The Economic and Cultural Value of Country Music in Australia 2018

Executive Summary

Prepared for the Country Music Association of Australia Inc
by Dobe Newton

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Introduction

2018 was a stellar year for Australian country music.

Kasey Chambers was memorably inducted as the youngest female ever into the ARIA Hall of Fame. Keith Urban was acknowledged by the US Country Music Association as its Entertainer of The Year. Morgan Evans achieved a notable #1 on US, ARIA and The Music Network charts with his debut single.

Country music festivals reported record attendances and box office results, more Australians listened to more country on radio than ever before and music streaming – the juggernaut driving the global and Australian industry revival, is being enthusiastically embraced by country fans listening on their phones, in their cars and on laptops, tablets and smart speakers. According to Spotify, Australia is the fastest-growing country music market in the world.
And as more Australian country music artists are writing, recording and performing and are being listened to and watched by more fans than ever before, we continue to honour our pioneers, as the late, great Slim Dusty recorded an astonishing 1,000 continuous weeks on the ARIA country chart.

In short, it was an excellent time to conduct the Country Music Census 2018 which forms the basis for this report.

The last time (1997), the CMAA conducted major research to inform itself and the broader community about the scope and importance of the genre in the Australian cultural and economic landscape, Kasey Chambers was a precocious young talent who had only recently left the comfort and security of a Nullabor campfire to front a promising family band; Keith Urban was starting to see his Nashville dream of success realised after years of hard work; Lee Kernaghan only recently established as the new 'king of country' enjoyed record-breaking genre sales; Adam Brand, now celebrating 20 years of hits, hadn't yet had his first and Morgan Evans was a 13 year-old schoolboy.

And, as many of us drove to work or set off on holidays, we still cranked up our favourite country somngs on the trusty cassette player, or listened to our favourite artists on a Walkman, Discman or Mini Disc player.

Yes, things have changed. Especially the way we consume recorded music.

Project Summary

The Country Music Census was conducted over a 9-month timeframe from September 2018 to May 2019.
The broad range of information and data collected during that time provided the basis for this report which follows on from the only other such study - *'An Industry Profile of Country Music in Australia'* (1997), commissioned by the CMAA in 1996.

The findings of that study were combined with those from market research firm ARM:Quantum Harris who the CMAA commissioned in 1996 to survey consumers.

The stated purpose of the initial 1997 research was:

1. To construct a detailed profile of the country music industry in Australia, including practitioner/business operations, workforce/employment statistics and economic generation data.

2. To establish benchmarks in media coverage and audience, recorded product sales, royalty and performance income and live performance attendance in order to establish benchmarks/markers against which future growth and trends could be measured.

While that focus has remained, this twenty-years-on update, was also specifically designed to elicit a range of responses from the consumers/fans of country music to establish metrics for the social and cultural significance of the genre in the broad context of the Australian music industry.

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The project was planned and undertaken in the expectation that the findings would allow the CMAA to better fulfil its advocacy role on behalf of its members and the broader constituency of practitioners, fans and the significant businesses that it represents.

The reported data will enhance the promotion of the genre and ensure the continued viability of operations and thus the thousands of genre-related

Specifically:

1. Up-to-date and relevant information on practitioners and consumer/audience behaviour and attitudes across its sector, will allow the CMAA and stakeholders to better identify areas and issues of strategic importance, thus ensuring that resources are appropriately allocated to targeted policies and initiatives that underpin sector development.

2. The genre's practitioners and stakeholders will enhance country music's reputation and influence in the creative industry sector by highlighting the importance of the genre through dedicated and widespread promotion of the project' s findings.

3. The project findings will provide a comprehensive sector development analysis to partners and all relevant stakeholders involved in the industry – eg. labels, publishers, promoters, managers, event organisers etc, and to the broader creative community of producers and consumers. Many, already in possession of information relevant to their sector/area of activity, will now have access to detailed and current 'big picture' information.

4. The report will provide practitioners and stakeholders with important and quantifiable data to inform and strengthen approaches to potential supporters in the private and public sectors.

5. The CMAA and a broad range of industry organisations will be able to provide their members with important data that will inform their own lobbying and advocacy to decision makers at all levels, from local government and small business level and all the way up to those involved in national deliberations.

The financial support from the CMAA and a number of industry partners who will be acknowledged in subsequent pages, allowed the allocation of sufficient time to ensure the accuracy and thus the credibility of the reported information.

Equally important was the enthusiasm with which practitioners, businesses and fans across the genre embraced the project, agreeing to share the sometimes confidential information which underpins the findings.

It has been a fascinating and enjoyable exercise, made even more so by being able to report that country music in 2018 is in robust economic health and delivers significant social and cultural benefit to its own community, the broader cultural industries sector and the general Australian population.

My thanks to all for your support and involvement in preparing this report which is dedicated to the memory and wonderful musical legacy of our dear friend and colleague Glen Hannah.

The summary which follows is conservative in nature, as explained in the Conduct and Methodology section - Section 10 of the full report.

We are confident therefore that it provides the most comprehensive analysis currently available on the economic and cultural contribution of country music in Australia.

Acknowledgements

This report could not have been completed without the moral support and financial assistance of a number of industry supporters and partners.

First and foremost I would like to thank my fellow CMAA board members Dan Biddle, Natalie Waller, Meryl Davis, Ross Johnson, Tom Inglis, Justin Thomson, Rebecca Gracie, Lachlan Bryan and Roger Corbett. Their faith in me and belief in the value of the project kick-started the whole process.

A number of industry partners supplied the financial support that ensured sufficient time and resources were available to the project. Our thanks to APRA AMCOS, Tamworth Regional Council, NSW Department of Premier and Cabinet, ABC Music and Universal Music Australia.

Our online Artist and Fan surveys were pivotal in generating an unparalleled range of responses from all age groups, all regions of Australia and practitioners at all career levels.
We would certainly not have been able to collect over 582 artist responses and 4,329 fan responses without the generous donation of prizes to encourage completion of the surveys.
Thanks especially to Mick & Eileen Manov (Choose Your Cruise) and Marius Els and Kim Reutski (Artist Network) for offering one lucky fan an oceanview balcony stateroom on Cruisin' Country 2019, and to Chloe Goodyear (Woodford Folk Festival), Caroline Moore (Port Fairy Folk Festival), Barry Harley (Tamworth Country Music Festival) and Michael Chugg and Jeremy Dylan (CMC Rocks Queensland) for offering event tickets to artist respondents.

The record survey response relied on assistance from a number of partnering organisations who shared the links with their supporters, contacts and members –
Maria Amato (AIR), Adam Simon (Americana Music Association of Australia), Milly Petriella, Jana Gibson, Jo Perjanik and Karen Tinman (APRA AMCOS), Emily Murphy (Gympie Music Muster), Chris Bodey (Deniliquin Ute Muster), Matthew O'Sullivan (AMPAL), Katherine Devaney, Wendy Sauders, Felicity Urquhart, Scott Lamond (ABC Radio), Geoff Trio (Australian Music Week), Christie Eliezer (The Music Network), Caroline Saul, Helen Henry, Martin Walters (CBAA), Karlee Cole, Cheryl Brown (Tamworth Regional Council), Lili Walmotch, Logan Moore, Eleanor Brown and Molly Myers (Nashville Tamworth volunteers), Queen of Country entrants (Tamworth), numerous student graduates and parents from the Junior and Senior Academy of Country Music, Joan Warner (Commercial Radio Australia), Miranda Boyce (iHeart Radio Australia), Max Ellis, Kevin Anderson, Aleyce Simmonds, Rebecca Gracie, Peter Hebbes, Ian James, Bill Page and the board of the CMAA.

Even more importantly, organisations and events were willing to share operational and event information to ensure the credibility and accuracy of reporting.

Additional thanks to Jo Perjanik and Karen Tinman (APRA AMCOS), Susan Heymann and Anne Phillips (Chugg Entertainment), Tracey Griffiths (Dashville Skyline), Jan McCormick (Groundwater Country Music Festival), Chris Bodey (Deniliquin Ute Muster), Barry Harley (Tamworth Toyota Country Music Festival), Adam Jankie (Mushroom Music Group), Marius Els (The Artist Network), Lynne Small (ARIA/PPCA), Peter Tuskan (The Music Network), Glenn Dickie (Sounds Australia).

And thanks to my Nashville colleagues who so generously gave their time and shared their stories: Nash Chambers, Emma Swift, Kylie Sackley, Tommy Emmanuel, Mark Moffatt, Sam Hawksley, Mark and Jay O'Shea, Lindsay Rimes and Phil Barton.

Fellow researchers Emma Webster, Matt Brennan, Adam Behr, Martin Cloonan, Jake Ansell (UK Live Music Census 2017), Rosa Coyle-Hayward (Melbourne Live Music Census 2017), Shane Homan (Monash University) and John Wardle (Live Music Office) have provided invaluable information which informs and underpins our own and has allowed comparisons to be made where relevant and illuminating.
A vast number of journalists, commentators and observers whose passion and insights have greatly assisted this project.

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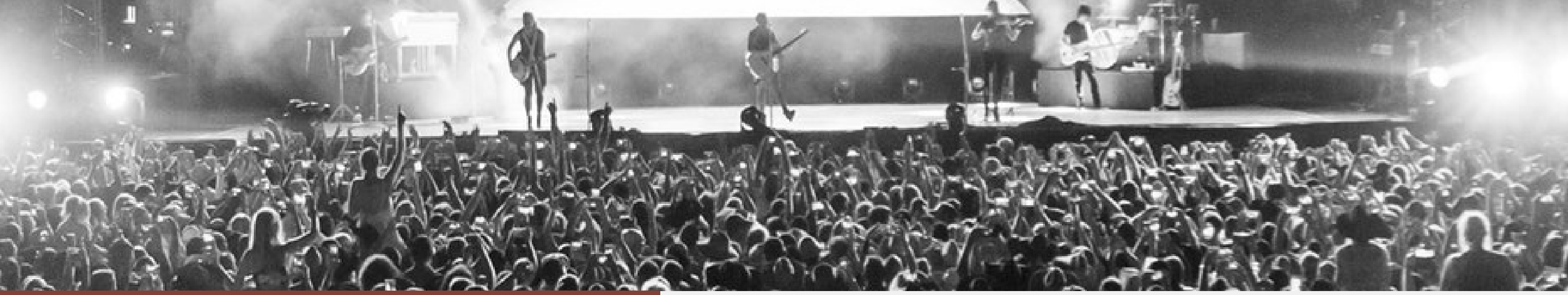
My special thanks to Margaret Ruwoldt and Meryl Davis for taking the time to check the entire document and contributing so many valuable design and formatting suggestions and corrections.

To all my friends, colleagues and acquaintances in this wonderful industry, my thanks for your support and involvement.

To the many whom I've never met but who responded so generously to my polite, but persistent 'nagging', this couldn't have been achieved without your valued contributions.

Lastly, to my lifelong partner and dear wife Sally whose love, moral AND financial support has allowed me to pursue my music dream and enjoy a wonderful career. My thanks to her for indulging my obsessive immersion in this project with such good humour and understanding and for her advice and exceptional editing and proof-reading skills.



Key Findings Summary - 2018

$574 Million	value of the Australian country music sector
200,000+ attendance	at major country festivals
$281 million	live performance box office & spending
14,000+ songwriters	14% of APRA's songwriter members identify as country (8% in 1997)
14% genre share	of all new-release Australian music on commercial radio
Fastest-growing	and 3rd largest country music market in the world - *Spotify*
# 1's	Australian & US country airplay charts and Australian all-genre airplay chart - first country artist #1 since 2009
A safe environment	80% of male and female artists and 90% of fans have rarely or never felt unsafe or uncomfortable at a country music gig
Since 1997	the country music sector has more than doubled in overall value

EXECUTIVE SUMMARY

Our extensive research, industry consultation and the responses from 4,329 country music fans and 582 artists, have enabled us to chart our music's progress since the first and only genre-specific report - *'Australian Country Music:An Industry Profile'* was prepared for the Country Music Association of Australia, in 1977.

The accumulated data has confirmed that country music 2018 is in a growth phase that all indicators and opinions suggest will continue.

Artists - playing more gigs than ever before, were watched and listened to by more fans whose enthusiasm and participation generated more income and thus, created increased employment for practitioners, investors and workers across the sector.

Section 1 - LIVE PERFORMANCE

Despite Australia's relatively small population, the International Federation of Phonographic Industries (IFPI) regularly registers it in the top 10 recorded music markets in the world. Most often in positions 6th to 8th (where it currently sits).
But, with few Australian artists being able to sustain a livelihood solely through revenue generated by recorded product sales, live performance has always been a crucial generator of income. Dating from the 1940s, when our pioneering artists took to the road with touring 'cowboy', 'western', 'rodeo' tent shows that toured the regions for decades, Australian country artists have relied on live performance - as have of course artists in all genres of popular music.

55% of the artists we surveyed, reported that live performance fees generated 60+% of their music income, and 36% reported it generated 80+%.

Major Festival - Box Office

Live Performance Australia, which conducts an annual Ticket and Revenue Survey of the major performing arts, reports that in 2004 popular music concert ticket sales were 2.7 million (20% of the performing arts total), generating $195 million (28% industry share). In 2017, 8.5.million tickets were sold (37% industry share), generating $826 million (44% of industry). The growth in festival attendance and revenue has been equally dramatic.

