



# The Economic and Cultural Value of Country Music in Australia 2018

## Full Report

Prepared for the Country Music Association of Australia Inc  
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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 songs 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.



## Introduction 2

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 –

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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.



## Acknowledgements 2

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.

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# Executive Summary



## EXECUTIVE SUMMARY

### 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 generously 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 opportunities 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 precisely 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 ancillary 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



# EXECUTIVE SUMMARY

## 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	
<b>TOTAL</b>	<b>\$61.3 m</b>	<b>\$40.2 m</b>	<b>\$43.0 m</b>	<b>\$45.7 m</b>

**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 million
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
<b>TOTAL LIVE COUNTRY REVENUE</b>	<b>\$281.5 million</b>

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

**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.



# EXECUTIVE SUMMARY

## 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

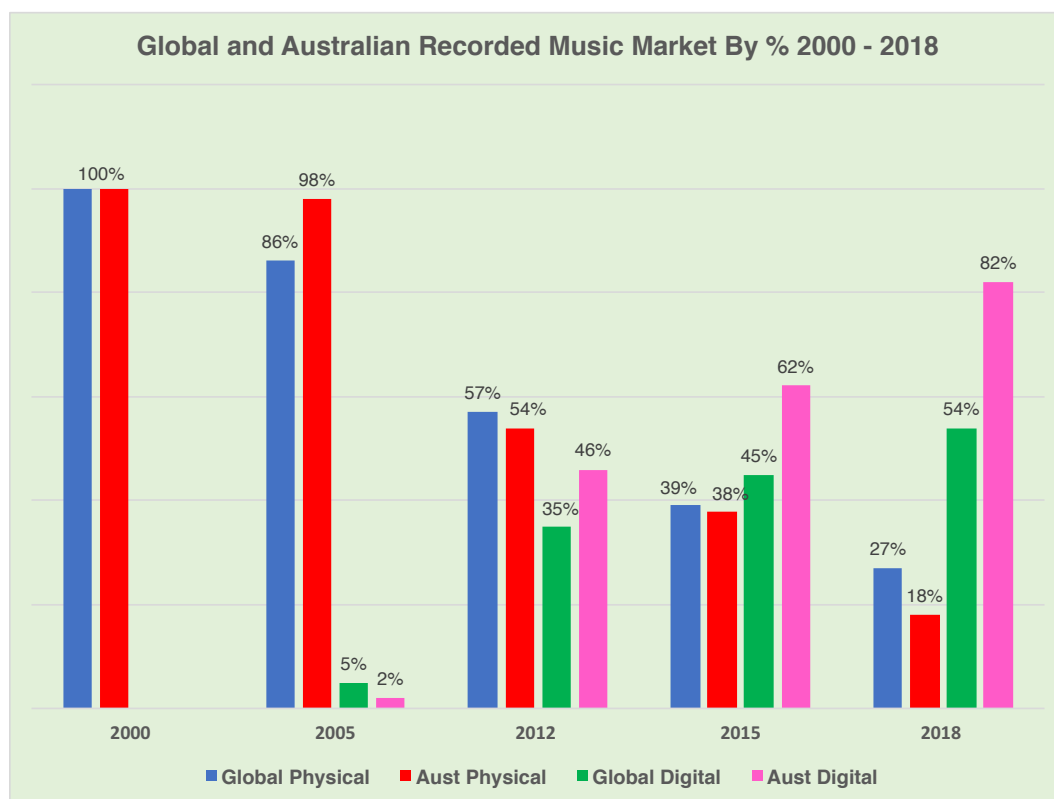
providers and the rapid embrace by consumers of their product offerings.

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).

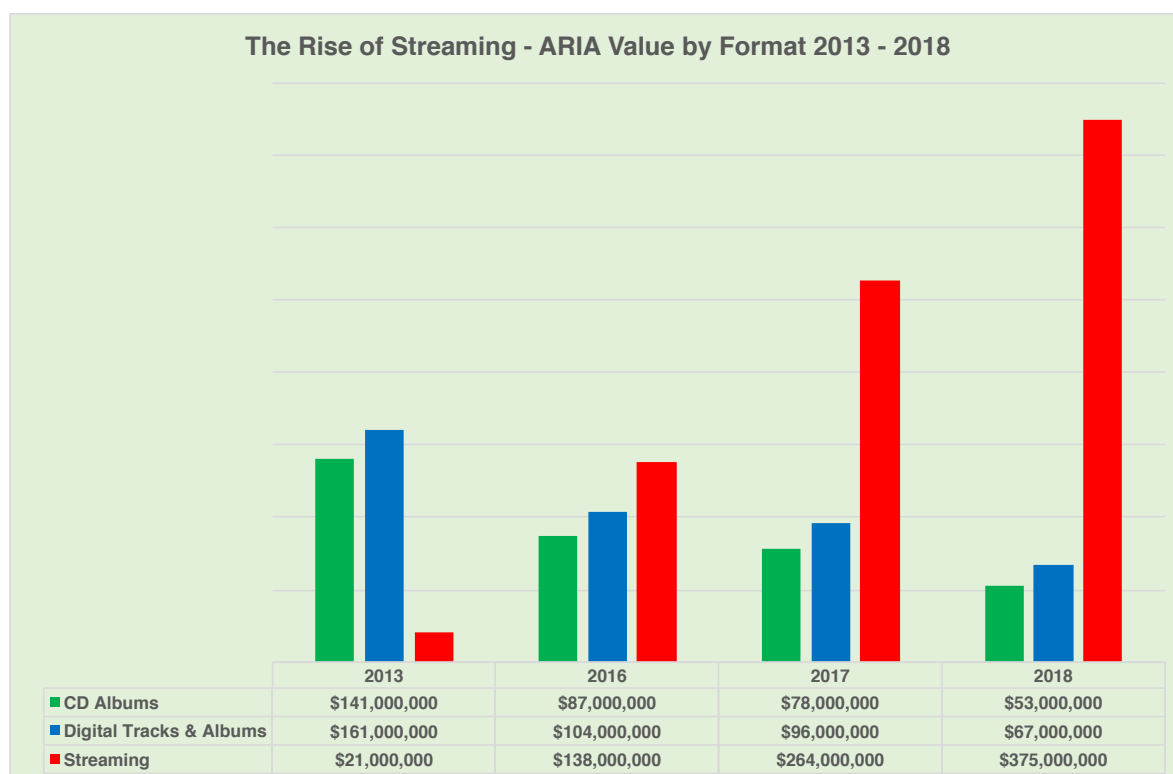
Streaming revenue accounted for 71% of that total - up from 41% recorded in 2016. The trend is expected to continue.



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.

# EXECUTIVE SUMMARY

## Recorded Music Product



### 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 Subscribe	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.



# EXECUTIVE SUMMARY

## 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 context 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.

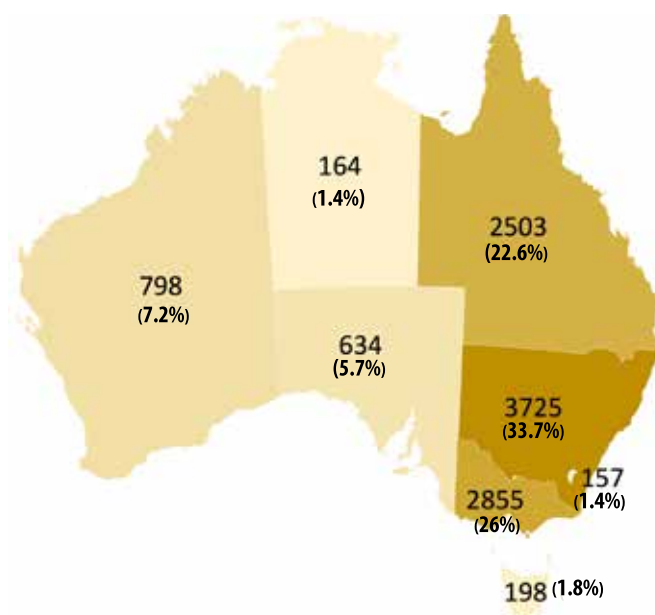
According to our artist survey, 96% of artists are songwriters and 93% are registered with APRA.

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
<b>TOTAL Distributed</b>	<b>\$67 million</b>	<b>\$183 million</b>	<b>\$253 million</b>	<b>\$363 million</b>

### 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.**

# EXECUTIVE SUMMARY

## 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 consumption 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) commissioned 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

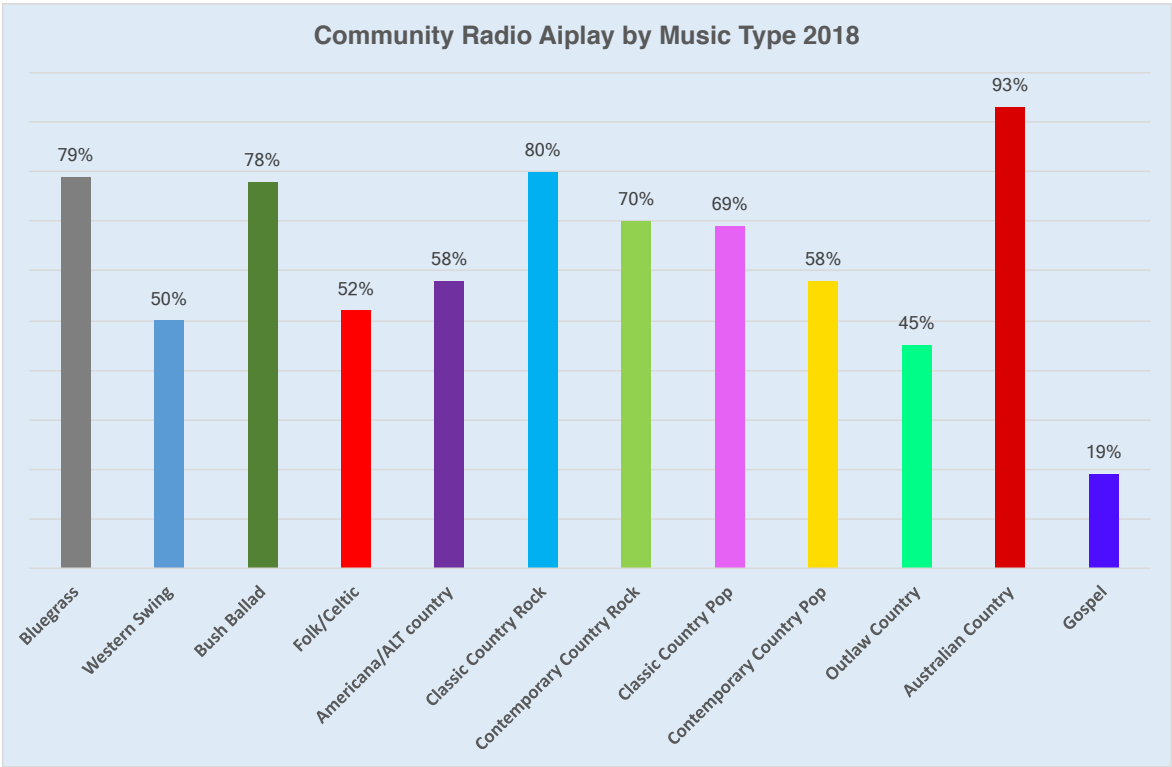
## Community Radio - Continued

One of the CBAA’s most important initiatives has been the establishment of AMRAP (Australian Music Radio Airplay Project) and its AirIt distribution program. Artists, 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.**

