 23% in the US. In 2024, 34% of Australian households owned at least one smart speaker, and increase of 160%, equalling the US ownership rate.

★ BEFORE DIVING INTO DATA AND ANALYSIS, IT IS IMPORTANT TO UNDERSTAND HOW PIVOTAL RADIO WAS IN INTRODUCING COUNTRY MUSIC TO AUSTRALIAN AUDIENCES AND THROUGH PROGRAMMING AND PROMOTION WAS LARGELY RESPONSIBLE FOR ESTABLISHING THE FIRST GENERATION OF THE GENRE'S 'STARS'.

## THE HISTORICAL CONTEXT - COUNTRY COMES TO RADIO

Tennessee-born Bob Dyer is often credited as radio's country music pioneer. Travelling to Australia in 1936 to tour with the ABC Dance Band, he was a regular on vaudeville's Tivoli Circuit with a 'hillbilly' song/comedy act.

In 1940, he was contracted by Melbourne's 3DB to host 26 episodes of 'The Last of the Hillbillies'. It was an instant success and laid the platform for one of Australia's most enduring and successful radio and TV careers.

Australia's first raft of prominent country artists and broadcasters were quick to grasp the potential for country music and Tex Morton and Smoky Dawson were among those who established significant country-music based programs.

At its peak, 'The Adventures of Smoky Dawson' was broadcast on 69 stations around the nation. The influence was America and the cowboy image was rooted in that portrayed by US screen stars Gene Autrey, Roy Rogers and others.

Tex Morton was also well-aware of the power of radio to reach the corners of a vast land and, in 1942, launched 'All Set and Saddled' on Sydney's 2UW.

Although Morton adopted the dress and accoutrements of the American cowboys, he was at pains to incorporate Australian references, material and language to make his show attractive to locals. In this he was the true forerunner of how a genuine Australian musical identity developed.

★ **RADIO PROVIDED A WONDERFUL OPPORTUNITY FOR THE EARLY PIONEERS TO PROMOTE THEIR PERFORMANCES AND, ALMOST WITHOUT FAIL, THEY TOOK TO THE ROAD ON THE BACK OF RELENTLESS RADIO PROMOTION.**

Thus began the great tradition of rodeo/western tent show tours. After Rock 'n Roll swept all before it in the 60s, country's place on commercial radio especially took a back seat as Top 40 format dominated the airwaves.

In response to this and other developments, a third model of broadcasting – 'community' radio was developed in addition to commercial and public broadcasting.



Max Jackson  
Greg Young

## THE RADIO LANDSCAPE 2024

### COMMERCIAL RADIO

According to the Federal Government's Australian Communications and Media Authority (ACMA) which is responsible for issuing licences, there were almost 300 commercial radio stations operating at the end of 2024.

Approximately 85% are based in regional Australia with 90% operating on an FM licence.

Commercial Radio and Audio (formerly Commercial Radio Australia), the sector's peak representative body has 260 members, 208 of whom are based in regional Australia.

According to CRA, commercial radio reached 12.6 million listeners weekly in 2024.

They listened on average to 12 hours and 47 minutes per week.

- 6.8 hours per week to FM stations
- 1.6 hours per week to AM stations
- 2.3 hours per week to stations online
- 1.7 hours per week to digital stations

According to research commissioned by CRA and reported by Deloitte Access Economics, commercial radio in 2023 –

★ **PROVIDED A \$320 MILLION ANNUAL BOOST TO REGIONAL AUSTRALIA**

★ **PRODUCED 1.1 MILLION HOURS OF LOCAL CONTENT, ACROSS BROADCAST, STREAMING AND PODCASTS**

★ **PLAYED 160,000 HOURS OF AUSTRALIAN MUSIC, OR 2.7 MILLION AUSTRALIAN SONGS**

★ **SUPPORTED 6,600 FULL TIME JOBS, WITH 38% IN REGIONAL AUSTRALIA**

In 2006, in response to persistent industry lobbying, ACMA introduced voluntary content quotas requiring commercial radio to program 25% content by Australian artists between 6am and midnight, with 25% of that having been released in the last 12 months.

Unfortunately, there are significant 'loopholes' in the code and research by a number of industry commentators suggests that, in many cases, the quotas – particularly those mandating 'new' releases, are not being met.

Responding to criticism of unmet quotas, CRA constantly cites the fact that these same quotas are not applied to audio streaming services.

Despite the Federal Government committing to local content for streamers such as Spotify in 2023, no apparent progress has been made.

#### Note on AMPCOM:

The Australian Music Performance Committee was originally tasked with monitoring the playing of minimum percentages of new-release Australian music on commercial radio as designated by the voluntary code of practice developed by ACMA.

It was originally comprised of music industry and commercial radio representatives. In recent years, CRA has taken on the monitoring task, reporting directly to ACMA. We note therefore that recent estimates are indicative, rather than definitive, but none the less illuminating.

In 2019, 85,580 new release tracks were submitted to commercial radio of which 18,314 (21%) were by Australian artists. Pop/Rock/Dance dominated releases accounting for 70+%. Country/Folk was the 2<sup>nd</sup> largest genre accounting for 13.5% of total releases.