That country music has been a significant contributor to this growth is nowhere demonstrated more powerfully than in the festival sector.

The two major festivals that were included in the original report - The Gympie Music Muster and the Tamworth Country Music Festival, have now been joined on the annual country calendar by - The Deni Ute Muster, CMC Rocks Queensland, Groundwater, Dashville Skyline, Out On The Weekend and Winton's Way Out West. In 2019, Europe's C2C (Country To Country) brand will begin Australian operations with major concert events in Sydney and Brisbane.

We also note in our report that 'country' artists - particularly those at the roots/Americana end of the genre spectrum, are increasingly involved in other major festivals such as Bluesfest, Woodford Folk Festival, Port Fairy Folk Festival etc.

From the information genrously supplied to us by event organisers and promoters, we are able to report that **major country festival ticket sales generated $24.3 million in 2018.**
This compares to the $7.7 million reported in 1997 - a 215% increase.

We note that the 1997 total was for the entire festival sector - local, regional and major.
In this report we were able, through information supplied by presenters and detailed responses from our 4,000+ surveyed country fans and 500+ artists, to estimate that ticket sales to the 360+ smaller country music festivals held in suburbs, towns and regional communities across the nation **generated a minimum of $8.9 million in additional ticket revenue in 2018.**

EXECUTIVE SUMMARY

Section 1 - LIVE PERFORMANCE

Country Music Concert Box Office
The major festivals - CMC in particular, have provided opportunites for headline artists to appear in-concert in major venues in our capital cities.
In addition, major promoters and agencies - Chugg Entertainment/RP Entertainment Edge, Love Police, Laing Entertainment, Frontier Touring, Harbour, Premier, Artist Network among them, presented a range of international and domestic artists in a variety of concert venues ranging from licensed club auditoriums, through theatres and concert halls to stadiums and arenas.

From information supplied to us by these presenters and cross-referenced wherever possible by the reporting of the music industry's international ticket monitoring agency Pollstar, we report that **major concerts by country music artists in 2018 generated $17.2 million in ticket revenue.**

Country Music Small Venue Box Office
It would require a more comprehensive study than this one to definitively and precisly capture the total value of the door/entry revenue from the thousands of country gigs that annually take place in small venues across the nation.

However, we do have significant data available from our artist and fan surveys, venue licensing information from APRA AMCOS, gig guides/listings and findings from other reports - particularly the Live Music Office's '*Live Music in Australia 2014.*'

From those sources, we confidently estimate that **country music performances in small venues generated minimum box office/entry revenue of $22.2 million in 2018.**

Live Performance - Ancillary Spending

All the reports we consulted, plus the work carried out for the two major Melbourne Live Music Census projects (2012 & 2017), were unanimous in their finding that the revenue generated by ticket sales/door entry to live performances represents only a small part (20-25%) of the overall spending by patrons attending events.

This additional acillary spending is comprised of outlays on - food and beverage, merchandise, transport/travel and, in the case of major festivals especially, accommodation.

Of course, the most authoritative confirmation comes from the 4,329 fans who completed our survey.

Such is the size of the sample, we are confident that we have accurately accounted for those who spend little or nothing in some of these categories .

We have also been able to account - from information supplied by the surveys and event presenters, for those on 'teen' and/or 'junior' tickets who, of course, do not spend the same amount as adult patrons.

Our surveys recorded that the average ancillary spending by patrons at country music live music events in 2018 was:

	Festivals	Concerts	Small Venues
Food & Bev	$125	$78	$52
Merchandise	$56	$37	$26
Transport	$70	$50	$35

Ancillary Spending - continued

	Major Festival	Small Festival	Concerts	Pubs/Clubs
Food & Beverage	$42.5 m	$31.4 m	$24.5 m	$35.3 m
Merchandise	$6.3 m	$4.7 m	$6.6 m	$6.3 m
Transport	$5.6 m	$4.1 m	$6.8 m	$4.1 m
Accommodation	$4.2 m		$5.1 m	
TOTAL	$61.3 m	$40.2 m	$43.0 m	$45.7 m

Ancillary spending associated with attendance at country music performances at festivals, concerts and in pubs and clubs in 2018 is estimated at $198 million.

Additional Live Revenue

'Specialty' Events/Touring
In 2018, artists and fans were involved in a number of specialty events not captured by figures quoted thus far.

These included destination music tours (USA, Ireland/Scotland, Outback Australia etc), usually led by an artist acting as 'tour guide'. There is also a major 'floating festival' (Cruisin' Country), corporate-themed 'country' events, house concerts, small halls tours etc.

We estimate, from our respondent information, that these events generated an additional $10.9 million in ticket revenue and an additional $7.8 in ancillary spending.

Lastly, we need to account for the information from our major festival presenters and our 4,329 surveyed fans who responded to a number of questions regarding spending in local communities away from the event site.

68% of respondents reported that they spent an average of $75 per day 'off-site'. That is, in communities visited on the way to or from the designated event site.
The major festivals reported that their own research estimated spending in the local/hosting community at tens of millions of dollars.

However, we note this with interest but have NOT included it in final value estimates as we are not confident in estimating the value with the required standard of accuracy set for this report.

Live Revenue Summary

In 2018, country music performances at festivals, concerts and in pubs, clubs and other venues generated $281.5 million. A 145 % increase on the $114.6 million reported in 1997.

Live Country Music Revenue Summary	
Major Festival Box Office	$24.3 million
Major Festival Ancillary Spending	$61.3 miilion
Major Concert Box Office	$17.2 million
Major Concert Ancillary Spending	$43.0 million
Small Festival Box Office	$8.9 million
Small Festival Ancillary Spending	$40.2 million
Small Venue Box Office	$22.2 million
Small Venue Ancillary Spending	$45.7 million
Other Live Music Revenue	$18.7 million
TOTAL LIVE COUNTRY REVENUE	$281.5 million

EXECUTIVE SUMMARY

Live Performance - Employment

When a country music live performance takes place, the artistic expression by the performers creates an emotional environment, but also has a more practical element. It creates employment for a large number of people involved in the presentation.

Even before the performers take to the stage, there have been a number of workers involved in planning and facilitating the performance – artist managers, venue management and staff, rehearsal facility operators, production equipment companies, musical instrument and stage gear providers, food and beverage suppliers, designers, printers, publicists, agents, bookers, bloggers, broadcasters etc.

On many occasions activity in recording studios, at labels and in replication businesses is undertaken so artists can launch product 'live'.

The performance itself involves sound, stage and lighting crew, riggers, loaders, roadies, event and hospitality staff - paid and volunteer and a range of contractors providing services essential to the various events.

The table below outlines some of the hours of employment generated by live country music performances in 2018.

The calculation is based on the information supplied to us by event organisers and promoters, our own research and responses to our major artist and fan surveys.

Obviously, the table does not reflect the totality of hours generated across the entire country music live performance sector. However, we have not attempted to aggregate beyond that information.

	Major Festivals	Small Festivals	Major Concerts	Clubs & Pubs	TOTAL HOURS
Performer Hours	9,820	180,000	1,260	263,050	**454,130**
Production Hours	10,060	169,600	5,250	159,008	**343,918**
Event/Venue Staff Hours	14,104	142,400	18,628	202,160	**377,292**
Casual Staff (F&B etc) Hours	29,505	252,000	32,461	497,960	**811,926**
Volunteer Hours	24,820	200,000	0	0	**224,820**
Management Hours	57,960	150,000	1,012	43,120	**252,092**
Security Hours	2,320	80,000	1,120	41,230	**124,670**
TOTAL HOURS BY EVENT	148,589	1,174,000	59,731	1,206,528	2,588,848

We estimate that this employment in 2018 generated as minimum $74 million in staff wages and payments.

However, that sum is already accounted for in overall revenue generation.

Section 2 - Recorded Music Product

No other sector of the music industry has been more dramatically impacted by the digital music 'revolution' than that involving the creation, distribution and the consumption of recorded music.
When our original study was done, physical product - CDs, DVDs and cassettes, accounted for 100% of retailed product.

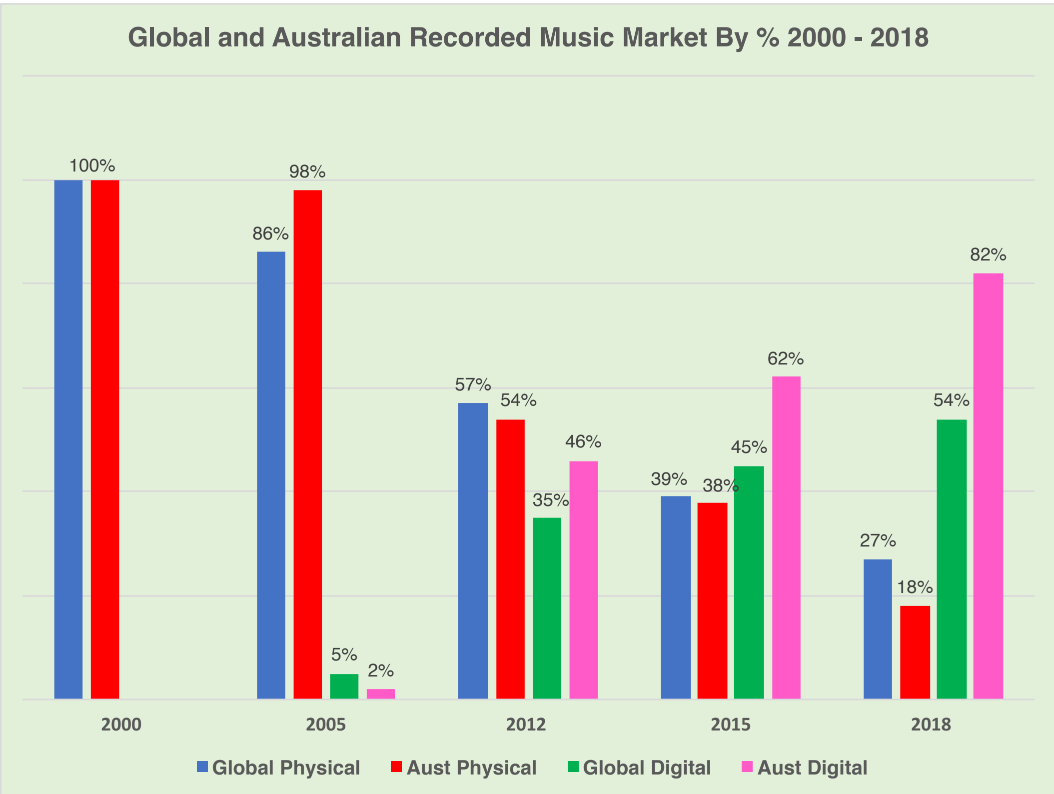
The decline in global and Australian physical product sales has been well-documented and dramatic. Well before the time of this report, ARIA stopped reporting cassettes and DVD sales as unit numbers no longer merited their inclusion. By the end of the 2018 year, CD sales accounted for only 18% of recorded music value.

Digitisation, originally seen as a threat by record labels, slowly began to arrest the decline in sales value through downloads, but it was not enough to restore the fortunes of the sector.
That restoration had to await the advent of streaming providers and the rapid embrace by consumers of their product offerings.

Australian sales declined year-by-year, reaching a low point in 2014. Streaming's dramatic impact first became obvious in 2015's end-of-year figures, and began to return the sector to growth for the first time in a decade and a half.

In 2017, ARIA reported recorded music product revenue growth of 10.5% and, in 2018, the increase was 12.6%

Such has been that growth, that by 2018, overall revenue from recorded product growth ($A563 million) at last began to approach levels recorded in 2000 ($A593 million).
Streaming revenue accounted for 71% of that total - up from 41% recorded in 2016. The trend is expected to continue.



The financial recovery of Australia's recorded music market is basically due to its membership of a group of markets identified as technologically 'advanced', where the take-up of streaming has been significantly more rapid than in less-developed areas. This latter group currently includes Europe whose performance is dragging down the global recovery. Australia's market is predicted (by ARIA) to regain 2000 revenue levels by 2020.