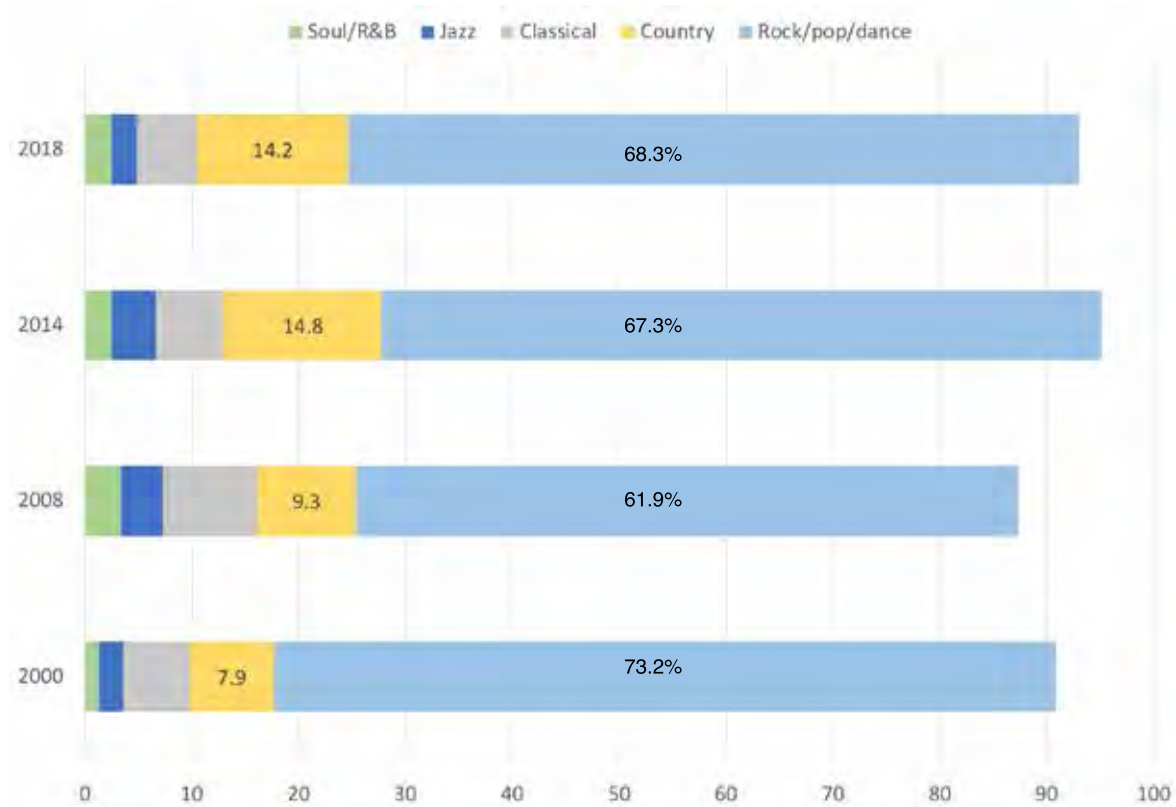
**In doing so, it has clearly outperformed all other recorded music genres.**

# EXECUTIVE SUMMARY

## 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



## EXECUTIVE SUMMARY

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 licenses 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.

One 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 population, 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).

# EXECUTIVE SUMMARY

## 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
<b>ABC COUNTRY</b>			
Sydney	42	53	38
Melbourne	29	30	35
Brisbane	9	18	16
Adelaide	7	7	10
Perth	7	8	11
<b>MMM Country</b>			
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
<b>KIX Country</b>			
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 Nashville 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 achieved 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 Airplay 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
<b>TOTAL</b>	<b>\$574 million</b>

# 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 analysed their responses on the basis of the amount of income derived from their music practice -

We received **211 responses (36%)** from artists

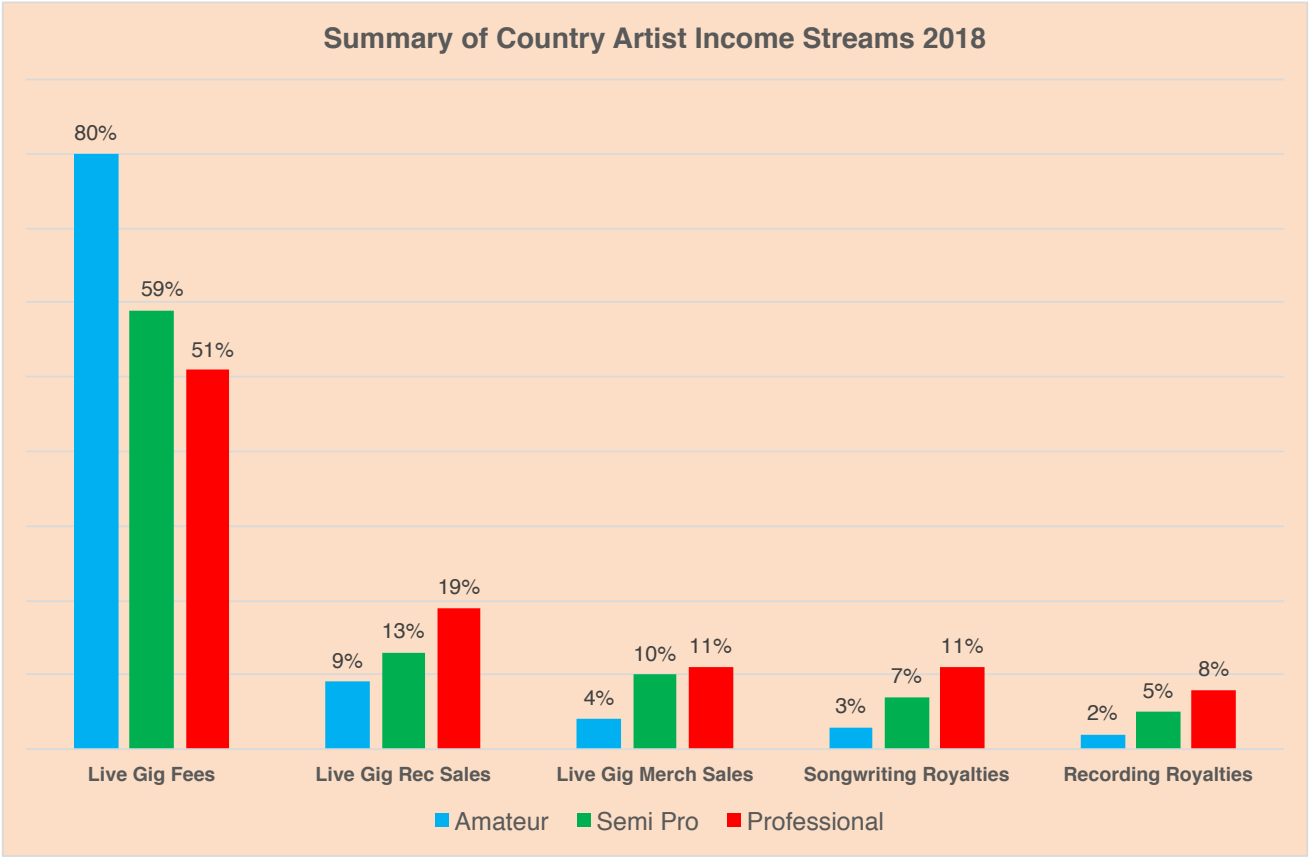
who derive less than 30% of their income from their country music practice. We have designated them as **'amateur'**.

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:

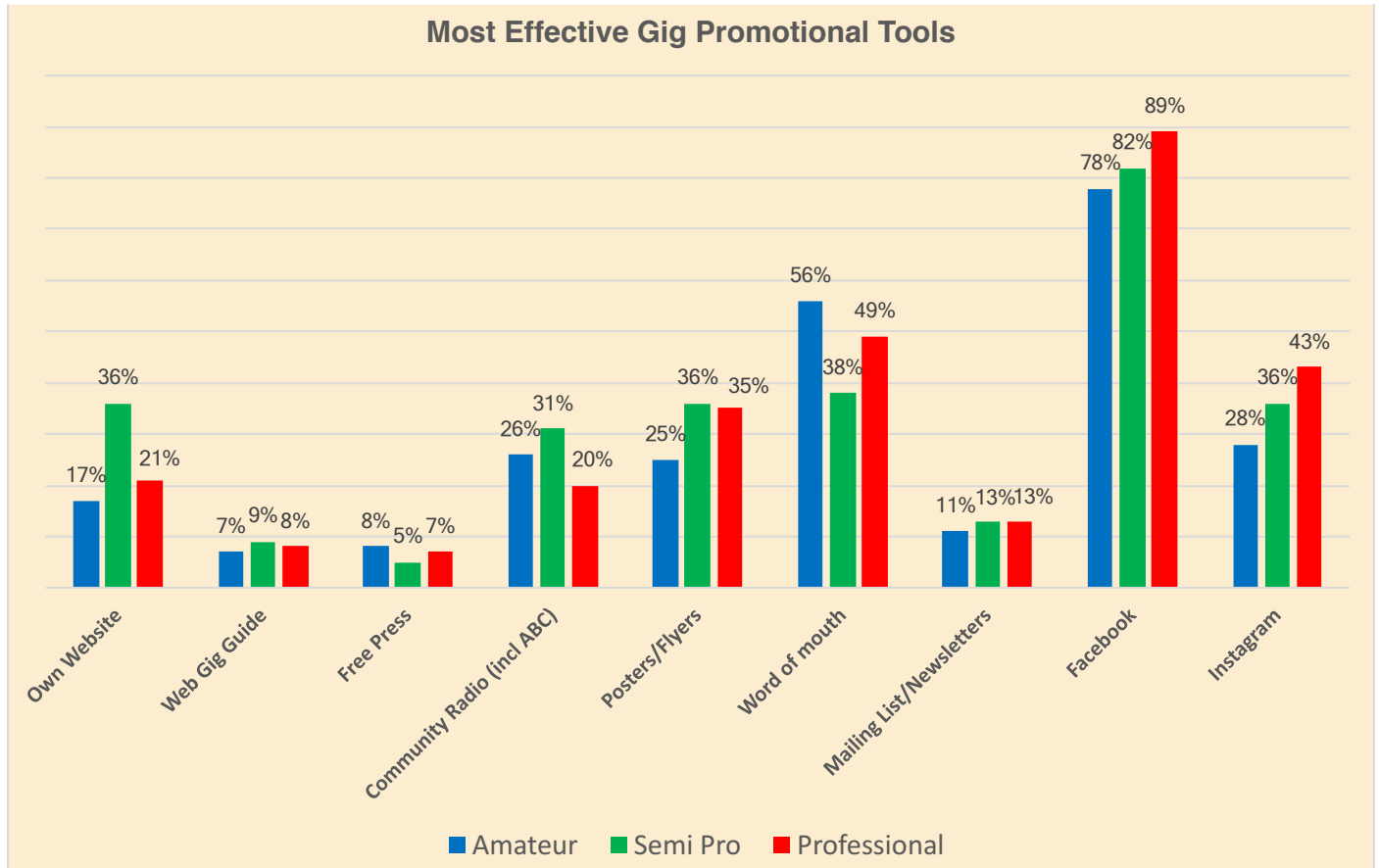
	Overall	Semi Pro	Professional
Tracks for Commercial Release	56%	70%	75%
Average Number tracks recorded	7	10	13
Self Financed	75%	90%	70%
Label Financed	10%	9%	18%
Label Distribution	27%	31%	39%
Indie Distribution	17%	26%	23%
Self Distribution	60%	54%	45%



# EXECUTIVE SUMMARY

## 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 respondent 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
<b>Junior Academy</b>					
Professional Development	43%	38%	15%	2%	2%
Career Development	40%	40%	17%	2%	1%
<b>Senior Academy</b>					
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%

