



QUEENSLAND 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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Groundwater Festival

EXECUTIVE SUMMARY

THE RISE AND RISE OF COUNTRY MUSIC

As detailed in our recently released 'Valuing Australian Country Music 2025' report, 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 fans, recent genre-bending collaborations featuring stars from pop, rock, hip-hop and rap have introduced the music to a new – and predominantly younger, audience.

Gen Z is embracing country in never before seen numbers.

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 (Topsy)' 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 RECENTLY CONFIRMED AUSTRALIA AS **THE WORLD'S THIRD-LARGEST AND FASTEST-GROWING COUNTRY MUSIC MARKET.**

★ SIGNIFICANTLY, SINCE 2023, COUNTRY MUSIC STREAMS HAVE **INCREASE BY 73% IN AUSTRALIA** AND IN 2024, OUR MARKET RANKED **4TH GLOBALLY FOR FIRST-TIME COUNTRY LISTENERS.**

★ 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.

Against this backdrop of market success, media exposure and the growing interest in the genre, it was a perfect time to conduct the Country Music Census 2025 project which produced the data for our major report.

★ 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 revenue, attracted 3.23 million fans and created over 2,000 Full Time Equivalent jobs for event and venue staff.

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.

★ **THE STATE-BASED ANALYSIS WHICH FOLLOWS IS BASED ON DATA COLLECTED FOR OUR FULL REPORT, AND CONCENTRATES ON OUR THREE MOST POPULOUS STATES WHICH ARE THE KEY DRIVERS IN TERMS OF COUNTRY MUSIC ACTIVITY, BOX OFFICE REVENUE, ATTENDEE SPENDING AND JOB CREATION.**

Given the national scope and focus of the research it has not always been possible to break down data on a state or territory basis.

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.

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

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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 music fans having access to over 200 million unique tracks, Luminate reports that in 2024, 87% of tracks received less than 1,000 streams per year, and only 5% of Spotify artists registered 1,000 monthly listeners.

We are hearing less Australian voices and stories on media outlets.

Chart analysis confirms that as a percentage, recordings by Australian artists are declining in sales and airplay. In the last twelve months fewer Australian artists feature in sales and airplay charts than was the case in 2018.

Analyst Duetti, analysed the 10,000 most streamed songs in Australia in 2024. Only 9.2% of them were by Australian artists. As opposed to 61% from US artists.

It 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 seven months of hard 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.

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, APRA AMCOS, Frontier Touring, Ticketek, Moshitix and Ticketmaster, Commercial Radio and Audio, Radio Monitors, Australian Recording Industry of Australia, AIR, KIX Country, iHeart Country, ABC Country, PPCA, Community Broadcasting Association of Australia, Australian Music Industry Network, Capital News, The Music Network, Creative Australia, CountryTown, Capital News/TCMF, Music Australia, Tamworth Regional Council, Tourism Research Australia, Sunburnt Country 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 from the International Federation of Phonographic Industries, Luminate, Billboard, Edison, Duetti, Music Business Worldwide, Medium, MiDiA, Goldman Sachs, Nielsen, Deloitte and Chartmetric.

As was the case in 2018, we have incorporated responses from hundreds 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.

LIMITATIONS

There were a number of metrics that we reported on a national basis in our major research where we did not have access to data that would allow a detailed state/territory breakdown. These included recorded music sales and publishing revenue and airplay and chart analysis.

The national overview is available in the full '*Valuing Australian Country Music 2025*' report available under the 'News' tab at the Country Music Association of Australia's website – [HERE](#)

The importance of this genre update and this state-based analysis 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.**

DOBE NEWTON

Project Manager
August, 2025

INTRODUCTION

On the basis of all available data, there is no doubt that country music in Queensland reflects the recent unprecedented global and national domestic surge in popularity and consumption.

Revenue, attendance and spending associated with attendance at major country music concerts and festivals in 2024 reached record levels, easily surpassing those recorded in pre-pandemic years.

Likewise, the engagement of country fans through the dominant audio-on-demand streaming services has driven consumption, especially among a new and younger audience.

The extent of the overall sector growth is underlined by some of the key findings recorded in the CMAA's 'Valuing Australian Country Music 2025' report released in July, 2025 –



Total industry revenue for Financial Year 2024/25 was \$1.11 billion, up 79% from the \$619 million recorded in 2019.



Live performance revenue was \$560 million, representing 51% of the industry's total and a 93% increase on 2019 figures.



137 dedicated country music festivals drew 684,000 patrons, while 49 major concerts, including Luke Combs' six sold-out stadium shows, attracted 490,000 fans.



16,000+ gigs at 542 small venues reached 1.87 million patrons. Although venue box office revenue declined by 23%, patron spending increased by 93% on the \$88 million reported in 2019.



Live Nation reported a 4.5-fold increase year-on-year in country shows booked in Australia.



Country music live performances created 2,086 Full Time Equivalent jobs.



Recorded music revenue was \$89.7 million, including \$25.7 million in direct-to-fan sales – a 37% increase on 2019.



Country streaming on Australia's Spotify platform has increased by 115% per cent in the last three years, with Australia confirmed as the third-largest and fastest-growing country market globally by Spotify AUNZ.



According to Spotify, Australia has the world's highest percentage (74%) of new country listeners.



92% of country streams come from metro areas with Gen Z Australians recording the world's second highest streaming rate at 22% of subscribers.



Songwriting participation rose, with 16% of APRA writers identifying as 'country', up from 11% in 2019. Melbourne continues to be Australia's country writing 'capital'.



Songwriting and publishing revenue was \$75.2 million, up 33% from 2019.



Graduates from the CMAA's unique Academy of Country Music programs have won 42% of the Golden Guitars awarded between 2014 and 2024, supplied 75% of the Star Maker Top Ten since 2014 and been awarded the title on 18 of the last 24 occasions.

The information which follows, concentrates on the live performance sector - the genre's most important revenue generator, visitation driver and job creator.

LIVE PERFORMANCE

Australian artists – in country, as in all other genres, rely to a great extent on the earnings generated by their live performances. Likewise, these performances at concert venues, on festival stages and at thousands of gigs in the nation's pubs, clubs and bars, provide the basis for revenue generation for organisers and operators and work opportunities for those directly involved in the presentations and the supply-chain of businesses underpinning them.

What follows is a detailed analysis which draws on our expertise in conducting multiple music 'census' projects, on reported and publicly available data, survey responses from artists and fans and information shared directly with us by a range of organisations, businesses and individuals involved in presenting country music in 2024/2025.

LIVE PERFORMANCE AUSTRALIA

In documenting concert and festival presentations we begin, as we have always done, with the reporting by Live Performance Australia, the organisation which represents a range of event organisers and presenters and venue operators in the performing arts. It has, for twenty years, presented a range of performing arts sector data via its consultants (Ernst & Young) in an annual *'Ticket Attendance and Revenue Survey'* report.

The data concentrates on 'major' events – basically seated concerts and festival events in theatres, arenas, stadiums and temporary festival sites.

The major ticket agencies – Ticketek, Moshtix, TicketMaster provide data which includes some larger pub and club venues, but these represent a small percentage of the reporting. So we are confident that double-counting is minimal.

The consultants also report - as they regularly do, that activity in the Contemporary Music category is traditionally under-reported.

So, this historic data has provided, for many years, a valuable overview to help chart the impact of music concerts and festivals across contemporary music genres.



Beccy Cole
Gympie Music Muster

LPA CONTEMPORARY MUSIC 2023

After reporting that revenue and attendance in 2022 returned to pre-pandemic levels, the 'Ticket and Revenue Survey' report for the 2023 calendar year (the latest LPA data available), confirmed the highest ticket revenue and attendance figures ever recorded.

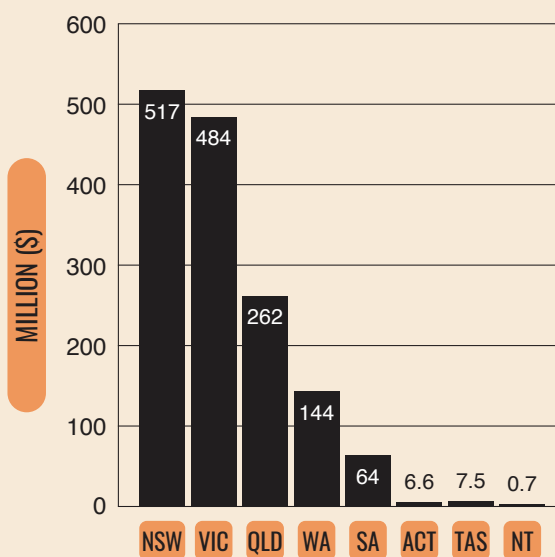
★ **ACROSS THE PERFORMING ARTS, REVENUE INCREASED TO \$3.1 BILLION, A 56% INCREASE ON 2022 AND ATTENDANCE GREW BY 24% TO 30 MILLION.**

LPA CONCERTS 2023

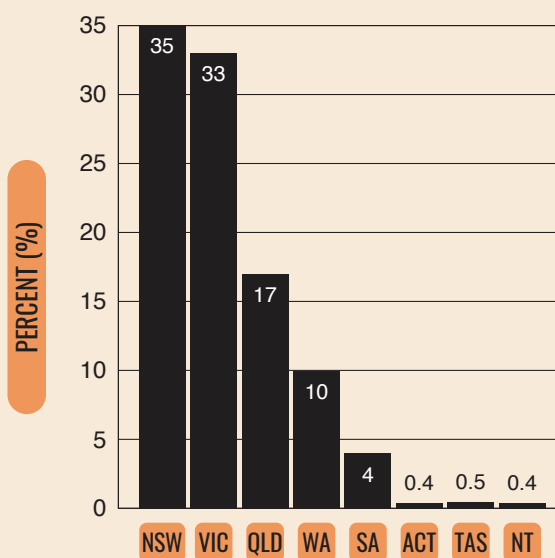
Contemporary music concerts were the dominant contributor, generating 47.4% of total live performance revenue (\$1.48 billion) and attracting 40% of all patrons (12 million).

★ **REVENUE INCREASED YEAR-ON-YEAR BY 110% ON 2022 AND ATTENDANCE BY 38%.**

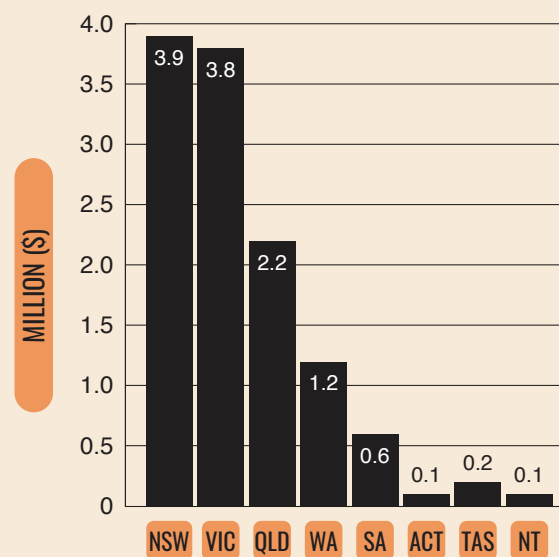
2023 REVENUE



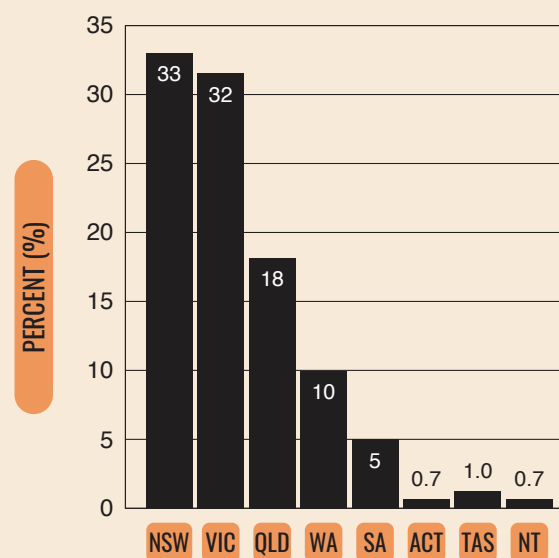
MARKET SHARE



2023 ATTENDANCE



MARKET SHARE

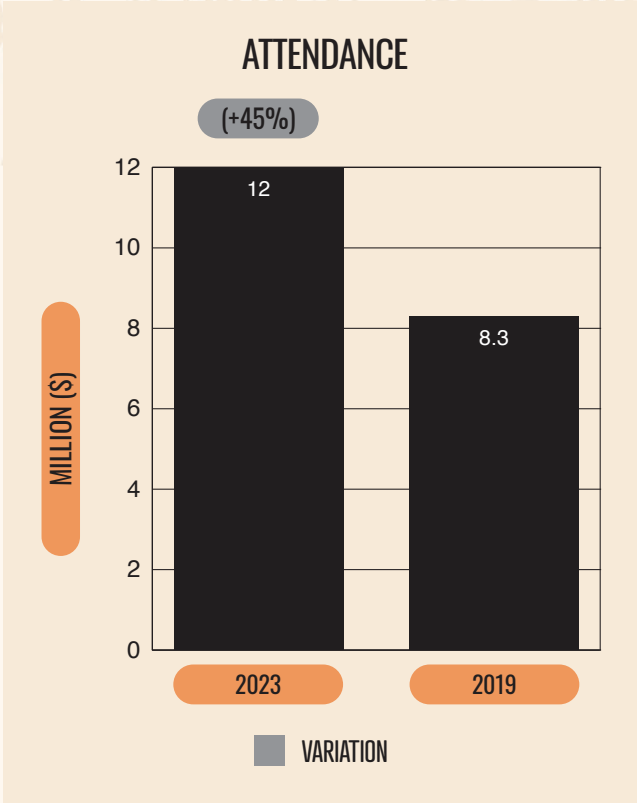
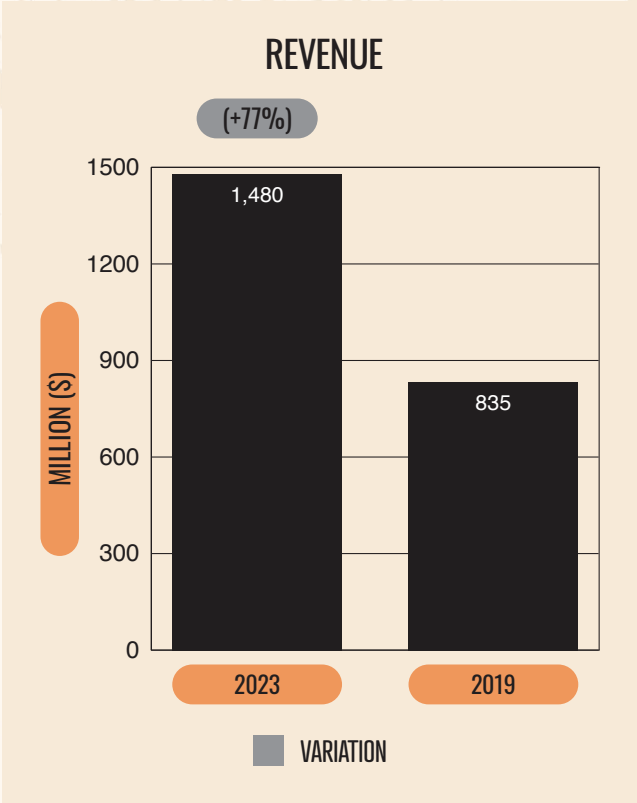


In 2019, the concert revenue figure was \$835 million and attendance was 8.3 million.

These results, as noted by LPA, were largely driven by a return to full-scale Australian tours by international headliners including Ed Sheeran, Harry Styles, The Red Hot Chilli Peppers, Coldplay, Paul McCartney and Elton John, and by increased ticket prices.

On average a major concert ticket was \$128 in 2023. It was \$100 in 2019.

★ SO, IN 2023, THE CONTEMPORARY CONCERT SECTOR HAD MORE THAN ‘RECOVERED’ FROM PRE-PANDEMIC LEVELS OF ACTIVITY WITH A 77% INCREASE IN REVENUE AND A 45% INCREASE IN ATTENDANCE SINCE 2019.

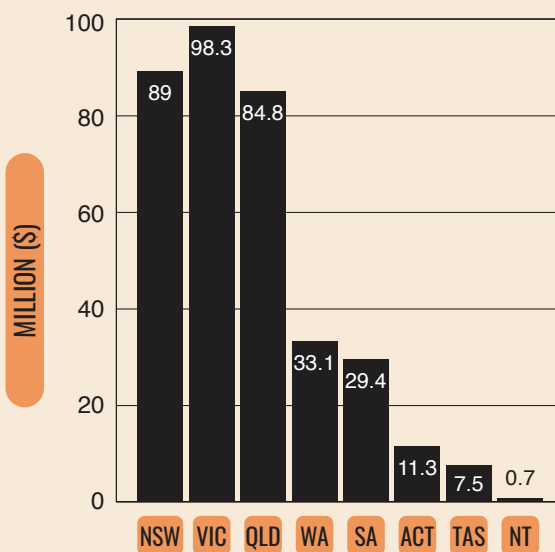


LPA CONTEMPORARY MUSIC FESTIVALS 2023

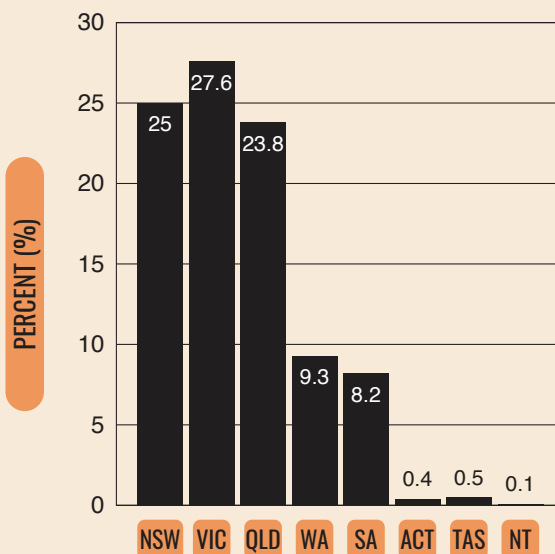
★ **RECORDED SIGNIFICANT GROWTH IN YEAR-ON-YEAR REVENUE (+ 51.5% TO \$355.1M) AND ATTENDANCE (+ 32.1% TO 2.0M) IN 2023. THESE RESULTS ARE THE HIGHEST EVER RECORDED FOR THIS CATEGORY.**

2023 marked an audience return to contemporary music festivals following the pandemic. Attendance increased alongside the average ticket price (by 12.4% to \$190.54), with both contributing to the significant growth in revenue. Between 2009 and 2023, revenue in the Festivals (Contemporary Music) category has increased by 542.4% and attendance has increased by 153.7% (partly due to the incremental inclusion of new data providers over time). Major festivals which contributed to the growth in revenue in 2023 were Beyond The Valley, Splendour in the Grass, CMC Rocks, Spilt Milk, Byron Bay Bluesfest and WOMADelaide.