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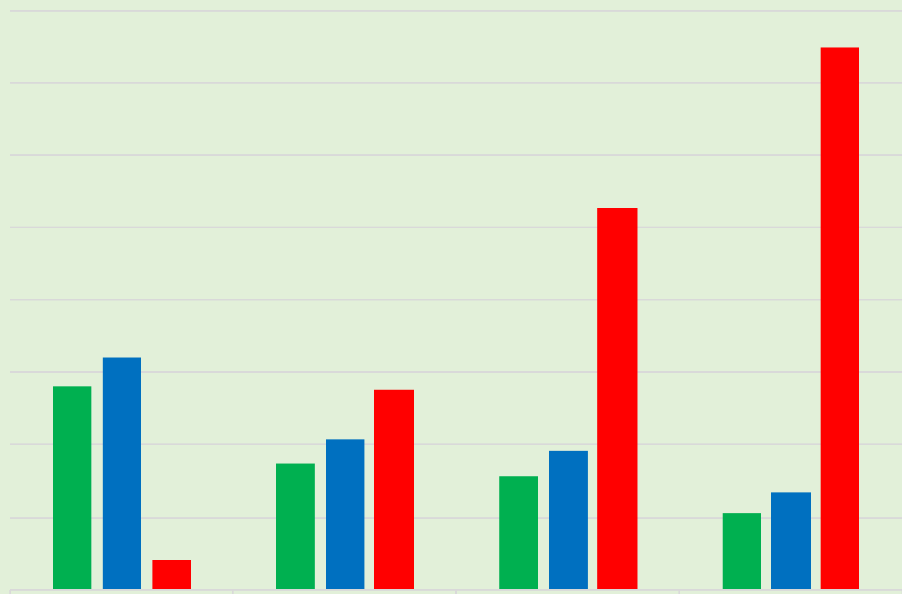
Recorded Music Product

The Rise of Streaming - ARIA Value by Format 2013 - 2018



	2013	2016	2017	2018
CD Albums	$141,000,000	$87,000,000	$78,000,000	$53,000,000
Digital Tracks & Albums	$161,000,000	$104,000,000	$96,000,000	$67,000,000
Streaming	$21,000,000	$138,000,000	$264,000,000	$375,000,000

ARIA - Physical Product

In 1997 country music was estimated to have a 7-8% share of the recorded music market.
Based on a number of indicators addressed in our methodology, and including the increased number of APRA writers identifying as country (14% up from 6% in 1997); country's increased share of new release commercial radio airplay (14% - up from 7.9% in 2000); country's Top 50 albums increasing significantly in sales value (24%) from 2017 to 2018 - we conclude that it is appropriate to assign a minimum 10% industry share to the $77.5 million in physical recorded product sales reported by ARIA for the 2018 year.

So, in 2018, **the retail value of physical country music product - CDs and a small (but growing) vinyl component was $7.75 million.**

ARIA - Digital and Streaming

As is noted in the Recorded Music section, both the global and Australian markets are in 'recovery' mode, thanks largely to the rapid adoption by consumers firstly of digital downloads and now streamed music.
Downloads and streaming in 2018 accounted for 54% of global recorded music revenue.
Australia's adoption of digital has been even more dramatic and, as will be noted elsewhere, consumers of country music have been active adopters and participants in this market transformation.

From a highpoint in 2012 when downloads accounted for more than a third of ARIA's reported sales value at $164 million, they have declined in value to the $69 million reported for 2018.
We estimate **country music product share of digital downloads as reported by ARIA to have been $6.9 million.**

ARIA Streaming

From our survey of 4,329 country music fans, we know that their embrace of streaming has been no less dramatic than it has been among general music consumers.
Whilst the take-up of subscriptions - especially paid, has been slower in the 55 years and over demographic, younger country fans have embraced the format enthusiastically.

EXECUTIVE SUMMARY

Country Recorded Product

	18-35 years	36-55 years	55+ years
Streaming Service	88%	72%	47%
Free Subscription	20%	36%	60%
Paid subscription	80%	64%	40%

	18-35 Years	36-55 Years	55 Years +
Don't Subcscribe	12%	28%	53%
Spotify	67%	51%	32%
Apple Music	30%	27%	17%
Google Play	12%	10%	5%

Among the two younger demographics, 80% reported a streaming subscription with 71% paying for that subscription. This compares to the 72% (in both categories) that was recorded among rock/pop/indie music fans in the Melbourne Live Music Census 2017.

To underline the point, Spotify - the most popular and dominant service provider, has identified Australia as the world's third-largest and fastest-growing country music market.

On these bases, **we estimate that country streaming revenue in 2018 accounted for $37.5 million of the ARIA reported total for the year.**

The US Country Music Association has recently reported (*Nielsen 'Music Connect'*) that country music's streaming revenue increased by 28% in Quarter 1, 2019.
Although this still lags slightly behind the overall industry growth rate of 32%, in the last three years country's growth has been 114% compared to the overall industry rate of 83%.
Further indication that the optimistic prediction's for the genre's streaming growth here are well-founded.

The Independent Sector

Independent labels play a vital role in all areas of popular music, providing the ability for the majority of artists not contracted to major labels, to record and release their music.
IFPI (globally) and the Australian Independent Record Label Association (AIR), have confirmed in a number of reports that the indie label sector accounts for approximately 30% of recorded music production and distribution.

Of our surveyed artists, 33% reported distribution of their recorded product through indie labels.

In 2017, AIR commissioned Deloitte Access Economics to conduct major research on the sector. The report they produced - *'Air Share:Australian Independent Music Market Report 2017'*, confirmed the size of the sector and estimated that although sales data for some indie labels was included in ARIA's annual sales figures, recorded product sales valued at $66 million was not.
We therefore estimate country music's share of that unreported revenue at $6.6 million.

Artist Retail Activity

Everyone familiar with the country music sector is aware of the significant, direct artist-to-fan retailing of recorded music product that takes place - particularly at live performances.
Anecdotally, it is suggested that this transaction between artist and fan is more prevalent in country than in other popular music genres.

The responses from our surveyed artist and fans confirm that this is the case.

From an artist's point of view, those we identified as semi-professional and professional derived 14% of their income from direct sales to fans, either at gigs or through their website.

Overall, 83% of the fans we surveyed reported buying CDs in the last 12 months. 55% did so at a live gigs and 21% reported purchase from an artist website.

They did not exclusively purchase from these sources of course, but the value to the artist is underlined by the fact that this direct retailing was as significant for fans as their purchase through a retail outlet (54%).
Of the 83% who purchased physical product, the average spend per month was $30 on 10-12 CDs per year.

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Country Recorded Product - continued

It is not possible, nor appropriate to attempt to extrapolate those findings to the entire country music fanbase.

However, based solely on the activity of our fan survey respondents, we estimate that at a minimum **this direct artist-to-fan retail, mainly of physical recorded music product, generated $4.3 million in 2018.**

CONCLUSION

Based on reports from ARIA and AIR and information supplied by responding artist and fans, we conclude that **sales of country music recorded product generated $65.2 million in 2018.**

Although this is only a modest increase on the $62.6 million recorded in 1997, the growth has taken place in a general recorded music market that has not yet recovered to that earlier level and in the contect of the dramatic decline in CD value from $596 million to $69 million during that period.

The Future - Recorded Product Postscript

Earlier this year, investment banker Goldman Sachs issued it's updated predictive report for the global music industry.
'The Music in the Air 2019' estimates that the global music industry will double in value in the next eleven years from the current $62 billion to $131 billion. While all sectors of the industry will increase in value, the growth will be predominantly driven by a dramatic increase in the value of recorded music product from the current $30 billion to an estimated $80 billion.
This will be entirely due to the revenue derived from paid subscriptions for products offered by music audio and video streaming service providers.

The report estimates that by 2030, there will be some 1.2 billion paid streaming subscribers worldwide and, that while current market leaders Spotify and Apple will maintain significant market share, they will be challenged by Amazon, YouTube and Facebook and providers in emerging markets such as TenCent in China.

And the future for Australian Country Music Recorded Product?

With country music identified by Spotify as a "genre on the rise", particularly in Australia, and with "room to move" re subscriber take-up; with the genre recording an increased share of ARIA recorded music product sales in 2018 and airplay as reported by ARIA, The Music Network and AMPCOM, the indicators suggest that country music will benefit substantially from the universally predicted future growth.

EXECUTIVE SUMMARY

Section 3 - Songs & Songwriting

Arguably, in no other genre is there such a strong connection between songs and their audience as exists in country music.

The creative passion and skill involved in creating memorable lyrics and melodies draws fans to our music.
Among the words they often use when asked about their attraction to country music are – honesty, simplicity, authenticity, storytelling, shared values, sense
of identity ...
This is particularly so in the regions and rural communities where the narrative and emotional content often have special resonance.
In terms of the economic value of country music, the song and its legal protection under copyright law – separately for the lyrics and the melody, the performance and the recording of that performance, lies at the heart of economic generation.
Without that legal regime, those who devote their energies to composing original works and those who invest in promoting and marketing and selling them would have no protection from those seeking to benefit unfairly from their efforts by illegally appropriating their work.
In short, we'd all have a hobby – not a career.

Country Songs & Songwriting - APRA

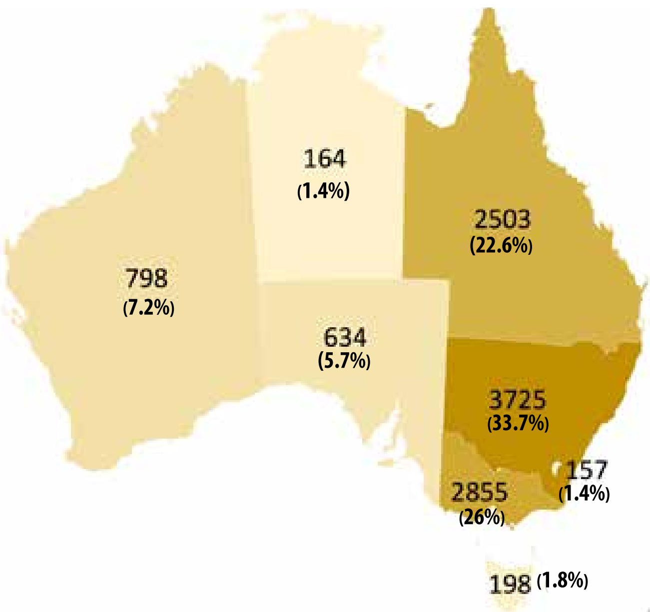
The Australasian Performing Right Association
Is the not-for-profit collection society which collects and distributes royalties to songwriters based on the licences they negotiate with a range of domestic and international businesses wishing to utilise the writer's works in live performance or recordings of those performances communicated to the public.

According to our artist survey, 96% of artists are songwriters and 93% are registered with APRA**.**

The significance and growth of the country genre is highlighted by an examination of APRA's membership.

In our 1997 report, 1,463 writers registering their works with APRA identified themselves as 'country'. This was 6% of the then 24,736 membership. By 2018, 13,978 identified as 'country' writers - 14% of the 77,000 Australian-based songwriter members.

The breakdown of country writers by state/territory and by number and percentage of all writers in 2018 was -



EXECUTIVE SUMMARY

Country Songs & Songwriting - APRA

in 2013 and 2014, APRA carried out an interesting postcode analysis of its members to identify the locations with the most members identifying with each music genre.

Based on information supplied by APRA, we have been able to update that analysis to include 2018. The top 10 postcodes for country writers were -

	2013	2014	2018
1	Northcote	Northcote	Tamworth
2	Tamworth	Brunswick	Northcote
3	Brunswick	Preston	Lismore
4	Lismore	Tamworth	Brunswick
5	Preston	Coburg	Central Coast
6	Coburg	Thornbury	Coburg
7	Thornbury	Central Coast	Preston
8	Central Coast	Lismore	Thornbury
9	Surry Hills	Newtown	Toowoomba
10	Leichardt	Marrickville	Gympie

It should be noted that the data for 2013 and 2014 reflected paid as opposed to registered writers. Unfortunately, only registered writers were available for 2018 at the time of this report.
Nevertheless, the strength of Melbourne's inner northern suburbs continues as a feature.

The Nashville Connection

Since the 1970s, Australian artists and writers have been making the pilgrimage to 'Music City USA' to pursue their creative hopes and dreams.

In terms of songwriting, Kylie Sackley was the first of this century's 'new' artists to relocate soon after her Star Maker win expressly for the purposes of pursuing a songwriting career.

Early success with Faith Hill and LeAnn Rimes covering her songs has seen her firmly established in that community.

She has been followed by many, many others. Currently there are 100+ Australian APRA writer members resident in Nashville.

In the last couple of years, they have achieved notable success with significant chart and sales achievements. Among those currently doing so are Lindsay Rimes and Phil Barton.

Such has been the strength of the Australian writer commitment to the world's country songwriting capital, that APRA opened an office there in 2017, and has conducted two of its Songhubs programs which bring together Australian and top US writers to collaborate. Another is planned for 2019.

This increased activity is underlined by the fact that **overseas performance reports submitted to APRA by Australian members increased from 2,845 2012 to 7,095 in 2018.**

In the same period, APRA's international revenue increased by 99% from $21.9 million to $43.7

EXECUTIVE SUMMARY

Country Songs & Songwriting - APRA - Revenue

APRA has experienced consistent and significant growth over the 20 year period between our reports.

	1997	2009	2014	2018
APRA Members	24,736	55,334	81,733	99,453
APRA Revenue	$78 million	$160 million	$214 million	$323 million
Number Works	N/A	N/A	783,070	1.4 million
AMCOS Members	N/A	5,806	13,971	19,074
AMCOS Revenue	N/A	$50 million	$69 million	$96 million
TOTAL Disributed	$67 million	$183 million	$253 million	$363 million

AMCOS

The Australian Mechanical Copyright Owners Society merged operations with APRA two decades ago. It is responsible for collecting and distributing the mechanical royalties associated with the recording of works and those royalties derived from the live performance and communication to the public of sound recordings containing those works ('songs').

These latter are derived from the licensing of thousands of businesses using those recordings to enhance their operations and are distributed to AMCOS's membership which, these days, is made up of many self-published writers as well as a range of publishing companies to whom writers are contracted.

