



COUNTRY MUSIC ASSOCIATION OF AUSTRALIA

VALUING AUSTRALIAN COUNTRY MUSIC 2025

EXECUTIVE SUMMARY



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.**



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 2ND 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.

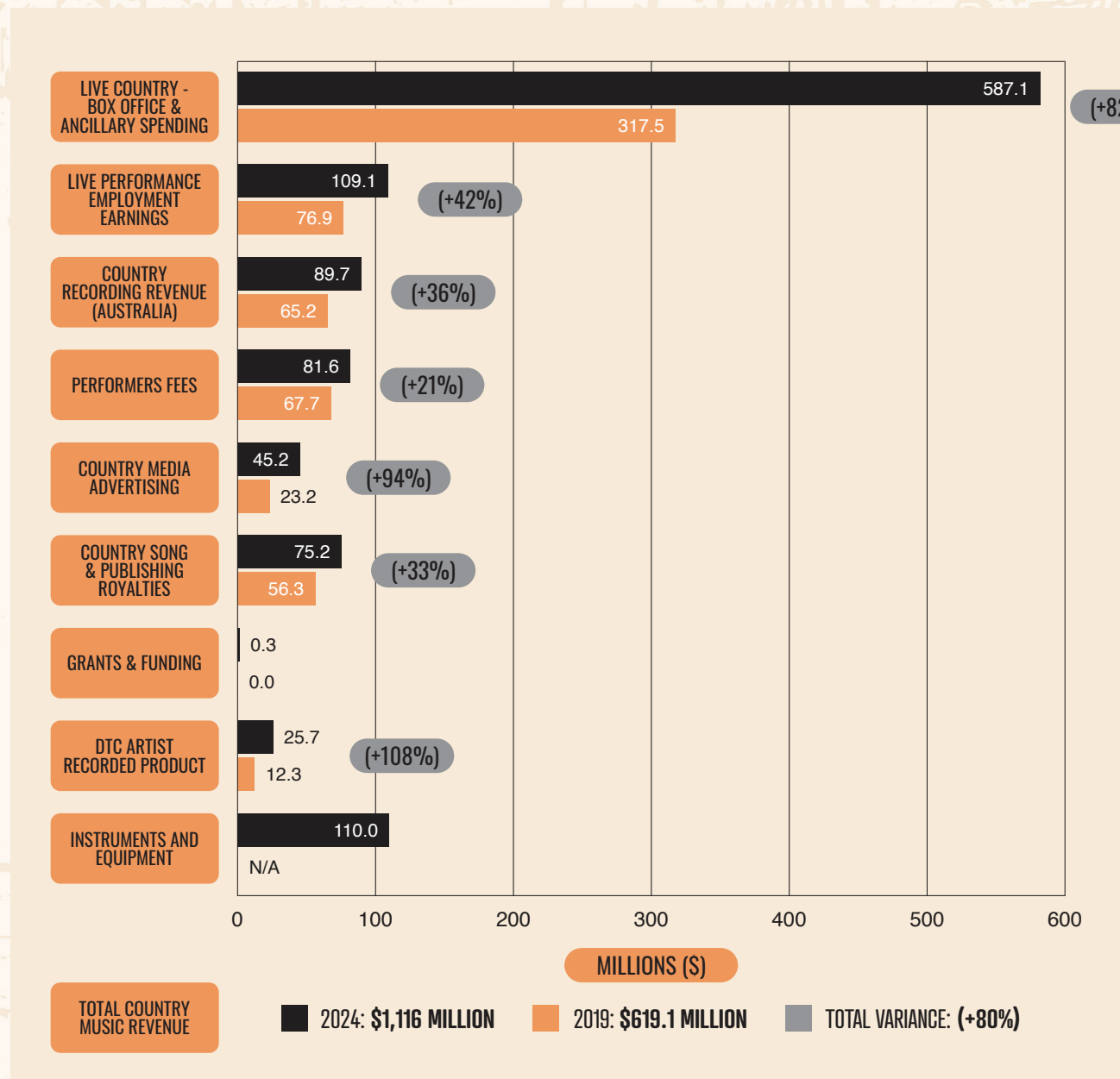
This is especially so, when we compare these findings to those we reported in 2019.

★ **IN THE 2024/2025 FINANCIAL YEAR, COUNTRY MUSIC GENERATED REVENUE OF \$AUD 1.11 BILLION.**

★ **THIS REPRESENTS A 79% 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 531,000 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.