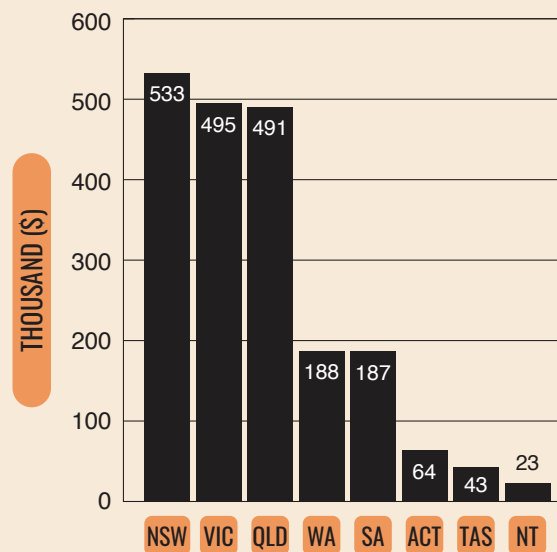
2023 REVENUE



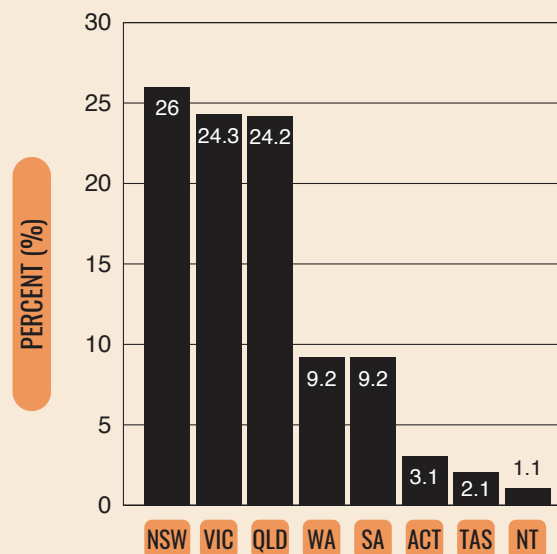
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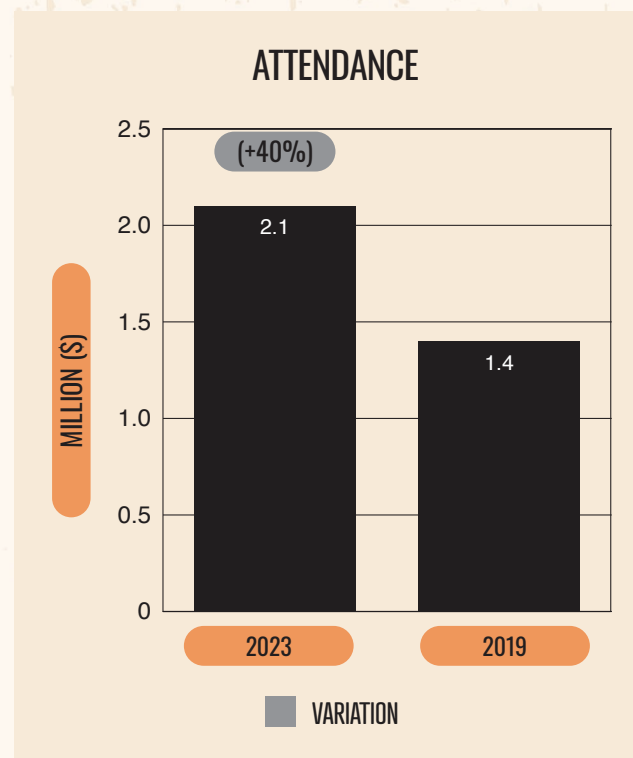
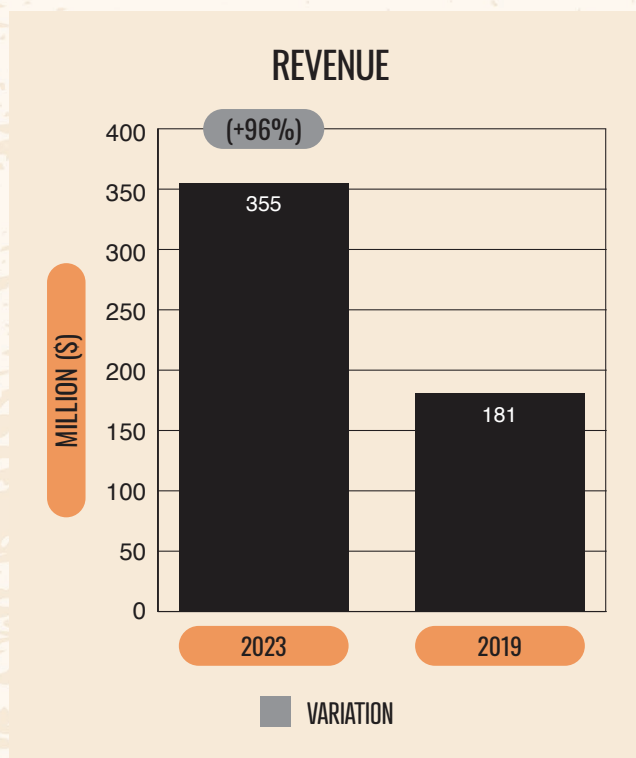
2023 ATTENDANCE



MARKET SHARE



★ AGAIN, THESE FIGURES CONFIRMED SIGNIFICANT **REVENUE AND ATTENDANCE GROWTH** SINCE WE REPORTED IN 2019.



LPA LIMITATIONS

In every iteration of the LPA reporting (since 2009), consultants Ernst & Young have cautioned that the reporting for contemporary music concerts and festivals under-reports revenue and attendance levels.

So, in refining our analysis, we stress that we have provided these figures for the purposes of overall context and in order to make direct comparison with the figures we reported in our *'Economic and Cultural Value of Australian Country Music 2018'* report released in 2019.

Although overall data is available for the individual states and territories, there is no breakdown on a genre basis.

We also note, that the LPA data only records revenue based on paid tickets through major ticketing agencies.

Whilst this captures the majority of large commercial concerts, there are many smaller events presented – primarily by local government authorities, which are community celebrations. While many do not generate box office revenue, there is considerable ancillary spending by attending patrons which is not captured.

The LPA data, in the main, does not record the hundreds of concerts which take place across a range of performing arts and cultural centres which do not sell tickets through the major agencies reporting to LPA.

For instance –

The majority of the hundreds of shows at the annual Tamworth Country Music Festival. Attended by an estimated 300,000 fans over its 10 days, are free entry, ranging from café and shopping centre gigs attended by dozens to major concerts in the park attended by thousands.

Likewise, the Groundwater Festival on the gold Coast has no ticketed shows but attracts an estimated 55,000+ fans.

And in Victoria, there are a number of multi-genre events which have a significant country programming element which is not captured by the LPA.

All that is by way of saying that in order to arrive at any meaningful state-based analysis, a great deal of 'deep diving' needs to take place. Particularly with regard to the many thousands of gigs which take place annually in hundreds of pubs, clubs and bars and are not captured at all in LPA data.

The following sections explain the methodology we employed to arrive at definitive state-based lists of major concerts and festivals, smaller concerts and festivals and gigs in small venues. The data we collected provided us with a credible basis to calculate revenue generation from box office, spending by patrons attending live performances and to document the creation of employment opportunities associated with those presentations.

★ **WITH REGARD TO FESTIVALS, NOT ONLY IS THERE NO LPA GENRE BREAKDOWN, BUT NO INCLUSION OF NON-TICKETED ACTIVITIES.**

THIS AFFECTS 'COUNTRY' IN OUR THREE BIGGEST STATE MARKETS.



CMC Rocks Crowd

MUSIC FESTIVALS 2024

In 2024, Creative Australia issued two significant 'Listening In' reports which documented the operation of contemporary music festivals in Australia in 2024.

Victoria and NSW dominated, with 149 recorded for each state.

The most popular genres were Electronic Dance Music (23% - 77% located in major cities); Rock/Indie (21% - 46% in major cities) and Country (19% - 83% in regional areas).

In summary –

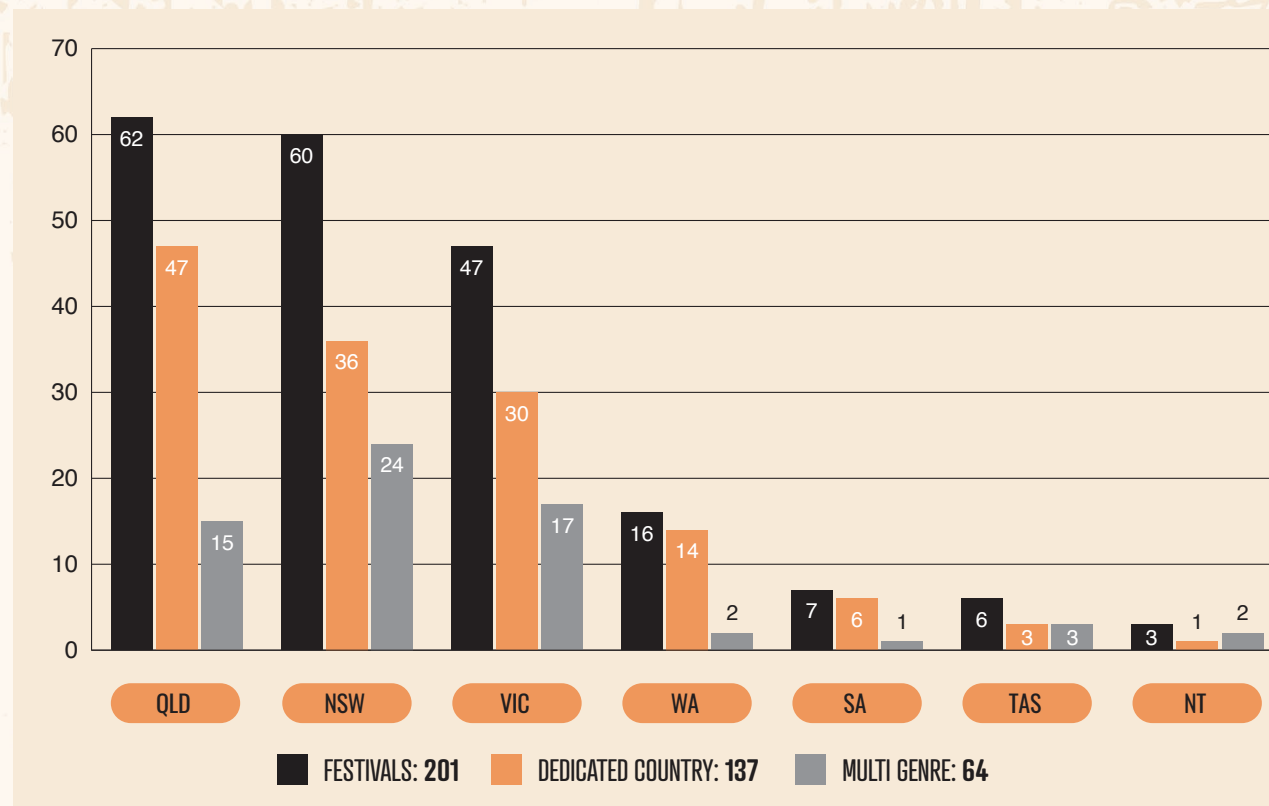
★ **50% WERE 1-DAY EVENTS, 33% 2-3 DAYS AND 6% 5+ DAYS.**

★ **50% WERE HELD IN MAJOR CITIES AND 33% IN INNER REGIONAL AREAS.**

★ **92% SOLD PAID TICKETS FOR THE ENTIRE EVENT, THE REMAINDER WERE FREE OR NON-TICKETED.**

Taking that festival list as a starting point, we cross-referenced with event licences issued by APRA, combined with information from a number of country-related websites and gig guides and information provided by agencies including the CMAA, Capital News, Country Music Bulletin and Queensland-based practitioners, to augment the list. This allowed us to add missing events to the Creative Australia list and remove a small number of events that did not take place that year.

In 2024, there were a total of 201 festivals across the states and territories that included country music programming.



Note:

Even though a number of the multi-genre events – eg. Woodford Folk Festival, Bluesfest, Port Fairy Folk Festival and a number of folk festivals, have a significant country programming element which continues to increase, there is no way to accurately allocate a share of box office revenue or patron spending, so they have not been included in calculations.

In calculating revenue and spending, we have analysed event websites, information from a variety of publicly available reports and commentaries. Ticket prices vary considerably and are dependent on the event duration.

In order to report conservatively we have allocated 10% of ticket sales to junior/youth sales (when offered) and a further 2% allow for FOC/complimentary tickets.

In calculating patron spending, feedback from 2,000 online attendee surveys has confirmed that on average, attendees spent an average of \$125 per day on food and beverage, \$64 per event on merchandise and \$80 on transport.

We have discounted the audience by 10% to allow for patrons who reported no on-site spending.

We believe that this guarantees our reporting is credible.

QUEENSLAND COUNTRY FESTIVALS 2024

IN TERMS OF SHEER NUMBERS, QUEENSLAND WITH 47 DEDICATED GENRE EVENTS, CAN RIGHTLY LAY CLAIM TO BEING COUNTRY MUSIC'S FESTIVAL ACTIVITY HUB.

PROFILE EVENTS

CMC ROCKS (QLD)

The CMC Rocks brand was established in 2008.

Since the initial event was established as 'CMC Rocks the Snowys' in Thredbo NSW, the festival moved to the Hunter Valley (Hope Estates, 2011) and in 2014 to its current home at Willowbank Raceway in Ipswich.

It has played host to international country icons such as Tim McGraw, Faith Hill, Alan Jackson, Taylor Swift, Lady Antebellum, Gary Allan, Rascal Flatts, Toby Keith, Jason Aldean, Florida Georgia Line, The Dixie Chicks, Darius Rucker, Luke Bryan, Lainey Wilson along with local stars including Lee Kernaghan, John Williamson, Troy Cassar-Daley, Adam Harvey, Adam Brand, Kasey Chambers, The McClymonts, Morgan Evans and more.

The event became Australia's first sold-out country music event in 2016 and has continued that record every year. The 2024 event sold out its 26,000 within days of going on sale, a rate only achieved by the iconic Splendour in The Grass.

It now proudly advertises itself as 'The Biggest International Country Music Festival in The Southern Hemisphere'.

It was initially the brainchild of Australian country music agent and promoter Rob Potts whose dream was to establish a major event presenting headlining US country acts with the cream of Australia's performers.

This was in line with his long-standing commitment to country as a global brand and, after many years on the Country Music Association (US) board and chairing their international committee, Potts was recognised in 2017 with the award of the CMA (US) Jo Walker Meador International Award to recognize his outstanding achievement in advocating and supporting Country Music's marketing development in territories outside the United States.

Following his untimely death in 2017, Rob's son Jeremy Dylan was appointed CEO of Rob Pott's Entertainment Edge and continues the partnership with Chugg Entertainment.



The exposure of the festival in America through word-of-mouth from artists, managers and agents, as well as various television specials and other media attention has made CMC Rocks the best known country and roots festival outside America. Most importantly, it has exposed Australia's huge pool of talented artists to the US industry and to growing audiences within Australia. CMC Rocks has played no small role in the growing Australian presence in Nashville, as more and more Aussies head there to show their talent.

As social media has increased in importance in terms of fan interaction and event promotion, so has the event's popularity. The CMC public Facebook page had 180,000 followers in 2024.

WAY OUT WEST FEST (QLD)

Was established in 2018 to coincide with the reopening of the Waltzing Matilda Centre in outback Winton.

The Centre was destroyed by fire in 2014, most notably the Banjo Paterson exhibition which celebrated the writing of the iconic lyric by the Australian poet during a stay at nearby Dagworth Station. It was first performed in 1895 at the North Gregory Hotel in Winton.

It is a 4-day camping festival with domestic and international country artists presented with rising pop, rock and indie stars and heritage acts.

Artists included - Jessica Mauboy, John Williamson, The Living End, Screaming Jets, Amber Lawrence, Travis Collins, The Bushwackers, The Wolfe Brothers, Kip Moore (USA), Lee Brice (USA), Sheppard, Busby Marou, Russell Morris, The Black Sorrows, and The Pierce Brothers.

The 4-day festival takes place across two main stages and involves 40+ artists. The 2018 event presented 36 artists across 2 stages over 4 days.

An adult/youth festival ticket costs \$439 and Junior ticket \$199. Single day tickets cost \$239 & \$119.

Multiple camping options are available.

Ipswich Council reports that 94% of patrons travel from outside the region, and estimates that the event annually injects \$14 million into the local economy.



GYMPIE MUSIC MUSTER (QLD)

One of Australian music's longest-running events, The Gympie Music Muster celebrated its 43rd year in 2024.

It is a four-day camping festival held in the picturesque Amamoor State Forest near Gympie.

In 2024, an estimated 50,000 attended and it was named Queensland Festival of the Year in the QMusic Awards.

Established by country music performers The Webb Brothers and the local Apex Club in 1982 as a community fund raiser, it remains unique as one of Australia's largest charity events.

All proceeds are distributed among community groups and charity partners who are centrally involved in helping to deliver the event.

The emphasis has always been on presenting the stars of Australian country music who regularly headline the festival. It has a major talent search element and an ever-popular, dedicated blues stage.

The 80 booked performers were joined by another 250 artists on the main amphitheatre stage and multiple venues around the site.

Organisers estimate that – 27% of the audience come from the Gympie region, 54% from other parts of Queensland and 20% from interstate.

Although there are a number of day-ticket attendees, it is predominantly a destination event, with approximately 50% of all attendees staying overnight in the Gympie region and in the extensive on-site camping areas.

The festival estimates that the 2024 Muster generated approximately 50,000 event-specific visitor nights.

A small, core management and marketing team is augmented by some 3,000 casual production and hospitality staff and general volunteers to deliver the event.

Adult 4-day tickets are \$540 and teen \$210. Limited 1-day tickets are available – Adult \$150, teen \$90. Tickets include camping in the general allocated areas.

Management estimates that the 2024 event generated fan spending of \$9.5 million in the Gympie region and an additional \$2.3 million in other communities visited by patrons on their way to or from the event.

FINAL ARTIST ANNOUNCEMENT IT'S LIVE!



FELICITY URQUHART & JOSH CUNNINGHAM **CASEY BARNES** **JOE CAMILLERI & THE BLACK SORROWS** **DRAGON**

THE WHITLAM'S BLACK STUMP • TORI FORSYTH
TAYLOR MOSS • CHAD MORGAN • MELANIE DYER
THE BUSHWACKERS • ALLAN CASWELL • NATALIE PEARSON

APPEARING WITH (IN ALPHABETICAL ORDER)

ALICE BENFER • THE BARLEYSHAKES • BIG SKY MOUNTAIN • BILLIE-JO PORTER
BRENDAN MCMAHON • BRIANA DINSDALE BAND • BRIANNAH GRACE
BUD ROKESKY • COL FINLEY • COURTNEY KEIL • CRAIG WAYNE BOYD (USA)
DARREN HANLON • DELSINKI & THE QUIET COACHMEN • FAVOURITE KID
FREIGHT TRAIN FOXES • GOOD WILL REMEDY • HANA & JESSIE-LEE'S BAD HABITS
THE HILLBILLY GOATS • THE INADEQUATES • JACK RAYMOND • JAKE WHITTAKER
JEREMY TURNER • KATELANN MAREE • LANCE FRIEND • LEE GRIFFIN
THE LYRICAL • MATT CORNELL • MIDWEST MOLLY • NATHAN MAY
PETE CULLEN & THE HURT • PETER CHAPMAN • THE ROCK N ROLL BOYS
RYAN GILES BAND • SMALL TOWN ROMANCE • SONS OF ATTICUS
STEVE GRAHAM • SUE RAY • TAMMY MOXON • TAUREAN THOMPSON
TENNESSEE LIGHTS • TOBIAS • THE WET WHISTLES
AND DEE JAYE BUX

**22-25 AUGUST 2024**
GYMPIE MUSIC MUSTER **MUSTER.COM.AU**

GROUNDWATER (QLD)

In 2018, the former Broadbeach Country Music Festival – sister event to Blues on Broadbeach, was re-branded as the Groundwater Country Music Festival, to reflect the reliance on water by First Nations people and farming communities across Australia.

It is unique among our genre's major events in being completely free.