As some of this income will already be accounted for in revenue reported by those publishers, we will not double-count in our final revenue summation.

APRA AMCOS - Revenue Summary

Based on our conservative estimate of 10%, rather than the 14% who identify with APRA as 'country' writers, we report that **APRA AMCOS distributed income associated with country music compositions generated $36.3 million in 2018.**

Although we did not have definitive information for AMCOS's share in 1997, our 8% industry share in that report applied to APRA's distributed income suggests a country revenue share of $5.4 million in 1997. Allowing for APRA's reported 14% administrative component, this represents a 500% increase.

Publishing Revenue

Music publishing which began in Australia in the early 1900s, has been impacted, as have all sectors of the industry, by the technologies which have transformed the music business.

Nevertheless, The Australasian Music Publishers Association (AMPAL) has reported increases in publishing income for the last three years. It reported a total sector value of $250 million in 2018.

This was made up of the mechanical, public performance and communication to the public of recorded works already noted in relation to AMCOS revenue. In addition to these however, publishers negotiate directly with businesses in a number of areas on behalf of their writers. Most notably in terms of synchronisation licenses for the use of works in audio/visual media.

Bearing in mind that considerable music publishing activity is conducted by non-AMCOS members, we estimate that **country music compositions generated $20 million of AMPAL's reported revenue in 2018.**

This compares to the $3.8 million reported in 1997.

Section 4 - Airwaves & Airplay

Since country music was first featured on Australian radio in the 1930s, thanks largely to the influence of US 'hillbilly' artists and their recordings, the broadcast media has been a vital component in exposing and promoting our music and musicians to an ever-growing audience.

An audience which now of course can increasingly consume the sector's product in a variety of formats on an ever-expanding array of devices - anywhere, anytime, at their convenience.

Through all these changes however, radio whether analogue or digital, remains no less significant as a consumtion medium for fans and is therefore pivotal in artist career advancement and the generation of income for music creators and the vast range of businesses that support them.
And that applies as much to community radio and the ABC as it does to commercial operations.

Community Radio

After country enjoyed its first success on commercial radio, it was largely abandoned - with notable and historic exceptions, as Rock 'n Roll and Top 40 formats began to dominate from the 60s onwards.

In response, the Community Broadcasting Association of Australia was established to bring 'local' news, views and specialist music to communities across the country.
Based (mainly) on narrowcast rural and regional licences, country music was always - and remains, a key component of this sector's content.

As part of this study, we received detailed survey responses from 75 stations situated in every state and territory.

In 2017, the Community Broadcasting Association of Australia (CBAA) commisioned a report - McNair yellowSquares - *Community Radio Listener Survey for the CBAA 2017,* to provide current information.
It revealed that there are currently 360 community radio licensees – ACT 6, NSW 101, NT 42, QLD 77, SA30, TAS 13, VIC 60 and WA 37.

According to the 14,000 surveyed listeners:
- There are 5.3 million Australians (1 in 4 of the population) listening to community radio every week for an average 15 hours per week. An increase of 1 million listeners since 2006.
- 19% of those listeners listen exclusively to community radio.
- 66% of stations are based in regional and rural areas and 34% in metro areas.
- Listeners are 55% male and 45% female and are spread evenly across age groups – 15-24 years (19%), 25-39 years (30%), 40-54 years (23%) and 55+ years (28%).

In 1997, our 68 responding stations reported 1,298 weekly hours of country airplay.
In 2018, our 75 responding stations report 2,799 weekly hours.
A 115% increase.

They also recorded an annual 145,000 hours of country music content, compared to the 67,500 hours recorded in 1997.

	Mon-Thurs	Friday	Saturday	Sunday	TOTALS
Weekly Country Hours	1,970	260	264	305	**2,799**
Annual Country Hours	102,440	13,520	13,728	15,860	**145,548**

EXECUTIVE SUMMARY

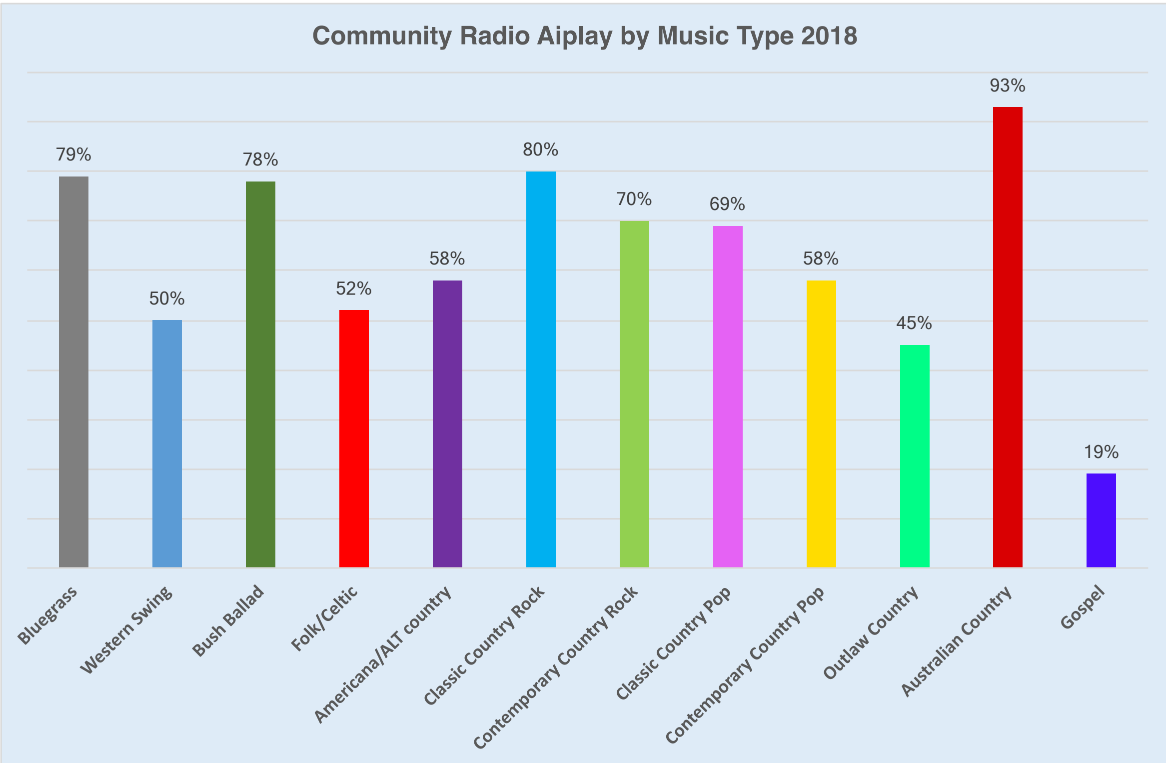
Community Radio - Continued

One of the CBAA's most important initiatives has been the establishment of AMRAP (Australian Music Radio Airplay Project) and its AirIt distribution program.
Arists, labels and managers can securely upload up to three tracks from a current release (or send a CD). Community radio programmers and presenters who register with AirIt are then able to access a digital or physical copy of the tracks for airplay or to add to their library.

This is a free service.
In 2018, some 400 tracks were added to AirIt, and 71% of our surveyed semi-professional and professional artists reported airplay on metro community radio and 82% reported airplay on regional community radio.

On average, community stations conduct 7-8 interviews per month with artists.

The responding stations and presenters reported playing a wide variety of country music -



When asked their opinion of the health of the industry currently and compared to 5 years ago, the community broadcaster respondents were very positive.

Now		5 Years ago	
In Very Good Health	47%	Much better now	28%
Feeling OK	40%	Somewhat better now	29%
Neutral	7%	The same	35%
Unwell	3%	Somewhat better then	4%
On Life Support	2%	Much better then	3%

EXECUTIVE SUMMARY

Commercial Radio

Commercial radio audiences reached an all-time high in 2018 and have grown by 12% over the past five years and by 22% over the past decade, according to Commercial Radio Australia's annual listening summary.

The CRA data showed that in 2018, more than 10.7 million people tuned in to commercial radio each week in the five major capital cities - an increase of 270,000 listeners or 2.6% over the previous year.

More than 4.2 million Australians listened to radio via a DAB+ digital radio each week (up from 3.6 million in 2017) and 2.2 million listened online on a connected device such as a mobile phone, computer or tablet (up from nearly 1.9 million).

During the same period, advertising revenue increased by 3.4% to $890 million.

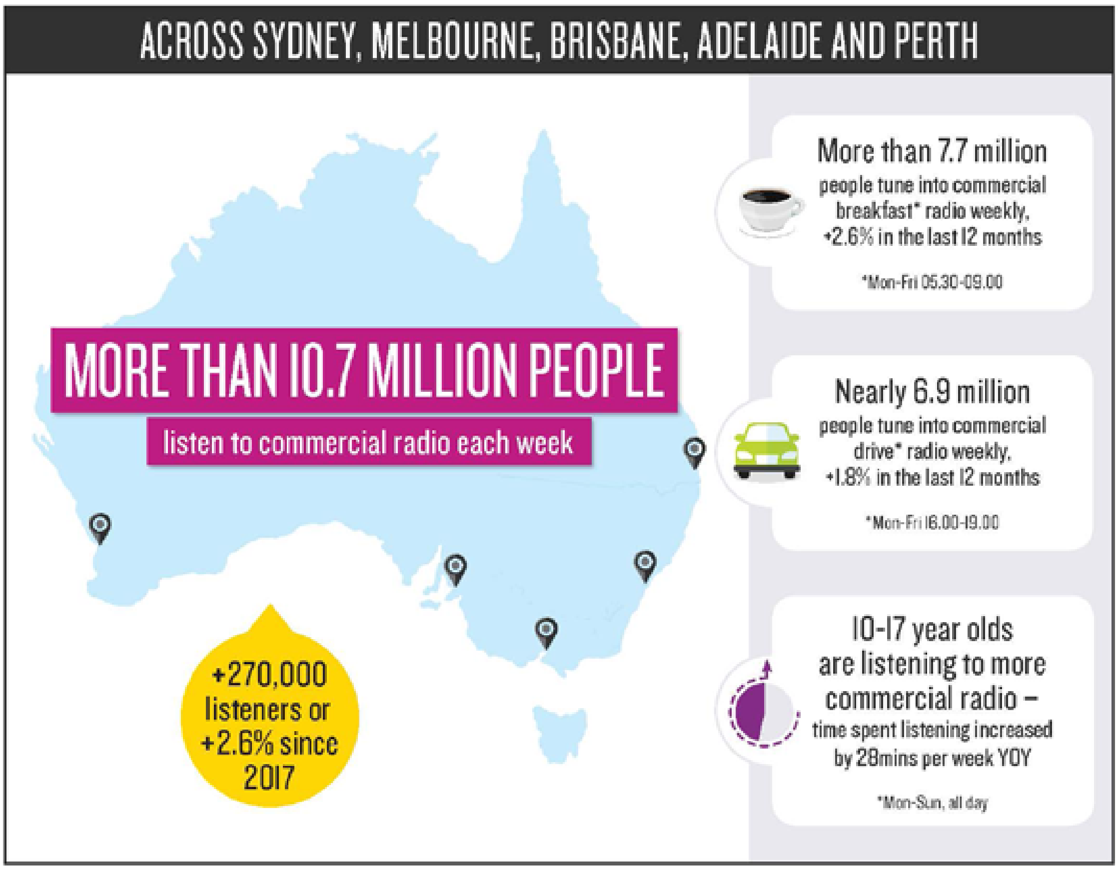
In 2018, there were 104 AM licensees across the nation and 152 FM licensees.

Since 2009, when Australia began rolling out a digital, capital city network, these stations have been joined by a growing number of digital stations operating on the DAB+ standard.

By the end of 2018, there were 154 digital licensees: Sydney 32, Melbourne 31, Brisbane 26, Perth 24, Adelaide 20, Hobart 6, ACT 9 and Darwin 5.
All the major commercial networks, the ABC and SBS and some 20 community stations make their content available on digital stations.

These digital stations are growing in significance as Australians embrace the new technologies which allow listening on a range of devices including smart speakers whose per capita take-up rate in Australia exceeds that in the US marketplace .

The total number of DAB+ radios in Australia, including those in cars, rose to 4.73 million at the end of 2018, a 24% increase from 3.80 million at the end of 2017. 65% of all new vehicles sold in Australia were factory-fitted with DAB+ radio in 2018.



EXECUTIVE SUMMARY

Commercial Radio & Country

In 1997, an AMR:Quantum Harris research project commissioned by the Country Music Association of Australia, reported that 45% of people who enjoyed listening to Australian music accessed that music from commercial radio.

Almost exactly the same percentage - 43% of the 4,300+ respondents to the 2018 fan survey, identified commercial radio as one of their major sources for country music listening.
The difference of course, is that in 1997 apart from live performance, listening to your owned music and the odd bit of country music on TV, radio was the ONLY other way to consume.

Commercial radio's significant embrace of country music in 2017 and 2018 is credited with much of the airplay chart success enjoyed by Morgan Evans and others. This will be examined shortly.