In 2023, the total number of new release tracks had increased to 156,922, an 83% increase on 2019. The share of the total by Australian artists declined to 17% (27,459). Country/Folk remained the second largest genre, but its share of the total was estimated to have fallen to 9%.

So, with the exception of country music-specific radio (see below), it is not possible with any certainty to document country airplay data for the majority of commercial radio stations, other than to say that all available data suggests that 2024 programming would reflect the genre's continued growth in popularity and production as documented in all sections of this report.

## DEDICATED COMMERCIAL COUNTRY RADIO

KIX Country, iHeart Country, MMM Country and Nova Fresh are dedicated genre platforms, operating with FM terrestrial and DAB+ stations and access through online streaming apps.

## KIX COUNTRY

Was launched as a brand in 2015 by Grant Broadcasters in Bundaberg, Queensland. It operates in 16 regional hubs with 48 FM stations (mainly), predominantly based in regional Queensland (23) and NSW (14).

The audience reach for their 24/7 country broadcasts is estimated at 5.3 million, with programs also available to stream from the website. Their content includes country music news, artist interviews, feature spots and they regularly broadcast live from major country music festivals including Gympie, Groundwater, CMC Rock, Deni and Tamworth.

## IHEART & TRIPLE M & NOVA FRESH

The Australian Radio Network which purchased the KIX network in 2021, relaunched iHeart Country Australia which now has 8 DAB+ stations in capitals plus the Gold Coast.

Triple M Country was launched in 2018 with dedicated DAB+ digital stations in Melbourne, Sydney & Brisbane.

It included some specialist content including 'The Range' hosted by Lee Kernaghan which is available through the Triple M app and syndicated through the network's 40-odd FM stations.

COUNTRY.COM.AU

Nova Fresh streams country 24/7 through smartphone apps, in-car and smart speaker/TV listening and a DAB+ station based in Brisbane. It features a global playlist with an Australian emphasis on Queensland artists.

## ABC LOCAL RADIO

The Australian Broadcasting Commission (now Corporation) was established in 1932.

It now includes a local AM network – with one station in each metro capital and 45 in regional Australia – 13 in NSW, 8 in Victoria, 11 in Queensland, 4 in South Australia, 7 in Western Australia, 1 in Tasmania and 2 in the Northern Territory.

The national audience for the network (as estimated by Edison) is 7.5 million, 4.5 million of those listening weekly in metro areas.

Radio programs across the ABC feature country music and ABC News may occasionally cover topics, events or news related to country music where there is a broad and general audience interest or significant editorial reason.

They often feature interviews or music from country artists where relevant to their local audiences, particularly in association with major events in the area.

Its flagship program (since 1993) has been Saturday Night Country, currently hosted by country star Beccy Cole. The first hour is simulcast on all ABC capital city radio stations across the country, with the full three hours heard on ABC regional radio stations. It is not possible to accurately report the weekly SNC audience. The full program is also available on ABC Country digital.

## ABC COUNTRY

Was launched in 2009 to coincide with the launch of DAB+ digital radio.

ABC Country can be heard via live audio stream and on-demand on the ABC listen app, on TV Channel 203 and on the ABC Country website. It is Australia's national home of country music, with 24 hours a day, 7 days a week of country music with a strong focus on supporting the work of Australian artists.

Early Morning Country is broadcast on ABC Radio in North Queensland and simulcast on ABC Country. The Tower of Song with Henry Wagons is on the Double J network and is ABC Country's specialist music program with a focus on new and classic Americana, outlaw-country, folk, twang and narrative singer-songwriters.

Tagging of digital content related to country music, which may be created by regional ABC stations or other parts of the ABC, allows ABC Country to share this content on its website. The ABC Country website augments the on-air content of the station with special audio content, tour info, feature albums, news stories, interviews or other audio or text content where relevant.

Country artists that crossover or sit in pop or other alternative genres, may get airtime on Rage.

The growth of interest in the country genre is highlighted by number of new releases provided to ABC Country for review and airplay.

In 2019, a total of 615 recordings were submitted, 42% of which were by Australian artists.

★ **IN 2024, THERE HAD BEEN AN ASTONISHING 500% INCREASE, WITH 3,803 SUBMITTED – 38% BY AUSTRALIAN ARTISTS.**

## THE COMMUNITY RADIO NETWORK

In 1974, the Whitlam government issued three licences to a newly formed Public Broadcasting Association with the intent of offering a variety of content that was not necessarily provided by the larger commercial radio stations. Community radio outlets carry news and information programming geared toward the local area.

Specialised music shows are also often a feature and they typically avoid content found on commercial outlets such as Top 40 music, sports and breakfast/drive-time personality talk-back.

Community radio's 450+ radio services (AM, FM and DAB+) provide an important, supportive 'home' for country music, particularly across its regional and remote heartland where 70% of licences are located.