Four major stages on the streets of the Gold Coast and multiple indoor venues present a range of veteran and emerging artists whose music is 'grounded in country and folk'.

In 2024, the three-day event featured 135+ performances.

With an audience estimated at 56,000 in 2024, it advertises itself as 'Australia's fastest growing country festival'.

Organisers estimate that the core management team of 8 full-time workers is augmented by 200+ casual production and contract staff, and numerous volunteers to deliver the event.

With no box office as such, it is obviously not part of our ticketed revenue calculations, but will be significant when we come to consider the ancillary patron spending associated with our major festival events.

It is estimated that this attendee spending in 2024 generated \$11 million.



QUEENSLAND COUNTRY FESTIVAL BOX OFFICE

In 2024, the 48 dedicated country music festivals we identified in the state attracted 235,000 fans.

Although the total is less than the 439,000 registered for NSW country festivals, we need to bear in mind that the latter total includes the estimated 300,000 who attend the annual Tamworth Country Music Festival.

In terms of ticketed Country festivals, Queensland hosts the genre's major revenue generators in CMC Rocks and Gympie.

Note:

Direct comparison with 2019 is not possible as our national report for that year did not include a state-based event breakdown.

But we do note that the total box office of \$54.5 million for major country music festivals in 2024 represented a 124% increase on the \$24.3 million reported in 2019.

Likewise, the 2024 total of \$15.7 million for small country festivals represented an overall 76% increase on the 2019 total.

★ WE ESTIMATE THAT BOX OFFICE REVENUE FROM MAJOR COUNTRY FESTIVALS IN 2024 WAS **\$31.6 MILLION**, AND **\$4.3 MILLION** FROM SMALL COUNTRY FESTIVALS.

ANCILLARY SPENDING

Our 2019 report and a number domestic and international studies consistently report that approximately 55% of patron spending at festival events involves on-site purchase of food and beverage, merchandise/retail and on the cost of transport to and from the event.

Given the regional/rural location of the majority of country music festivals plus the fact that a significant number of visitors attend from out-of-region, there is also significant spending on various forms of accommodation – camping, caravan parks, motel, short-stay .. etc.

These studies and our Country Music Census attendee survey responses confirmed that patrons attending major festival events in 2019 spent an average \$125 on food and beverage, \$64 on merchandise and \$80 on transport.

We have based our calculations on this item spending in order to err on the conservative side.

Our calculation includes spending by 55,000+ patrons attending the free Groundwater festival.

In considering multi-day events we have doubled the outlay on F&B, but not on merch and transport.

In calculating the ancillary income, we have made some important assumptions, which are in line with previous reporting.

- We have discounted the attendance by 10% to account for patrons who reported no significant on-site spending.
- We have calculated spending for the small percentage of junior ticket holders at 30% of the adult spend.
- In calculating the ancillary spend at the Tamworth Festival we have used a 4-day visitation window which is the average length of stay consistently reported in recent years in the event's comprehensive annual attendee survey.

★ PATRONS ATTENDING MAJOR COUNTRY MUSIC FESTIVALS IN 2024 SPENT AN ADDITIONAL **\$40.3 MILLION**. THOSE ATTENDING SMALLER COUNTRY FESTIVALS SPENT **\$17.6 MILLION**. THIS OVERALL TOTAL REPRESENTED A **70% INCREASE** ON THE TOTAL REPORTED IN 2019.



ADDITIONAL REVENUE GENERATION

ACCOMMODATION

As we have observed, the majority of the smaller festivals are regionally based and rely on a mix of accommodation options including camping, home stays, motels, hotels, short-stay and caravan parks.

Organisers of CMC estimate that 90+% of attendees are from outside the region and predominantly camp on-site as do those attending the Gympie Muster where ticket purchase includes basic camping. Groundwater, on the other hand, takes place in an urban environment.

Most of these events have provided estimates on the percentage of attendees who camp and we have information on the costs involved.

We are again mindful when analysing camping festivals that our reporting reflects the fact that camp sites (especially) are often utilised on a shared basis by family and/or friendship groups.

In 2019, we reported spending on various accommodation options generated an estimated \$4.2 million nationally.

★ **IN 2025, WE ESTIMATED \$7.3 MILLION IN SPENDING – A 74% INCREASE.**

However, we don't have detailed breakdowns, so we have not included this spending in our calculations.

SPENDING IN COMMUNITIES

Organisers report that many of the major and smaller festivals that we are reporting on are 'destination events' in regional and rural communities, driving visitation from patrons resident outside the event locale.

We know from our previous projects, and especially from the survey responses of festival attendees that there is considerable spending in communities that visitors pass though on the way to or from events.

Definitive information associated with this visitation is not available, but we can say with certainty that, based on data from Tourism Research Australia, day trips and overnight stays in all states have returned to pre-pandemic levels as has patron spending.

Various Local Government authorities estimate that these country music festivals inject tens of millions of dollars in additional spending into businesses in the communities that host them.



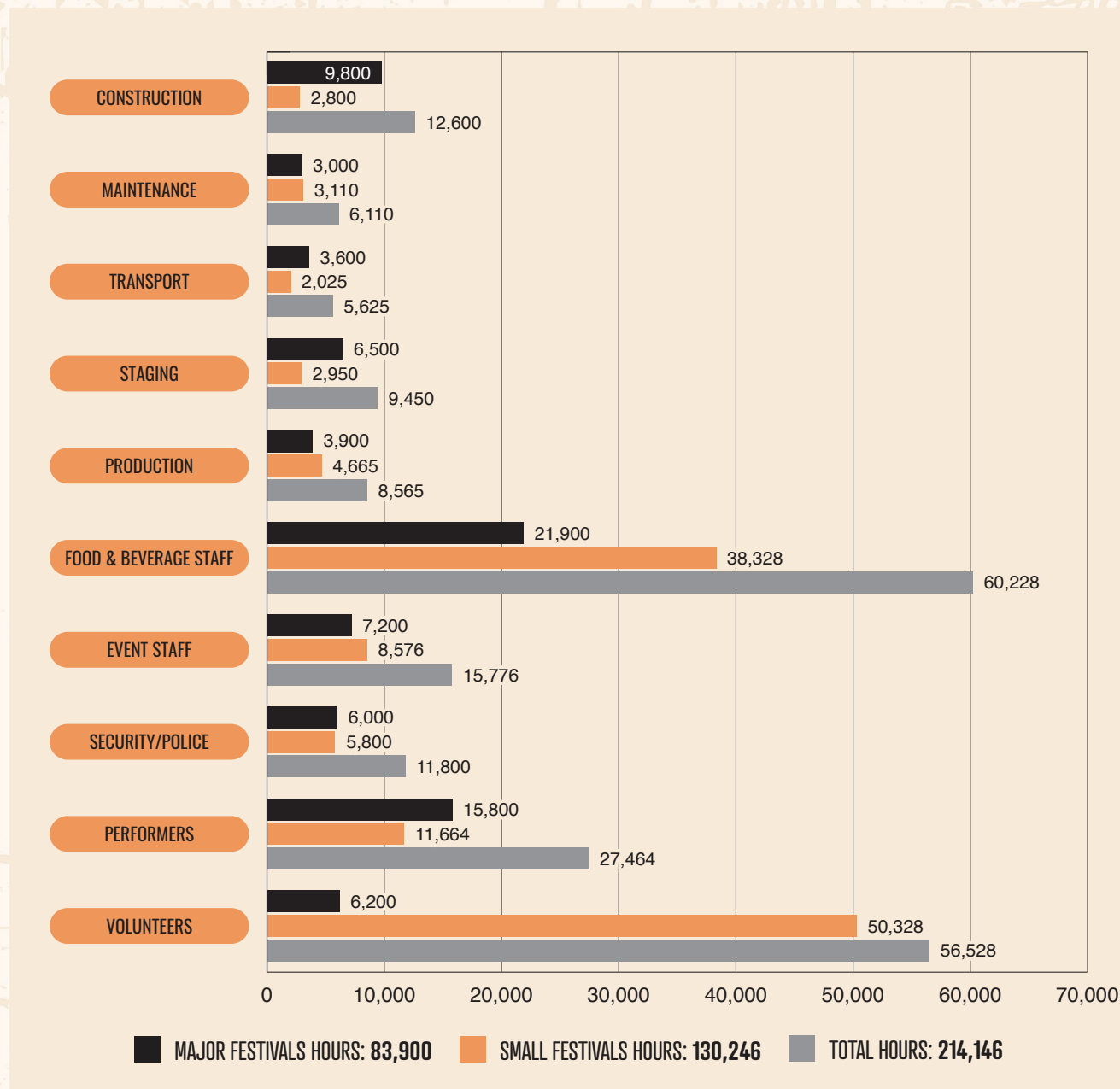
COUNTRY MUSIC FESTIVAL EMPLOYMENT

Major country music festivals in 2024 provided employment opportunities for 1,945 personnel. Small festivals provided 3,317.

Given the 'temporary' nature of the events, the vast majority of those are casual, shift-based opportunities.

As we have consistently done across decades of reporting, we have relied on the formula developed by the Australian Bureau of Statistics and utilised by the FairWork Ombudsman – 1,610 annual hours = 1 Full Time Equivalent job.

★ **QUEENSLAND COUNTRY MUSIC
FESTIVALS IN 2024 CREATED
133 FTE JOBS.**



QUEENSLAND COUNTRY MUSIC CONCERTS IN 2024

CONTEXT

As Live Performance Australia reported in its annual 'Revenue & Ticket Survey', contemporary music concerts were by far the dominant driver in terms of revenue generation and attendance across the performing arts.

They accounted for \$1.5 billion in revenue (58.7% of the performing arts total, and 12 million attendance (46.6%).

The influx of US country stars continued in 2024, with tours by perennial favourite Kip Moore (8 theatre and Arena shows), rising star Lainey Wilson (4 arena shows in Melbourne and Sydney) and Kane Brown (4 arena shows in Brisbane, Sydney, Melbourne and Perth).

They were joined by Hurray For The Riff Raff, Tyler Hubbard, Cooper Alan, Asleep At The Wheel, Mackenzie Porter, Tanner Adell, Josh Ross, Riley Green and Joshua Hedley.

Note 1:

A number of these artists performed at major festival events such as CMC Rocks, Ridin' Hearts, Deni Ute Muster and Bluesfest.

The revenue generated by these festival events has been calculated and reported separately in the Festivals Section and has not been double-counted in this section.

Note 2:

In February 2025, US superstar Luke Combs became the first country artist to headline and sell-out stadium concerts in Australia.

His six concerts – two each in Brisbane (Suncorp Stadium), Sydney (Accor Stadium) and Melbourne (Marvel Stadium) attracted an estimated 320,000+ fans.

February was a very busy country month with acclaimed Americana star Chris Stapleton touring Australia for the first time. His six arena shows (two each in Brisbane, Sydney and Melbourne), sold out in hours and attracted an estimated 100,000+ fans.



The Buckleys
Gympie Music Muster

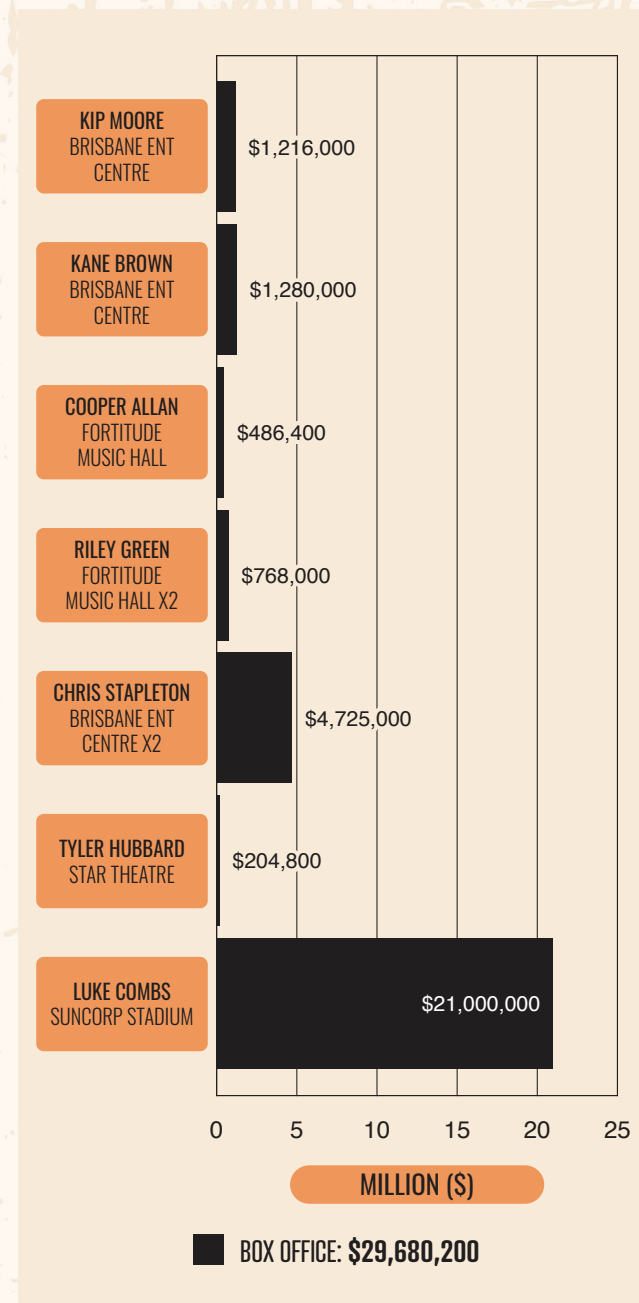
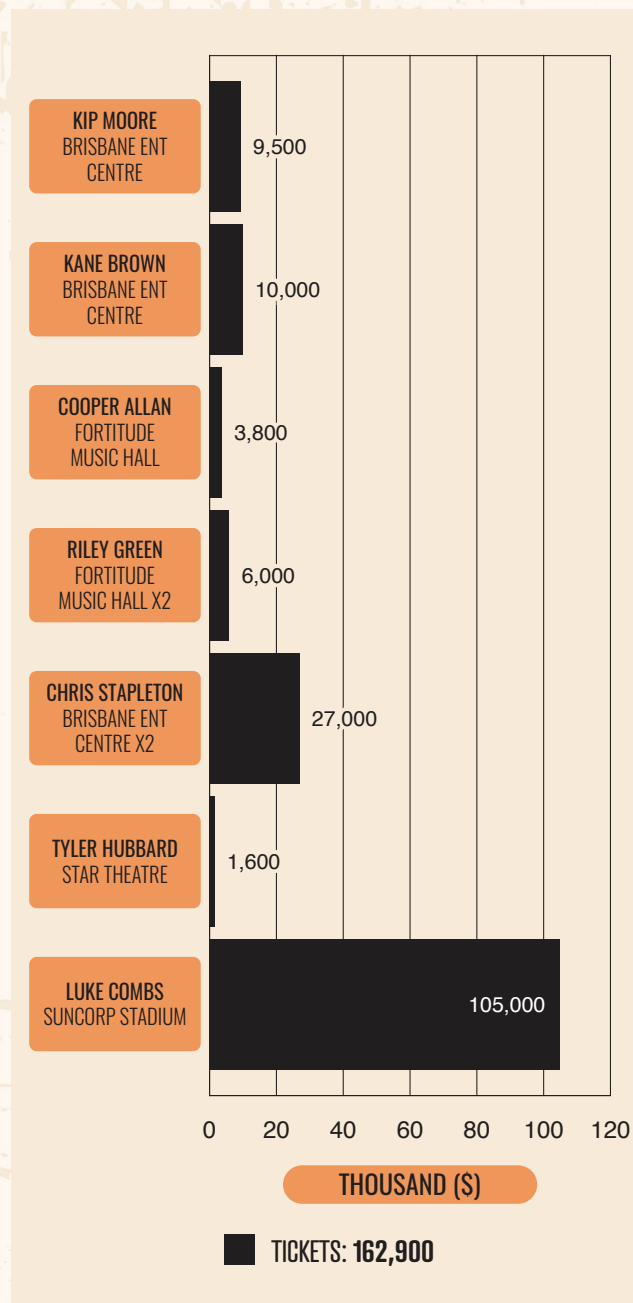
QUEENSLAND MAJOR CONCERT BOX OFFICE REVENUE

Our calculation is based on LPA reporting, plus information shared directly with us by a number of concert presenters and major ticketing agencies. Where we have not been able to directly access ticketing/attendance data for country concerts, we have erred on the side of caution.