As well as playing a significant role in broadening the appeal of the music, driving product sales and facilitating widespread touring by our industry's pioneers, commercial radio was instrumental in creating a national audience through the syndication of John Minson's 'Hoedown' program from 2TM in Tamworth. On its popularity the major festival and awards that are so much a part of our modern industry were founded.

KIX

The current 'flagbearer' for country on the AM/FM bands is KIX Country, established by Grant Broadcasters, based in Bundaberg, in 2015.

The network comprises 57 stations nationwide, mainly on the FM band with most stations in regional Queensland and NSW.
Based on licence information from ACMA (Australian Consumer Media Authority), these stations have a potential listening audience of 2,896,000.

Although with streaming Apps available in the Google and iTunes stores, there is obviously the potential to reach a much larger audience.

In order to compete with digital offerings and the challenges of streaming, KIX has significantly expanded its country music news and video offerings and event involvement. It reports 26-30 interviews per month with artists.

Approximately 55% of its country content is Australian with classic and contemporary country rock and contemporary country pop being the listeners preferred genres.

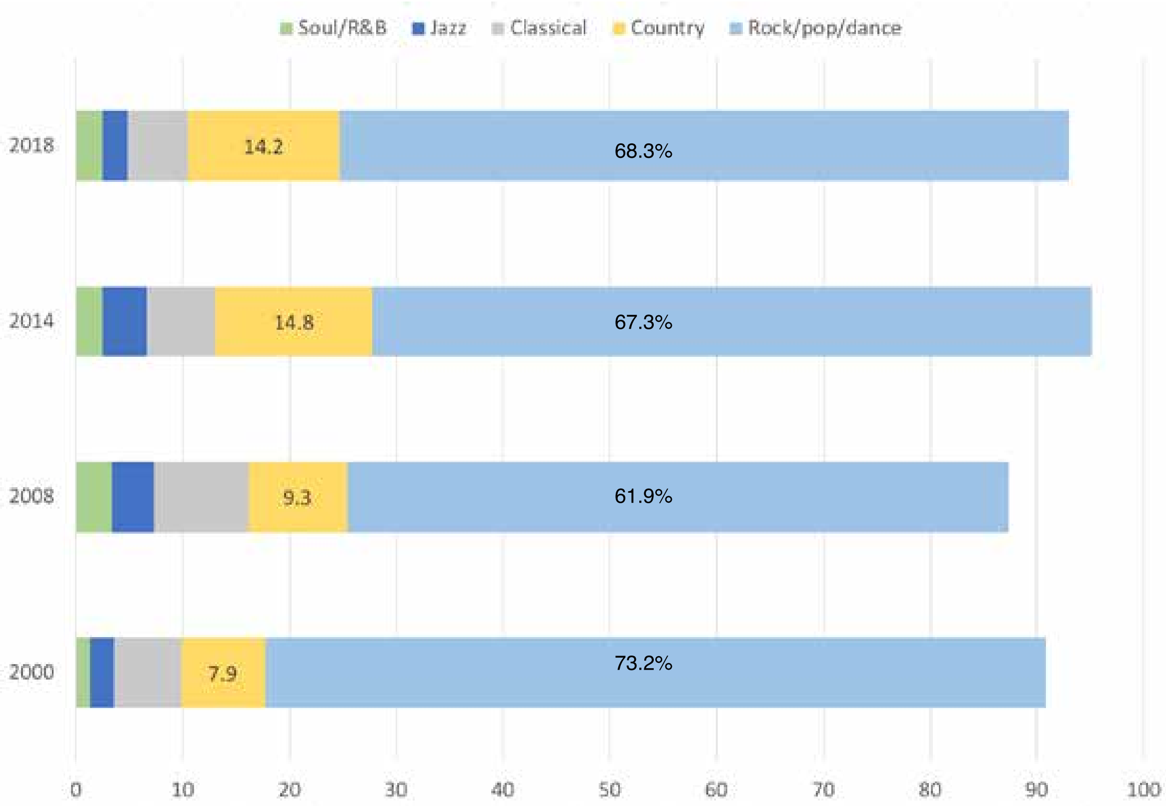
This opinion is reinforced by AMCOM (The Australian Music Performance Committee) which was originally tasked with monitoring the playing of minimum percentages of new release music on Australian commercial radio. It still reports annually on the Content Returns supplied by Commercial Radio Australia.

Country music has been the outstanding commercial radio performer. It has consistently recorded the second highest percentage after Rock/Pop/Dance, and has nearly doubled its airplay share from 7.9% in 2000 to 14.2% in 2018.

In doing so, it has clearly outperformed all other recorded music genres.

Commercial Radio - Continued

Percentage of new release Australian music product on commercial radio in 2018.
(Source: AMPCOM)



ABC Radio

The ABC has always featured country music as part of its programming, most prominently on the Local Radio network and through the dedicated 'Saturday Night Country' program.

The Local Radio network is comprised of 52 stations operating on the AM band. It includes stations in all capital cities and regional/rural areas across all states and territories.
17% of our fan respondents identified it as their favourite source for country music listening.

In 2018, the network reported that 16,224 hours of country music was programmed across the network.

The coverage of country music increases substantially when festivals/concerts are held in local station areas, through artist interviews and news coverage.

Saturday Night Country

It is hard to argue that historically, there has been a more important media outlet for country music than the iconic ABC program.

At a time when country music did not receive the commercial radio support that has recently emerged, having a dedicated national outlet for country music, especially that by local artists, was significant.

In 1993, Townsville-based broadcaster John Nutting proposed a national two-hour country music radio program to management.
This came at a time when the ABC was under some criticism for a city-centric focus, so the program began broadcasting that year.

Initially given a 'dead spot' at 10pm Saturday night, but broadcast through the Local Radio and capital city

AM networks, it attracted a large audience and was extended to four hours.

It unashamedly championed Australian artists and featured regular interviews and reviews, including a popular segment which encouraged artists to phone in after their gigs.
Tamworth music identity Felicity Urquhart took over the program in 2010.

Amidst considerable protests, the ABC announced, in 2018, that it would no longer be broadcast on the capital city network, and would move to a new digital ABC Country station in those markets. It continues on the Local Radio network in regional areas and is also streamed live from the program's website.

It is still identified by fans as one of their favourite sources for country music.

Favourite Country Radio	
KIX Country	45%
MMM Country	23%
ABC Local	17%
Saturday Night Country	12%
iHeart Country	8%
3RRR	4%
Central Coast FM	3%

Digital/Internet Radio

As mentioned earlier, there are now 154 digital licensees across the country, established since Australian radio 'went digital' in 2009.

The estimated 3 million listeners will continue to increase as consumers increasingly avail themselves of the opportunity to listen live through Apps and/or stream their content on-demand.

On of the most dramatic developments has been the rapid adoption by Australians of various home-based smart speakers, which have obviously contributed to streaming growth, including digital radio.

At the end of December 2018, there were about 5.7 million Australians with smart speakers out of an adult population of about 19.3 million. That means 29.3% of all Australian adults now have access to a smart speaker - up from zero 18 months ago.

On a user base relative to polulation, Australian's ownership of smart speakers exceeds that of the US.

60% of those owners report streaming radio content.

Triple M

An Australian radio brand owned and operated by Southern Cross Austereo. A number of networks operate under this brand. The longest-running and 'main' network is the Metropolitan network – which focuses on a mix of rock, sport and comedy. There are four of these stations all in capital cities.

The Digital Radio network, which consists of all the rock, sport and comedy stations – as well as KOFM, Gold FM, Mix 94.5 & Mix 106.3 plus Triple M Classic Rock, Triple M Country, Triple M Aussie and Triple M Greatest Hits.

Triple M Country was the last to launch in April 2018. It is beginning to establish a healthy listening audience among country fans.

(Note: In early 2019, dedicated country stations became available in Adelaide & Perth).

Digital/Internet Radio

iHeart Radio

Developed from the Clear Channel media group in the US in 2008.

In Australia, it provides access through Apple and Android Apps and website streaming to stations on the popular AM/FM Australian Radio Network.

These offerings include 'stations' devoted to most popular genres. iHeart Country Australia has been available for 3 years.

It reports that classic and contemporary rock, contemporary country pop and Australiana country are most popular with listeners. Approximately 60% of its programming content is devoted to music by Australian artists, with Australian country star Amber Lawrence fronting daily 'Amber Nights' programs with interviews, news and features – often live from major festivals/events.

iHeartCountry endorsed the opinion of all others in the sector that Australian country music in 2018 was in "very good health".

000's Listeners	January 2018	April 2018	December 2018
ABC COUNTRY			
Sydney	42	53	38
Melbourne	29	30	35
Brisbane	9	18	16
Adelaide	7	7	10
Perth	7	8	11
MMM Country			
Sydney	Not Available	20	19
Melbourne	Not Available	17	23
Brisbane	Not Available	6	19
Adelaide	Not Available	Not Available	3
Perth	Not Available	Not Available	Not Available
KIX Country			
Perth	Not Available	4	8

EXECUTIVE SUMMARY

THE CHARTS

For decades Australia has had the benefit of two consistently reliable and credible charts - the ARIA sales charts and The Music Network airplay charts. There are of course others, but these two have set our industry standard.

Both charts reveal that 2018 was a very good year for Australian country music.

ARIA - Sales

In 2018, 13 of the Top 50 albums (including four by Keith Urban) and 24 of the Top 100 country albums were by Australian artists.
This latter compares with the 19 Australian artist albums that featured on the overall, all-genre Top 100 album chart.

Excluding compilations and albums by Overseas artists, the Top 10 best selling country albums by Australian artists for 2018 were –

TOP 10 Australian country Albums 2018		
1	Graffiti U	Keith Urban
2	Ripcord	Keith Urban
3	The Very Best of Slim Dusty	Slim Dusty
4	Campfire	Kasey Chambers & TFD
5	Greatest Hits:18 Kids	Keith Urban
6	Things We Drink To	Morgan Evans
7	Milestones	Adam Brand
8	Butcherbird	John Williamson
9	The Story So Far	Keith Urban
10	Greatest Hits	Troy Cassar-Daley

During 2018 there were six Australian albums that topped the ARIA Country Chart - 'Adam & Brooke' (1 week), 'Graffiti You', (11 weeks), 'Milestones - 20 Years' (2 weeks), 'The Nashviille Tapes (1 week), 'Butcherbird' (2 weeks), 'Things That We Drink To' (1 week).

The Top 50 albums (all genres) recorded a 1% decline in sales from 2.58 million units in 2017 to 2.55 million in 2018.

However, from ARIA supplied data, the Top 50 country albums in 2018 increased their unit sales by 24%.

And Country album sales in 2018 increased from a 15% to a 19% share of the overall sales.

We cannot consider the ARIA Australian country music chart for 2018 without documenting the amazing achievement of one artist and one particular recording – 'The Very Best of Slim Dusty'. It not only finished 3rd on the best-selling Australian artist album list, but was #10 on the Top 100 country chart including O/S artists and compilations.

The album was released in 1998, just five years before Slim's untimely passing.
Yet in July 2018 it recoded its 1000th week (currently up to 1,046) on the ARIA Country Music Chart, making it the **only recording anywhere in the world to appear for that length of time on a single genre chart.**

It has been certified 5 times Platinum. In 2002 it was # 20. By 2010, it had slipped to #45. And now ... #10. Amazing!

The Charts - Airplay

Keith Urban replicated a wonderful sales year with a significant presence on The Music Network's Hot Country airplay chart, but it was Morgan Evans who was the airplay 'star' in 2018. His record-breaking local achievements were matched by notable success in the US.

By the end of 2018, his US debut 'Kiss Somebody' had recorded 500,000 unit sales and 52 million streams.

Locally, 'Day Drunk' - the follow-up to his local and #1 US airplay debut hit 'Kiss Somebody', sat on top of the TMN country airplay chart for 24 weeks in 2018. Taking over from Keith Urban's 'Parallel Line' (21 weeks).

This run put 'Day Drunk' at 3rd for the all-time record number of weeks spent at No.1 on any of the TMN airplay charts (1. Taylor Swift 'Love Story'- 33 weeks,

EXECUTIVE SUMMARY

The Charts - Airplay

By the end of the December quarter, 'Day Drunk' had also reached No.1 on the TMN Hot 100 Australian chart, a feat not achievewd by a country artist since Taylor Swift in 2009, and edging out such notables as Dean Lewis, Amy Shark and 5 Seconds of Summer.
It reached No. 4 on the all-genre Contemporary Hot Radio Top Ten.