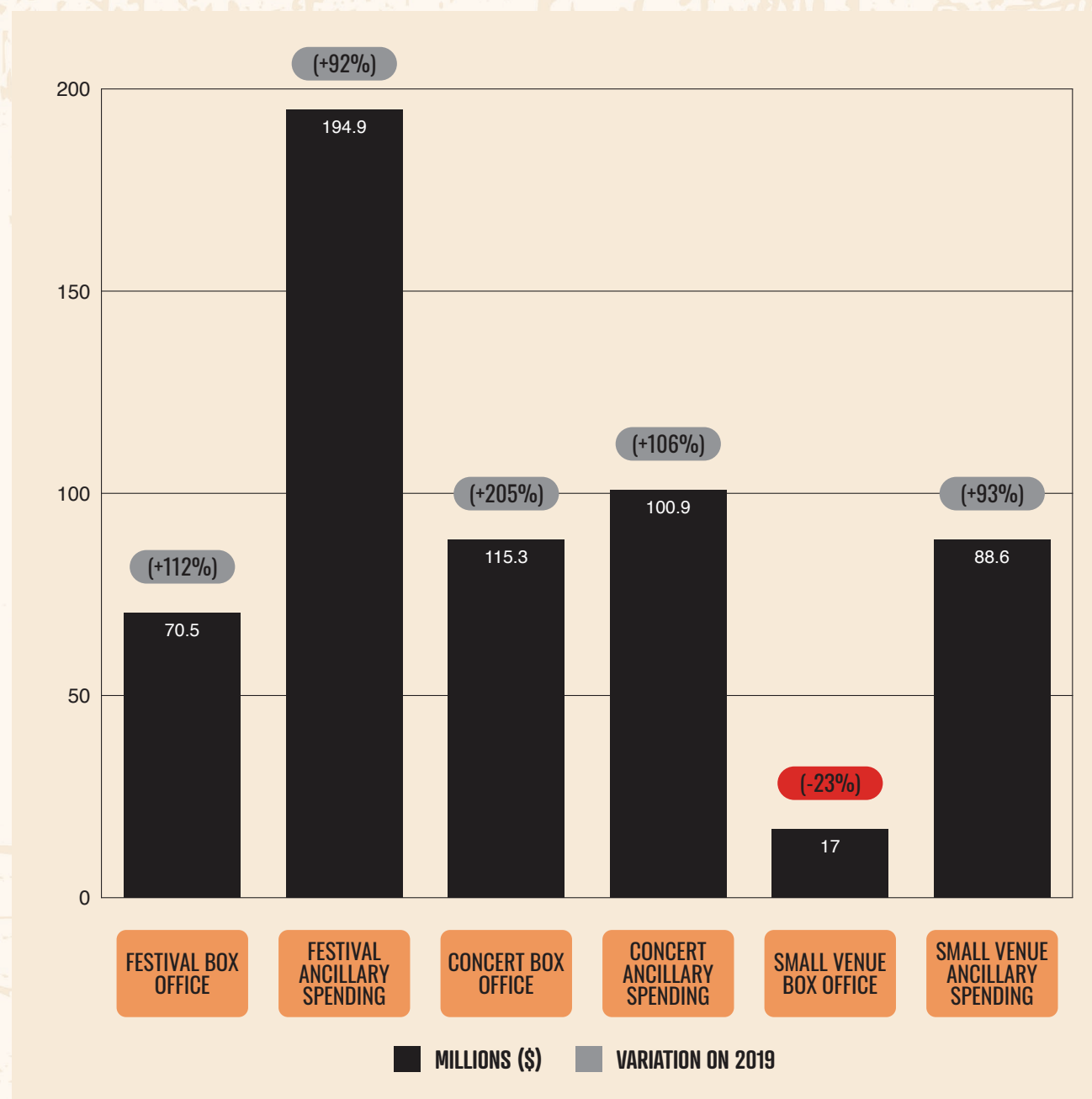
Revenue from box office and patron spending at country music festivals and concerts increased significantly, while small venues (hotels, clubs and bars) recorded a box office decline on 2019 figures, but an increase in patron spending.

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'.