# EXECUTIVE SUMMARY

## 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.

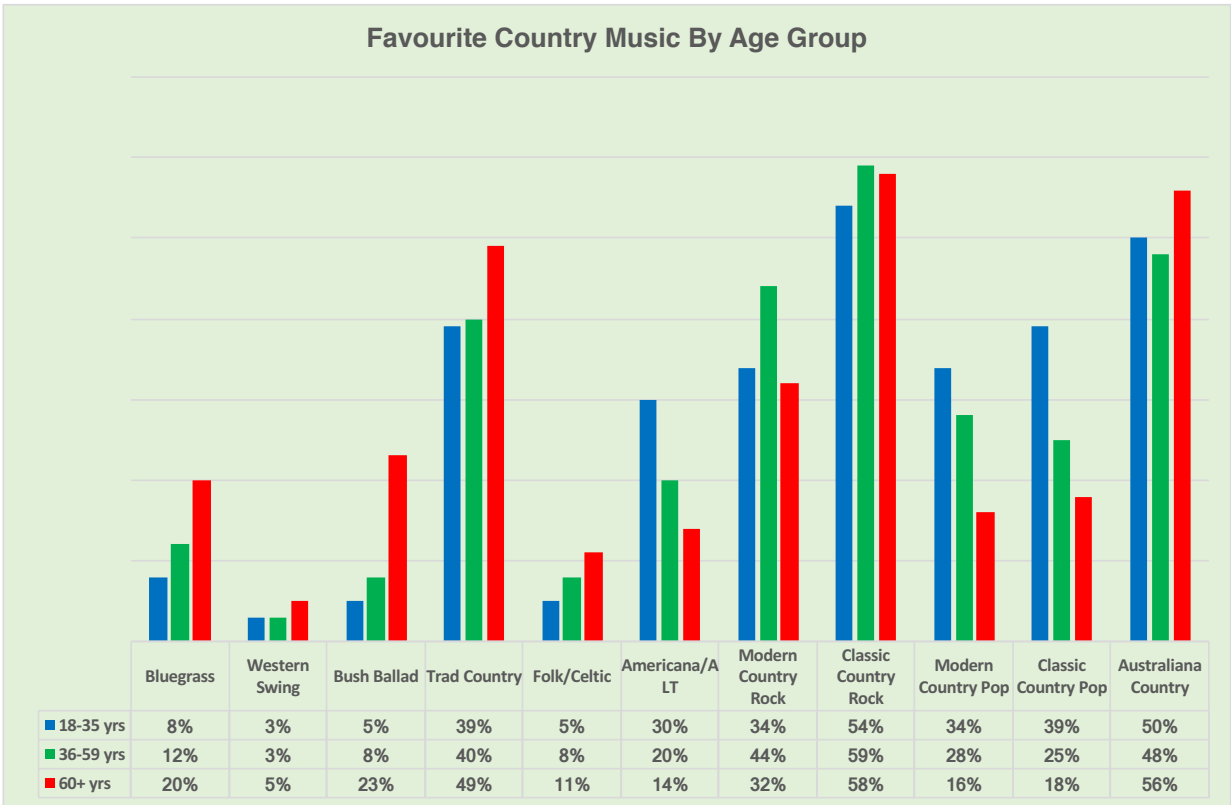
As was the case with the Artist Survey, we were at pains to make sure that we sampled respondents from different age groups and geographic locations. The full results are available in the Appendix section.

### 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:





# 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 accommodation 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 Subscribe	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, cultural and 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 Music Office 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 artists 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.



# EXECUTIVE SUMMARY

## 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

# EXECUTIVE SUMMARY

## 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.



Country Music in Australia 2018

# Detailed Data

Country Music in Australia 2018

# 1: Live Performance





## 1: LIVE PERFORMANCE

### Introduction

Australia, with a relatively small population has nonetheless built a vibrant and significant live music market. IFPI (International Federation of the Phonographic Industries) currently has Australia as the 8th most valuable recorded music market in the world. As a consequence of that and Australian's passion for live performance attendance, we have been a regular destination for major touring artists.

Estimating the size and value of the live music performance sector is a more challenging exercise than quantifying the recorded music market, especially for the individual genres of popular music where so much of the activity takes place in small venues whose operations mostly fly under the statistical radar.

For example, the Melbourne Live Music Census (2017) reported attendance of 1.65 million patrons to contemporary music concerts and festivals in that city valued at \$175 million, while 10 million patrons attended gigs in small venues generating \$100 million in revenue. (Source: Melbourne Live Music Census 2017, Music Victoria 2018).

It is essential that we make the effort because all of us involved in country music understand just how important live music performance is in our genre. Playing live not only created long-lasting and successful careers for our pioneering artists, but remains the key income generator for our artists and the thousands of businesses across the country involved in presenting them on domestic and global stages.

**55% of the artists surveyed for the Country Music Census 2018 reported that live performance fees generated 60+% of their music income. 36% reported it generated 80+%.**

We know for a fact – from Australian Bureau of Statistics Census data and numerous other sources, that 71% of the adult Australian population attend live performances (54% for music) in a given year. (Source: Australian Bureau of Statistics *'Participation in Cultural Activities'*, 2016). What follows is a summary which drills down into a variety of reported data and information supplied by key stakeholders in order to quantify the live music sector

in general and from there, country music activity in particular.

We will concentrate on:

**Box office revenue** – ticket sales and door entry.

**Ancillary patron spending** – additional purchases of food, drink, merchandise, accommodation, travel etc associated with live music attendance.

**Live performance for artists** – income, experiences etc

**The live music fan experience**

**Employment generated by live performance**

### 1.1 General Context

There have been very few national studies focused on the live music sector.

Arguably the most authoritative – *'Live Music in Australia 2014'*, was conducted by the University of Tasmania for the Live Music Office and a number of industry partners.

Utilising Live Performance Australia's annual *'Ticket & Revenue Survey'* and combining it with data from an Ernst & Young report commissioned by APRA AMCOS (2013), the report's authors calculated that in 2014, live music attendance by Australia was 49.2 million - 36% at ticketed shows (festivals, concerts, small venues) and 64% at free shows.

They estimated that the ticketed shows generated \$958.1 million in revenue – Concerts \$628 million, Festivals \$107 million and small venue gigs \$222 million.

They reported that ticket sales accounted for approximately 20-25% of patron expenditure when attending a live music performance, while spending on food and drink, travel, accommodation, merchandise etc accounted for approximately 65%.

Based on the spending breakdown, they estimated the total revenue generated by live music attendance was approximately \$3.83 billion in 2014.

To put that in industry perspective, in the same year ARIA reported that the wholesale value of sales of recorded music product was \$353 million.

We know of course that not every patron spends the same amount of money or consumes all those products, but the importance of the live sector is clear.

## LIVE PERFORMANCE

Further, the report concluded that live music delivers a 3:1 benefit to cost ratio. That is, for every dollar spent on live music in Australia, \$3 worth of benefits are returned to the broader community.

We shall return to this figure when we consider the cultural and social significance of live performance. (Source: *'The Economic and Cultural Value of Live Performance in Australia 2014'* – University of Tasmania, 2015).

For artists, live gigs not only generate income, but also provide the opportunity to interact directly with the fans who are potential customers for their range of merchandise – recordings, hats, caps, books, stubby holders, tea towels .... etc.

When asked in our survey why they attend country music gigs, 89% of fans reported that it was to 'support the artist', 34% responded that it was 'to meet the artist in person'.

We venture to suggest this is a much higher proportion than would be the case for rock and/or pop gigs where the expectation of a personal interaction with the artist would be considerably lower.

To underscore the importance of this artist-fan interaction at live gigs, 36% of artists report that 15% of their income is generated by merchandise sales (other than recordings), while 57% of artists report that 16% of their income is generated by recording sales at gigs. This corresponds with the response from fans who

report that if they purchased physical recordings in 2018 – and only 17% did not, 55% purchased those recordings from artists at gigs as opposed to 54% purchasing through a retail outlet.

(Source: Responses to Artist & Fan Survey – Country Music Census 2018).

APRA AMCOS, representing Australia and New Zealand's 100,000 songwriters and composers, licenses venues for the presentation of live music.

Their research produces data on live performance at the grass roots, provided of course that venues are licensed.

### 1.2 Live Performance Australia - Concerts & Festivals 2018

Live Performance Australia collects ticket sales and revenue data from a broad range of performing arts organisations, presenters and major ticket agencies, which they report annually.

The table below details total revenue and tickets sales for the entire live sector from 2004 (when LPA began reporting), and then identifies the data applicable to the 'popular' music sector – concerts and festivals.

The figures reveal just how much the live performance sector has grown in recent years. Much of it generated by popular music performances which sell the most tickets and generate the most income by industry share.

The three most populous states were obviously the leaders in terms of numbers of tickets sold and revenue generated for major popular music events..

	2004	Industry Share	2009	Industry Share	2017	Industry Share
<b>Total Tickets</b>	13,480,000		15,200,000		23,030,000	
<b>Total Revenue</b>	\$689,600,000		\$1,080,000,000		\$1,880,000,000	
<b>Music Tickets</b>	2,740,000	20%	4,680,000	31%	8,460,000	37%
<b>Music Revenue</b>	\$195,000,000	28%	\$460,400,000	42%	\$826,000,000	44%
<b>Festival Tickets</b>	190,000		800,000		852,000	
<b>Festival Revenue</b>	\$9,020,000		\$55,200,000		\$100,600,000	

Table 1.2.1

### 1.2 LPA Concerts & Festivals Continued

NSW – 3.1 million tickets (32% share of industry) generating \$325 million (34% share)

VIC – 2.7 million tickets (28% share) generating \$289 million (30% share)

QLD – 1.6 million tickets (16% share) generating \$157 million (17% share)

2017 was a bumper year for popular live music with an increase of 22% in ticket sales and a revenue increase of 8% on 2016.

The average ticket price across the sector was \$90. (Source: *Revenue & Ticket Survey 2017* – Live Performance Australia).

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Pollstar, the live music sector's peak tour reporting body, reported that in 2018 Australia hosted 4 of the top 7 world tours (outside the US) with Ed Sheeran and Pink selling 777,000 tickets and generating \$83.3 million for concerts in Melbourne and Sydney.

Frontier Touring (The Mushroom Group) was the world's 7th most successful promoter selling 2.3 million concert tickets.

Bluesfest was the world's 8th largest festival with 101,000 tickets generating \$10.6 million. An additional \$2.7 million was generated from side show touring. CMC Rocks Queensland was the 18th largest festival with 20,000 tickets generating \$6 million, with side show touring generating an additional \$1.5 million.

Although there is no specific genre breakdown of the LPA's popular music data, we have been supplied with confidential information by country music's major concert and festival promoters.

This will allow us to accurately report box office - audience numbers and revenue for country music on a whole-of-genre basis, as per our confidentiality undertaking.

### Small Venues - Tickets and Revenue

In terms of calculating audience and revenue data for small venues – pubs, clubs, bars etc, this job is considerably more difficult.

There is no reason to believe that data reported in the *'Live Music in Australia 2014'* report is anything other than accurate. They report that in 2014, 10.22 million tickets were sold in small venues generating \$222.5 million.

Applying our 10% of industry share, we estimate that, based on the above figures, country music performances in small venues in 2014 sold 1.02 million tickets which generated \$22.2 million.

It will be interesting to compare that estimate with our own in our conclusion.

### 1.3 Country Music Live Performance

Arguably, in no other genre, has live performance been more important than in country music.

Without the high profile and mainstream media exposure of other contemporary music genres, country artists, and the businesses that support them, have long relied on live performance for the majority of their income.

Although, as we shall see when we consider the recorded music market in the next section, the rise of streaming services and other digital platforms has created greatly enhanced opportunities for the country music sector, particularly in driving live performance attendances.

### 1.4 Major Festivals - The Context

The most obvious indicator of economic growth in the country music sector is the increase in the number of major festival and concert events which are now a feature of our scene.

When the original report was done in 1997, the Tamworth Country Music Festival and The Gympie Music Muster were our industry's marquee events. Since then, the Deni Ute Muster has celebrated its 20th anniversary and major new events have been established at Ipswich (CMC Rocks Queensland) and the Gold Coast (Groundwater). Winton's Way Out West has ambitious plans and Out on the Weekend (Melbourne) and Dashville Skyline (Hunter Valley) have been established to cater for the growing number of fans attracted to the Americana/Roots sub-genre. CMC in particular has also generated significant ticket sales and box office associated with touring by headline acts.

It is also the case that country artists – particularly at the Americana/Roots end of the country spectrum have become a regular feature of other major festivals – eg. Bluesfest, Port Fairy Folk Festival and Woodford Folk Festival.

However, as country only constitutes a small component of the overall program, no allocation of their box office revenue or patron ancillary spending has been included in our calculations.

If any additional evidence of the growing popularity of country music is needed, it's provided by the plan to expand the C2C brand (Country To Country) from its European base to Australia. Concerts, headlined by Tim McGraw, will be held in September 2019 at Sydney's Qudos Bank Arena and the Brisbane Entertainment Centre.

With the exception of Groundwater, which is totally free, all the festivals mentioned are ticketed, or have a ticketed component.

This last comment refers to the Tamworth Country Music Festival, which is a mix of free and ticketed, with the Tamworth Regional Council presenting a selection of ticketed shows, including the Toyota Country Music Awards of Australia (the 'Golden Guitars'), and a number of large, free open-air concerts.