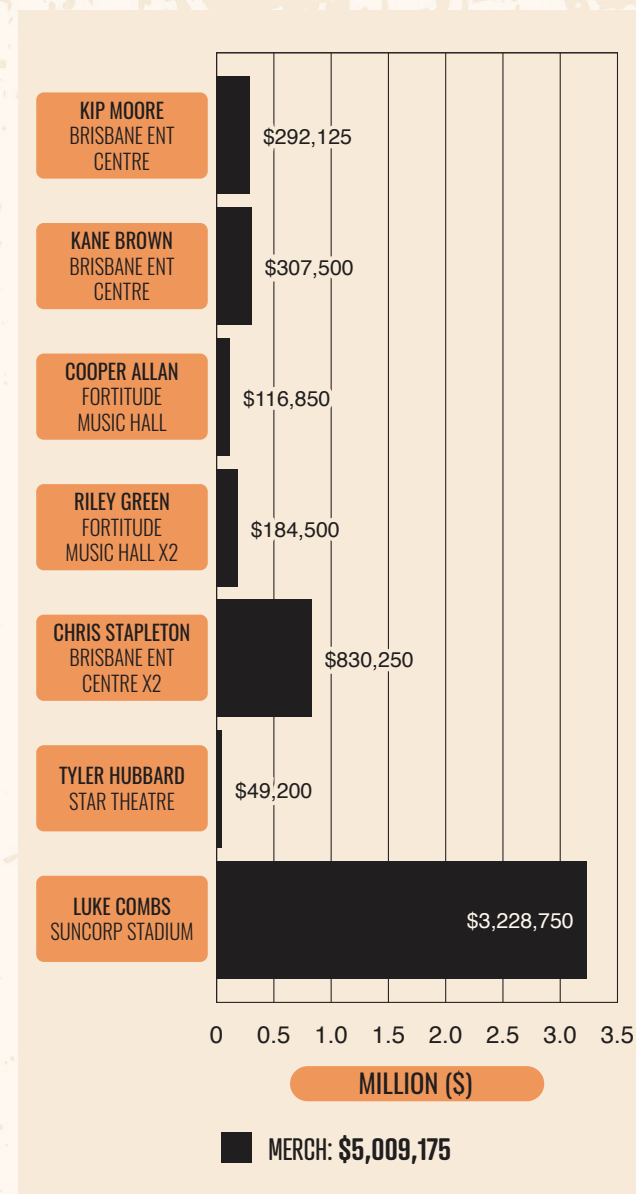
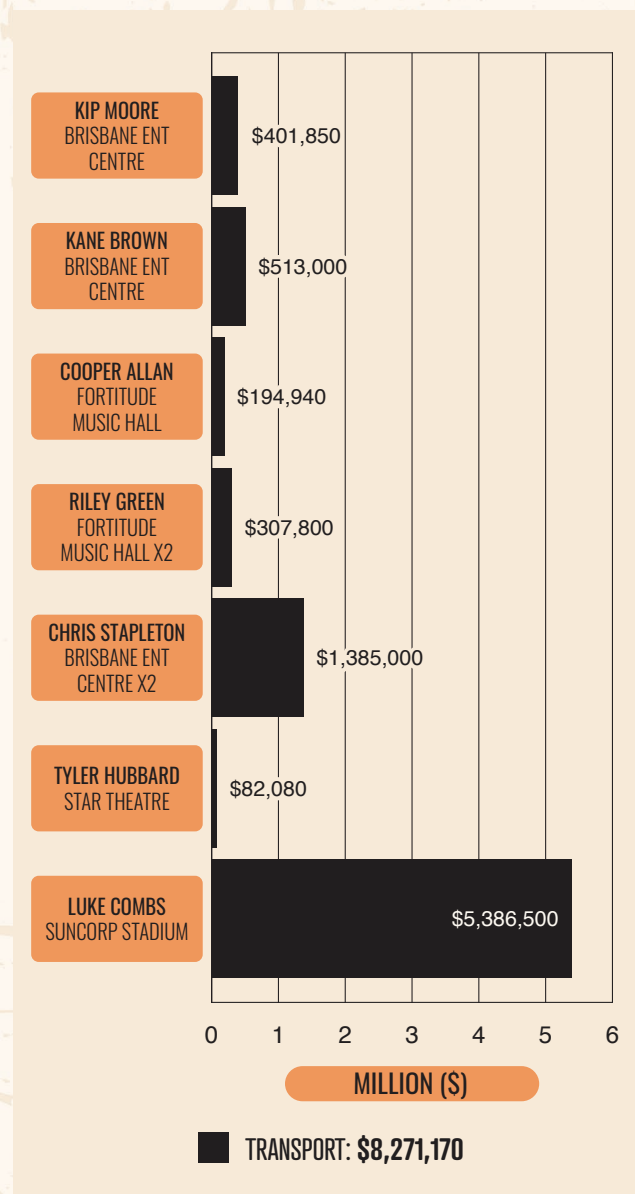
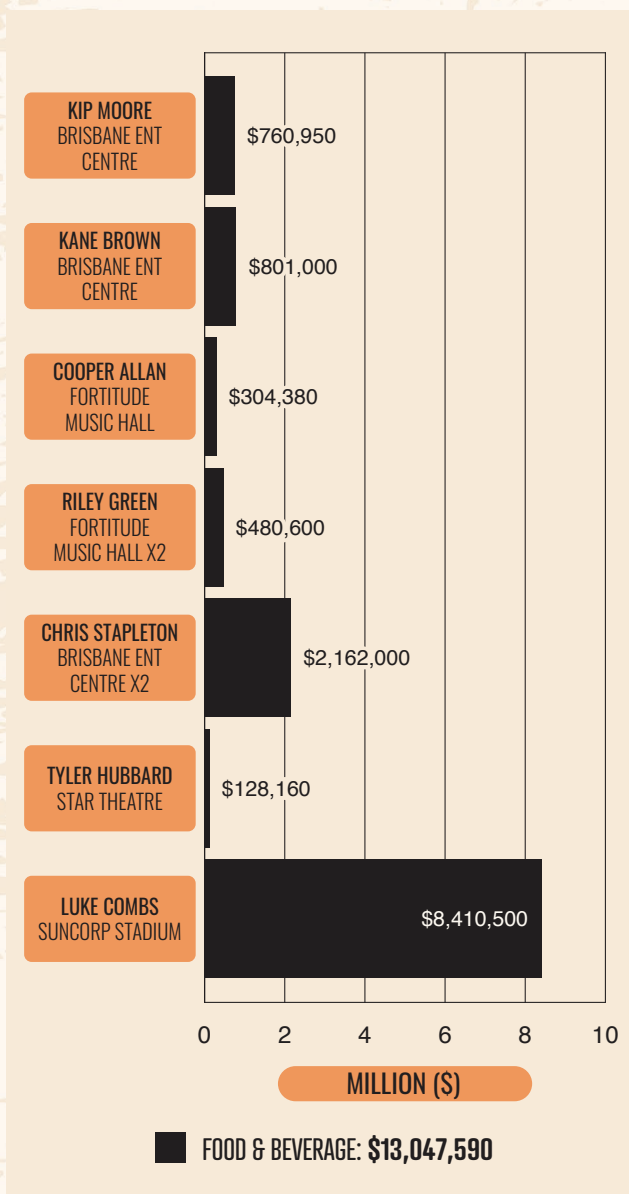
We are well aware that, given the growth in popularity of the genre since our 2019 report, our calculations are conservative, but provide us with the ability to make direct comparisons.

In 2024, there were 9 major country music concerts headlined by Cooper Allan, Riley Green, Kip Moore, Kane Brown, Chris Stapleton, Tyler Hubbard and Luke Combs.

★ **THESE CONCERTS ATTRACTED 162,900 PATRONS WHO GENERATED A BOX OFFICE OF \$29.6 MILLION.**



★ THEY ALSO GENERATED **\$26.2 MILLION** IN ANCILLARY SPENDING.



MINOR CONCERT REVENUE

While the concert revenue and attendance above was generated by performances in arenas and stadiums, there are a significant number of 'other' country music concerts which take place in auditoriums, performing arts centres, theatres and other community spaces. Many of these are owned or controlled by local councils/authorities.

Many Australian artists and overseas visitors performed concerts (often more than once) in these venue.

An amount of information on these country music presentations has been directly shared with us, and we have cross-referenced that data with event licences issued by APRA. However, when that information was not shared nor verifiable, it has been excluded.

In the last twelve months, there were 588 country music concert events in these smaller venues across states and territories.

They attracted 230,820 patrons.

Utilising an average ticket price of \$65 (based on presenter reports) and discounting the audience number by 5% to allow for complimentary/FOC tickets, we estimate ticket revenue of \$14.25 million.

QUEENSLAND MINOR CONCERTS

★ **169 OF THESE CONCERTS TOOK PLACE IN QUEENSLAND, ATTRACTING 68,060 PATRONS WHO GENERATED BOX OFFICE REVENUE OF \$3.9 MILLION.**

In terms of calculating ancillary spending, we have relied on the survey responses of 2,000+ country music fans attending these smaller concerts.

On average, they spend 35% less on food and beverage, merchandise and transport than those attending larger events.

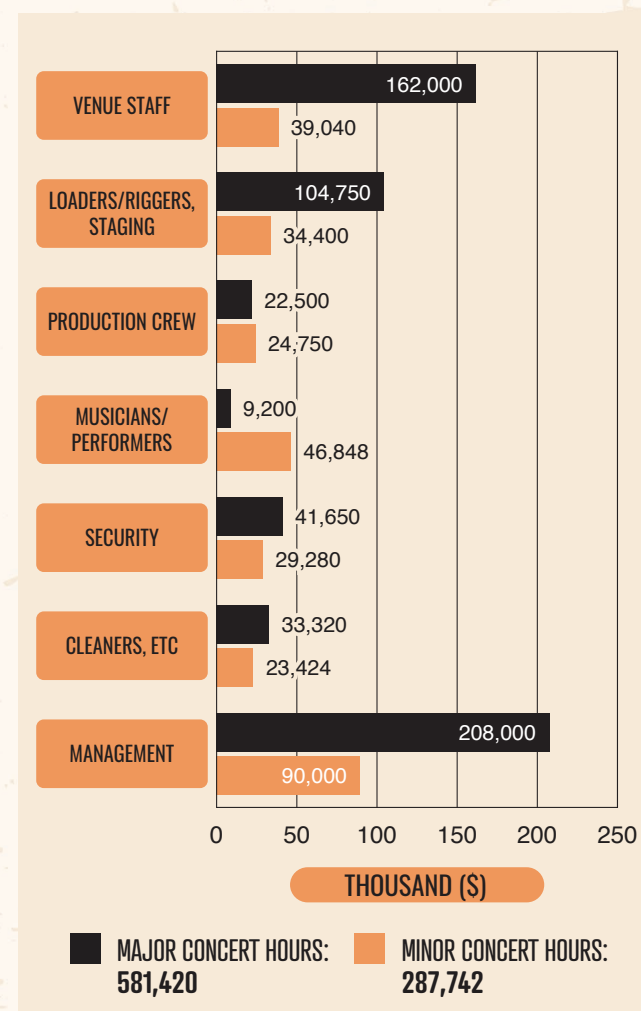
We have also discounted the audience numbers by 10% to allow for those that report \$0 additional spending.

★ **WE ESTIMATE THAT 68,060 PATRONS ATTENDING SMALL COUNTRY MUSIC CONCERTS IN QUEENSLAND IN 2024 SPENT AN ADDITIONAL \$8.43 MILLION.**

CONCERT EMPLOYMENT SUMMARY

The 600+ major and minor country music concerts recorded across the country in 2024, created a total 869,162 employed hours.

★ **THE QUEENSLAND SHARE WAS 212,069 HOURS, EQUATING TO 132 FULL TIME EQUIVALENT JOBS.**



QUEENSLAND COUNTRY GIGS IN SMALL VENUES

THE CONTEXT

As we have noted in all our numerous Live Music Census projects, including our landmark 'The Economic and Cultural Value of Country Music in Australia 2018', the thousands of gigs that annually take place in the nation's small venues – pubs, clubs, bars and halls, generate significant revenue for venues and provide employment for artists, staff and technical personnel.

The availability of venue licensing data, information from numerous gig guides plus responses from over 500 country music artists and 6,000+ fans, provides us with the ability to create credible estimates of the activity in this vital sector of our live performance industry.

COUNTRY.COM.AU



Max Jackson
Groundwater

SMALL VENUE LICENCES 2024

As we have done in all our previous projects, we begin with data supplied to us by our major Performing Rights Organisations APRA AMCOS and the PPCA, who issue OneMusic licences to a variety of small venue operators to present live and recorded music as part of their business operations.

In 2024, there were 4,255 such licences issued to small businesses nationally.

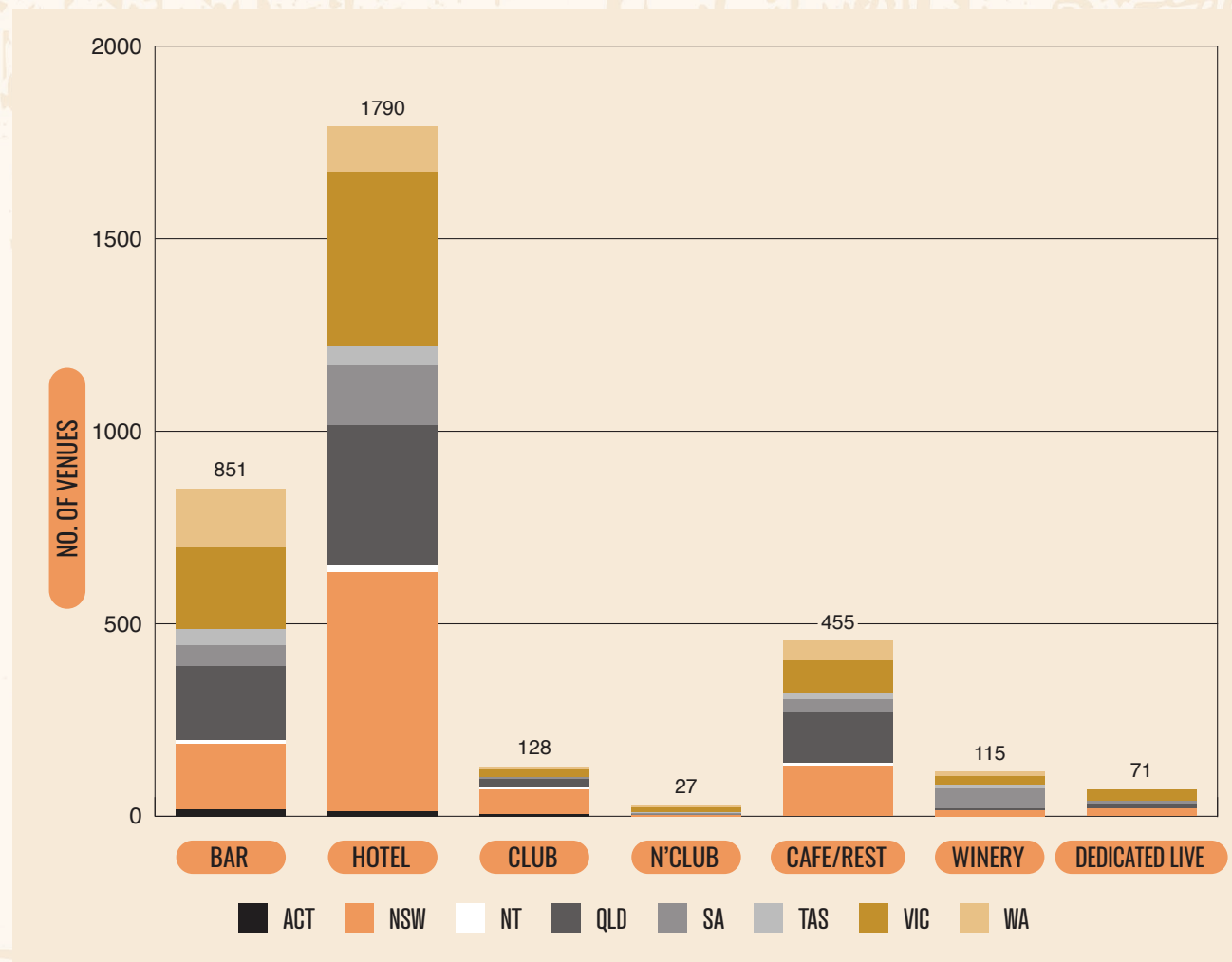
Many of these licences are issued to entities that are not part of the small venue music sector and, if they present live and/or recorded music, it is only on a very occasional basis.

As it is not possible to accurately document and analyse their live music activities, we have therefore excluded shopping centres, recreational/amusement facilities, museums and galleries, motels and resorts, caravan and tourist parks, variety stores and clothing and retail outlets.

This produced a list of 3,503 potential small venue presenters -

Unsurprisingly, NSW the most populous state, recorded the largest number of hotel and registered club licences. Victoria had the most licenced bars and dedicated live music venues, while South Australia recorded the most licenced wineries.

Using this list as a starting point, we then filtered the data to determine venues presenting country music. We consulted a number of country-specific gig guides – CountryTown, Capital News, Country Music Bulletin, Country Music Association of Australia, The Music Network, What's Lively and state-specific guides. We also reached out through AMIN (Australian Music Industry Network), our own member database and to a number of country artists and agents in each state to identify country music venues on the list and add venues not included.



Note:

1. Based on our previous research studies we know that not all venues presenting live/recorded music have a OneMusic licence whilst some that do hold a licence do not present performances.
2. We further note that these licences also apply to performances in Performing Arts Centres and Theatres. These have been considered in the Concert Section.

This produced a list of 542 small venues across the nation which present country –

We have also been unable to gather consistent comprehensive data on live music presentations in nightclubs, cafes/restaurants and wineries, where artists are often unidentified (unadvertised). So, to err on the side of caution in presenting verifiable data, live music gigs in these venue categories have also been excluded from our calculations.

Note on OneMusic Licences & Small Venues

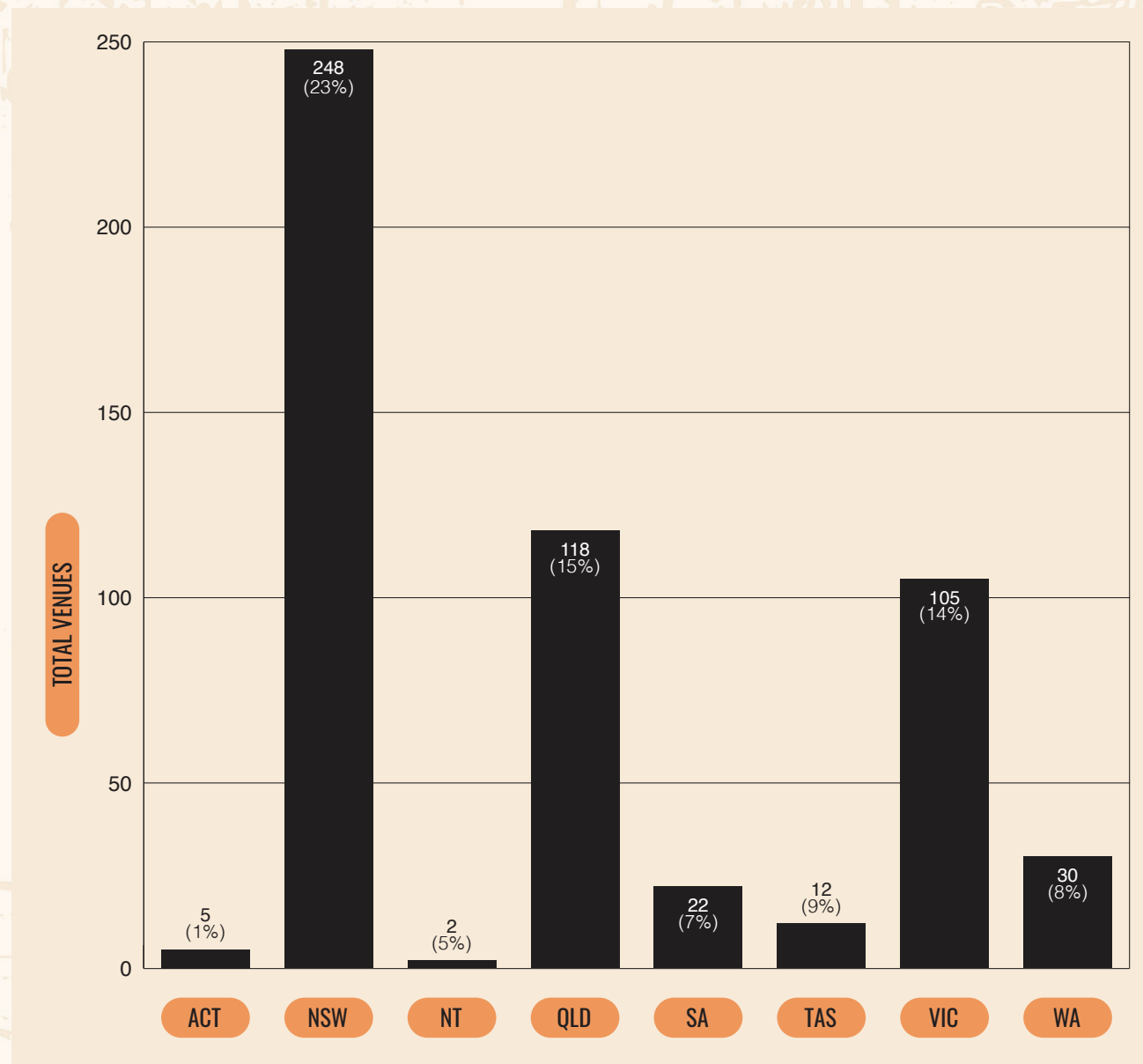
In its 'Year in Review' annual report in 2023, APRA AMCOS reported that, since the COVID-19 pandemic, we have 'lost' 1,300 live music venues and stages across the country, particularly in the small venue sector.

The figure has been seized upon by a number of media outlets and repeated in a number of reports, as indicative of the poor state of health of the live music sector.

However, based on research involved in a number of live music census projects conducted in metropolitan and regional Victoria and detailed data analysis for this report, we believe that figure needs to be treated with caution.

Undoubtedly, many live music events and small venues have struggled in the wake of the pandemic due to patron caution in fully returning to their former consumption levels, rising operational costs and staffing challenges for venues, and across-the-board cost of living pressures impacting discretionary spending.

However, based on our analysis of venue operations and APRA's licence list, we would suggest that many venues have not been 'lost', but are rather operating without the appropriate licence.



SMALL VENUES PRESENTING COUNTRY IN 2024.

The revenue, spending and employment information presented below, is based on advertised gig information plus detailed survey responses from venue operators, performers and those attending live country music gigs.

The nature of the gigs and the venues themselves varies substantially across the sector. Clubs, for instance tend to host more ticketed (paid) shows, often in large entertainment spaces, whereas hotel and bar gigs usually take place in smaller spaces.