Most Weeks in the 2018 TMN Country Aiplay chart -

Weeks	Highest Position	Weeks Top 10	Track	Artist
35	2	12	Heaven	Kane Brown
33	9	2	Tequila	Dan + Shay
31	4	10	Milestones	Adam Brand
30	9	1	Me Without You	Caitlyn Shadbolt ft. Reece Mastin
29	6	10	Neon Smoke	Gord Bamford
29	2	17	Crawl, Beg & Cry	Brad Butcher
27	1	25	Parallel Line	Keith Urban
27	1	25	Day Drunk	Morgan Evans
27	2	23	Babe	Sugarland ft. Taylor Swift
27	3	12	Most People Are Good	Luke Bryan
27	3	10	Hotel Key	Old Dominion
27	3	12	Most People Are Good	Luke Bryan
26	2	19	Simple	Florida Georgia Line
26	14	0	I Hate Love Songs	Kelsea Ballerini
25	3	15	Like We Used To	The McClymonts
25	3	9	Ain't Seen It Yet	The Wolfe Brothers
25	3	7	Cry Pretty	Carrie Underwood
25	11	0	High Horse	Travis Collins
25	11	0	You Make It Easy	Jason Aldean
25	15	0	Hangin' On	Chris Young
24	2	15	Po' Boyz	The Davisson Brothers
24	2	15	Brake Lights	Rachael Fahim
24	6	7	Loaded	Christie Lamb
23	5	10	I'd Rather Be a Highwayman	Adam Harvey
23	6	11	Bad	Caitlyn Shadbolt
23	6	6	Livin' on Summertime	Gord Bamford
23	9	2	So Smooth	Adam Eckersley & Brooke McClymont
22	1	9	Kiss Somebody	Morgan Evans
22	20	0	Women, Amen	Dierks Bentley
22	28	0	Up Down	Morgan Wallen ft. FGL
21	7	4	No Sad Song	The Wolfe Brothers
21	8	4	Life Changes	Thomas Rhett
21	12	0	Dreamcatchers	Melanie Dyer
20	2	12	Heatwave	Missy Lancaster
20	3	13	Red Dirt	Catherine Britt & TCCHs
20	10	1	Written In Sand	Old Dominion
20	15	0	Get Down South	The Davisson Brothers
19	1	13	Drive On	Lee Kernaghan
19	13	1	Coming Home	Keith Urban ft Julia Michaels
18	1	5	Body Like a Back Road	Sam Hunt

EXECUTIVE SUMMARY

The Country Music Sector - Economic Value Summary

Although not all the categories of activity measured in 2018 were matched in the 1997 report, it is nonetheless interesting to consider a 'then-and-now' value comparison and note the percentage increase in results.

The Value Variance Comparison	1997	2018	% Variance
Artist Performance Fees	$18 million	$67.7 million	275%
Live Performance Box Office & Spending	$114.5 million	$281.5 million	145%
Specialty Event Tickets & Spending	$5.4 million	$9.3 million	72%
Recorded Product Sales Revenue	$62.6 million	$65.2 million	4%
Songwriting Royalty/Publishing Revenue	$9.2 million	$56.3 million	510%
Media Advertising Revenue	$9.4 million	$23.2 million	146%
Employment Generation - wages/Fees	$15.4 million	$76.9 million	400%
Tamworth - economic generation	$30 million	$55 million	83%
Additional Community Revenue	N/A	$20 million	

The Final Word

For our final 2018 estimation, we are aware of the need to adjust a number of items in order to remove double-counting in some categories.

From the table above, we have therefore adjusted the Artist Performance Fee and Employment figures to allow for the fact that some of those totals are already accounted for in box office revenue for festivals and major concerts.

Likewise, a portion of the value associated with Tamworth has been accounted for in box office, patron spending and employment. The balance after adjustment has been included in the Additional Community Revenue total.

That done, and confident in the conservative nature of our analysis, we report that in 2018, the country music sector in Australia had an economic value of $574 million.

Country Music Sector Value 2018	
Artist Performance Fees	$46.6 million
Live Performance Box Office & Spending	281.5 million
Specialty Event Tickets & Spending	$9.3 million
Recorded Product Sales Revenue	$65.2 million
Songwriting Royalty/Publishing Revenue	$56.3 million
Media Advertising Revenue	$23.2 million
Employment Generation - wages/Fees	$46.9 million
Additional Community Revenue	$45 million
TOTAL	$574 million

EXECUTIVE SUMMARY

The Artist Survey - Highlights

In 1997, the ratio of male to female artists responding to our survey was 3:1. In 2018 that ratio was 1.5:1. **We received 582 responses**.

So that we could differentiate, where appropriate, between musicians at different career stages, levels of knowledge, experience and reputation etc, we have segmented respondents and analyed their responses on the basis of the amount of income derived from their music practice -

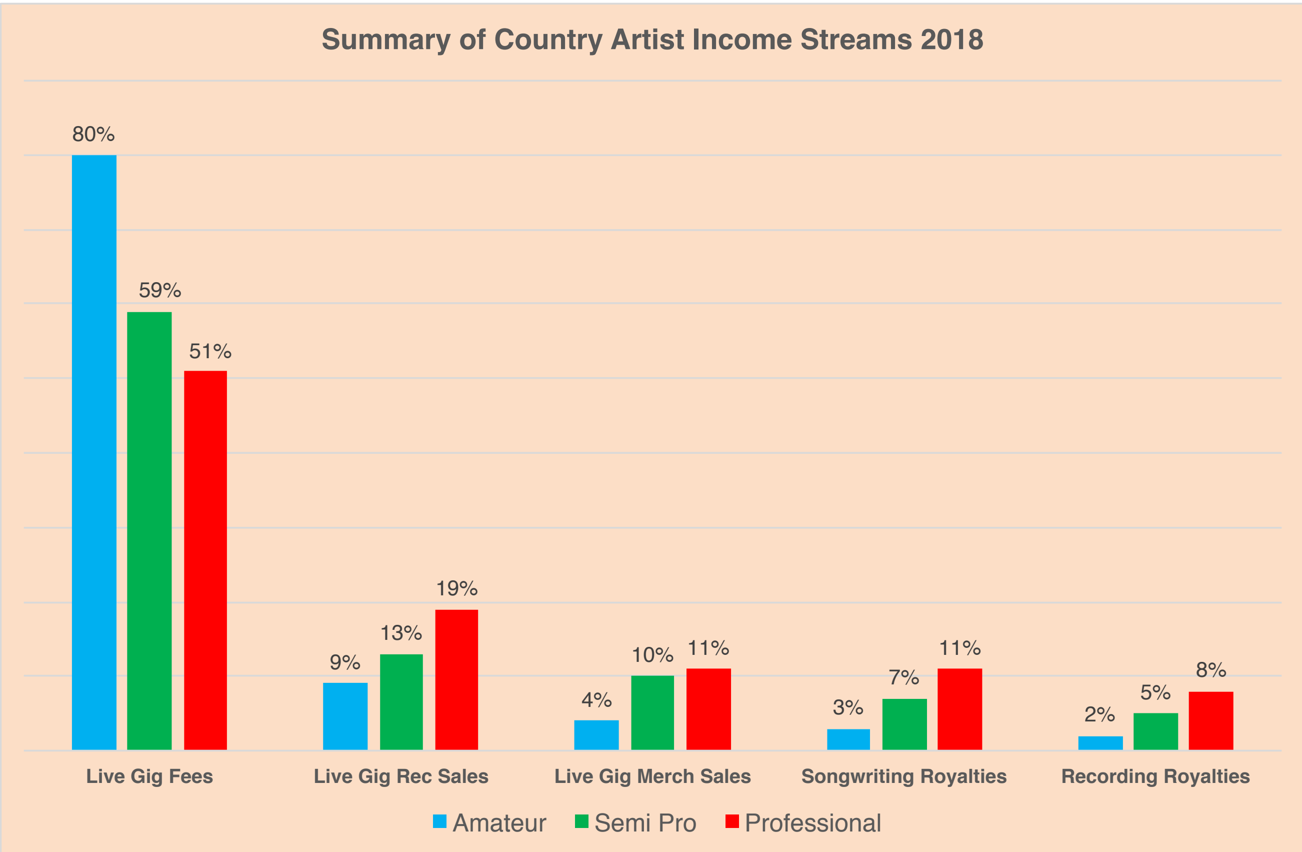
We received **211 responses (36%)** from artists who derive less than 30% of their income from their country music practice. We have designated them as **'amateur'**.

There were **180 responses (31%)** from artists who received more than 31%, but less than 70% from their practice. We have designated them as **'semi-professional'**.

The **191 (33%)** who earned more than 70% from their practice were designated as **'professional'**.

Music Income

On average, amateurs reported earning 10% of their overall income from their music practice. Those who identified 56% of income were designated as semi-professionals and those earning 85% as professionals. In all cases, fees from live performance represented the largest music income stream.



EXECUTIVE SUMMARY

The Artist Survey - Highlights

Music Performance

88% are vocalists, 71% musicians and 96% are songwriters.
They play a range of instruments, perform a broad range of country music and the majority (55%) are mainly self-taught with no formal training.

The majority of the music they perform is original - amateurs 60%, semi-professional 68% and professional 72%.
Most perform on a regular basis and are paid for the majority of those performances.

	Local /Reg Festival	Interstate Festival	O/S Festival	Concert (Theatre/Club)	Hotel/Bar
Amateur	Average 2	Average 0.5	Average 0	Average 3.5	Average 10
Semi Pro	Average 4	Average 2.5	Average 0.5	Average 7	Average 15
Professional	Average 9	Average 7	Average 1	Average 22	Average 33

The performance fees naturally vary significantly across the three groups.

SOLO Average Fee	No Solo	$ Av Festival	$ Av Concert	$ Av Pub
Amateur	27%	$160	$150	$145
Semi Pro	23%	$360	$310	$305
Professional	15%	$750	$700	$520
DUO Average Fee	**No Duo**	**$ Av Festival**	**$ Av Concert**	**$ Av Pub**
Amateur	49%	$300	$280	$320
Semi Pro	30%	$550	$500	$530
Professional	41%	$750	$650	$700
GROUP Average Fee	**No Group**	**$ Av Festival**	**$ Av Concert**	**$ Av Pub**
Amateur	42%	$700	$500	$385
Semi Pro	27%	$1,100	$1,430	$870
Professional	38%	$1,900	$1,850	$1,140

Recording

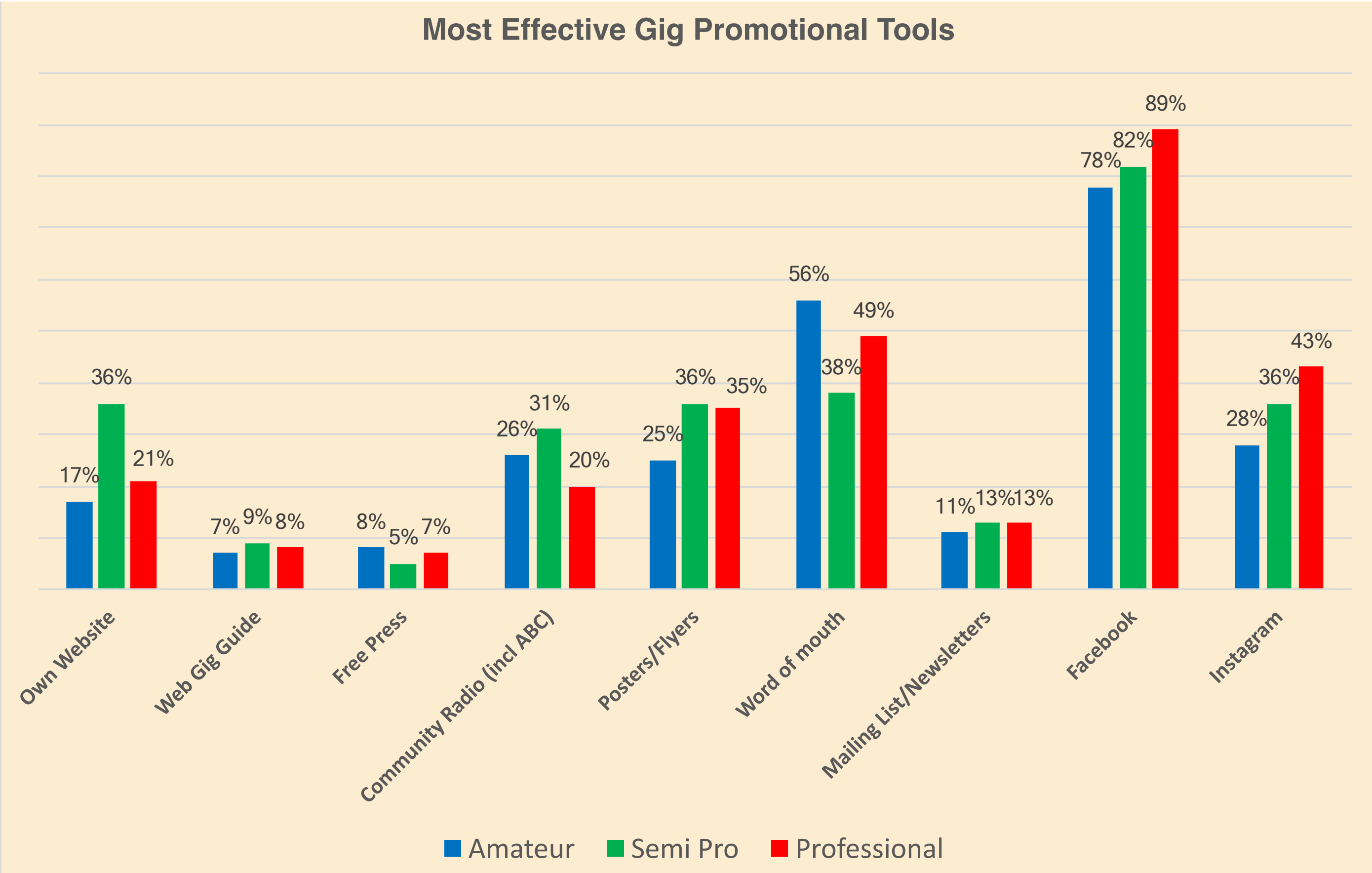
All have recorded in the last 12 months, with semi-professionals and professionals recording an average of 15 demo tracks and 12 tracks for commercial release. Most were produced in a home/non-commercial studios and were, in the main (80%) self-financed.