Community radio continues to be a force in Australia's broadcasting landscape. Of the 75% of Australians, aged over 15, who report listening to radio on a weekly basis, 62% listened to commercial radio, 31% to ABC/SBS radio and 25% to community radio.

When asked why they listened to community radio, over 14,000 listeners cited specialist music programs (33%) and Australian music programming/support for local artists (32%) as their second and third choices. News and local information was first with 47%. These reasons prevail irrespective of the listener's age or location.

The Community Broadcasting Association of Australia is the peak body representing the sector. It currently has over 290 member stations actively broadcasting nation-wide. The CBAA's members include 85% of Australia's permanently licensed community radio stations.

(Source: [www.cbaa.org.au/about](http://www.cbaa.org.au/about))

According to CBAA data -

★ THERE ARE **5.3 MILLION AUSTRALIANS** (25% OF THE POPULATION) LISTENING TO COMMUNITY RADIO EVERY WEEK FOR AN AVERAGE **15 HOURS PER WEEK**. AN INCREASE OF 1 MILLION LISTENERS SINCE 2006.

★ **19% OF THOSE LISTENERS LISTEN EXCLUSIVELY TO COMMUNITY RADIO.**

★ **70% OF STATIONS ARE BASED IN REGIONAL AND REMOTE AREAS AND 30% IN METRO AREAS.**

★ LISTENERS ARE **55% MALE AND 45% FEMALE** AND ARE SPREAD EVENLY ACROSS AGE GROUPS – 15-24 YEARS (19%), 25-39 YEARS (30%), 40-54 YEARS (23%) AND 55+ YEARS (28%).

(Source: McNair yellowSquares - 'Community Radio Listener Survey 2024')

★ IN 2024, THE CBAA REPORTED A **10% INCREASE** IN LISTENERS COMPARED TO 2023.

The CBAA has set up two platforms that allow stations to share content & programs. The Community Radio Network (satellite) broadcasts specialist, one-hour programs featuring news, issues-based stories and specialty music. Stations can tap into the feed at any time and also send program ideas and content for inclusion.

The Digital Delivery Network provides the same services via an online App.



## AMRAP

One of the CBAA's most important initiatives was the establishment in 2000 of AMRAP (Australian Music Radio Airplay Project) as a distribution platform for artists, labels, managers and publicists to upload current release singles, EPs and albums.

Community radio programmers and presenters who register are then able to access a digital copy of the tracks for airplay or to add to their library. Over 860 of the 5,000 community radio presenters report programming country music content.

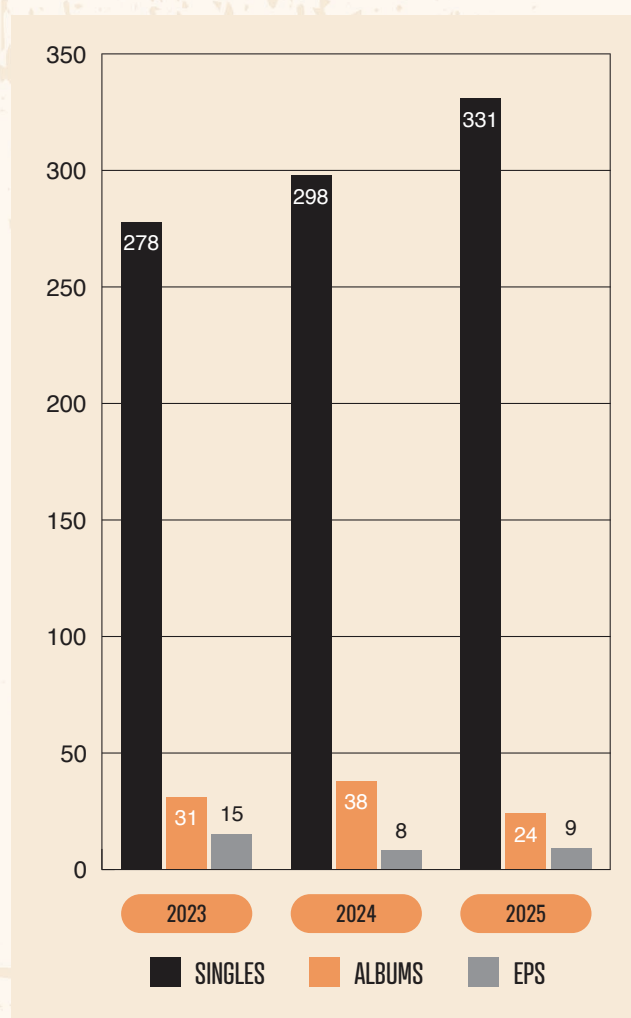
It is impossible to overestimate the importance of AMRAP as an outlet for independent country music releases before streaming became dominant.

In 2018, 398 new tracks were made available to stations. The artists involved covered the spectrum from established to those making their recording debut.

★ **IN 2024, THE NUMBER OF UPLOADS HAD INCREASED SIGNIFICANTLY BY 292% TO A TOTAL OF 1,561 – 1,341 SINGLES, 158 ALBUMS AND 62 EPS.**

Given the fact that music consumption is now dominated by streaming services, it comes as no surprise that single track recordings and releases are the preferred option for artists.