Across the small venue sector, our analysis shows that some 50-60% of gigs are free entry.

Patrons typically pay a higher ticket price for club gigs than the door entry charges for hotel and bar gigs.

Our box office calculations are based on advertised ticket prices, venue capacities as detailed by liquor licensing regulators, attendee information and audience estimates by operators.

Some of the gigs take place on a regular basis – a minimum of one per week. Others on a more occasional basis – two or three a month. Detailed analysis of venue advertising has enabled us to determine the frequency of presentations.

Variations also exist in terms of ancillary patron spending (food and beverage, merchandise, transport), with those attending larger club gigs typically spending more than those attending hotel and bar gigs.

The calculation of this spending is based on attendee reporting and audience numbers.

We are confident that our analysis and calculations accurately reflect small venue operations across Australia in 2024.

COUNTRY.COM.AU

SMALL VENUE COUNTRY GIGS AND ATTENDANCE 2024

In the last 12 months, across all states and territories, 16,961 country music gigs were presented in the nation's small venues. They attracted 1.87 million patrons and created some 42,000 employment opportunities for performers and musicians.

The percentages vary across the country depending on the nature of the venue mix but, averaged across the states and territories, we estimate that approximately 20% of gigs took place in a registered club, 59% took place in a hotel and 21% in a bar.

SMALL VENUE BOX OFFICE

50% of gigs that take place in registered clubs and hotels are free entry. The figure for bars is 60%.

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

★ **BASED ON OUR ANALYSIS OF ADVERTISED GIGS, THEIR REGULARITY AND ATTENDANCE LEVELS, TICKET SALES AND ENTRY CHARGES GENERATED \$17 MILLION IN BOX OFFICE REVENUE.**



Adam Brand
Groundwater

SMALL VENUE ANCILLARY SPENDING

As we have noted elsewhere in this report, a decade of reporting and analysis has confirmed that the majority of patrons attending live music gigs – irrespective of the venue type, outlay significant sums in addition to whatever they may have paid for a ticket or entry.

Typically this additional spending is on the consumption of food and beverage, the purchase of merchandise items and costs associated with transport.

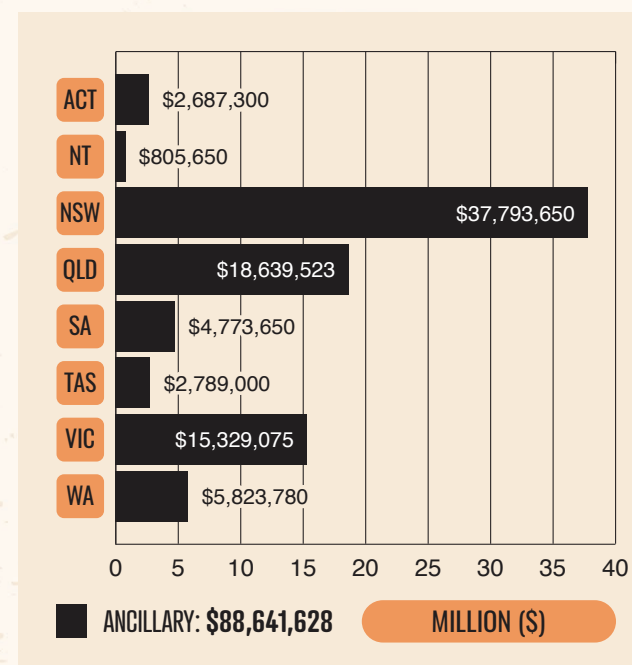
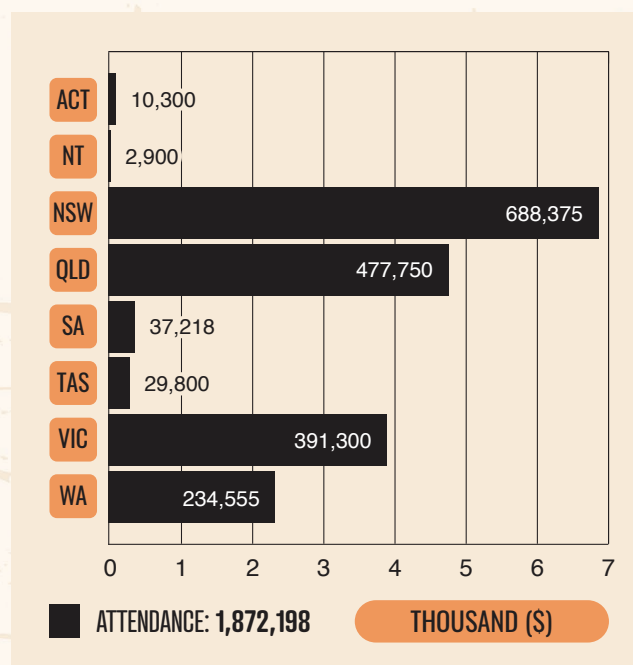
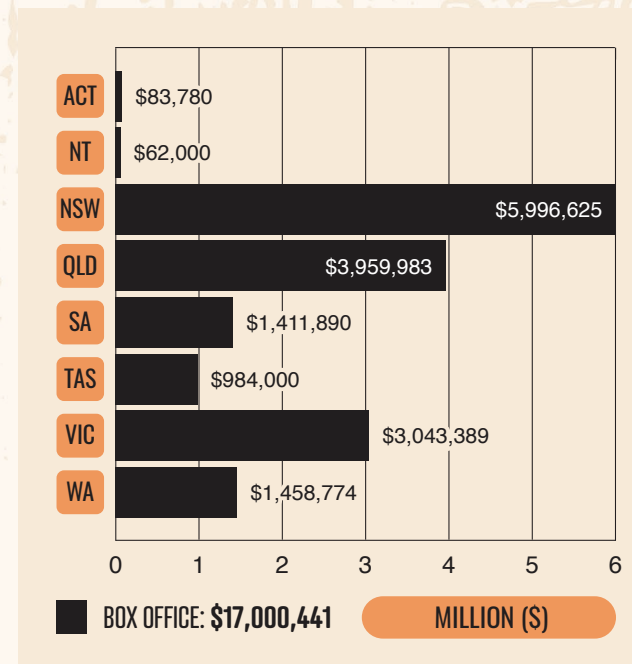
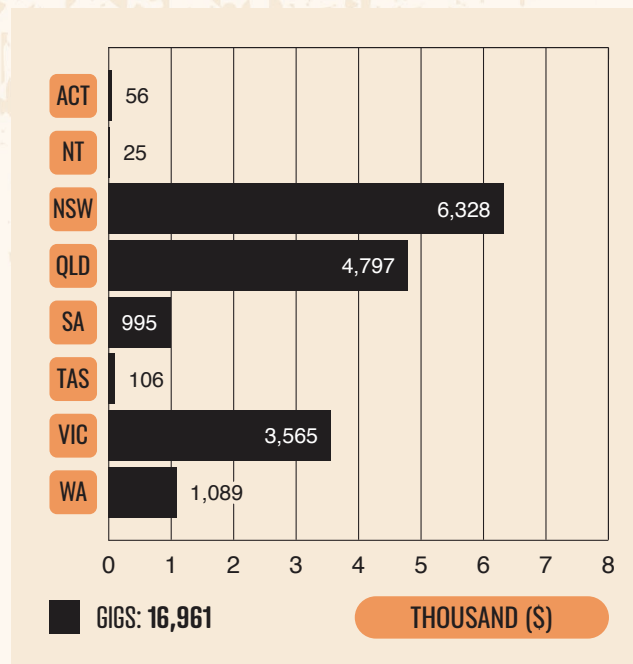
In our case, we have been guided by the 4,000 patron survey responses we received for the 2019 report, a decade of live music census work and 2,000 additional survey responses for this report.

Whether they have paid for a ticket/entry or not, 81% of patrons report spending on food and beverage when attending a country music gig in a small venue. The average was \$52 per patron at a club gig, \$38 per patron at a hotel gig and \$43 per patron at a bar gig.

58% of patrons attending a club gig reported purchasing a merchandise item. They spent an average \$22. 30% of those attending a hotel gig spent an average of \$20 on merchandise. 12% of those attending a bar gig spent an average \$20.

30% of attendees at club, hotel and bar gigs reported transport costs averaging \$31.

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



QUEENSLAND SMALL VENUE REVENUE SUMMARY

In 2024, small venues in Queensland presented 28% of the nation's country gigs and attracted 25.5% of the national audience.

★ THESE GIGS GENERATED **23%** OF THE NATIONAL BOX OFFICE AND ACCOUNTED FOR **21%** OF THE NATIONAL ANCILLARY SPENDING TOTAL.

QUEENSLAND SMALL VENUE EMPLOYMENT

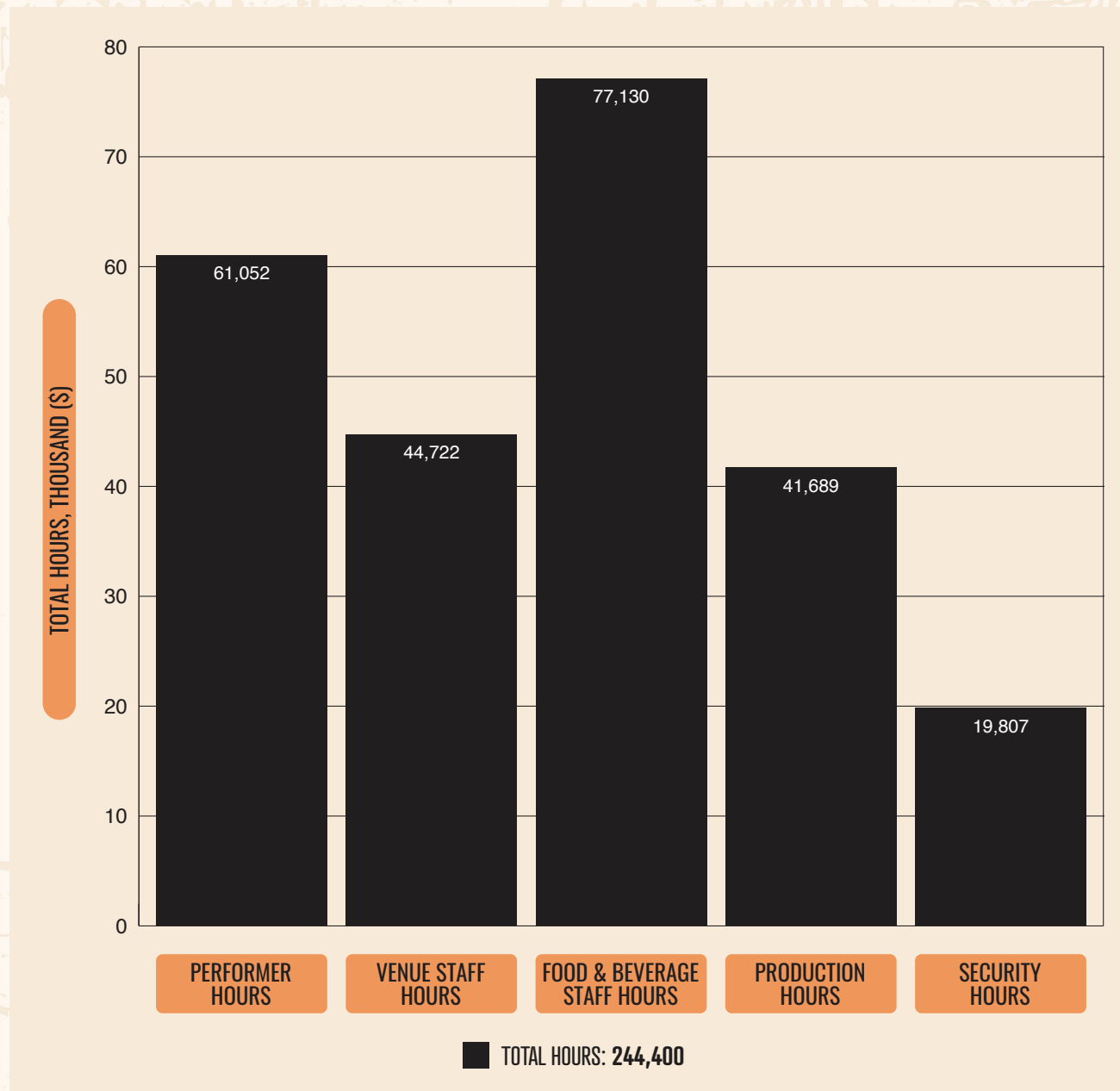
The 4,797 country music gigs in Queensland small venues in 2024 provided significant employment hours.

★ THIS EQUATED TO **152 FULL TIME EQUIVALENT JOBS.**

Small Venue Note:

As we reported in the 'Valuing Australian Country Music 2025' report, although attendances and spending across country festivals and concerts all showed significant increases, gigs in small venues have not yet recovered to levels recorded prior to the pandemic.

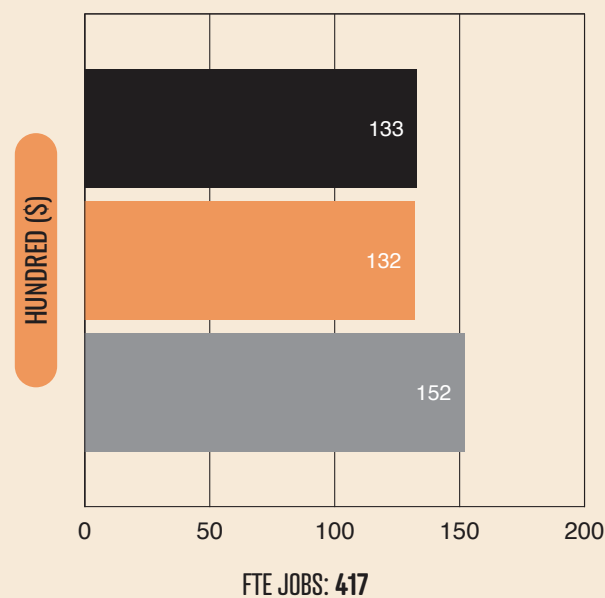
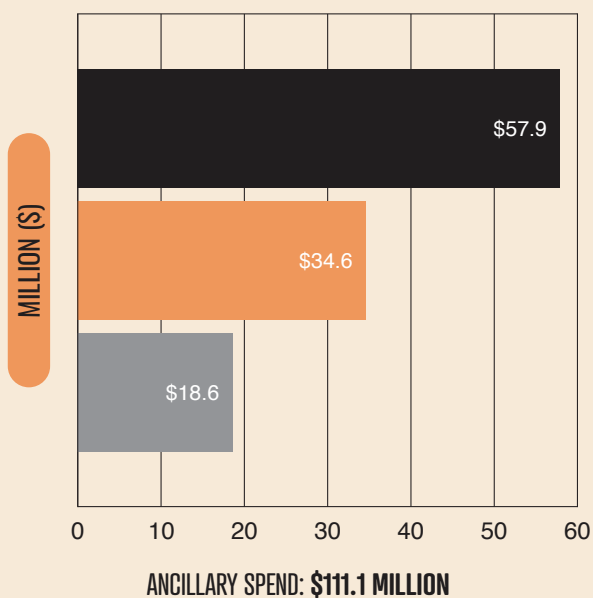
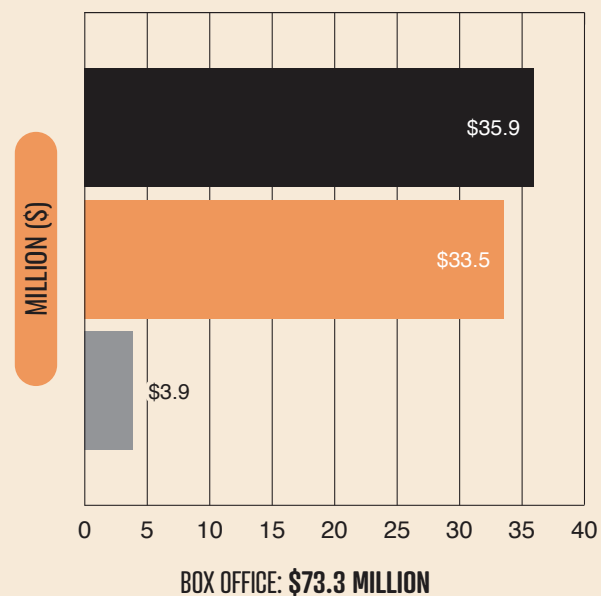
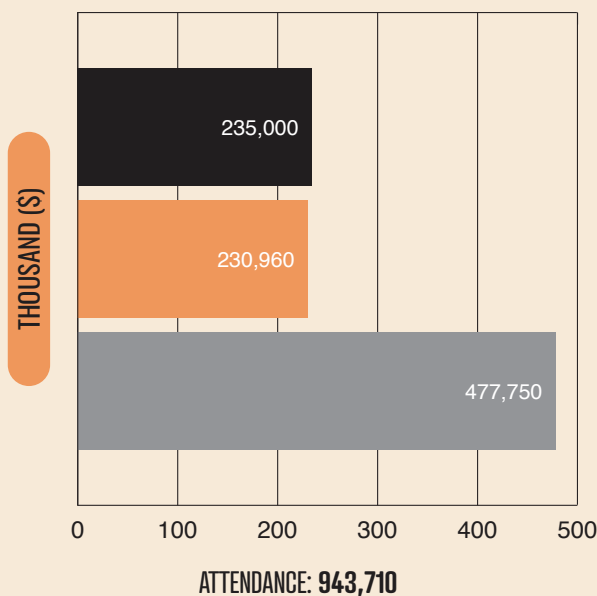
Although ancillary spending has fully recovered to previous levels, box office revenue declined by 23% on the 2019 figure.



QUEENSLAND LIVE PERFORMANCE SUMMARY 2024

The 47 Country Music Festivals, 177 concerts and 4,797 small venue gigs in 2024, generated significant revenue and created important employment opportunities.

★ **THE TOTAL REVENUE OF \$184.4 MILLION GENERATED BY LIVE COUNTRY MUSIC PERFORMANCES IN QUEENSLAND VENUES IN 2024/25 ACCOUNTED FOR 33% OF THE NATIONAL TOTAL OF \$560.4 MILLION.**



■ FESTIVALS ■ CONCERTS ■ SMALL VENUE GIGS

SONGWRITING AND APRA – AN INSIGHT INTO CREATIVE COUNTRY 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.

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.