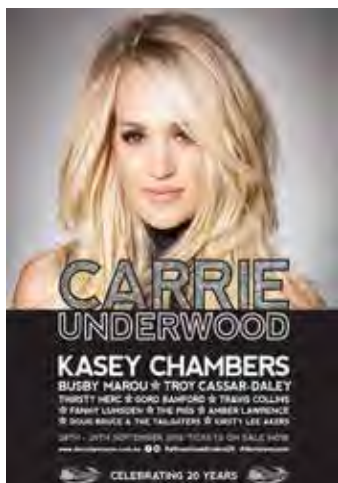
## LIVE PERFORMANCE

There are hundreds of other shows that take place in the city's clubs and pubs over the ten-day event. They are a mix of ticketed and free.

We will consider these when we document small venues, but will ensure there is no double counting.

Before proceeding to our economic calculations however, it is worth considering the nature of these major events as they are central to the promotion of the genre, the enjoyment of fans, the livelihoods of creative and business practitioners and the economic, social and cultural health of the communities that host them.

### 1.5 Major Festivals - Snapshots



#### Deni Ute Muster

In 1998, the town of Deniliquin sought to establish a major event to attract young, local rural people and external visitors to benefit the local community. It is held annually on Friday and Saturday of the NSW Labour Day weekend (October). It receives support from Destination NSW, but is keen to achieve the

'hallmark' status accorded to events such as the Tamworth CM Festival and Sydney's Mardi Gras.

Lee Kernaghan was the initial headliner and, like most major Australian music festivals, it has expanded its music offerings to include international artists (Alan Jackson, Carrie Underwood) and Australian heritage/rock acts (Cold Chisel, James Reyne, Ross Wilson etc). From the single main stage offered for many years, it now offers A & B stages for major acts plus a C 'Day' stage presenting local and emerging talent. These stages are situated in a main arena.

In order to appeal to a wider demographic, its physical facilities have expanded to include a Sports Arena (the Utes etc), a Bull Riding Arena and Circus Arena.

With extremely limited motel/hotel accommodation, the vast majority of the approx. 14,000 adult ticket holders camp adjacent to the arena sites.

The \$270 adult ticket includes an unreserved camping site. Patrons can book a reserved camping site (av \$60) and also have the option to rent-a-tent.

Destination NSW has estimated that patrons spend an average of \$840 on-site and in the local community in addition to ticket purchase.

Obviously this economic injection has increased in importance as the local region is impacted by the effects of drought and the current lack of dryland cropping.

#### Tamworth

The Toyota Country Music Festival Tamworth celebrated its 46th year in 2018. It is one of the most unique music events in the world with hundreds of artists performing thousands of times to hundreds of thousands of visitors over ten days in January.



Having proclaimed itself Australia's 'Country Music Capital' in 1969, local radio station 2TM staged the first Australasian Country Music Awards in 1973, presenting the now famous Golden Guitar trophies.

From the beginning, the festival promoted itself as a celebration of Australasian music, and this has remained an underlying principle, with little involvement from the international 'stars' featured at other major events.

Unlike the majority of other major festivals, there is no single promoter nor artist director responsible for programming the event.

The Tamworth Regional Council supplies basic infrastructure – policing, traffic management, shuttle transport, rubbish collection etc, curates a number of free open-air concerts, presents the Golden Guitar Awards, the street Cavalcade and manages the hundreds of street buskers who are a prominent and traditional feature of the event.

The rest of the extensive program is curated by individual venues and presenters across the town's pubs, clubs and music venues and a diverse range of community and commercial spaces including restaurants, churches, halls, retail outlets and camping grounds which, for the 10 days, become pop-up music venues.

These predominantly present free entertainment for patrons, while the traditional music venues present a mix of ticketed and free shows, many scheduled from breakfast-time to late evening.

It is almost impossible to 'escape' from music during the festival, but that's exactly what attracts so many to Australia's longest-running and largest music event.

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One of the longest-running traditions of the festival is the annual is-it-as-big-as-last-year 'game' played by event veterans.

Our 1997 report analysed the Official Program Guide and data supplied by the Council to record a range of Tamworth Country Music Festival data. Using the same methodology and indicators, there is no doubt that the event has continued to grow and deliver an increased range of benefits to patrons and the broader community.

**(Note:** The relatively recent involvement of Destination NSW and the creation by Tamworth Regional Council of a dedicated festival team, has resulted in a range of data that was not available in 1997).

In 2018, 60,000 attended a program of free concerts in Toyota Bicentennial Park - Opening Concert, TFSS Concert, Star Maker Grand Final, Americana In The Park, Live & Loud, Back To The Bush, Adam Brand, Stars Under The Stars, Busking Championship, The Last Roundup.

26,000 tickets were sold for 120+ performance events in Council-operated venues (eg. Town Hall, TRECC, Capitol Theatre), including the Toyota Australian Country Music Awards.

There were an estimated 38,000 pre-sold tickets for shows in major venues (West Leagues, Diggers, Long-yard Hotel, Family Hotel, The Pub, Services Club).

In terms of artists:

In 2018 there 1,468 artists (748 advertised in the Official Guide) involved in 2,500+ advertised events providing 3,240 performance opportunities at over 100 venues.

70 % of those came from NSW, 30% from Interstate and 8% from overseas.

In addition to the advertised artists, there were 396 artists involved in heats and finals of a range of Co-ca-Cola competitions – Battle of the Bluegrass, Battle of the Bands, Battle of the Golden Oldies, Battle of the New Stars, Battle of the Young Stars. Plus many more in various talent quests, songwriting sessions and walk-up sessions across the program.

Council in recent years, instituted a system of busker registration which reveals that there were, in 2018, 333 busking acts.

They were predominantly from NSW, Queensland and Victoria.



## CMC Rocks QLD

The CMC Rocks brand was established in 2008. Since the initial event was established as 'CMC Rocks the Snowys' in Thredbo NSW, the festival moved to the Hunter Valley (Hope Estates, 2011 ) and in 2014 to its current home at Willowbank Raceway in Ipswich.

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

The event became Australia's first sold-out country music event in 2016 and continued that record in 2017 and 2018.

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

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

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

In order to present this major event and tour the US headliners around Australia, he partnered with legendary rock promoter Michael Chugg.

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

Michael Chugg has highlighted the importance of the event: "The festival has opened the door to many international acts, convincing Nashville and America that there is a market for country outside the States. As a result, Australia has become a booming market

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and is now a priority for all country acts.

The exposure of the festival in America through word-of-mouth from artists, managers and agents, as well as various television specials and other media attention has made CMC Rocks the best known country and roots festival outside America. Most importantly, it has exposed Australia's huge pool of talented artists to the US industry and to growing audiences within Australia. CMC Rocks has played no small role in the growing Australian presence in Nashville, as more and more Aussies head there to show their talent". The partners readily acknowledge the importance – especially in the early years, of Foxtel's Country Music Channel, in promoting the event and its international headliners to fans. It's increasingly popularity led to the establishment of a dedicated pre-festival CMC Awards event with all categories decided by fan votes.

As social media has increased in importance in terms of fan interaction and event promotion, so has the event's popularity. The CMC public Facebook page has 100,000 followers (2018).

The 2018 event presented 36 artists across 2 stages over 4 days. US headliners Darius Rucker, Luke Bryan and Kelsea Ballerini were joined by Dustin Lynch, Luke Combs, Old Dominion, Dean Brody (Can) and local artists including Travis Collins, Busby Marou, Sunny Cowgirls, Missy Lancaster, Christie Lamb, Troy Kemp, Jodie Direen (NZ) and Kaylee Bell (NZ).

The 2018 festival set a record for a country music event with 20,000 tickets sold in under an hour. A sales rate only achieved by the iconic Splendour in the Grass.

### Way Out West

Our newest country music celebration, the event was established in 2018 to coincide with the reopening of the Waltzing Matilda Centre in outback Winton

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



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

In 2018, artists included - Jessica Mauboy, John Williamson, The Living End, Kip Moore (USA), Lee Brice (USA), Sheppard, Busby Marou, Russell Morris, The Black Sorrows, and The Pierce Brothers.



### Dashville Skyline

Held in 2018 for the fourth time, the event presents itself as 'a family friendly, laid back celebration of the roots of alternative country music, from beginnings in the 60s and 70s to its widespread influence on today's performers'.

Named with a nod to Bob Dylan's iconic 1986 album 'Nashville Skyline', it was developed as a more genre-specific celebration to sit alongside the Gum Ball held at the same site since 2004.

Like most others, it is a camping festival held in a bushland setting in Belford in the Hunter Valley.

In its short history, it has presented a range of local and international acts, among them - Bahamas (CA), All Our Exes Live in Texas, William Crighton, Wagons, Melody Pool, Valerie June (Memphis) Shane Nicholson, Tim Easton (US), The Brothers Comatose (US), The Waifs, CW Stoneking, The Bushwackers, The Teskey Brothers, Oh Mercy, Lachlan Bryan, Tracey O Neil, Catherine Britt, Tim Rogers, Bill Chambers, Skyscraper Stan, Magpie Diaries, Claire Anne Taylor, Cash Savage, The Wilson Pickers and Brian Cadd.

There were 40 acts programmed for the 2018 event.

In line with its promotion as a family-friendly 'Cosmic Country Weekender' it features American-inspired food, beer and wine, vintage markets, and vintage car displays.

Activities for kids include circuses, petting zoos and sandpits in a super safe environment.

Management reports that the core management team of 4 is augmented by some 40 casual and production staff and 80+ general volunteers to deliver the event.

Ancillary spending is estimated at \$0.5 million.



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### Gympie

One of Australian music's longest-running events, The Gympie Music Muster celebrated its 37th year in 2018.

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

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

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

The emphasis has always been on presenting the stars of Australian country music. In 2018, it was headlined by Lee Kernaghan, Troy Cassar-Daley, John Williamson, Beccy Cole, Sara Storer, The Wolfe Brothers, Shane Nicholson, The Pigs, Hat Fitz & Cara, Fiona Boyes, Lloyd Spiegel and Blues Eyes Cry.

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

In 2018, the audience came from:

Gympie area - 27%, Other parts of Queensland - 54%, Interstate - 20%. A very small number were from overseas.

Although there are a number of day-ticket attendees, it is predominantly a destination event, with approximately 50% of all attendees staying overnight in the Gympie region, predominantly in the extensive camping areas. The festival estimates that the 2018 Muster generated 44,000 event-specific visitor nights.

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

Management estimates that the 2018 event generated fan spending of \$7.3 million in the Gympie region and an additional \$1.9 million in other communities visited by patrons on their way to or from the event.



### Groundwater

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

It is unique among our genre's major events in being completely free. Four major stages on the streets of the Gold Coast present a range of veteran and emerging artists whose music is 'grounded in country and folk'.

In 2018, the three-day event featured 100+ performances with artists including: James Blundell, Suzanne Vega, Amber Lawrence, Bennett, Bowtell & Urquhart, Ashleigh Dallas, The Davidson Brothers, Jasmine Rae, Matt Cornell, The Weeping Willows, Col Finley, Billy Bridge, A Band Called Twang, Brad Cox, Amy Nelson, The Whiskey Mountain Boys, Brook Chivell, The Cherry Pickers, Tyson Coleman, Pine Mountain Cartel, Paradise Band, Bud Rokesky, Ruby Gilbert, The McClymonts Granger Smith, Adam Harvey, O'Shea, Catherine Britt & The Cold Cold Hearts, Lillie Mae, Bill Chambers, Joshua Hedley, Troy Kemp, Kirsty Lee Akers, Casey Barnes, The Hillbilly Goats, Hurricane Fall, Doug Bruce, The Morrisons, Melody Moko and Country Music Cocktails.

With an audience estimated at 61,000 in 2018, it advertises itself as 'Australia's fastest growing country festival'.

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

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

It is estimated that this attendee spending generated \$6.5 million in 2018.

### 1.6 Major Festival Audience

From information available in the public domain and that supplied to us by promoters of the events, we are able to report that **the audience for the major country music events identified above was 202,500 in 2018.**





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At the end of this section, we will return to the findings of the *'The Economic and Cultural Value of Live Music in Australia in 2014'* (University of Tasmania) report to see how our figures for ancillary spending compare with their findings:

Tickets 19.3%; Food & Beverage 29.3%; Travel 17.6%; Merchandise 7.6% and Accommodation 12.4%.