This is confirmed by a comparison of uploaded tracks over the months January to March 2023-2025.



The AMRAP platform is dominated by independent artists, many of them in the early/mid stages of their career.

The AMRAP and ABC Country figures are confirmed by respected website/blog/podcast platform Sunburnt Country, dedicated to promoting Australian country artists and their music.

★ **THEIR COMPARISON OF RELEASES SENT TO THEM IN 2023 AND 2024, CONFIRMS AN OVERALL 268% INCREASE, CONFIRMING NOT ONLY THE PREDOMINANCE OF EMERGING ARTIST RECORDINGS, BUT ALSO THE GENRE'S GROWTH.**

### 2023

ESTABLISHED	EMERGED	EMERGING
60 RELEASES	84 RELEASES	142 RELEASES

### 2024

ESTABLISHED	EMERGED	EMERGING
76 RELEASES	184 RELEASES	507 RELEASES

## COUNTRY MUSIC AIRPLAY 2024

Reporting airplay as opposed to sales data has always presented a significant challenge, but all credible, industry-standard charts confirm country's upward trajectory in global and local markets.

## GLOBAL IMPACT

US superstars Morgan Wallen and Luke Combs dominated global charts in 2023, achieving historic successes.

Wallen had a break-out year becoming the first country artist to top the Billboard end-of-year Hot 100 airplay chart since 1981. He also had the year's most streamed song on Spotify and Apple Music, 5 of the top 50 streamed songs on Spotify, 11 of the top 100 on Apple and 8 songs on the Billboard Hot 100 (Taylor Swift had 4).

The dominance continued in 2024 with Wallen, Luke Combs and Zac Bryan topping country and all-genre charts, joined by emerging stars Shaboozey and Lainie Wilson. Then of course we had cross-genre releases by Post Malone, Jelly Roll and Beyonce taking country to new audiences and levels of popularity.

## AUSTRALIAN COUNTRY AIRPLAY 2024

It has always been something of a genre in-joke, that with the multitude of charts created by a range of organisations, individual radio stations and 'authorities', almost anyone can claim a No.1 or a Top Ten somewhere, sometime.

There is little cross-over between charts based on airplay on commercial radio, streaming services and those based on airplay on the community radio network where country is a component of station programming.

The most widely regarded airplay charts are the weekly and annual charts produced for media outlets The Music Network and CountryTown websites.

They are based on AM, FM and DAB+ data gathered by Radio Monitors from – the ABC's 52 regional and 8 metropolitan stations including DAB+ ABC Country, the 48 stations in the KIX Country national network (FM and DAB+ stations covering 22 regions), the 8 stations in iHeart Country Radio's DAB+ network, Triple M Country's 3 DAB+ stations, 98.9FM (Brisbane), Nova Fresh Country, Australian Country Radio and Big Country Radio.

The vast majority of the reporting stations are based in regional areas, with the DAB+ stations mainly capital city-based.

Radio Monitors is acknowledged as providing the industry standard globally for determining airplay of recordings to compile credible charts. The charts have been compiled since the 90s, and as we used their data as the basis for our reporting in 2019, their current reporting provides us the ability to draw direct comparisons.

An analysis of the annual airplay data shared with us for the CountryTown Top 50 Country Songs provides some fascinating insights.

## COUNTRYTOWN AIRPLAY CHARTS

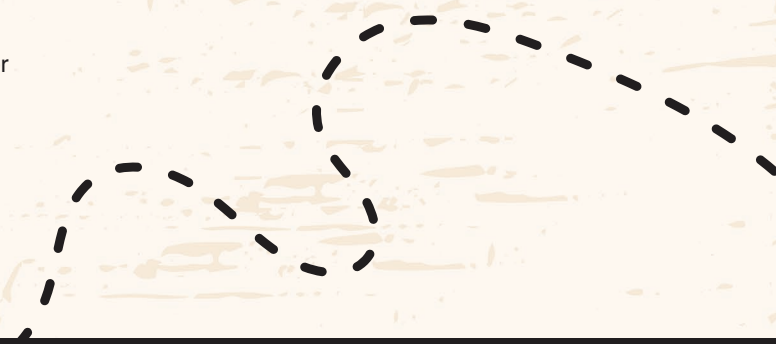
### 2020

During a year when international touring virtually ceased during COVID-related border closures and travel restrictions, Australian artists dominated the top 10, occupying 6 positions including the top 4 (Morgan Evans, The Wolfe Brothers, Brad Cox and Melanie Dyer).

★ **ALTOGETHER, THERE WERE 17 SONGS (34%) BY AUSTRALIAN ARTISTS IN THE TOP 50 WITH 12 OCCUPYING THE NO.1 POSITION ON THE CHART AT SOME POINT IN THE YEAR.**

★ **FOR THE YEAR, THE TOP 50 SONGS RECORDED 115,638 PLAYS WITH 41,948 (36%) BEING FOR THE 17 SONGS BY AUSTRALIAN ARTISTS.**

★ **SIX OF THE SONGS WERE RELEASED ON MAJOR LABELS, WITH THE OTHER ELEVEN BEING INDEPENDENT RELEASES.**



## 2023

The fact that international touring regained momentum post-pandemic was reflected in the annual chart.