2023/24 YEAR IN REVIEW

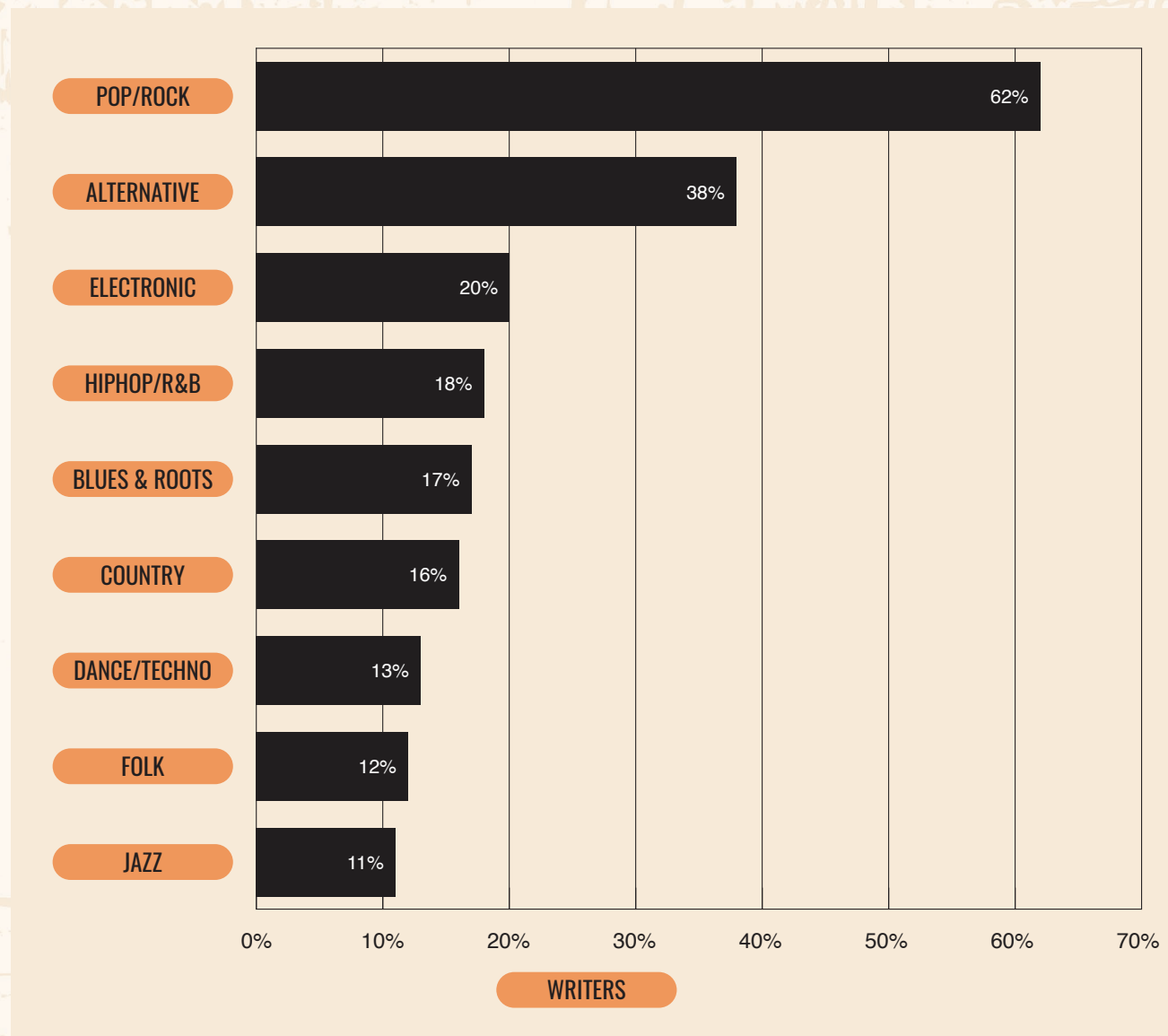
In terms of overall revenue, APRA's latest 'Year In Review' for the 2023/24 Financial Year, recorded a year-on-year increase in revenue of 7.2% to \$740 million

★ **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.**



APRA COUNTRY WRITER DATA – 2024

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

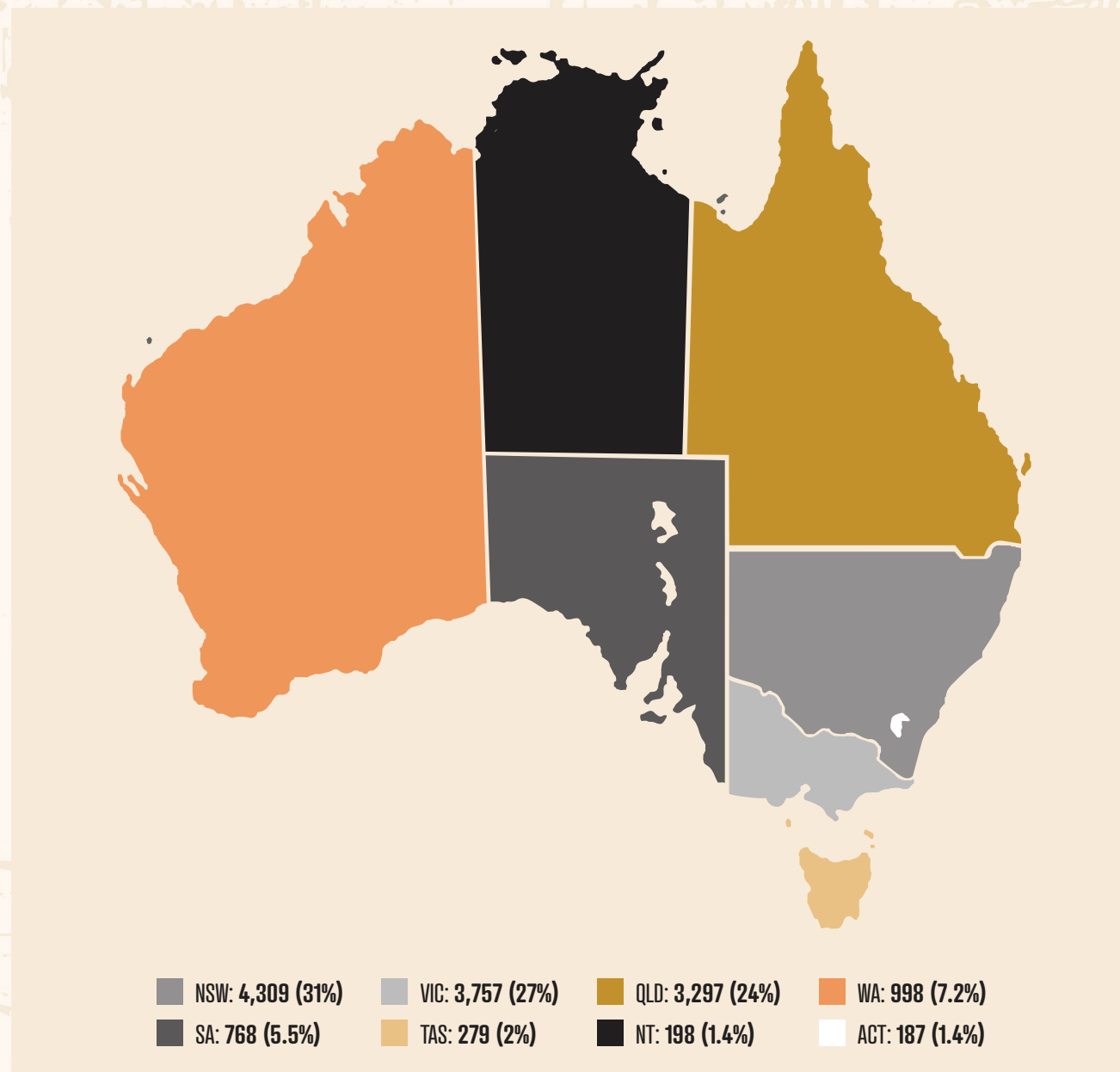
This was an increase from the 11% share we figure recorded in 2019, and a very significant increase on the 6% share we recorded in our very first economic profile of the country sector in 1997.

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.



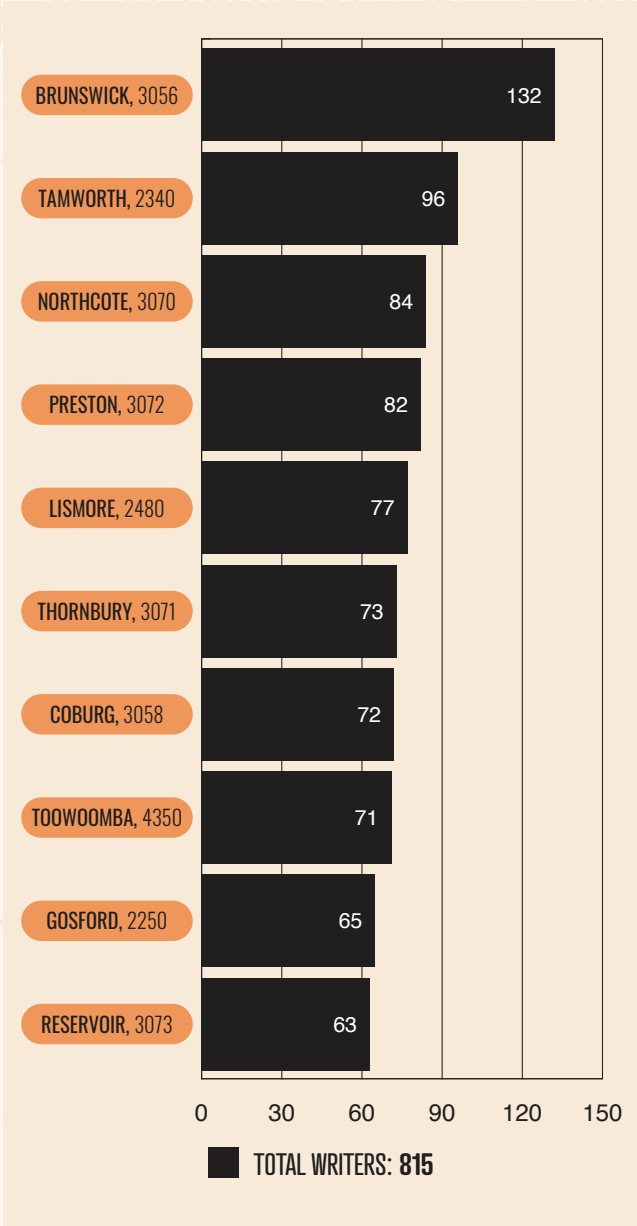
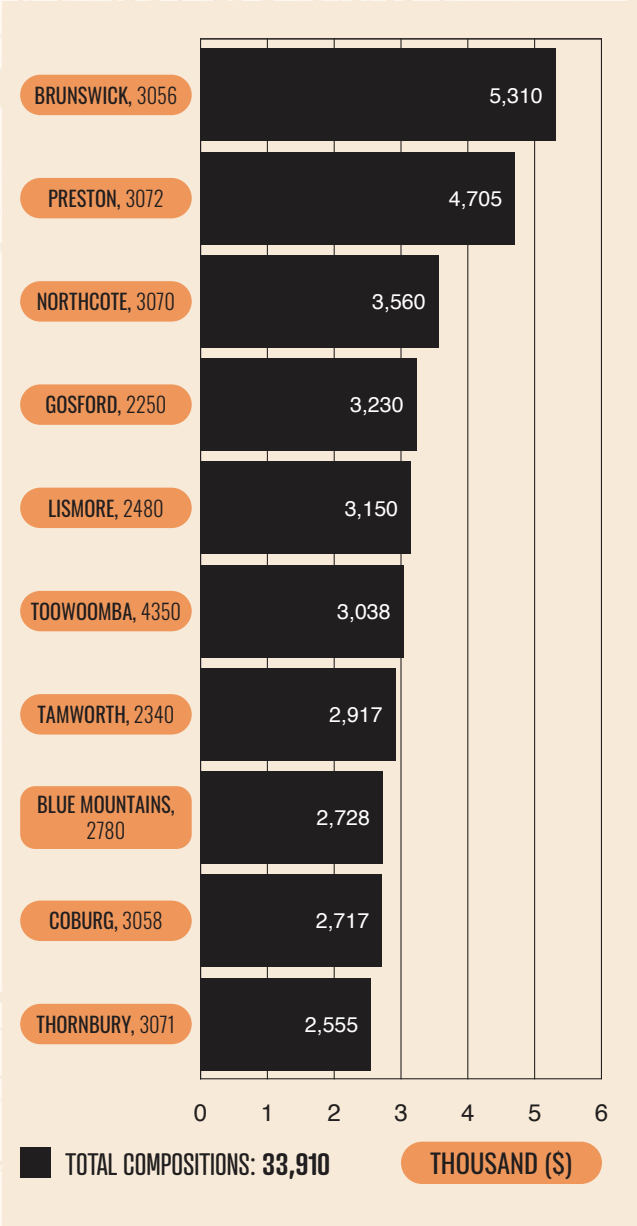
TOP COUNTRY WRITER POSTCODES 2024

When we conducted our major country research in 2019, we were surprised to discover that an analysis of APRA country writers by location revealed the dominance of adjacent suburbs in Melbourne’s inner-northern suburbs.

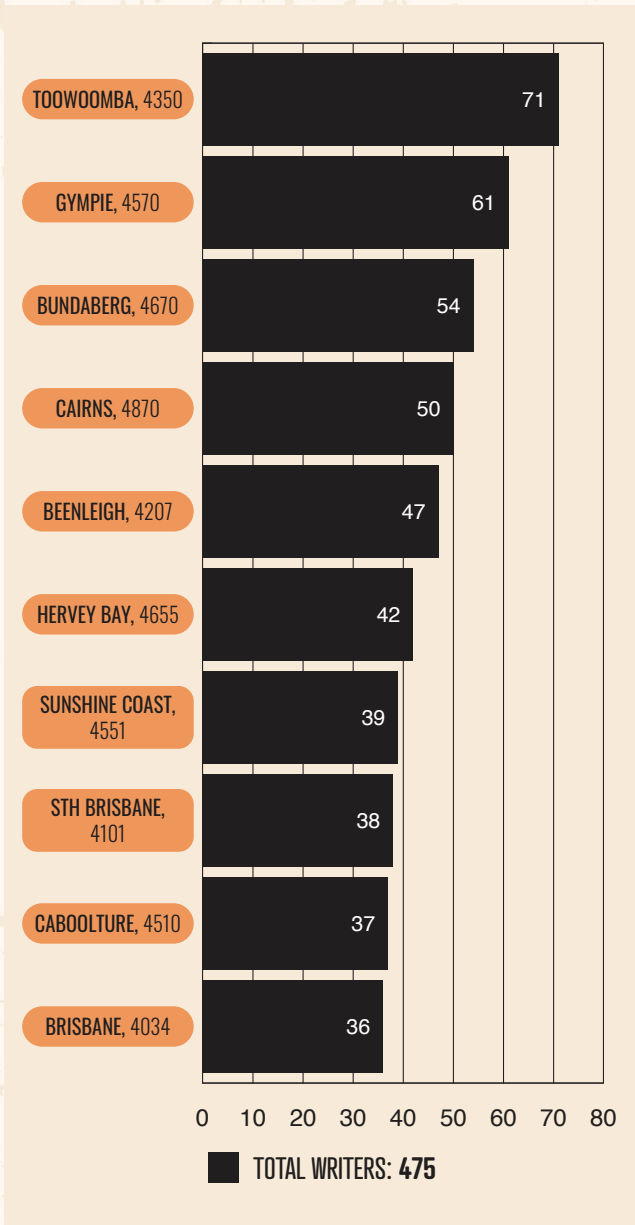
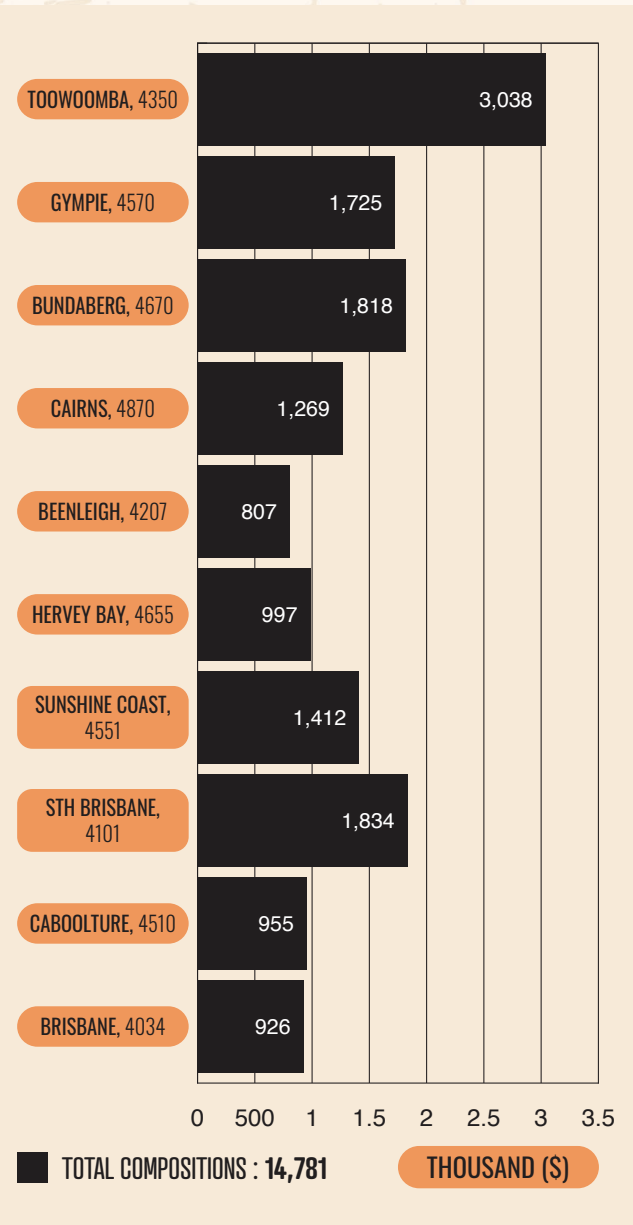
In 2024, that dominance has been confirmed.

★ WRITERS IDENTIFYING AS ‘COUNTRY’ BASED IN THE CITIES OF YARRA, MERRI-BEK AND DAREBIN ACCOUNTED FOR 62% OF WRITERS IN THE NATIONAL TOP 10 POSTCODES AND 55.5% OF THE REGISTERED COUNTRY COMPOSITIONS.

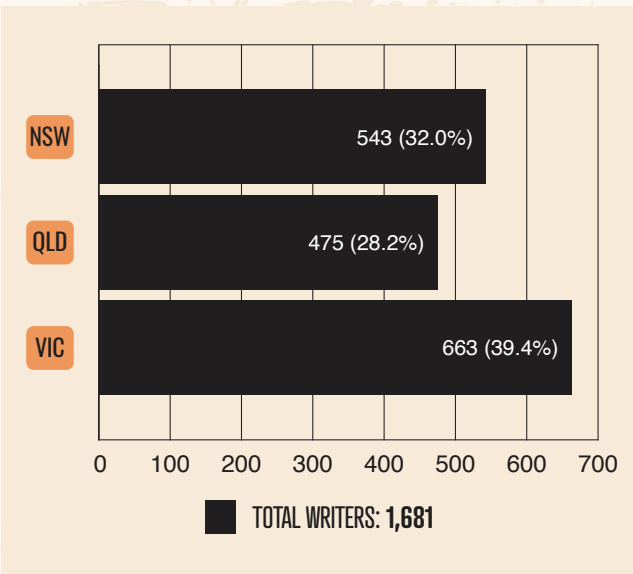
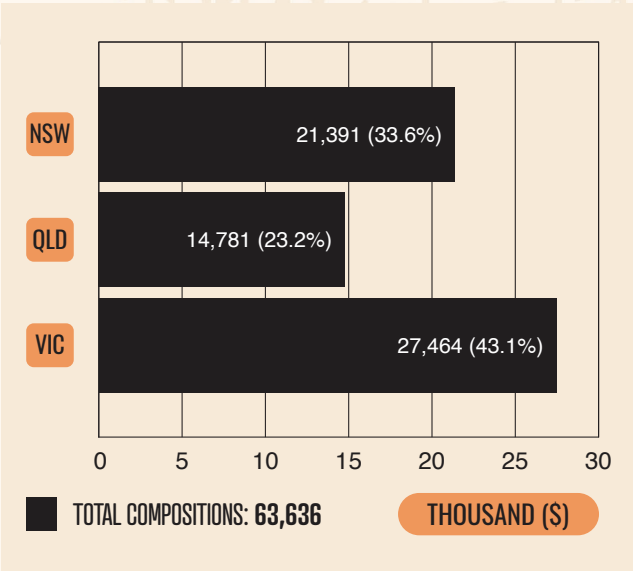
	2019	2024
1	TAMWORTH	BRUNSWICK
2	NORTHCOTE	TAMWORTH
3	LISMORE	NORTHCOTE
4	BRUNSWICK	PRESTON
5	GOSFORD	LISMORE
6	COBURG	THORNBURY
7	PRESTON	COBURG
8	THORNBURY	TOOWOOMBA
9	TOOWOOMBA	GOSFORD
10	GYMPIE	RESERVOIR



QUEENSLAND APRA COUNTRY WRITERS 2024



In terms of the Top 10 postcodes in each of the three largest states, the percentages for country writer members and registered compositions were -



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.**

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!