In summary:

	Overall	Semi Pro	Professional
Tracks for Commercial Relesae	56%	70%	75%
Av Number tracks recorded	7	10	13
Self Financed	75%	90%	70%
Label Financed	10%	9%	18%
Label Distribution	27%	31%	39%
Indie Distribution	17%	26%	23%
Self Distribution	60%	54%	45%

The Artist Survey - Highlights

In terms of promoting gigs and recordings, the most effective promotional tools were:



Music Business

With access to the artist survey data from the Melbourne Live Music Census 2017, we were able to make some comparisons between country artists and a broader music genre cohort in terms of their business affairs.

	CM Census 2018	MLMC 2017
Manager	29%	30%
Agent	53%	37%
Publicist	39%	28%
None	30%	52%

	CM Census 2018	MLMC 2017
APRA Member	93%	75%
PPCA	37%	11%
Peak Organisation	65%	21%
ABN	90%	78%
GST Registered	33%	24%

EXECUTIVE SUMMARY

The Artist Survey - Highlights

The Academy

As the Senior Academy program has been operated by the CMAA for 20 years and the Junior Academy somewhat less, we were keen to get feedback on the value ex-students derived from the formal tuition and the networks developed from involvement in the program.
Of the total responent sample, 9% were graduates of the Junior program and 16% graduates of the Senior. Needless to say, we were very pleased by the following responses.

	Very Useful	Useful	Neutral	Not Useful	Poor
Junior Academy					
Professional Development	43%	38%	15%	2%	2%
Career Development	40%	40%	17%	2%	1%
Senior Academy					
Professional Development	57%	25%	15%	2%	1%
Career Development	55%	23%	17%	2%	3%

Health, Wellbeing & Safety

We asked a series of questions to determine the extent that the artist's music practice had impacted on their physical and mental health and whether they considered that country music events/venues provided a safe environment.
The tables below reflect the responses. In terms of the level of safety participants felt, we have reported results based on gender and compared them with artist practitioners from the Melbourne Live Music Census 2017.

Has your hearing been affected by your music practice ?

	Amateur	Semi Pro	Professional
Yes	36%	49%	39%
No	37%	29%	38%
Not Sure	27%	22%	23%

If you answered 'yes', what did you do ?

	Amateur	Semi Pro	Professional
Self-managed the condition	44%	38%	38%
Sought medical assistance	22%	37%	27%
Took no action	34%	25%	35%

Do you regularly wear hearing protection ?

	Amateur	Semi Pro	Professional
In Rehearsal	12%	13%	15%
On Stage	10%	9%	17%
At Other Gigs	17%	25%	18%
In The Studio	7%	2%	2%
Don't Use Any	72%	73%	73%

The Artist Survey - Highlights

Has your mental health been affected by your music practice ?

	Amateur	Semi Pro	Professional
Yes	31%	47%	43%
No	64%	47%	51%
Not Sure	5%	6%	6%

If you answered 'Yes', what did you do ?

	Amateur	Semi Pro	Professional
Self managed the condition	32%	40%	41%
Sought professional assistance	40%	44%	41%
Took no action	28%	16%	18%

Have you ever felt unsafe or uncomfortable at a country gig you played ?

	Amateur	Semi Pro	Professional
Often	2%	4%	3%
Sometimes	16%	18%	23%
Rarely	18%	28%	24%
Never	64%	50%	50%

And respondents by gender -

	Male	Female
Often	2%	3%
Sometimes	14%	22%
Rarely	21%	25%
Never	63%	50%

And compared to artists from Melbourne's rock/pop/indie music community -

	Male		Female	
	CM Census	Melb Census	CM Census	Melb Census
Often	2%	2%	3%	9%
Sometimes	14%	20%	22%	28%
Rarely	21%	34%	25%	38%
Never	63%	44%	50%	25%

EXECUTIVE SUMMARY

The Fan Survey - Highlights

We received 4,329 responses.

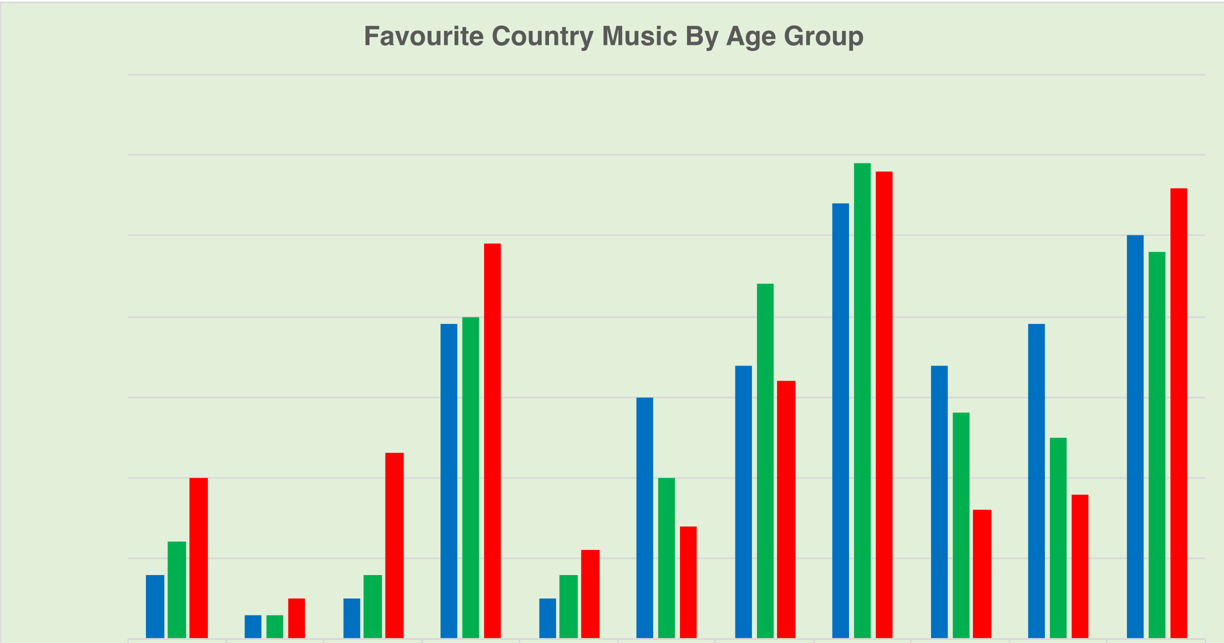
As was the case with the Artist Survey, we were at pains to mak.e sure that we sampled respondents from different age groups and geographic locations. The full results are available in the Appendix section.

Age groups and locations of fans

	% Respondents	Male	Female
18-35 years	28%	24%	30%
36-55 years	31%	28%	32%
55+ years	41%	46%	38%

	Metro City	Regional City	Regional/Rural	TOTAL	%
ACT	43			43	1%
NSW	387	474	536	1397	32%
NT	26		25	51	1%
QLD	302	501	351	1154	28%
SA	134	14	149	297	7%
TAS	48	8	52	108	2%
VIC	485	99	449	1033	24%
WA	87	36	123	246	5%
TOTAL	1512	1132	1685	4329	
	35%	25%	40%		

Although they listen to a broad range of music, 43% of country fans spend 80% of their time listening to country. Approximately 50% of their listening in to Australian artists. Their favourites are:



	Bluegrass	Western Swing	Bush Ballad	Trad Country	Folk/Celtic	Americana/A LT	Modern Country Rock	Classic Country Rock	Modern Country Pop	Classic Country Pop	Australiana Country
18-35 yrs	8%	3%	5%	39%	5%	30%	34%	54%	34%	39%	50%
36-59 yrs	12%	3%	8%	40%	8%	20%	44%	59%	28%	25%	48%
60+ yrs	20%	5%	23%	49%	11%	14%	32%	58%	16%	18%	56%

EXECUTIVE SUMMARY

The Fan Survey - Highlights

Live Performance

They attend multiple performances per year - festivals, concerts and gigs in pubs, clubs and bars. When they do, they spend significant amounts - in addition to ticket/door entry, on food and beverage, merchandise - including recordings, transport/travel and on accomodation associated with their attendance.

	18-35 Years	36-55 Years	55 Years +
Av number major festivals	3.5	4.0	3.5
Av number small festivals	4.0	5.0	4.0
Av number major concerts	4.5	6.5	7.0
Av number club gigs	3.5	10.5	12.0
Av number pub gigs	10.0	12.0	10.0
Av number CM club gigs	1.0	2.5	2.5

	N0 Spend	Food & Beverage	Transport	Merchandise
Festival Av	8%	$125	$70	$56
Major Concert Av	17%	$78	$50	$33
Club/Pub Av	23%	$52	$35	$26

We have access to fan spending comparisons from the UK Live Music Census and the Melbourne Live Music Census 2017. The table below compares the number of patrons who spent an average of $A35 per month on live gig attendance.

	Conc/Fest Tix	Pubs/Clubs	Recorded Music
Country Census 2018	66%	48%	46%
UK Live Census 2018	46%	37%	25%
Melbourne Live Census	61%	40%	42%

Recorded Music

Overall, 82% of fans bought physical recorded music product (CD) in the last 12 months.

	None	At Artist Gig	Artist Website	Retail Outlet	Online Retailer
18 - 35 Years	28%	40%	17%	51%	16%
36 -49 Years	19%	54%	21%	52%	15%
50+ Years	9%	66%	24%	59%	28%

EXECUTIVE SUMMARY

The Fan Survey - Highlights

They spent an average of $32 per month on CDs, and 66% of respondents bought digital product in the last 12 months, spending an average of $18 per month.

Fan Streaming

Given that music streaming has become the most dominant recorded product format since the introduction of the CD, we were keen to get feedback on its embrace by country fans. Particularly as the opinion is often expressed that the take-up of streaming is slower among country fans than those involved in other popular music genres.
We were interested to discover that while this would seem to be true for the older demographic, it does not appear to be the case for the under 50s.

	18-35 Years	36-55 Years	55 Years +
Don't Subcscribe	12%	28%	53%
Spotify	67%	51%	32%
Apple Music	30%	27%	17%
Google Play	12%	10%	5%

	18-35 years	36-55 years	55+ years
Streaming Service	88%	72%	47%
Free Subscription	20%	36%	60%
Paid subscription	80%	64%	40%

The 72% of under 50s who had a streaming subscription and the 71% who paid for their subscription compared almost exactly with the 72% recorded for both categories in the Melbourne Live Music Census 2017. Fans paid an average of $13 per month.

Safety & Wellbeing

We asked a series of questions about the environment at country music gigs.

Have you felt unsafe or uncomfortable at a country music event/venue ?

	18-35 Years	36-55 Years	55 Years +	Overall
Often	1%	1%	1%	1%
Sometimes	8%	6%	3%	5%
Rarely	24%	16%	11%	16%
Never	67%	71%	85%	77%

And by gender -

	Male	Female
Often	1%	1%
Sometimes	5%	6%
Rarely	17%	16%
Never	77%	77%

EXECUTIVE SUMMARY

The Fan Survey - Highlights

Who made you feel unsafe or uncomfortable ?

	18-35 Years	36-55 Years	55 Years +	Overall
Another audience member	83%	74%	63%	73%
Venue staff	4%	6%	5%	5%
Security staff	11%	8%	8%	9%
A performer	1%	1%	2%	1%

The very small number who reported feeling unsafe or uncomfortable overwhelmingly identified another intoxicated audience member (or members) as the source.

And compared with country music artists and music fans surveyed for the Melbourne Live Music Census 2017 -

	Often	Sometimes	Rarely	Never
CM Fan - Male	1%	5%	17%	77%
CM Fan - Female	1%	6%	16%	77%
Melb Music Fan - Male	2%	25%	48%	25%
Melb Music Fan - Female	2%	31%	43%	24%
CM Artist - Male	2%	14%	21%	63%
CM Artist - Female	3%	22%	25%	50%
Melb Music Artist - Male	2%	25%	34%	34%
Melb Music Artist - Female	9%	28%	38%	25%

EXECUTIVE SUMMARY

Cultural and Social Value

There is an extensive body of research which identifies a number of civic, social and cultural benefits associated with involvement in music - both as a participant and as a consumer.
Connections to physical and mental health and enhanced learning are significant and well established.

Music performance and production builds social, culturaland knowledge 'capital' which delivers benefits to individuals and communities.
In many cases, these benefits have an economic impact.
The *'Live Music in Australia 2014'* report,prepared for the Live MusicOffice by the University of Tasmania, estimated that for every $1 invested in live music a $3 benefit was delivered to the community.

Even when the physical capital associated with the conduct of major festivals involves temporary infrastructure on, mainly, 'green fields' sites, the investment required to mount the event creates many thousands of hours of work for production personnel, event staff and volunteers and a myriad of contractors involved in the delivery of the festival.
In addition, the research undertaken for this report revealed that communities in direct proximity to those major events derive tens of millions of dollars annually from the patron spending associated with event attendance. Significant spending also takes place in communities away from the event locale as patrons travel to and from the events.