### CM Census - Fan/Patron Spending

Our primary source for calculation was the data provided by our 4,329 survey respondents.

Respondents detailed their ancillary spending on food and beverage, merchandise, travel and accommodation when attending festivals, concerts and performances in small venues (pubs/clubs). This table reports our findings re average patron spend based on responses –

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

Table 1.8.1

#### Note on transport:

Because of our ability to filter responses, it was possible to identify average patron spend on transport to and from the different types of events. Given that so many large festivals take place in regional centres, transport to and from event locations is an important consideration. 49% of survey respondents report travelling 'regularly' 100+ Kms to gigs. 19% regularly travel 50-100 Kms and only 15% travel 1-20 Kms.

We have combined this information – where available, with a range of detail from surveys conducted by the major events themselves to identify attendees from the local area, region and interstate.

#### Note on exclusions:

By filtering our fan responses, we are aware that there are significant numbers of patrons who report little or no spending on food and beverage, merchandise and/or transport.

We have included those percentages in our calculations, but we have discounted audience numbers appropriately to arrive at accurate spending figures.

We have further discounted audience numbers to reflect the number of young patrons (under 14) who will obviously not spend the same as adults and, in terms of those attending on a youth/teen ticket, we have assumed ancillary spending at 20% of the adult rate.

### Conservative Reporting:

In order to err on the side of caution to avoid any possibility of inflating figures, we have calculated on the basis of three days for events with four-day duration. With the exception of Tamworth – explained below.

The range of detailed data obtained from promoters and event organisers has been added to the responses from our surveyed fans. This has allowed us to create robust and accurate estimates of patron ancillary spending at major country music concerts and festivals in 2018.

### Food & Beverage

10% of surveyed patrons reported spending \$0 on food and beverage at major festivals. We have therefore discounted audience numbers appropriately to determine final figures.

So, utilising the \$125 per adult patron per day spend, discounting the audience for those reporting no spending and utilising a 70% reduced figure for youth/teen patrons, we estimate that **major country festivals in 2018 generated an additional patron spend of \$45.2 million on food and beverage.**

### Merchandise

17% of patrons report spending \$0 on merchandise at major festivals. We have discounted the audience figures to reflect that and likewise applied the discount above in regard to junior attendees.

Based on the reported per event average spend of \$56, we estimate that **merchandise sales at major country festivals in 2018 generated \$6.3 million in 2018.**

### Transport

In order to calculate patron spending on transport associated with major festival attendance we have again relied on the responses of our surveyed patrons, combined with the data from major events which identify the numbers of attendees from outside the event region and/or from interstate.

CMC for instance, estimates that 20% of attendees travelled by plane to attend the event in 2018. Tamworth reports that 30% of attendees came from the event region, 35% came from NSW outside the region, 32% from Interstate and 2% from Overseas.

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From our survey respondents we know that 45% regularly travel 100Kms+ to attend live performance events, and that their usual mode of transport is a private vehicle. However, 15% report travelling by plane to major events.

We are of course mindful of the fact that many attendees travelling to and from major festival events – especially those using private transport will share their vehicles in friendship and/or family groups.

We have accordingly adjusted the audience figures used as the basis for calculation.

We estimate that **spending on travel to and from major country music festivals in 2018 generated an estimated \$5.6 million.**

### Accommodation

Again, we have relied on a mix of information provided by the major festival promoters and the responses from our patron/fan survey.

We know from the latter, that 42% of attendees stay in a motel or hotel when an overnight stay is required and that 36% either camp or use their own caravan. The majority of the major events considered are camping festivals – Deni Ute Muster, Gympie Music Muster, CMC Rocks, Way Out West. The Tamworth Festival is a mix of camping, home stay and hotel/motel.

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

We are again mindful of discounting audience numbers to reflect the fact that camp sites (especially) are often utilised on a shared basis by family and/or friendship groups.

We have excluded Groundwater from calculation due to its urban location and the lack of any reliable figures on which to base a calculation.

We estimate that the **spending on accommodation associated with attendance at major country festivals in 2018 generated \$4.2 million.**

### Note on Tamworth

As noted earlier, the most difficult event to quantify is the Tamworth Toyota Country Music Festival because of the unique duration of the event. In order to determine the patron length of stay and thus the audience figures on which to base our calculations, we combined figures from the Tamworth Regional Council and Destination NSW and data from the Country Music Census Fan survey. There is significant correlation between the two.

		1 Day	2-3 Days	4-5 Days	6-7 Days	8-10 Days
Table 1.8.2	Tamworth Council	6%	15%	21%	13%	41%
	CM Census	7%	19%	23%	12%	34%

### Additional Community/Off-site Spending

We are aware from the various event websites, that all major events are keen to identify the value to the local community that is generated by patron visits. This economic and social benefit is often used as a lobbying and advocacy tool to elicit local and state government support and sponsorship.

We were intrigued by a finding in the 'UK Music Census 2017' which found that some 40% of the total of patron spending associated with major event attendance actually occurred off-site, either in the immediate geographic area, or in communities visited on the way to or from these events.

We therefore asked a specific question in our patron/fan survey to attempt to quantify this spending for our genre.

'When you travel away from home for a country music event, can you estimate how much you spend per day in the local community away from the event venue?'

68% of respondents reported their daily off-site spending at \$75+.

While we have made no attempt to report this in our detailed findings, **there is no doubt that the 200,000+ fans attending major country festivals in 2018 injected tens of millions of dollars into local and regional economies.**

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### 1.9 Major Festival Ancillary Spending

We therefore conclude that -

**The ancillary patron spending associated with major country music festival attendance in 2018 generated \$61.3 million.**

**This compares to \$13.9 million we reported in 1997 for the entire festival sector. A 340% increase.**

Food & Beverage	\$45.2 million
Merchandise	\$6.3 million
Transport	\$5.6 million
Accommodation	\$4.2 million
<b>TOTAL ANCILLARY</b>	<b>\$61.3 million</b>

Table 1.9.1

### 1.10 Major Concerts & Tours - Box Office

In 2018, there were a number of major concerts performed by country music artists.

They predominantly involved overseas (mainly US and Canadian) artists touring on the back of headlining major festivals.

They included: Luke Bryan, Darius Rucker, Luke Combs, Kip Moore, Morgan Evans, Randy Houser, Kelsea Ballerini, Justin Lynch, Joshua Radle, and Old Dominion.

There were of course a large number of 'concerts' performed by local country music artists but, as the majority were presented in large clubs, they have been included in our calculations of small venue box office to follow.

From information supplied by concert/tour promoters and agents - Frontier, Harbour, Premier, The Artist Network, Chugg/RP Entertainment Edge and verified by Pollstar reporting, we calculate **that ticket sales for major country music concerts in 2018 generated box office revenue of \$17.2 million.**

### 1.11 Major Concert Ancillary Spending

Utilising the average patron spend figures quoted earlier for concert attendance – Food & Beverage (\$78), Merchandise (\$36) and Transport (\$50) and combining them with audience numbers provided by promoters, we are able to calculate the value of these presentations.

We have excluded any calculation of accommodation revenue associated with major concerts as we were not confident of doing so with certainty.

**We estimate that ancillary patron spending associated with major country music concerts presented in 2018 generated \$43 million.**

Food & Beverage	\$32.5 million
Merchandise	\$6.7 million
Transport	\$3.8 million
<b>TOTAL ANCILLARY</b>	<b>\$43 million</b>

Table 1.11.1

#### Concert Stop Press:

In order to challenge the international concert and touring powerhouse that is Live Nation, AEG, Frontier Touring and Chugg Entertainment have announced a business partnership that will see them partnering to promote major tours.

This will also see Frontier joining Chugg Entertainment and Rob Pott's Entertainment Edge in presenting CMC Rocks and ensuring its continued marquee status.

### 1.12 Small Festivals

The major country music festivals which we have so far examined are relatively simple to quantify being, in the main, solely country music events or 'based' on country. The smaller festivals – of which there are many scattered around the suburbs and towns of Australia, present a greater challenge to accurate quantification.

We will note a similar challenge when we report on the small venue sector.

Many of these smaller festivals are country music-specific, others simply have a country music component. In all cases, this study did not possess the resources to contact each and every one for specific data.

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### 1.12 Small Festivals - Continued

From the responses to our online survey, we do have detailed data on the attendance frequency, costs involved in tickets/entry and ancillary on-site spending by 4,300+ patrons attending those events.

We also report that when fans and artists were asked to identify their favourite festivals, they listed 360 separate events in addition to their major festivals already listed. The estimation which follows is, we believe, justified by the key findings from this study that confirm significant growth has taken place in all areas of country music production, presentation and consumption since our last research.

That growth is indicated by:

- The significant growth in major festivals and concerts generating increased revenue and employment.
- Increased performance opportunities for artists at these events and many others that include a country music program element where none existed previously.
- A significant increase in the number of country writers and artists registered with APRA AMCOS, and the increase in live performance licenses issued and income generated.
- Widespread reporting of the increased and increasing popularity of the country music genre primarily based on expanded consumption platforms and options.
- The responses from our significant artist and fan samples.

All of which leads us to conclude that the revenue generated across the small festival sector in 2018 was at least commensurate with that reported in 1997.

### 1.13 Small Festival Box Office & Ancillary Spending

Proceeding first to our 'known known', our fan survey respondents report that in the last twelve months 70% of them attended a small festival (less than 2,000) where country music was featured. The average patron attended 2.5 events and paid on average \$60 to do so.

Based on our respondent sample, we therefore calculate that our **surveyed fans generated box office revenue of \$454,545.**

They reported ancillary spending in line with that reported for concert attendance.

That is - Food and Beverage \$78 per head, Merchandise \$36 and Transport \$50.

Discounting the size of the sample used for calculation to reflect the respondents who reported \$0 spending in each of the categories above, we estimate that the survey patrons who reported attending **small festivals featuring country music in 2018 generated a minimum of \$982,000 in additional spending.**

The 1997 study reported total festival attendance of 427,850 of which 330,000 was credited to small festivals across the nation.

We estimate that the 360 small festivals reported by fans and artists in 2018 attracted a minimum audience of 360,000 patrons.

Allowing for the fact that 40% are free entry, and applying a further 10% discount to reflect junior ticketed patrons, we estimate that **a minimum \$8.9 million in box office revenue was generated by attendance at small festivals in 2018.**

In addition, and applying the discount for those survey respondents who report spending \$0 on food and beverage, merchandise and transport (average 10%), we estimate that **a minimum \$40.2 million was generated by additional patron spending at small festivals featuring country music in 2018.**

We also note that these (mainly) local festivals generate a large amount of off-site community spending by patrons. However, we do not have sufficient data as we did in the case of major festivals to confidently estimate the value of this spending.

### 1.14 Small Venues & Country Music

As noted earlier, we know from a number of other studies that small venues – clubs, pubs, halls, bars etc, host thousands of live popular music performances across the nation every year.

We can also report with confidence that this is also the case in country music.

That certainty comes from a number of sources:

**The number of these small venues licensed by APRA AMCOS to present live music.**

**The listing of country music artist performances advertised in print and online gig guides.**

**The responses to the online surveys completed by artists and fans.**

**Data and findings from other, relevant reports.**



## 1.14 Small Venues - Continued

A complete estimate for the total, national box office revenue generated by country music performances in small venues is well beyond the scope of this study. The only studies which can claim absolute accuracy are those conducted in a single marketplace: The *Melbourne Live Music Census* projects conducted in 2012 and 2017 which documented the 500+ live music venues in that city and, to a lesser extent, the *'Live Music in Australia 2014'* report by the Live Music Office.

Our desk research and artist and fan surveys have revealed a range of fascinating information about country music performances in these small venues.

### Scope and Size

'It's Country' was an online gig guide providing artists and presenters with the opportunity to list their performances in small venues.

In 2018, the website listed 2,728 unique performances – the vast majority in NSW, Queensland and Victoria. Street press gig guides (Sydney, Melbourne, Brisbane) listed an additional 800+ country/folk performances for 2018.

We also know that there are many, many country music performances that are not advertised in these gig guides.