The top three chart positions were occupied by US stars Morgan Wallen, Luke Combs and Tyler Hubbard.

James Johnston occupied 4<sup>th</sup> position with Kaylee Bell 6<sup>th</sup>, The Wolfe Brothers 7<sup>th</sup> and Morgan Evans 9<sup>th</sup>.

★ OVERALL, THERE WERE **18 SONGS BY AUSTRALIAN ARTISTS** IN THE TOP 50, **EIGHT OF THEM REACHING NO.1**.

★ THE TOP 50 SONGS RECORDED **115,700 PLAYS**, WITH THE AUSTRALIAN SONGS REGISTERING **41,235 (37%)** OF THE TOTAL.

★ **FOUR** OF THE AUSTRALIAN SONGS WERE **RELEASED BY MAJOR LABELS**, WITH OTHER **FOURTEEN** BEING **INDEPENDENT RELEASES**.

## 2024

The Top 50 airplay chart dramatically reflected the genre's growth as consistently reported across the sector, but also highlighted an overall decline in local representation across the genre.

★ TOTAL PLAYS WERE **147,100**, A YEAR-ON-YEAR **INCREASE OF 27%**.

★ THERE WERE **THIRTEEN SONGS BY AUSTRALIAN ARTISTS** IN THE CHART, BUT NONE IN A TOP 10 DOMINATED BY US COUNTRY ARTISTS.

★ THE HIGHEST POSITION ACHIEVED WAS **NO.12 BY DARLINGHURST**.

Although six Australian songs made it No.1 during the year, the number plays for Australian songs fell to 33,928 a year-on-year decline of 23%.

★ **FOUR** OF THE THIRTEEN AUSTRALIAN ARTIST SONGS WERE **RELEASED BY MAJOR LABELS** WITH THE OTHER **NINE** BEING **INDEPENDENT RELEASES**.

Radio Monitors, as well as detailing plays to compile their charts, also records 'impacts'. That is a measure of the potential for a recording to reach an audience – based on station plays and estimated station audience reach.

★ WHILE IT IS NOT POSSIBLE TO DETERMINE WHO ACTUALLY LISTENED TO A TRACK, THE POTENTIAL IMPACTS IN 2024 COMPARED TO 2020 **INCREASED BY 166%**.

Yet another indicator of the genre's growth.

However, the impact percentages confirm the year-on-year decline in Australian artist airplay.

Impacts by Australian artists in 2020 were 38% of the total recorded for the year.

In 2023, the Australian artist percentage was 39% of the total.

In 2024, the Australian artist percentage of annual impacts declined to 26%.



## CONCLUSION

So, although there has been a dramatic increase in the number of Australian country recordings being produced, especially by new and emerging independent artists, the ability for Australian artists – not only country artists, to gain airplay and traction in the marketplace is an ongoing challenge in a market where 56% of recorded music consumption in 2024 was sourced from the USA.

Little wonder then that APRA enlisted the support of industry organisations (including the CMAA) and developed an advocacy agenda ('Music Votes 2025') presented to parties involved in the 2025 federal election. Central to the campaign priorities were an emphasis on increasing Australian artist voices on domestic and international stages and media platforms, and local content quotas on streaming platforms.

The Labor party fully endorsed the agenda. So we eagerly await the outcomes!

### ARIA Chart Note:

The decline in the presence of Australian voices in 2024 was underlined by the annual ARIA sales charts. In the overall Top 100 album chart (all genres), there were only three recordings by Australian artists, only one in the Top 50, with Cold Chisel's 50th at No. 44. At the same time, country's overall growth was highlighted with 9 recordings by US stars in the Top 100 albums (and an amazing further 11 by Taylor Swift!).

In 2019, Australian artists occupied 10 spots in the annual Top 50 Country Album chart, with 3 in the Top 10 and 5 in the Top 20.