Tamworth provides an obvious example of the physical capital generated by music.
When it became increasingly obvious that previous venues had insufficient capacity to host the festival's marquee Golden Guitar Awards event and major concerts by the genre's headline artists, the city made a substantial commitment to increase its physical capital.

The creation of the Tamworth Regional Entertainment and Convention Centre provided a facility that has allowed Tamworth to preserve its symbolic status as Australia's 'Country Music Capital'. In much the same way that Nashville created a new home for the Grand 'Ole Opry to enhance its reputation as 'Music City USA'.

Human Capital

Human capital is best appreciated as the sum of three elements - psychological capital, knowledge capital, and physical health.

Psychological Capital

In a musical context, we often refer to the 'vibe'. The interaction within and between audiences and performers associated with feelings of collective experience.
In our surveys, the experience of attending and delivering a live music performance was identified as 'unique' – unrepeatable – a one-off in an increasingly mediated world.
It was overwhelmingly reported as mood-enhancing with respondents using words like 'energising', 'uplifting', 'stress-relieving', 'happy', 'proud', 'inspiring', feeling of 'inclusion', 'acceptance' when describing their experiences and emotional reactions from their country music engagement.

They stressed that the country genre was particularly valued for its 'authenticity' and the narrative emphasis in country songwriting – 'real stories of real people' with which they could 'identify' and 'connect'.
Delivered by artist who were 'genuine' and 'honest'.

Country music performers and fans often refer to being part of a large 'family', with events providing opportunities for social bonding – the chance to spend time with friends and family, like-minded people and the opportunity to make new acquaintances.

Country music fans were keen to highlight the positive emotional impact of performances in communities experiencing personal or general hardship.
Country music artists were universally praised for their willingness to donate their services to assist rural and regional communities impacted by the ravages of fire, drought and flood in particular.
Performances created an opportunity for residents to come together and celebrate - to 'forget their cares for a while'.
Of course these celebrations, as well as delivering an emotional and psychological benefit, have also had a significant economic impact through fundraising that generates considerable revenue for local relief and a variety of charitable causes.

Cultural & Social Value - Continued

Knowledge Capital

Knowledge capital comprises two forms, that gained through formal education and training and that gained through experience.

Whilst previous generations of musicians were largely self-taught or, at most, had access to private tuition to enhance their technical skills, the current generation have a much broader range of formal options.

Many TAFEs and universities now offer certificates, diplomas and degrees in music performance, sound production, songwriting and music business.

Primarily these have been developed to cater for an increased demand arising from the dramatic changes that have taken place in the music industry over the last two decades.

Artists who previously relied on attracting the interest of a range of investors – labels, publishers, managers, agents etc to record, perform and distribute their music, now have unprecedented access – through technological changes, to much cheaper recordings and, through a variety of social media platforms and analytical tools, the ability to target their distribution. In response to our survey, 20% of artists confirm acquiring these skills through formal channels.

Formal training has expanded beyond the secondary and tertiary public education sectors with a range of private providers offering not only certificates, diplomas and degree but also workshops, master classes and short courses through face-to-face and online delivery.

APRA AMCOS has been particularly pro-active with a broad-ranging program targeting music practitioners and self-managed artists especially.

Their SongHubs program brings together established (often international) writers and producers for collaboration with local practitioners.

Australian country music has produced its own unique skills and development program, the Academy of Country Music (or College as the senior program was initially titled, and Camerata under which the first junior programs were run).

These programs – described in detail elsewhere, have contributed to the knowledge capital of hundreds of early and mid-career artists, many of whom have established viable careers and regularly feature as nominees and winners of Golden Guitars and the Star Maker talent quest which are highlights of the annual Tamworth celebration.

The technical skills gained from live and recorded music production are broad and can be transferred and adapted to many other professional pursuits, however they form only a minor part of the acquisition of knowledge capital in our genre.

As many local-level acts (70% from our artist survey) do not employ professional (even semi-professional) management, the responsibility of booking, organising, promoting and executing successful live music events often falls on the artists themselves.

As is the case in other music genres, this on-the-job training has seen many artists transfer their focus to other sectors of the industry.

Many of our leading producers, promoters, managers, label executives, publicists etc began their careers as performers, and many continue in multiple capacities.

Country music artists are ‘lucky’ in the sense that they operate in a genre area where fans (as confirmed by our surveys) consume recorded product, at live gigs and from artist websites, in quantities unrivalled in other popular music genres.

Advances in digital hardware and software technologies have enabled a generation of artist to acquire recording and production skills, often from their industry colleagues.

Likewise, their involvement in social media, often begun as a communication with friends and family, has provided many with the self-taught skills and knowledge to promote performances and target potential consumers of their recorded product and associated merchandise.

Physical health

Beyond, the general sense of well-being already noted, there is limited literature on the physical health benefits associated with the consumption of music.

We know however, that there is strong anecdotal evidence to suggest that physical threat, violence and harassment are less common in venues that feature live music. This is particularly the case in licensed premises.

We asked a number of specific questions in our surveys to determine how often fans and artists had felt unsafe or uncomfortable at venues and events featuring country music. We compared these findings with the only other known source for comparison – The Melbourne Live Music Census 2017.

EXECUTIVE SUMMARY

Cultural and Social Value - Continued

84% of male country artists and 75% of female country artist had rarely/never felt unsafe or uncomfortable.
The equivalent percentages from the Melbourne study were 68% for male artists and 63% for females.

94% of male country fans and 93% of female country fans had rarely/never felt unsafe or uncomfortable.
The Melbourne equivalents were 73% for male fans and 67% for females.

It comes as no great surprise that the small percentage of those who had an unsafe/uncomfortable experience reported an individual audience member as the perpetrator. Intoxication was overwhelmingly identified as the cause.

Given there is significant evidence to suggest a causal link between music practice and hearing loss, we asked country music artists a number of related questions.
An average of 42% of all (amateur, semi-professional and professional) reported that their hearing had been affected by their music practice.
Of those, 30% took no action and only 20% sought medical advice/assistance.
Again, across the spectrum of artists, 73% use no hearing protection either onstage, at rehearsal or when attending other gigs.

Social Capital

Measurements of social capital generally identify elements such as an individual's trust, happiness, inter-personal networks and civic engagement.

The relationship between social capital and commercial success is well documented, and contemporary music scenes thrive on social, economic and cultural capital sustained and maintained by social networks of like-minded enthusiasts, musicians and music industry professionals.
In this regard, country music is no different from other music genres and, indeed, most artforms.

What has changed so dramatically to alter the store of social capital in our increasingly digitized world, has been the very nature of those social networks through the embrace of social media platforms and the proliferation of 'smart' devices enabling and encouraging ever-greater access.

As our research confirms, country music fans are no less enthusiastic in their embrace of social media platforms and instruments than those who support other music genres.
As well as utilising their accounts and memberships to interact with other like-minded people, they also obtain event/gig information utilising (especially) Facebook Events and recommend and share their favourite music through posts.

The rise and rise of streaming services, also embraced enthusiastically by country fans has created a new level of social interaction in music listening through the ability to consume, create and share recommended playlists.
And of course, social media has enabled a direct interaction between fans and artists which was previously only available through direct, physical contact at performances or by personal correspondence.

A unique feature of our country genre, especially in regional areas, is the existence of country music clubs. They provide a physical gathering point for fans of the genre with an emphasis as much on social interaction in a family-friendly environment as it is on the music itself. With so many performers beginning their careers at an age when pub/club appearances are problematic or unavailable, these clubs provide an important and supportive launching pad for those taking their first career steps in building a fan base.

The economic consequences of accumulating social capital has not been lost on the producers and presenters of country music.
Events and venues of all shapes and sizes have been quick to appreciate the potential and have increasingly prioritised direct engagement with existing and potential fans to increase their reputation and status, attendee numbers and thus their attraction to prospective sponsors.
The CMC Rocks public Facebook group has over 100,000 members who spend the time between the annual festival sharing their experiences through words, pictures and videos, discussing favourite acts and industry issues and lobbying for artists to be included on next year's bill

Cultural & Social Value - Continued

Country Music artists are an integral part of these expanded social networks
Their ability to interact directly with fans through social platforms has enabled them to expand their fan base and promote gigs and products. Many utilising a variety of analytical tools which provide them with a range of data to better target promotions.
For promoters, presenters and producers the ability of an artist to accumulate and strategize social capital assets has become an important marker in determining their potential involvement and support.

During the universal downturn in world and Australian record markets and the consequent tightening of recording budgets and reduced artist signings across the major and independent label sector, the ability of artists to monetize their social capital through crowd funding campaigns has provided many artists with the ability to continue their creative production and distribution when they had either been cut from rosters or had little likelihood of securing financial support in a restricted and depressed commercial market.

Musicians also associate some venues as being significant in developing networks with fellow musicians or music industry practitioners.

Symbolic Capital

Symbolic capital describes the value derived from being known and recognised—a concept synonymous with standing, good name, honour, fame, prestige and reputation. Symbolic capital need not necessarily be confined to the elite domain—there is a limited form of symbolic capital observable in all stratas of society.

In the music context, symbolic capital can attach to regions, cities, venues and performers.
Melbourne, for example, has an actively self-promoted reputation for being the live music 'capital' of Australia due to its multitude of venues, its calibre and concentration of local acts, and its history and legacy of producing world-class artists and musicians.
It is argued that such place-based symbolic capital encourages migration of consumers and producers, as the appeal of Melbourne's vibrant live music scene draws creative individuals and music lovers from other regional and urban centres.

In the country music genre, we have a number of obvious examples.
When the country music became a feature of radio broadcasts during the 1930s in regional areas of the USA, the city of Nashville – previously best-known as the nation's bible printing centre, seized the opportunity to create the Grand 'Ole Opry as a weekly live concert radio broadcast.
It announced itself as 'Music City USA' and building on the popularity of the Opry, it began to attract the artists and industry operatives who took over a large residential area to establish 'Music Row', home to labels, publishers, studios and related businesses.
This investment in physical capital, combined with relentless reputation building has seen the city transformed into a creative, production and touring hub for musicians and operatives involved in all genres.
It is now a major tourist destination for country music fans, and is now one of the fastest growing cities in the nation.

The successful marketing and exploitation of the symbolic capital it has accumulated has made the Nashville experience an essential 'must-do' for country writers and performers from around the world.

As mentioned, there are currently over 100 Australian writers, performers and producers currently calling Nashville 'home', and they are regularly joined by other Australian artist and industry practitioners visiting to tour, record, co-write and do deals.

Such has been the power of Nashville's branding that the digital music and streaming service providers, with no technical need to be specifically geographically based, have nonetheless all established offices in the city to be part of what they consider a burgeoning scene and market opportunity.

Interestingly, this has seen them expand their operations to become involved in a range of activities usually identified with the industry's traditional businesses.

Our most obvious local genre example is Tamworth. A middle-sized rural market centre for primary produce, it too grasped an opportunity based on the popularity of a syndicated country music radio program – John Minson's 'Hoedown'.

EXECUTIVE SUMMARY

Cultural and Social Value - Continued

Styling itself Australia's 'Country Music Capital', it established a major awards (1973) and began building Australia's most unique and long-lasting music event, featuring music in 100+ venues – pubs and clubs, churches, school and community halls, restaurants, on the streets and in pop-up venues in retail outlets, camping areas, caravan parks etc.

Although it's geography has so far precluded attempts to entice traditional industry businesses to establish a physical presence, the city is currently developing plans for a performing arts complex and exploring partnerships with regional universities to drive plans to enhance its reputation as a creative arts hub.

Venues and events of all shapes and sizes search for that point of difference which will create a distinct image, enhance their reputation and thus their social capital to drive attendance and patronage.

Artists, too, enjoy and exploit their own form of symbolic capital.

Many of those travelling overseas, particularly to North America, have been beneficiaries of status and affection that many ascribe to the initial efforts of Paul Hogan's Crocodile Dundee character, reprised by Steve Irwin in recent years.

At home, many country artist have consciously included a 'country' theme in their symbolic capital building.

For example, Lee Kernaghan's on and off-stage persona and creative output has been unashamedly crafted to reflect identification with rural life, values and experiences.

In this, he follows in the balladeer tradition of pioneers such as Tex and Buddy and Slim & Joy.

Conclusion

Country music making and consumption in Australia alters the states of physical, human, social and symbolic capital in individuals, firms and communities.

It generates a broad range of commercial and civic benefits ranging from the jobs created at the smallest of grass roots events attended by dozens, to those at major concerts and festivals attended by tens of thousands.

The revenues generated help supplement the income of the lowest-paid practitioner and ultimately contribute to the national GDP.

What is not as easy to grasp – or measure, are the range of intangible benefits that are experienced by those who create the music, those who deliver it, those who present it and those who consume it.

That said, we have ample evidence from our research that country music in Australia has great cultural and social value that enriches the nation and the lives of millions of Australians.

The Economic and Cultural Value of Country Music in Australia 2018

A Report Prepared for the CMAA
By
Dobe Newton
July, 2019

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