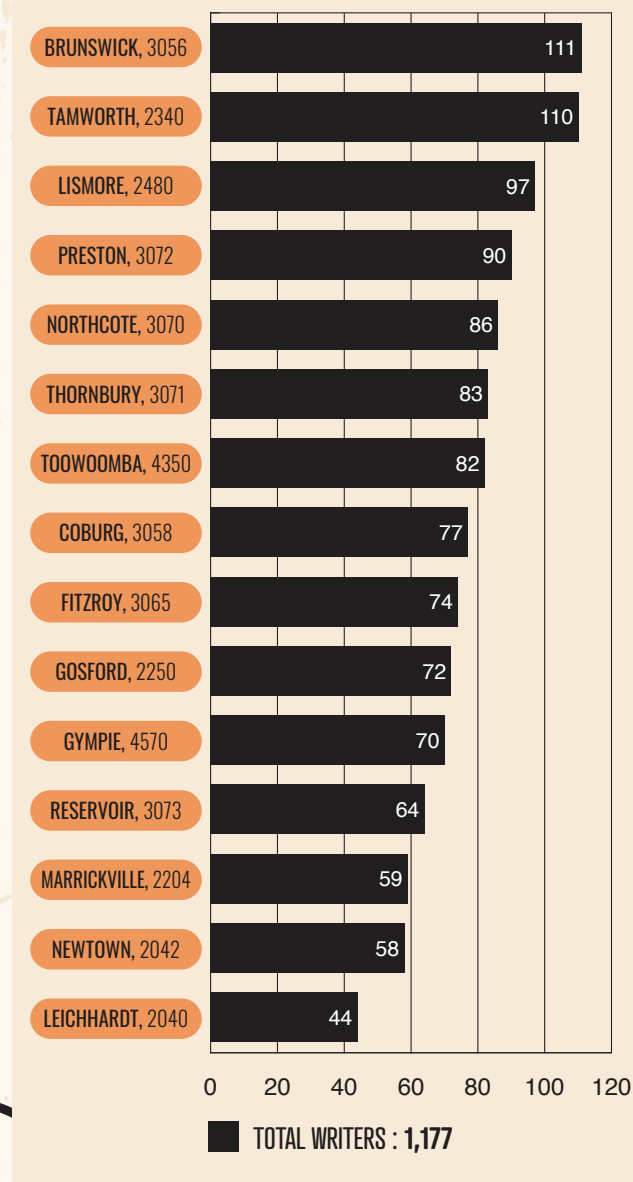
★ **COUNTRY WRITERS AND PUBLISHERS EARNED AN ESTIMATED \$75.2 MILLION. AN INCREASE OF 33% ON 2019.**

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.

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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.**

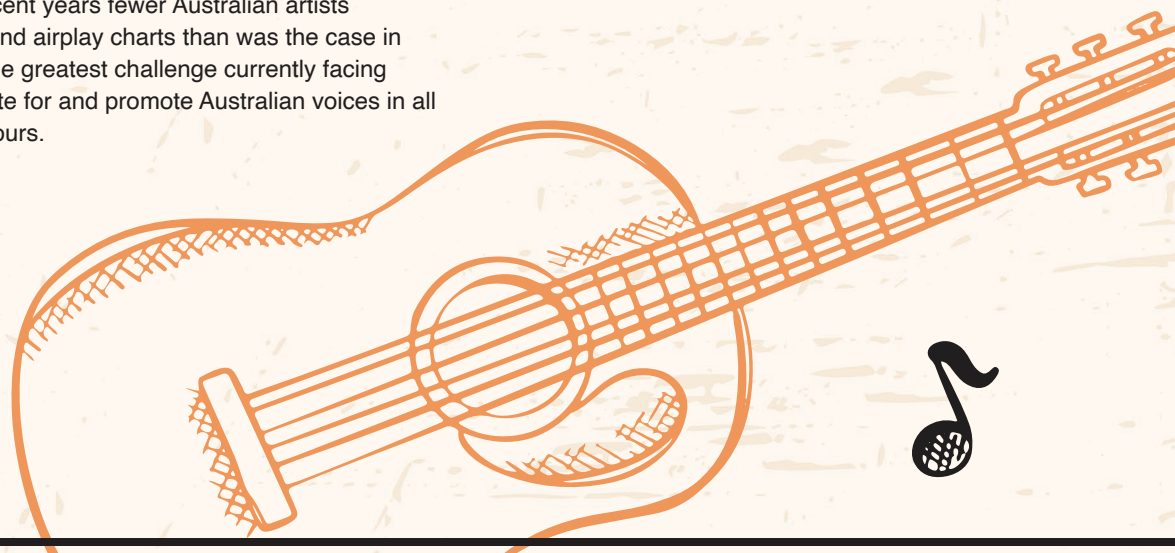
The small venue sector will also be a focus of our attention as owners continue to grapple with a range of challenges including rising operational costs.

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.

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

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

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
RESPONSIBILITY OF THE AUTHOR.

This document, the Executive Summary and the Full Report
are available for download from www.country.com.au

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