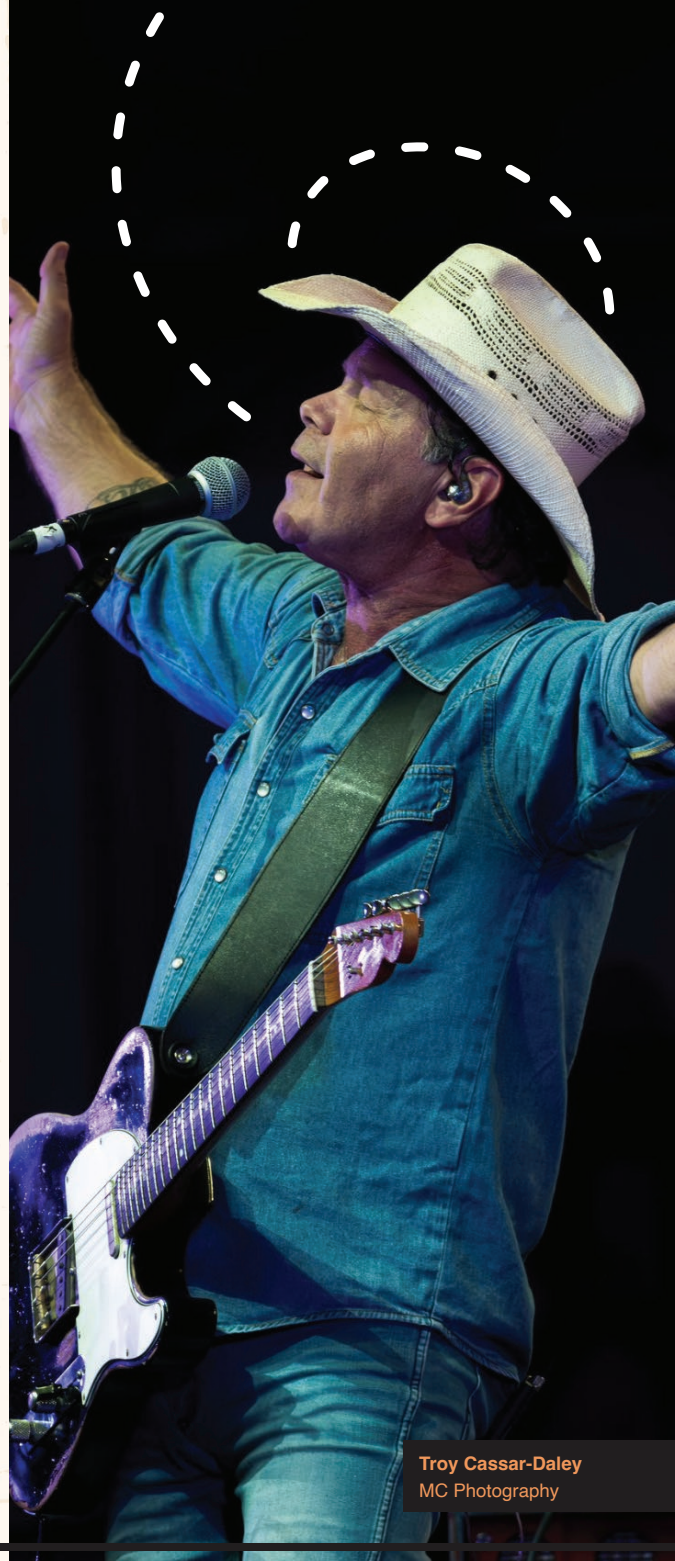
By 2023, there were 5 Australian albums with Brad Cox the highest ranked at 30.

In 2024, there were only three, with Troy Cassar-Daley highest ranked at 38.

Of course these are sales charts, but they confirm – and help explain, the airplay data trend reported above.

In response to the declining Australian chart and airplay voices, ARIA launched their 'Amplify' initiative in August 2024.

So far, 350 Australian artists have been profiled with 'good news' stories and clips targeted at mainstream media – The Today Show and The project, reaching an estimated 630,000 Australians weekly on Free-To-Air TV.



Troy Cassar-Daley  
MC Photography

# THE ACADEMY OF COUNTRY MUSIC

No report on country music in Australia - especially one commissioned by the CMAA, would be complete without reference to an initiative which is unique in the world of country music.

★ **SINCE THE SENIOR AND JUNIOR ACADEMY OF COUNTRY MUSIC PROGRAMS WERE ESTABLISHED, 1,078 SONGWRITERS, PERFORMERS AND MUSICIANS HAVE GRADUATED – 626 SENIORS AND 448 JUNIORS (UNDER 18).**

*The Academy*  
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## THE BEGINNING

Soon after it was established in 1993, the Country Music Association of Australia realised that the vast majority of practitioners entering the industry were self-managed, with little access to the information, mentor support and networks necessary to inform their decision making and progress their careers. Country was much more of a niche genre then.

And so the organisation developed a plan.

★ **TO CREATE A SKILLS DEVELOPMENT AND CAREER PLANNING PROGRAM TO ASSIST THEIR ARTISTS TAKING THOSE FIRST STEPS.**

In 1997, it aligned with TAFE New England to establish the College of Country Music – as it was first named.

It would be an intensive, two-week residential course held prior to our industry's major gathering – the annual Tamworth Country Music Festival.

In those early days, it was very much a case of trial and error in terms of the course content. But one thing was clear.

★ **THE SONGS AND STORYTELLING THAT HAVE ALWAYS BEEN CENTRAL TO COUNTRY MUSIC, WOULD BE AT THE HEART OF THE CURRICULUM.**

The 25-30 students attending each Junior and Senior program – with the help of group leaders/tutors drawn from our most experienced practitioners, would create new, original works which they would rehearse in three groups and perform at a final Graduation Concert. Students in a separate instrumental stream would form the backing band. As well as working in their groups, all students attend masterclasses/workshops where they receive instruction in the craft of songwriting, music theory, vocal and instrumental skills and a range of business/career presentations to enable participants to better-plan their future in the genre. Each year a number of industry experts and our most prominent artists and songwriters attended the program to share their skills, knowledge and insights.