We asked surveyed fans and artists to identify their favourite three small country music venues. Fans identified no fewer than 600 small venues as among their favourites. The list included country music clubs, various licensed clubs, hotels, bars, restaurants and a number of other community venues. Artists identified over 500 individual small venues amongst their favourites.

Interestingly, Melbourne recorded the most number of individual 'favourite' venues (27). This emphasises the strength of Melbourne's live music scene, but is also partly explained by the concentration of APRA registered country music writers in the city's inner northern suburbs, and the popularity of some iconic programs on community radio which plays a more prominent role in Melbourne than any other Australian city. (Source: *Melbourne Live Music Census 2017*)

What follows is an estimate of ticket sales/door entry revenue and ancillary patron spending based on verifiable data.

When we lack that data or cannot provide estimates with any certainty, we have not reported findings.

## 1.14 Small Venues Box Office

The one area where we do have precise data involves those small venues which offered live performances during the 2018 Tamworth Toyota Country Music Festival.

Based on a detailed analysis (of the 2018 Official Guide) of the ticketed component of performances across a number of clubs and hotels - eg. West Leagues, West Diggers, Services Club, Longyard Hotel, The Pub, Imperial Hotel, Joe McGuire's, Family Hotel, Southgate Inn etc. **We can confirm that an additional \$923,920 was generated by sales of tickets and/or door entry to small venue events during the 2018 Tamworth Toyota Country Music Festival.**

Our 4,300+ country music fans answered a number of questions based on the number of performances in small venues they attend in a year, and what they spend on entry and additional (ancillary) spending while in attendance.

This provides us with a 'snapshot' of small venue revenue, and we note that this is only a fraction of the total for the national sector.

23% of our respondents did not attend a country music performance in a licensed club in 2018. The figure for hotels was 26%. 61% did not attend a performance in a non-licensed venue, eg. country music club. Those that did attend, reported spending an average \$20 entry for each of the average 5 country performances they attended in licensed clubs in 2018. The entry figure for hotels/bars was an average \$11 for an average 4 performances.

Based on our sample of 4,329 fans, box office revenue generated in small venues for country music events in 2018 was \$489,000.

In addition, there is another source of small venue data to consider, namely, the attendance and revenue findings reported in the *'Live Music in Australia 2014'*. Utilising APRA AMCOS venue licensing statistics, they estimated total national ticketed attendance at live popular music events in hotels and clubs in 2014 was 10,227,063. These attendances generated box office revenue of \$222,504,955.

By applying a conservative 10% genre share, deducting the figures above in order to prevent double counting and bearing in mind that all indicators suggest genre growth since 2014, we estimate that live **country music performances in small venues in 2018 generated box office revenue of \$22.2 million.**



## 1.16 Small Venues Ancillary Spending

Patrons attending country gigs in small venues spent an average of \$52 on food and beverage at each small venue event; an average \$22 on merchandise at each and an average \$31 on transport.

19% of respondents spent \$0 on food and beverage, 42% spent \$0 on merchandise and 30% spent \$0 on transport.

So, utilising the responses from our survey and the 'Live Music in Australia 2014' report figures, discounting the audience numbers to reflect those who reported spending \$0 and subtracting the figure reported above to avoid double counting, we conclude that **ancillary patron spending at country music performances in small venues in 2018 generated \$45.7 million.**

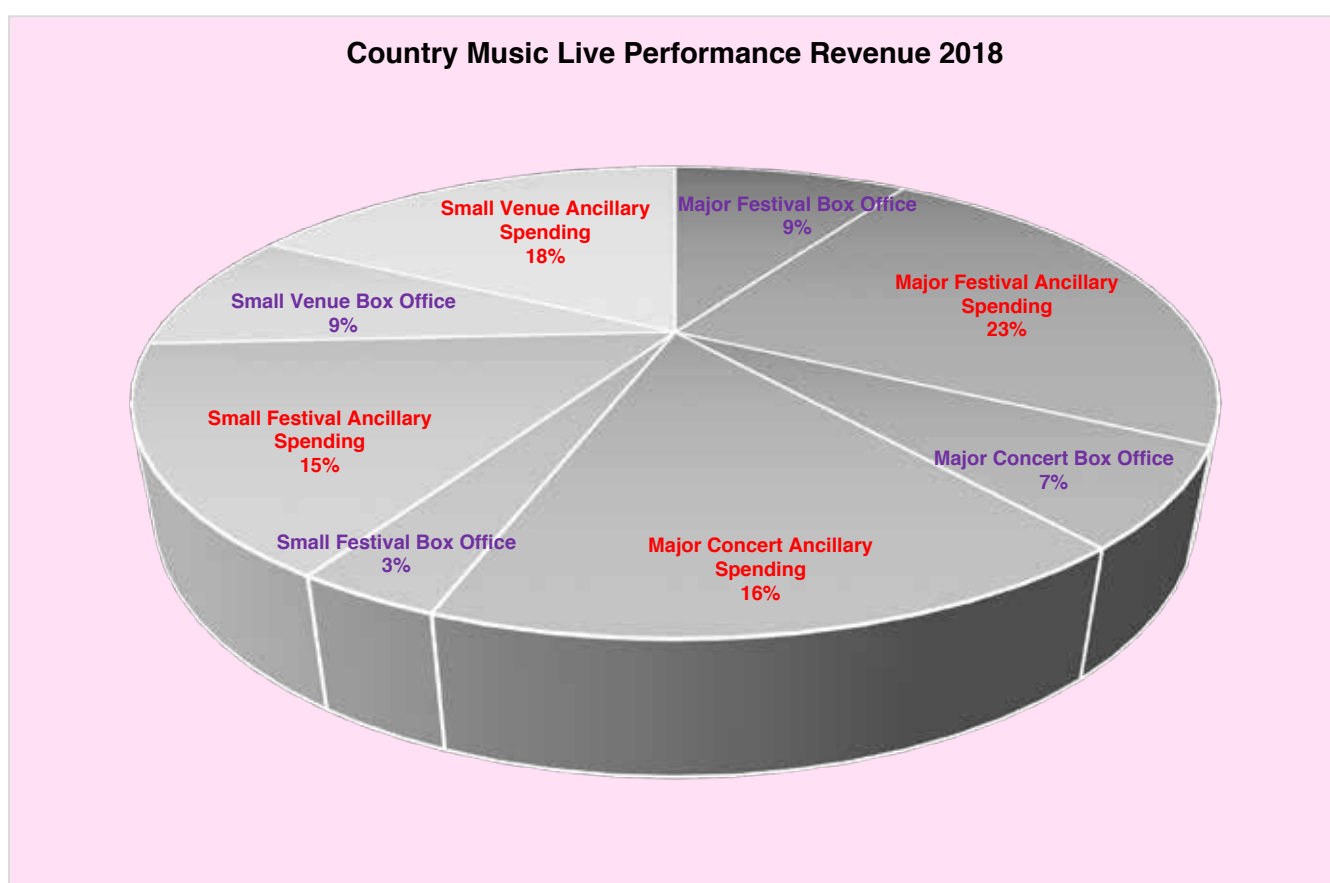


Chart 1.16.1

### Note

We report that the ticketed events in small venues during the Tamworth Toyota Country Music Festival generated ancillary spending by patrons of \$2,177,640. However, this ancillary spending is NOT included in our overall reporting as it has already been counted in the ancillary total previously reported for major festivals.

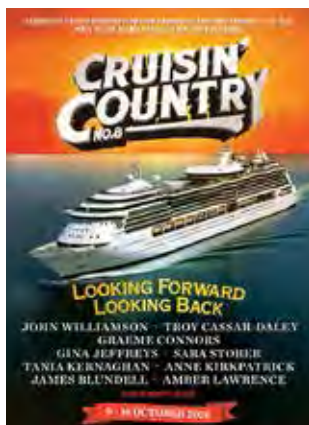
# LIVE PERFORMANCE

## 1.17 Event Revenue Summary

Box Office & Spending Summary	\$ Millions
Major Festival Box Office	\$24.3
Major Festival Ancillary Spending	\$61.3
Major Concert Box Office	\$17.2
Major Concert Ancillary Spending	\$43.0
Small Festival Box Office	\$8.9
Small Festival Ancillary Spending	\$40.2
Small Venue Box Office	\$22.2
Small Venue Ancillary Spending	\$45.7
<b>TOTAL</b>	<b>\$262.8</b>

Table 1.17.1

## 1.18 Additional Live Music Revenue



### Travel & Tours

This report considers an element that was not part of our 1997 study: the growth and popularity of cruises and specialty touring which, in recent years, have become a significant feature of the travel market.

They have spread from the retiree community which for

years was the almost exclusive customer base to involve a broader demographic. Country music was not slow to get on board.

In Australia, the first country music cruise – Cruisin' Country, was conducted in 2009 when a partnership between Adelaide transport business owners Mick and Eileen Manov and Sydney-based agency the Artist Network chartered a major cruise ship for a 8-day cruise of the South Pacific.

It was an instant success, attracting 2,000+ passengers. They are entertained by 30+ country music artists performing in venues throughout the ship, including two concert sittings per night in the 600-seat theatre. As well as providing significant employment for artists, these cruises have of course generated significant revenue for organisers.

The very significant investment in chartering such a large vessel has obviously paid off as two other cruises, Rock The Boat and Bravo (music theatre), have been added to the annual country cruise.

Fans have a range of accommodation options ranging from inner, shared cabins to balcony staterooms.

Based on the success of Cruisin' Country, a number of other boutique cruise and related events have been established.

Land-based tours have also been established to offer fans a unique and intimate travel experience with major artists acting as host and guide.

In 2018, destinations included Memphis, Nashville, general USA, Ireland, Scotland, Europe, Pacific Islands, Japan, Mediterranean, Central and Western Australia.

The country music performer acting as host/tour guide/performer was often joined by 'local' guest artists on the tour. The majority involved 25-30 fans.

Based on advertised ticket prices and information from operators we estimate that in 2018 these **cruises and tours generated \$10.9 million in ticket revenue and an additional \$7.8 million in ancillary spending.**

We also note that some Australian artists have created their own unique events based on 'travel'. Fanny Lumsden, several years ago established a 'Local Halls' touring circuit, working with local communities to present music events in regional communities. Often where none had previously taken place.

Andrew Swift created a touring circuit based on caravan park performances, and Beccy Cole has invited fans to follow several of her tours where they attend the scheduled performances, but enjoy unique interaction opportunities with the artist 'on the road'.

Lastly, we note that House Concerts have now become a regular feature of the live country music performance landscape.

Various social media platforms and analytical tools have allowed artists to identify and contact fans in specific locations and offer them intimate performances and interaction opportunities. They have become a valuable supplementary source of income for many country artists.

### Corporate & Private

As a genre that readily lends itself to decoration and physical costuming, country music has long been popular with businesses, organisations and fans seeking 'themed' celebratory events.

From our 582 artist survey respondents, we can also report that private functions and corporate events in 2018 generated minimum revenue of \$456,500.

## LIVE PERFORMANCE

### 1.19 The Final Word - Live Events & Venues

In conclusion, we estimate that in 2018 country music performances at major festivals, small festivals, major concerts and in small venues **generated total revenue of \$281.5 million** comprised of patron spending on tickets/door entry and additional ancillary spending associated with attending those performances.