ARTISTS & FANS

AS HAS ALWAYS BEEN THE CASE, ONLINE SURVEY RESPONSES FROM COUNTRY MUSIC FANS AND ARTISTS PROVIDE A WEALTH OF INFORMATION ON CREATIVE PRACTICE AND INSIGHTS INTO EVENT ATTENDANCE AND MUSIC CONSUMPTION THAT INFORM OUR RESEARCH FINDINGS.

★ FOR THIS PARTICULAR PROJECT, WE SURVEYED 2,000+ COUNTRY FANS AND 430 ARTISTS.

In terms of gender and age-groups, the number of responders were balanced as they were in terms of those providing metro and regional postcodes – especially across the three most populous and ‘active’ country music territories of NSW, Queensland and Victoria.

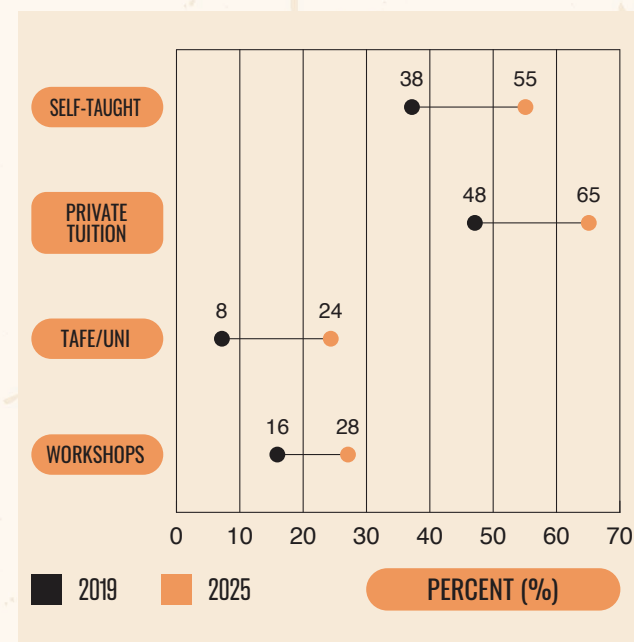
Where possible, we have compared the results we analysed with those reported in 2019.

COUNTRY MUSIC ARTISTS

In analysing the responses from surveys, we have filtered responses to focus on those we identify as ‘professional’ practitioners. That is those who spend 70% of their week concentrating on their music practice and generate 70% of their income from that commitment.

TRAINING AND CREATIVITY

- 38% are self-taught. In 2019 it was 55%.
- 65% have had private tuition. In 2019 it was 48%. There has been a significant increase (8% - 24%) of those involved in TAFE/University courses, and also those involved in industry-based workshops/seminars/ retreats (16% - 28%).
- They perform across all types of country, with contemporary country rock and Americana/Roots recording the highest percentage (48%).
- Whether they perform solo, in a duo or in a group, 43% report performing 60+% original material.
- Their own listening is eclectic, with Bluegrass, Traditional Country and Americana/Roots recording the most significant increases since 2019.
- Only 35% of those who write collaboratively have a verbal or written agreement about royalty splits. The vast majority rely on APRA registration to identify the creators of works.



INCOME

- 40% of professional artists don't supplement their music income but, where they do, 36% are supported by family members while 14% work casually outside the industry and/or receive a government benefit.
- All of these artists generate 60+% from their music practice/activity, with 87% reporting the figure at 80+%.
- In the last 12 months, they have averaged 8 appearances at a local/regional festival, 9 appearances at an interstate festival, 25 appearances at country music concerts and 47 pub/club/bar gigs. The number of appearances represented a small increase on 2019 numbers.
- 75% of those appearances have been paid and are responsible for an average of 74% of total music-related income.
- Artist payment have increased since 2019 across the event/venue categories for solo, duo and group artists, but the increase has not been consistent –

Solo

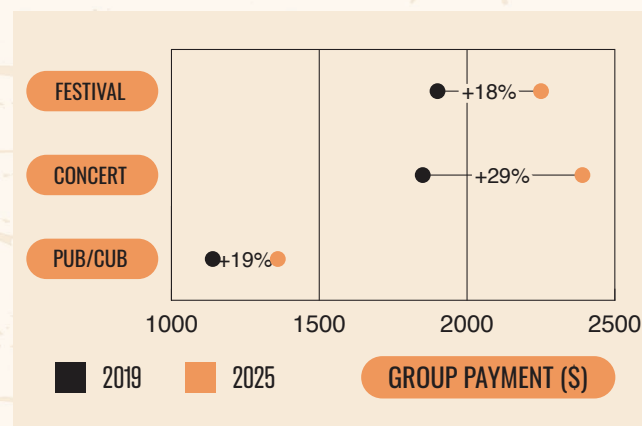
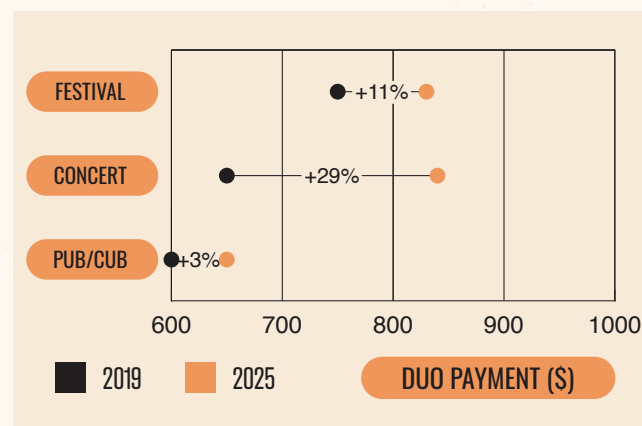
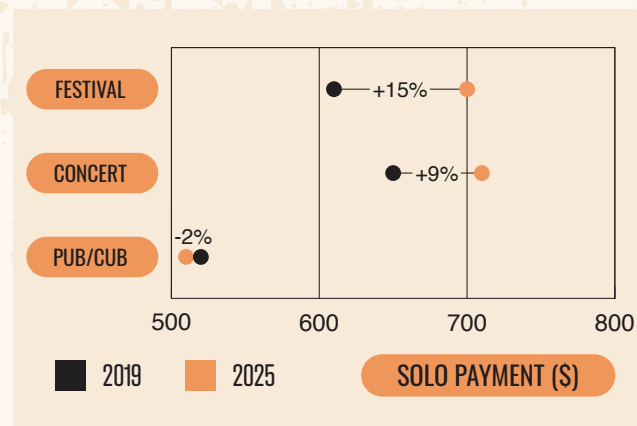
- Festival \$610 to \$700 (+15%)
- Concert \$650 to \$710 (+9%)
- Pub/Club \$520 to \$510 (-2%)

Duo

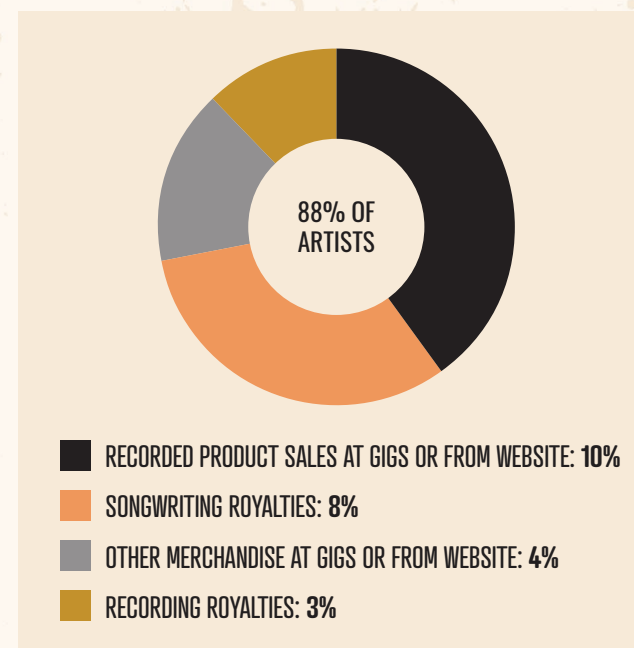
- Festival \$750 to \$830 (+11%)
- Concert \$650 to \$840 (+29%)
- Pub/Club \$600 to \$650 (+3%)

Group

- Festival \$1,900 to \$2,250 (+18%)
- Concert \$1,850 to \$2,390 (+29%)
- Pub/Club \$1,140 to \$1,360 (+19%)

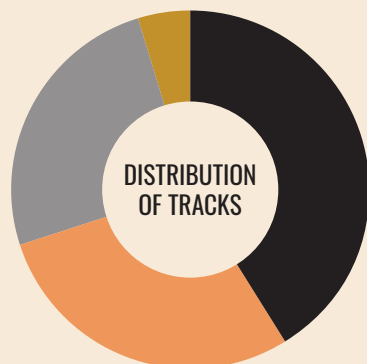


- 88% of artists reported that the balance of their music-related income was generated by –
 - Recorded product sales at gigs or from website – 10%
 - Other merchandise at gigs or from website - 4%
 - Songwriting royalties – 8%
 - Recording royalties – 3%



RECORDED MUSIC

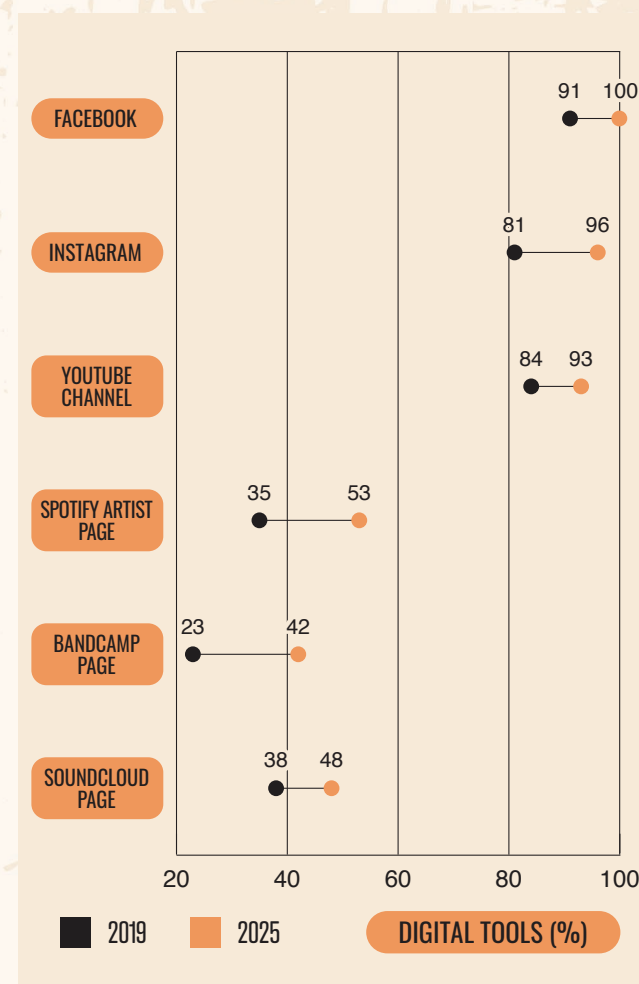
- In the last 12 months, professional country music artists recorded an average of 19 demo tracks and 15 for commercial release. This represented a 20% increase on 2019.
- Half of tracks for commercial release were recorded in a home/private studio, with 40% self-produced and 60% with a producer.
- 70% were self-financed.
- 49% were self-distributed (gigs/website/digital aggregator).
- 43% were distributed by a third-party distributor/independent label.
- 8% were distributed by a major label.



- SELF FINANCED: 70%
- SELF-DISTRIBUTED: 49%
- THIRD-PARTY DISTRIBUTOR/INDEPENDENT LABEL: 43%
- DISTRIBUTED BY A MAJOR LABEL: 8%

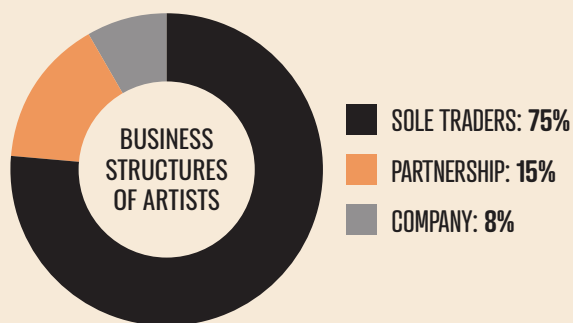
MARKETING & PROMOTION

- The percentage of artists with their own website has remained steady at 80%, but the use of all other digital tools has increased since 2019 –
 - Facebook – 91% - 100%
 - Instagram – 81% - 96%
 - YouTube Channel – 84% - 93%
 - Spotify Artist Page – 35% - 53%
 - Bandcamp Page – 23% - 42%
 - Soundcloud Page – 38% - 48%
- 75% of artists maintain the content themselves.
- In terms of promoting gigs, artists use all available channels but, compared to 2019, there has been an increase in digital tools – especially Facebook and Instagram, and a significant decrease in the use of posters and flyers and paid advertising, especially in print media (21% - 4%).
- Facebook Events (93%), Instagram (70%) and Word of Mouth (49%) were identified as the three most effective promotional tools.
- Artists are increasingly using analytical tools associated with Spotify, Google and Apple Music to fine-tune their promotion.
- Community radio, particularly in regional areas, continues to provide important exposure for country music artists, although the increased availability of streamed content on ABC Country and the KIX network has provided increased exposure and airplay.



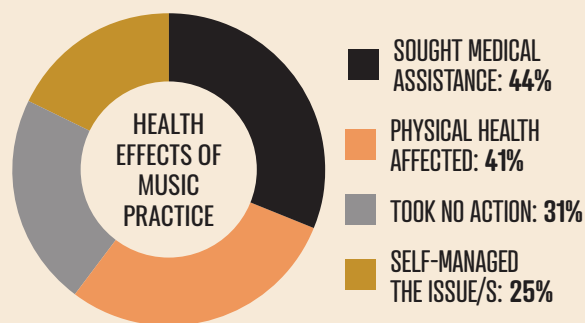
BUSINESS STRUCTURE & AFFAIRS

- 75% of responders report being sole traders, with 15% being in a partnership and 8% operating a company.
- Only 22% of those in a partnership have a formal agreement.
- 96% have an ABN, but only 37% are registered for GST.
- 38% employ a manager, 32% an agent and 45% a publicist.
- Since 2019, there has been a significant increase in membership of professional associations and organisations – APRA 92% - 100%, CMAA 71% - 92%, Folk Alliance 6% - 21% and state music associations 15% - 26%.
- The majority of artists have applied for local, state or federal government grant, with recording (68%), regional touring (52%) and Marketing/promotion (47%) being the most popular categories.
- 36% report a successful application. An increase on the 26% success rate recorded in 2019.



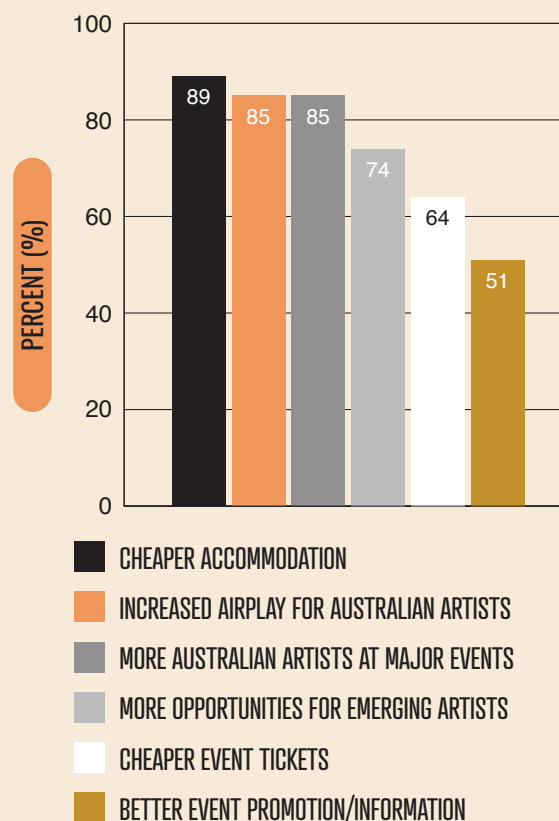
HEALTH & WELLBEING

- 41% of artists report that their music practice has affected their physical health (predominantly hearing). 25% self-managed the issue/s, 44% sought medical assistance and 31% took no action.
- 52% reported that their practice had affected their mental health. An increase from the 43% recorded in 2019.
- 35% Self-managed, 40% sought medical assistance and 24% took no action.
- Country music events and gigs continue to provide a safe environment for artists with 75% reporting that they had rarely (25%) or never (51%) felt uncomfortable or unsafe at a country gig. There was almost no variation based on gender.
- The small percentage who reported feeling unsafe or uncomfortable, overwhelmingly identified an audience member as the source of concern.
- They either took no action (38%) or left the venue event early (53%). Only 4% reported the incident to security or venue staff or police (1%).



MORE COUNTRY!

- Artists were asked what would increase attendance at country music events.
 - Cheaper accommodation – 89%
 - Increased airplay for Australian artists – 85%
 - More Australian artists at major events – 85%
 - More opportunities for emerging artists – 74%
 - Cheaper event tickets – 64%
 - Better event promotion/information – 51%



COUNTRY MUSIC FANS

As our recent 'Valuing Australian Country Music 2025' report documented, a recent global surge in the popularity of the genre has been driven by the engagement of new, young fans in unprecedented numbers.

Spotify reports Australia as having the world's largest percentage of country 'discovery' at 74%, and the second-highest rate of genre engagement by Gen Z at 24%.

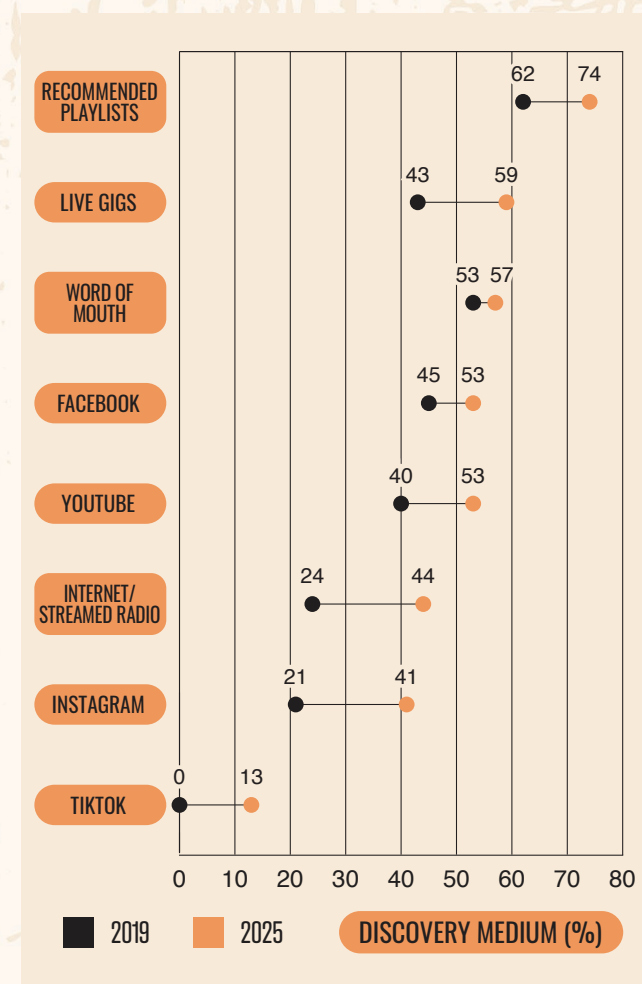
We were particularly keen to document attendee/fan attitudes and consumption patterns across an age demographic that has not previously been regarded as seriously engaging with the genre.