Based on the success of the Senior program, in 2002 it was decided to establish a Junior College (Camerata) for those under 18, in recognition of the fact that so many country artists start their career journey in clubs and talent quests at a young age.

We were also aware that many of them were being guided by parents/carers/relatives who themselves often had little experience or knowledge of the industry.

So, as part of the Junior program, a dedicated 'parent' course was developed for the adults who accompany each young participant.

Although the Academy programs are only two weeks (Seniors) and 10 days (juniors) long, the 10-hour days are an intense and immersive experience requiring commitment and dedication to the team-building ethos central to the process.

There is no doubt they act as a catalyst, inspiring participants to further study, skills development and career goal setting.

★ **THE PROGRAMS CREATE A SIGNIFICANT PEER NETWORK ON WHICH EACH YEAR'S GRADUATE COHORT CONTINUES TO DRAW FOR SUPPORT, ADVICE AND COLLABORATION AS THEY PROGRESS THEIR PROFESSIONAL CAREERS.**

This is particularly so for those who have graduated from the Junior to Senior Academy.

Many of the graduates – particularly those from regional, rural and remote Australia, have not previously met. They often talk about 'finding their tribe' and continue to collaborate and support each other long after Academy.

Each year's graduate network also includes the established industry writers, performers and business people who continue to mentor, interact and collaborate with each student intake. Sometimes for years.



Fanny Lumsden  
Nell Donovan

## SUCCESS STORIES

★ SINCE THE ACADEMY WAS ESTABLISHED, THE STUDENTS – SOME WITH LITTLE OR NO PREVIOUS WRITING EXPERIENCE, HAVE CREATED AT LEAST **2,000 ORIGINAL SONGS**, MANY OF WHICH HAVE SUBSEQUENTLY BEEN RECORDED AND RELEASED.

The Academy alumni includes many of today's established artists and rising stars who began their professional journey at Academy - Sara Storer, Brooke McClymont and Adam Eckersley, The McClymonts, James Johnston, Kaylee Bell, Max Jackson, Gretta Ziller, Gabi Louise, Liam Kennedy-Clark, Ashleigh Dallas, Kristy Cox, Sarah Buckley, Kylie Sackley, Wade Forster, Travis Collins, Lyn Bowtell and Amber Lawrence among them.

## A GOLDEN RECORD

Each year, the Country Music Awards of Australia (the Golden Guitars) attracts 600+ entries in some 15 categories.

The Top 5 finalists in each category are announced in November, and winners of these prestigious, peer-voted trophies are celebrated at the marquee Awards event as the climax to Australia's largest music event.

★ SINCE 2014, THERE HAVE BEEN **900 FINALISTS** ACROSS THE GOLDEN GUITAR CATEGORIES. **39% OF THEM HAVE GRADUATED FROM THE ACADEMY.**

Academy graduates have enjoyed notable success.

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## ACADEMY GOLDEN GUITAR FINALIST 2014-2024

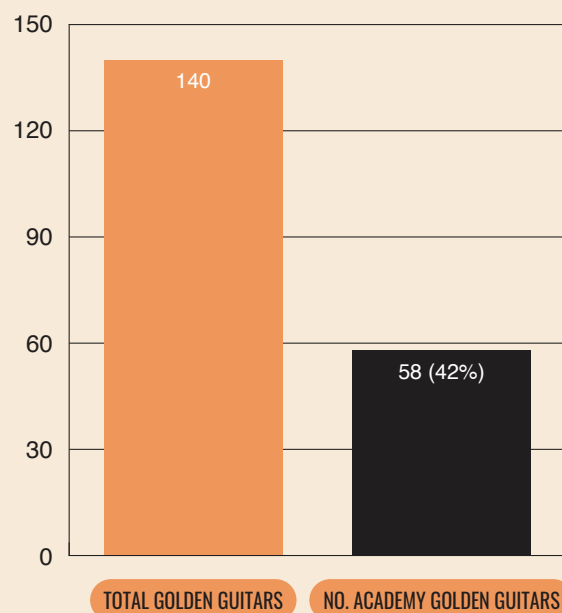


Graduates have enjoyed success in all peer-voted categories including – Album Of The Year, Song of the Year, Male and Female Artist of the Year, Single of the Year, Instrumental of the Year, Bush Ballad of the Year, Heritage Song of the Year, Vocal Collaboration of the Year, Video of the Year.

★ **IN THE LAST TWO YEARS, GRADUATES HAVE BEEN AWARDED 57% OF THE AVAILABLE GOLDEN GUITARS.**

The annual Tamworth Festival also hosts Star Maker – our industry's most important talent search event.

## GOLDEN GUITARS AWARDED 2014-2024



## ACADEMY GOLDEN GUITAR WINNERS 2014-2024



## STAR MAKER

Established in 1979, it was developed specifically to assist emerging artists to progress to a professional career. It remains Australia's premier talent search contest, with its most notable winner being international superstar Keith Urban in 1990. Other topline artists to be crowned over the years include Beccy Cole, James Blundell, Kaylee Bell, Lee Kernaghan, Gina Jeffreys, Travis Collins, Max Jackson, Brad Cox and many more.