**This represents an 145% increase (\$166.9 million) on the \$114.6 reported in 1997.**

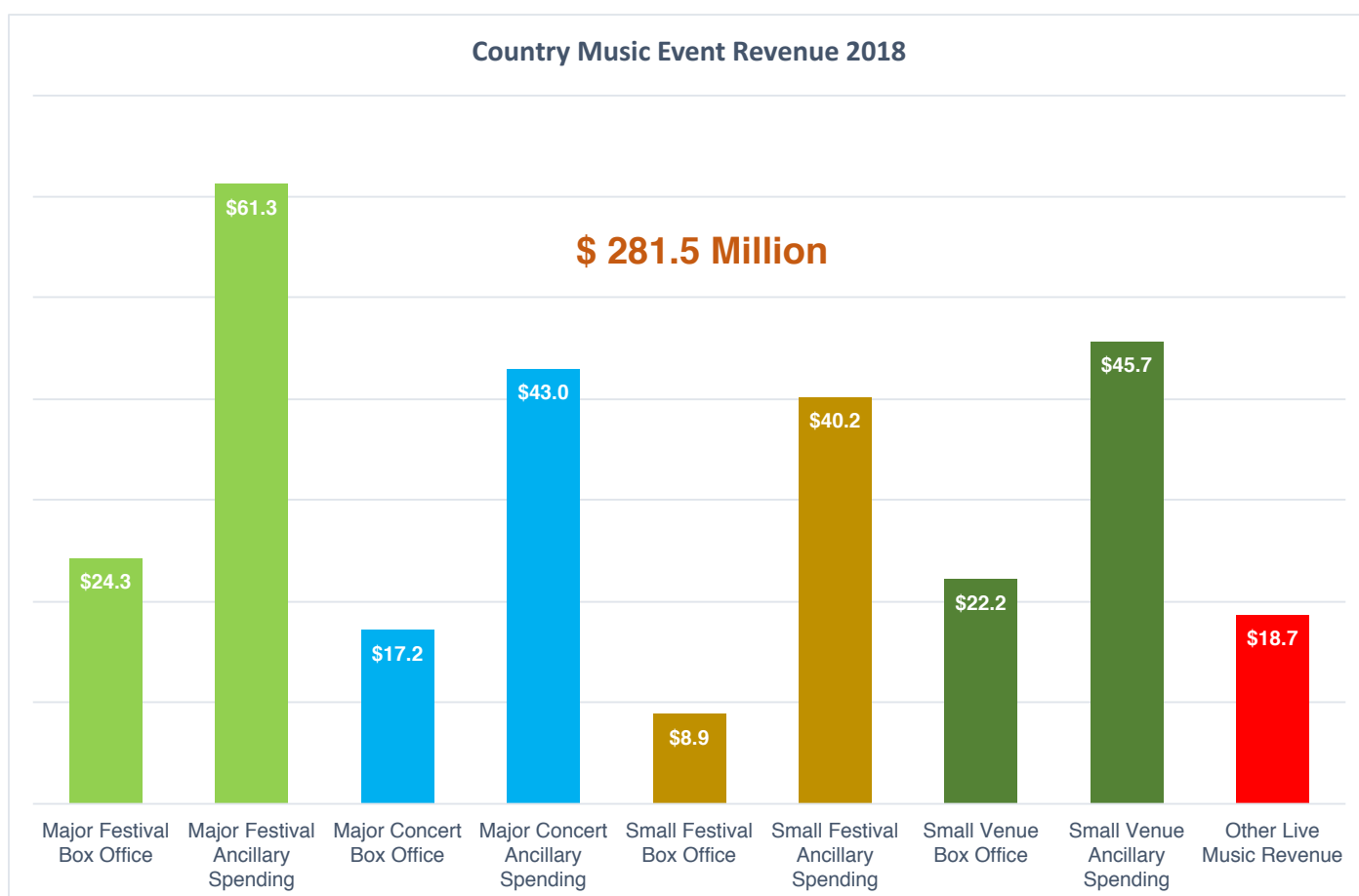


Chart 1.19.1

#### Note

in order to verify our calculations, we compared our findings with those reported in the 'Live Music in Australia 2014' report. That study reported live music ticket sales at 19.6% of total revenue, and ancillary spending in the categories we considered 66%. This study reports ticket revenue at 22.7% and ancillary spending at 69%.

# LIVE PERFORMANCE

## 1.20 Artists & Live Performance

As with any popular music genre, it is very difficult to estimate the total number of artist involved in presenting country music live performances in 2018.

We are however, able to make some relevant observations:

We know that APRA has over 13,000 registered writer members who identify as 'country'. There is no way of identifying which of those are performers, but it seems reasonable to suggest that at least 50% would be engaged in some live activity. Particularly as we know from our surveys that Australian country music artists rely – as do their colleagues in other genres, on fees from live performance for the bulk of their music-related income.

We have also noted that some 750 artists were advertised in the 2018 Tamworth Festival Official Guide. Adding unique artists who promoted their gigs on the 'It's Country' web gig guide in 2018, brings the total to 1409.

Then there are another 586 on the master list we compiled to survey artists who do not feature on either of the foregoing lists.

This total of 1,995 semi-professional and professional artists is just an indicator of the numbers we confidently report were involved in gigs in 2018.

### The 2018 Artist Survey

As noted earlier, from the 582 completed surveys we received, 55% of artists overall reported that on average 60+% of their music-related income came from live performance. For 36% of all respondents it was 80+%.

**In 1997, we reported that country music artists performed a minimum of 9,600 gigs across local, regional and international festivals, in concert venues and in clubs and pubs.**

**In 2018, the artists responding to our survey reported a total of 20,033 performances.**

	Festivals	Concerts	Pub
Amateur Gigs	508	851	2,230
semi Pro Gigs	1,168	1,427	2,915
Professional Gigs	2,004	2,594	6,336
<b>TOTAL SURVEY GIGS</b>	<b>3,680</b>	<b>4,872</b>	<b>11,481</b>

Table 1.20.1

We asked a number of question related to frequency of performance and income.

As these were revenue-based we filtered respondents on the basis of the percentage of their income that was music-related, rather than on the basis of other criteria - eg. age, gender or industry experience.

We anticipated that this approach would provide information about artists at the beginning of a career (**amateur – 0 - 30% music-related income**), artists whose music was generating a larger part of their income (**semi-professional – 41-70%**) and artists who derived most of their income from their music practice (**professional – 71-100%**).

We achieved a good mix of responses – amateur (212), semi-professional (181) and professional (192).

Whilst we note that the large number of amateurs will tend to drive overall averages lower, the reality is that performers in our genre tend to start their careers at an earlier age than in other genres, mainly due to opportunities provided by country music clubs and numerous talent quest-type events.

The tables on the following page detail the responses from each group.

# LIVE PERFORMANCE

## 1.20 Artists & Live Performance - continued

What percentage of the gigs you performed in the last 12 months were free?

	0%	1-10%	11-30%	31-50%	51-70%	70%+
Amateur	17%	29%	13%	9%	9%	23%
Semi Pro	27%	48%	6%	7%	6%	6%
Professional	39%	42%	7%	5%	4%	2%

Table 1.20.2

How many times in the last 12 months have you performed at the following venues?

	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

Table 1.20.3

Estimate fees paid for solo, duo or group performances at Festival, Concert and Pub gigs.

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

Table 1.20.4

From our sample of 500+ respondents, we report that for the 2018 year, **these artists received a total of \$31.4 million. This represents a 76% increase on the 1997 figure of \$17.9 million** when the sample was 20% smaller.

	Festivals	Concerts	Pub
Amateur Gig Fees	\$192,643	\$461,399	\$792,834
semi Pro Gig Fees	\$1,230,950	\$1,751,400	\$3,275,910
Professional Gig Fees	\$4,606,400	\$7,860,350	\$11,208,800

Table 1.20.5

### Note

The fees paid to artists for appearances at major festivals, concerts and pub gigs has already been accounted for in box office income. We therefore will exclude this figure when we come to calculate total revenue for the country music sector.



# LIVE PERFORMANCE

## 1.21 Artist-To Fan Live Retail

Of course, without the artists and the fans who come to see them, none of the revenue we have so far recorded would be generated.

But in our genre especially the relationship between artist and fan is important for another reason. Country music fans buy their music at gigs in numbers unseen in other genres.

	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%

Table 1.21.1

Sales of their recorded music at gigs is a very important source of income. According to our Semi-Pro and Professional respondents, it represents 13-14% of their income. Second only to the performance fees they earn from the gig.

### Note

This revenue has already been accounted for in this section, or will be in the next where we document artist to fan recorded music product sales.

## 1.22 Artist Live Performance Royalties

In 1996, the APRA member database contained 1,463 writers who identified themselves as 'country' writers. They represented 6% of the total membership of 24,736.

In 2018, that number had increased dramatically to 13,978 – 14% of Australian-based membership.

In 2018, APRA reported \$85.8 million in revenue generated by the public performance of compositions. This included \$7.1 million distributed to writers on the basis of live performance returns submitted by performers. Of the 16,137 writers paid, 14,417 (89%) were unpublished.

We estimate that **live country music performances in 2018 generated a minimum of \$8.6 million for Australian-based country writers.**

### Note

As this revenue has already been accounted in the section on Songs and Songwriting, we have not included it in this section's reported totals nor in the final revenue summary.

## 1.23 Live Music & Fans

Fans attend live performances to enjoy a unique music experience and do so on a regular basis.

Across our 4,000+ respondents fans reported attending an average of 3 major festivals per year, 4 small festivals, 4 major concerts, 5 licensed club performances and 6 pub gigs.

There was hardly any variation in those numbers across the three age groups except in the case of pubs with the 18-35 years group more likely to attend and the 50+ years group less so.

But, as the 'UK Live Music Census' has noted "Live music enhances social bonding, is mood enhancing, provides health and well-being benefits, is inspiring, and forms part of people's identity."

### Why do you go to country music gigs?

	18-35 Years	36-55 Years	55 Years +
Fan of the artist	91%	90%	86%
Fan of the event/venue	42%	38%	37%
Fan of country music generally	82%	75%	74%
Entertainment - Good day/night out	83%	76%	71%
For inspiration/new ideas	11%	9%	7%
A spiritual/inspiring experience	10%	11%	9%
To be in the same room as artist	24%	20%	20%
To discover new music	49%	41%	35%
To feel energised/excited/Uplifted	39%	34%	32%
Sense of belonging with like-minded	37%	28%	26%
Deeper understanding of the music	14%	11%	11%
To meet new people	38%	23%	22%
To meet the artist	35%	31%	31%
To relax - escape everyday worries	48%	47%	45%
Spend time with family/friends	63%	61%	46%
To support the venue/event	41%	36%	44%

Table 1.22.1

## LIVE PERFORMANCE

### 1.23 Live Music & Fans - continued

What words best describe the emotional/social/cultural benefits you derive from Country Music gigs?

This wordcloud represents the responses –



Figure 1.23.1

## LIVE MUSIC EMPLOYMENT

### 1.24 Country Live Employment

When a country music live performance takes place, the artistic expression creates an emotional environment.

But it also has a more practical element, creating employment for a large number of people involved in the presentation.

Even before the performers take 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/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 in order for artists to launch product 'live'. However, it is beyond the scope of this report to estimate outlays or the employment associated with this preparatory activity.

We are however, in a position to calculate and estimate the employment associated with the live music performances themselves, thanks to information provided by promoters and venues, consultation with industry operatives and our detailed research.

Whilst there are a number of permanent, full time jobs associated with the management of venues, the majority of other workers involved – performers, food and beverage service workers, general venue staff, production, staging and security personnel, are basically involved as casual (shift) workers.

We have calculated casual hours connected with country music presentations at major and smaller festivals, concerts in major venues and large licensed clubs and in smaller pub/hotel venues. We are fortunate to have detailed information from the two *Melbourne Live Music Census* reports (2012 & 2017) which detailed casual employment (especially) across the live performance sector to help guide our research.

**The calculations that follow are based strictly on the information reported to us. We have not attempted to aggregate beyond that.**

The table below outlines the hours of employment generated by live country music performances in 2018. The calculation is based on the information supplied to us by major event promoters, our own research and from responses to our major artist and fan surveys.

Obviously, the table does not reflect the totality of employment hours created across the entire country music live performance sector.

#### Employment Hours – Country Music Events 2018

	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
<b>TOTAL HOURS BY EVENT</b>	<b>148,589</b>	<b>1,174,000</b>	<b>59,731</b>	<b>1,206,528</b>	<b>2,588,848</b>

Table 1.24.1

## 1.24 Country Music Live Employment - continued

### Full Time Equivalent Jobs

We have used a 35-hour, 48-week year to calculate the full time equivalent jobs created by the events that have been reported to us.

	Hours	FTE Jobs
Performer Hours	454,130	270
Production Hours	343,918	205
Event/Venue Staff Hours	377,292	225
Casual Staff (F&B etc) Hours	811,926	483
Management Hours	252,092	150
Security Hours	124,670	75
<b>TOTAL FTE JOBS</b>		<b>1,408</b>

Table 1.24.2

### Pay & Wages Generation

Some of workers listed below are very likely to be on salaries above the award rates for their job classification. However, we have used the appropriate industry award rate as designated by the Fairwork Ombudsman in order not to overestimate.