★ **WE HAVE THEREFORE FILTERED 2,000 ONLINE SURVEY RESPONSES TO CONCENTRATE ON THOSE CURRENTLY AGED 13-28 YEARS (GEN Z) AND THOSE 29-44 YEARS (MILLENNIALS).**

In terms of gender identity the number of responders were balanced – 52% female, 47% male, as they were in terms of those providing metro and regional postcodes – especially across the three most populous and 'active' country music territories of NSW, Queensland and Victoria.

COUNTRY LISTENING

- In terms of what the younger fans are listening to, Americana/roots recorded the highest preference at 59%, but there was very strong support for traditional country (55%), bluegrass (44%) and classic/modern country rock (42%).
- 70% of responders reported that country listening accounted for 60-70% of their total listening, while 42% reported it at 80+%.
- This was higher than that reported by those 60+ years who reported listening to jazz and classical in greater numbers.
- The younger demographic reported that on average 40% of their country listening was to music by Australian artists. That percentage rose to 62% among older fans.
- Not surprisingly, the younger demographic are fully invested (86%) in the ability to stream a wide variety of audio including commercial and public radio. They are more likely to listen to country live at gigs (70%) than the older audience (61%), but far less likely to listen music from their own CD collection than was the case 5 years ago (66% down to 31%).
- In terms of discovering new country music, audio and video on-demand again dominate –

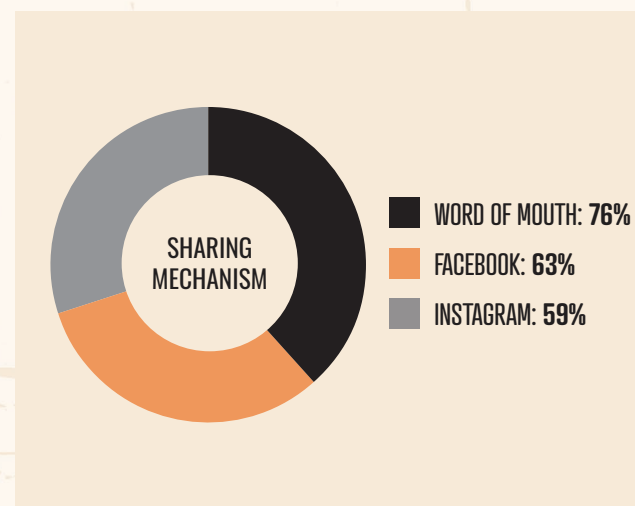


RECORDED MUSIC

- In 2019, the percentage of those in the age range purchasing physical recordings was 82% compared with 89% in the older demographic. When they did purchase physical product, 50+% did so at a retail outlet. That percentage fell to 29% in 2025, with vinyl purchases surpassing CDs and digital downloads effectively disappearing.
- Of the 82% who purchased physical product in the last 12 months the average spend per month was \$27, with half of those sales being direct-to-consumer sales at gigs or from an artist website.

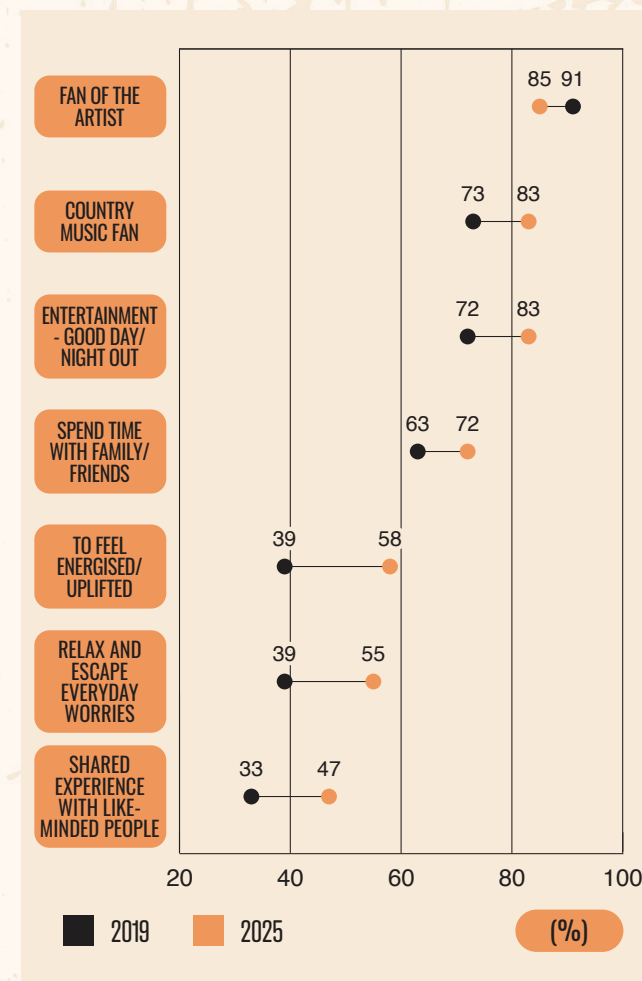
THE STREAMING JUGGERNAUT

- 94% of country fans reported having at least one audio streaming subscription in 2025. In 2019 it was 87%.
- The most significant change has been in the increase in the percentage having a paid subscription (88%) as opposed to an ad-supported free subscription. In 2019, paid subscribers were 77% of the total.
- On average, this demographic spend \$17.50 per month subscribing.
- Interestingly, while the percentage who do not share digital files has remained constant at 9%, the percentage who do has increased from 20% in 2019 to 29%.
- Word of Mouth (76%) is the dominant sharing mechanism, followed by Facebook (63%) and Instagram (59%). Sharing music via CDs has declined from 24% in 2019 to 8% in 2025.



ATTENDING GIGS

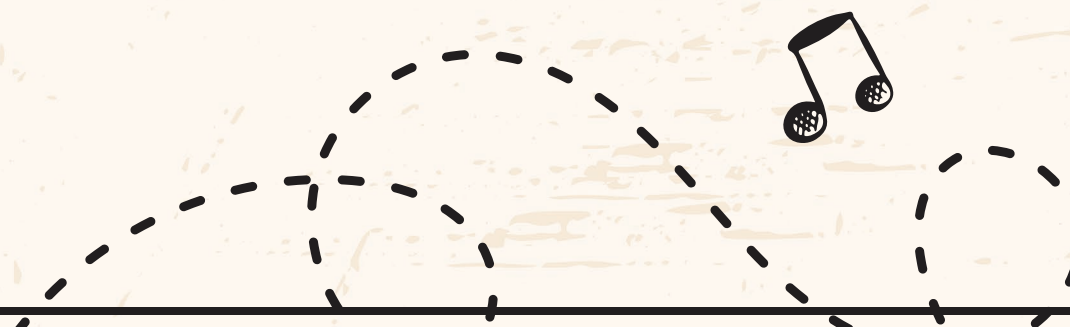
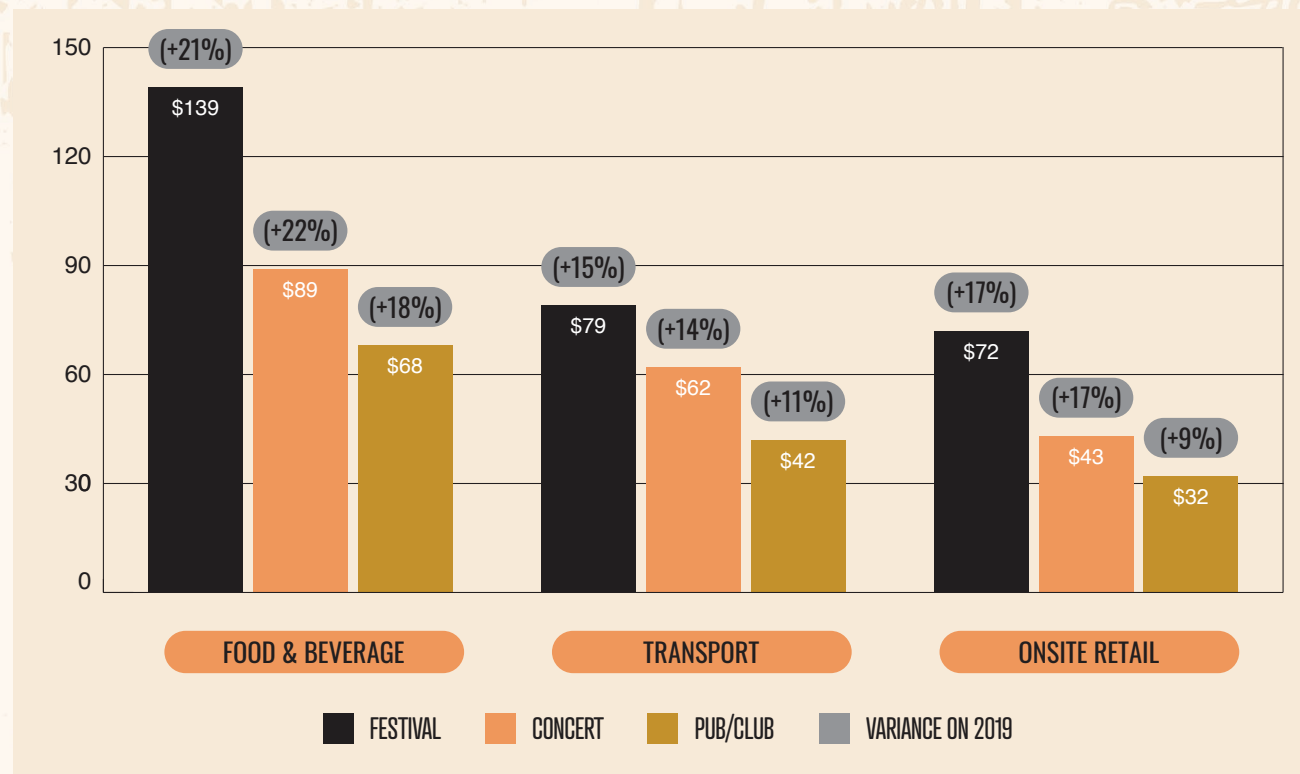
- There are all sorts of motivations to attend country gigs. According to this demographic the most important are –



We note with interest that while being a fan of the artist and the genre is still important there is a growing importance attached to a shared positive communal experience.

LIVE MUSIC SPENDING

- Across the last 12 months, our demographic on average attended 4 major festivals, 4 small festivals, 7 concerts and 14 pub/cub gigs.
- Across that period, their average spending on tickets/door entry was \$123 per month on festival tickets, \$89 per month on concert tickets and \$62 per month on pub/cub gig entry.
- CPI increased by 6.2% (according to the Australian Bureau of Statistics) between 2019 and 2025. The increase in the average monthly spend for tickets and entry across the period was 32% for Festivals, 28% for Concerts and 12% for Pub/Club gigs.
- During the same period patron ancillary spending at each event and gig they attended increased by similar margins compared to 2019.
- When travelling to an event requiring an overnight stay, 46% of this demographic opted to camp, while 14% stayed with friends and 20% stayed in a hotel/motel.
- Unsurprisingly, only a small percentage (6%) used their own caravan.



SPENDING IN THE COMMUNITY

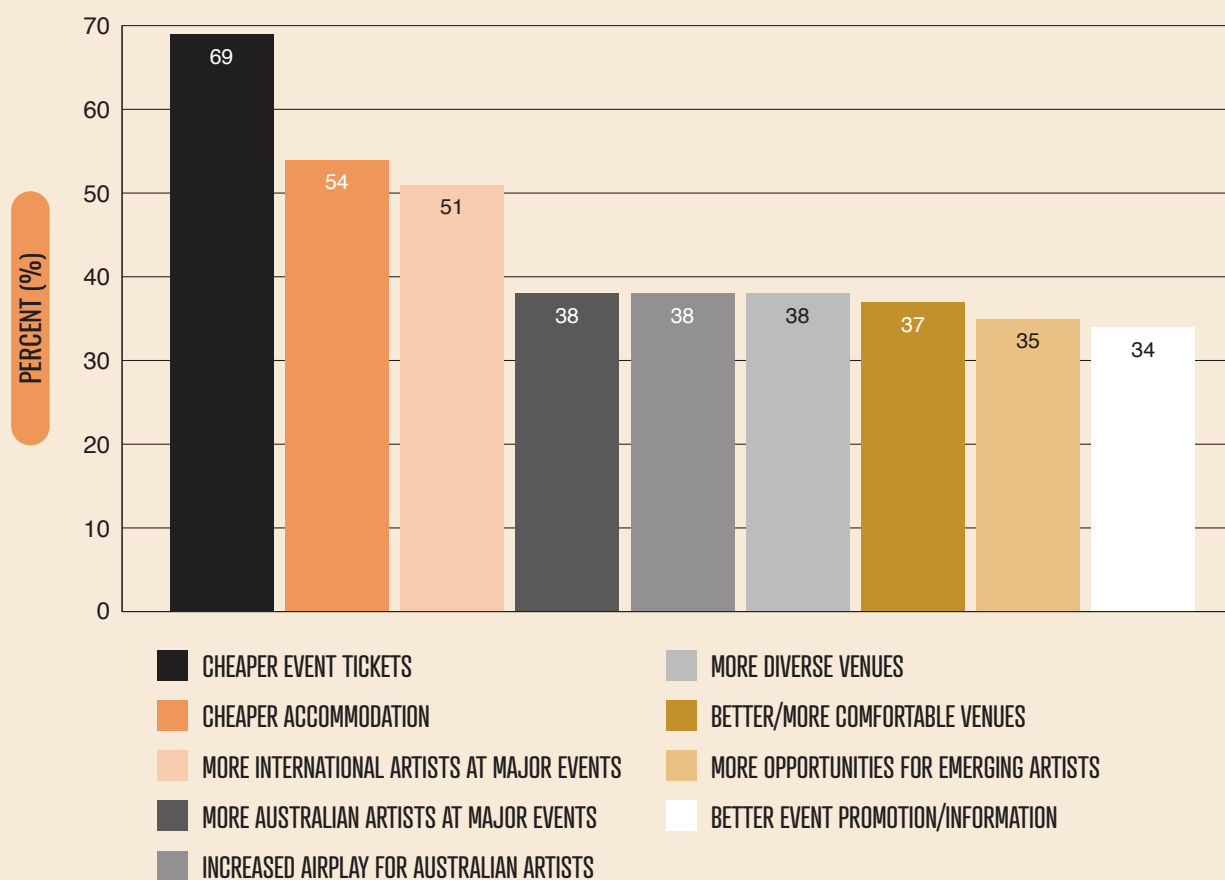
- As we noted in our major report, the majority of our major country music festivals take place in regional cities and towns and on rural properties. They are in most cases 'destination events' attracting significant numbers of visitors from outside the hosting region. This tourism driver is also in evidence for large stadium and arena concerts.
- 95% of our 2,000+ responders reported spending an average of \$95 per day either off-site or in surrounding communities, often passed through on the way to and from events.

COUNTRY – A SAFE SPACE

- Country music creates a safe environment for fans.
- 93% of responders reported that they had 'rarely' (21%) or 'never' (72%) felt uncomfortable or unsafe at a country event/venue.
- There was almost no variation based on gender.
- The small percentage who reported feeling unsafe or uncomfortable, overwhelmingly identified an audience member as the source of concern.
- They either took no action (58%) or left the venue event early (27%). Only 6% reported the incident to security or venue staff or police (2%).

MORE COUNTRY!

- Fans were asked what would increase attendance at country music events.
 - Cheaper event tickets – 69%
 - Cheaper accommodation – 54%
 - More international artists at major events – 51%
 - More Australian artists at major events – 38%
 - Increased airplay for Australian artists – 38%
 - More diverse venues - 38%
 - Better/more comfortable venues – 37%
 - More opportunities for emerging artists – 35%
 - Better event promotion/information – 34%



QUEENSLAND FESTIVALS



EVENT NAME	LOCATION	GENRE
Australian Camp Oven Festival	Millnerran	Country
Back To The Bush Festival	Miles	Country
Ballads & Bush Yarns	Charlotte Plains	Country
Barra & Boots Music Festival	Lake Proserpine	Country
BBQ in The Bush	Thargomindah	Country
Big Red Bash	Birdsville	Country
Bouilia Camel Races	Boulia	Country
Bouldy Bush Ballad Bash	Bouldercombe	Country
Boyne Valley Country Music Campout	Ubodo	Country
Camp Oven Music Muster	Mackay	Country
Capella Country Music Festival	Capella	Country
Channel Country Muster	Thargomindah	Country
Charters Towers Country Music Festival	Charters Towers	Country
CMC Rocks Queensland	Ipswich	Country
Country Fest	Midge Point	Country
Country On Keppel	Gt Keppel Island	Country
Crows Nest Country Music Festival	Crows Nest	Country
Dalrymple Country Music Festival	Charters Towers	Country
Drover's Camp Festival	Camooweal	Country
EKKA Country Music Showdown	Brisbane	Country
Festival Of Outback Skies	Hughenden	Country

EVENT NAME	LOCATION	GENRE
Get Bushed Outback	Greenvale	Country
Gidgee CoalBush Ballad Awards & Festival	Pittsworth	Country
Gladstone Country Music Festival	Gladstone	Country
Groundwater Country Music Festival	Broadbeach	Country
Gympie Music Muster	Gympie	Country
Hughenden Country Music Talent Festival	Hughenden	Country
Lasso Country Music Festival	Eagleby	Country
Lighthouse Country	Burnett Heads	Country
Murgon Music Muster	Murgon	Country
Music In The MULga	Eulo	Country
Nanango Country Muster	Nanango	Country
Neurum Creek Music Festival	Neurum Creek	Country
Outback Sounds	Charleville	Country
Phil & Chris Coad's Country Muster	Bundaberg	Country
Pioneer Valley Country Music Festival	Mackay	Country
Reels and Railways	Cunnamulla	Country
Roma's Easter In The Country	Roma	Country
Savannah In The Round	Mareeba	Country
Spirit Of The Bush Festival	Boondooma	Country
Texas Country Music Festival	Texas	Country
Thargool Country Music Roundup	Thargool	Country

EVENT NAME	LOCATION	GENRE
The Gully Sessions	Thallon	Country
The Southern Trail	Various	Country
Unearthed - A Night in Eromanga	Eromanga	Country
Way Ot West Fest	Winton	Country
Widgee Balladeers & Country Music Festival	Widgee	Country
Yellowbelly Country	St George	Country
Agnes Blues, Roots & Rock Festival	Agnes Water	Multi
Airlie Beach Festival of Music	Airlie Beach	Multi
Big Sound	Brisbane	Multi
Blues On Broadbeach	Broadbeach	Multi
Bony Mountain Folk Festival	Bony Mountain	Multi
Maleny Music Festival	Maleny	Multi
Meatstock	Toowoomba	Multi
Mitchell Creek Rock 'N' Blues Festival	Kandanga Creek	Multi
Mt Isa Rodeo	Mt Isa	Multi
NQ's Rock 'n Country	Mackay	Multi
Tablelands Folk Festival	Yungaburra	Multi
Warwick Junior NRA Rodeo	Warwick	Multi
Warwick New Years Eve Rodeo	Warwick	Multi
Warwick Rodeo	Warwick	Multi
Woodford Folk Festival	Woodford	Multi



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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