Each year, Academy graduates feature prominently in the Top Ten who battle for the annual title at the Tamworth Country Music Festival.

The Academy (then College) enjoyed success in its first year (1997) when new graduate Lyn Bowtell was named the winner.

In 2025, recent Senior Academy graduate Felicity Kircher was crowned the new Star Maker, succeeding fellow-graduate Wade Forster, who took over from Gamilaraay woman and graduate Loren Ryan who followed Max Jackson, another ex-graduate.

★ **18 OF THE LAST 24 STAR MAKER WINNERS HAVE GRADUATED FROM THE ACADEMY PROGRAMS.**

★ **SINCE 2013, GRADUATES HAVE FILLED 75% OF THE ANNUAL TOP TEN GRAND FINALISTS AND HAVE WON ON 10 OF THOSE 12 OCCASIONS.**

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## THE ACADEMY – A CAREER PATHWAY

Although winning awards is important and we take great pride in the accolades bestowed on our graduates over the years, our primary focus has always been on providing the inspiration, information and networking opportunities to help aspiring artists take the first steps to a sustainable career.

We would never claim all the credit, but we know from our yearly feedback, just how inspiring it is for graduates to find like-minded souls who share their passion and commitment.

The numbers speak for themselves.

Of those qualifying by year of graduation –

★ **33% OF ALL SENIOR ACADEMY GRADUATES HAVE ESTABLISHED VIABLE CAREERS OF AT LEAST 10 YEARS IN COUNTRY MUSIC.**

★ **27% HAVE ENJOYED 15 YEAR CAREERS.**

★ **30% HAVE BEEN CONSISTENTLY PERFORMING AND RECORDING FOR 25 YEARS.**

One of the most notable features of the Academy program and a key to its success, is the number of ex-graduates who return regularly to act as group leaders/tutors, guest presenters, interns, and guest songwriters.

2003 graduate Amber Lawrence has been our business and career planning mentor for many years and Lyn Bowtell, our first Star Maker winner, has been the Director of the Junior and Senior programs for the last 6 years. Ashleigh Dallas, Beccy Cole, Melody Moko, Mickey Pye and Liam Kennedy-Clark have all been group leaders. Many others return regularly as guest presenters and songwriters to share their stories and skills with students attending Junior and Senior Academy programs.



Kaylee Bell  
Ruby Boland

## THE NASHVILLE CONNECTION

In any one year, a large number of Australian country artists travel to 'Music City USA', the widely acknowledged global songwriting 'capital' for our genre.

★ **THEIR FOCUS IS MOSTLY ON SONGWRITING COLLABORATIONS AND THEY ARE ABLE TO CALL ON THE ADVICE AND ACCESS THE NETWORKS OF THE 100+ EX-PATS WHO LIVE IN NASHVILLE AT ANY ONE TIME.**

Several years ago, Golden Guitar winner (and Academy graduate) Mark O'Shea joined the board of non-profit Sister Cities of Nashville. Tamworth and Nashville had officially partnered in 2013, so negotiations began re a cultural exchange.

For the last two years, courtesy of funding from Sound NSW, a Senior Academy graduate has been selected to spend three weeks in Nashville, writing, recording and networking. They are hosted on their visit by Sister Cities.

In return, SNC has sent us an emerging singer/songwriter to attend Senior Academy and then perform during the Tamworth festival. They are hosted by Tamworth Regional Council.

★ **THE EXCHANGE HAS BEEN A GREAT SUCCESS AND WE ARE GRATEFUL TO LONG-TIME ACADEMY SUPPORTER MATON AND THE NSW GOVERNMENT THROUGH SOUND NSW FOR SUPPORTING THE EXCHANGE.**

There is simply nothing like the Academy of Country Music anywhere in the world!

**COUNTRY.COM.AU**



**James Johnston**  
Gympie Music Muster

# REFERENCES

MUCH OF THE DATA INCLUDED IN THIS REPORT HAS BEEN SOURCED FROM INFORMATION DIRECTLY SHARED WITH US BY NUMEROUS INDIVIDUALS AND ORGANISATIONS, AND 1,500+ ARTIST AND ATTENDEE SURVEYS. THE HUNDREDS OF WEBSITES AND SOCIAL MEDIA PLATFORMS WE HAVE ACCESSED, HAVE BEEN SUPPLEMENTED BY NUMEROUS BLOGS AND INDUSTRY COMMENTARIES. THERE ARE TOO MANY TO DOCUMENT INDIVIDUALLY.

However, a number of major reports have provided specific data and commentary –

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THANKS TO ALL THOSE  
WHO PARTICIPATED IN THE  
VARIOUS COUNTRY MUSIC  
CENSUS SURVEYS AND  
SHARED THEIR INFORMATION,  
INSIGHTS AND OPINIONS.

ANY OMISSIONS, OVERSIGHTS  
OR ERRORS ARE SOLELY THE  
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