We report that **in 2018, country music live events across the sector generated \$73.9 million in worker remuneration.**

	Hours	Payment
Production Hours	343,918	\$15,476,310
Event/Venue Staff Hours	377,292	\$15,091,680
Casual Staff (F&B etc) Hours	811,926	\$25,169,706
Management Hours	252,092	\$12,604,600
Security Hours	124,670	\$5,610,150
<b>TOTAL WAGES &amp; SALARIES</b>		<b>\$73,952,446</b>

Table 1.24.3

## 1.25 Conclusion

On the basis of responses from our Artist and Fan surveys, information supplied by event/venue producers and presenters and our comprehensive researching of the country music live performance sector, we are confident in reporting that **in 2018, live performance of country music generated value of \$335.6 million.**

**We note however that when we come to estimate the total value for the live music sector, artists fees and earnings (\$40 million) and wages and staff payments (\$73.9 million) are already accounted for.**



## 2: Recorded Music





## 2: RECORDED MUSIC MARKET

### Physical Product, Digital Downloads & Streaming Revenue

In 2018, the Australia Council for the Arts confirmed 98% of the population aged over 14 years listened regularly to recorded music. This percentage has been basically unchanged since our report in 1997. What has changed, and dramatically so, has been the way they listen and the format in which the music is presented.

#### 2.1 The Global and Australian Market - Context

No other sector of our industry has undergone such a dramatic change as has the recorded music market.

For the last two decades, the marketplace has been in a constant state of flux as technological innovations have piled one on another with ever-growing rapidity.

It is fair to say that few people grasped the full financial ramifications of the universal decline in the once dominant CD format.

The decline in the value of the physical (CD) format ushered in a decade and a half of falling value which was not fully arrested by the introduction of the first wave of digital music – download tracks and albums.

The global and Australian markets only returned to growth in 2015 due to the revenue generated by audio and video on-demand streaming. In Australia, returning the sector to double-digit growth.

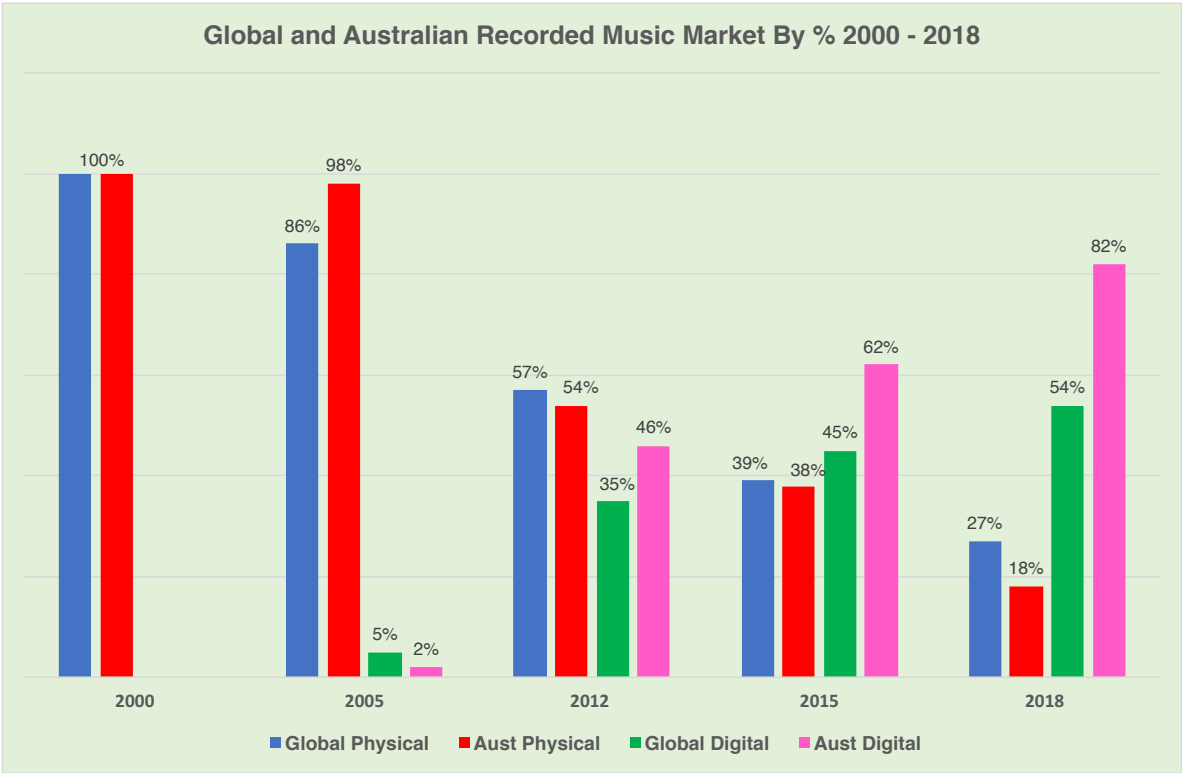


Chart 2.1.1

It is only in the last few years that the Australian market has returned to growth, recording a 10.5% revenue increase in 2017 and 12.6% increase in 2018.

# RECORDED MUSIC MARKET

## Context Continued

When we conducted our original research, sales of physical product (CD singles and albums, cassette and vinyl albums and DVDs) represented 100% of the recorded music sector's revenue.

In 2000, that was still the case, with the value of global recorded music product reported at \$A 31 billion. Australian recorded music product in that same year generated \$A 593 million in revenue.

At the low point of the revenue decline that followed - 2012, the global market had declined by 41% to \$A 18.2 billion and the Australian by 32% to \$A 398 million. Due almost entirely to declining CD sales.

The increasing importance of digital downloads and streaming subscriptions have revived the financial fortunes of the sector, although the return to positive growth has been quicker in 'advanced' markets such as Australia and the US which have embraced the new formats at a faster rate.

Streaming revenue, for instance, accounted for 71% of total recorded product value in Australia in 2018 while still only making up 47% of global market value.

*(Sources – IFPI 'Global Music Report 2000/2019', and ARIA 'End of Year Statistics 2000/2018').*

The transformation of the market and the sharp decline in revenue had dramatic consequences for the fortunes of the companies relying on that income to sustain their operations.

In 1996, there were six major labels. As their revenue declined, some found themselves increasingly unviable. First to go was Polygram which merged with Universal in 1998. Next BMG sold its label business to Sony in 2004. Lastly in 2011 the recording arm of EMI was sold to Sony and the publishing arm to Universal. So, we now have the big three.

In 2017, their share of the global music market was reported as:

Warners	25%
Universal	24%
Sony	22%
Others	28%

(Source: IFPI Music Report 2018)

'Others' refers to independent labels which have become an increasingly important outlet for artists and a significant revenue source for the major labels that often distribute them and, in some cases, help finance their operations.

The single, physical format market that existed at the turn of the century was firstly transformed by the digitisation of music.

Apple began rolling out its iTunes store from 2003 with the intention of establishing the world's largest legal digital music marketplace.

In combination with the ubiquitous iPod, and deals in place with all the major music content providers, it achieved its aim.

In 2010 Apple became the world's leading music vendor having sold billions of songs. It had also overtaken physical sales as the recording industry's chief revenue generator. But there was a significant competitor on the horizon.

Eager to take advantage of the rapid consumer migration to smartphones especially, music streaming services began to make their mark promising millions of songs 'anywhere, anytime'. Consumers were immediately drawn to these on-demand services, especially as the initial offerings were free.

By 2016, streaming service revenue became the industry's leading revenue generator as downloads began their own decline. Music streaming has become as dominant a format as was the CD in its heyday.

### Note:

See 'Postscript' at the end of this section for a prediction on the future of the recorded music market and the dramatic increase in revenue that will continue to be driven by music streaming.

What follows is an examination of these formats in the global and Australian marketplaces. For the general industry and for country music specifically.

### Note: ARIA revenue data

The annual recorded music revenue reported by ARIA is based on reports it receives from major labels and a small number of independents.

As we shall see later, it is important to consider the sales generated by the hundreds of independent labels not reporting to ARIA.

We also note that ARIA revenue data includes earnings in Australia for domestic and international labels. It does not include export revenue generated by international sales for Australian labels.

# RECORDED MUSIC MARKET

## ARIA TOTAL MARKET VALUE

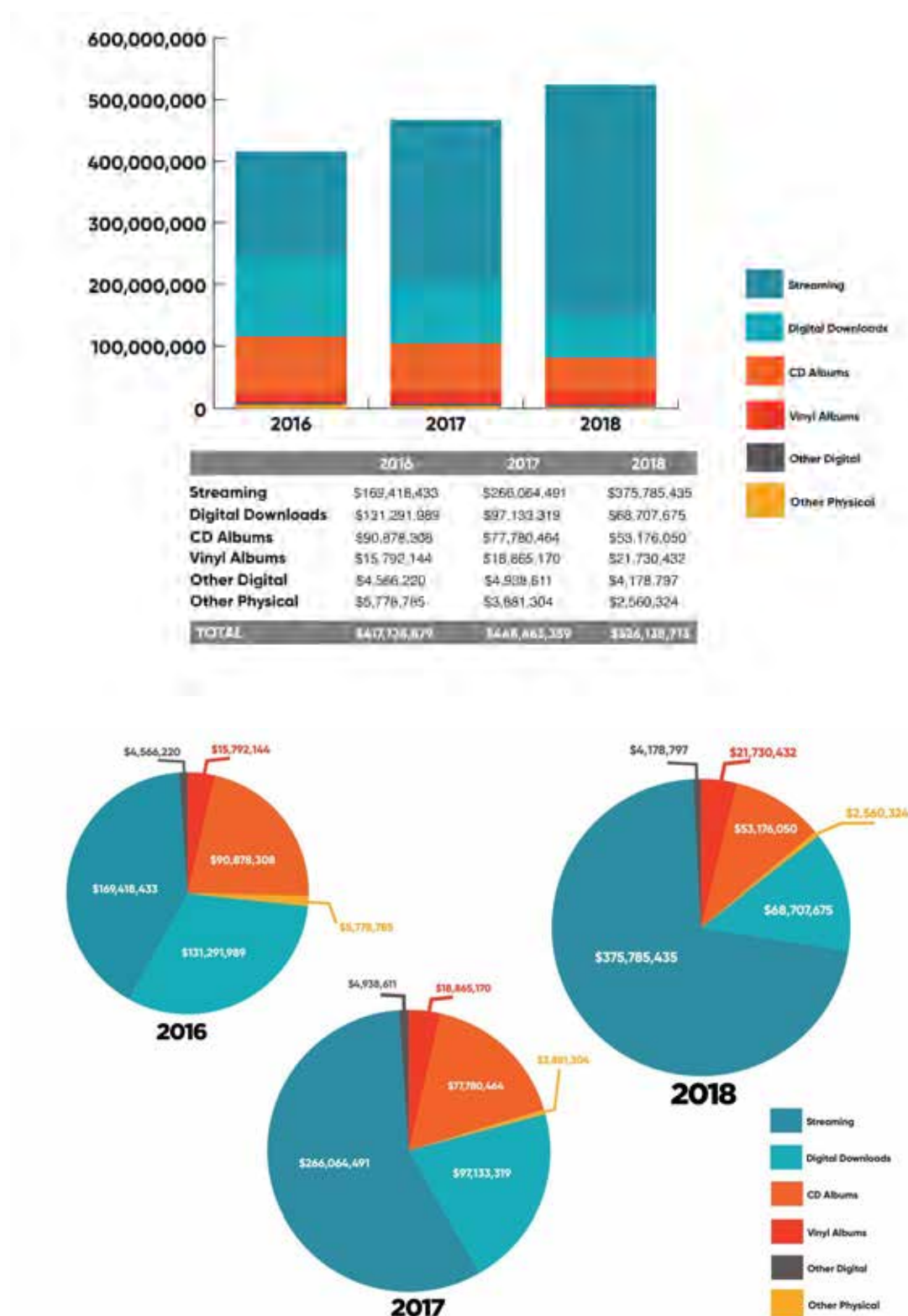


Figure 2.1.1 Reproduced by permission ARIA

# RECORDED MUSIC MARKET

## 2.2 The Physical Product Market - Australia

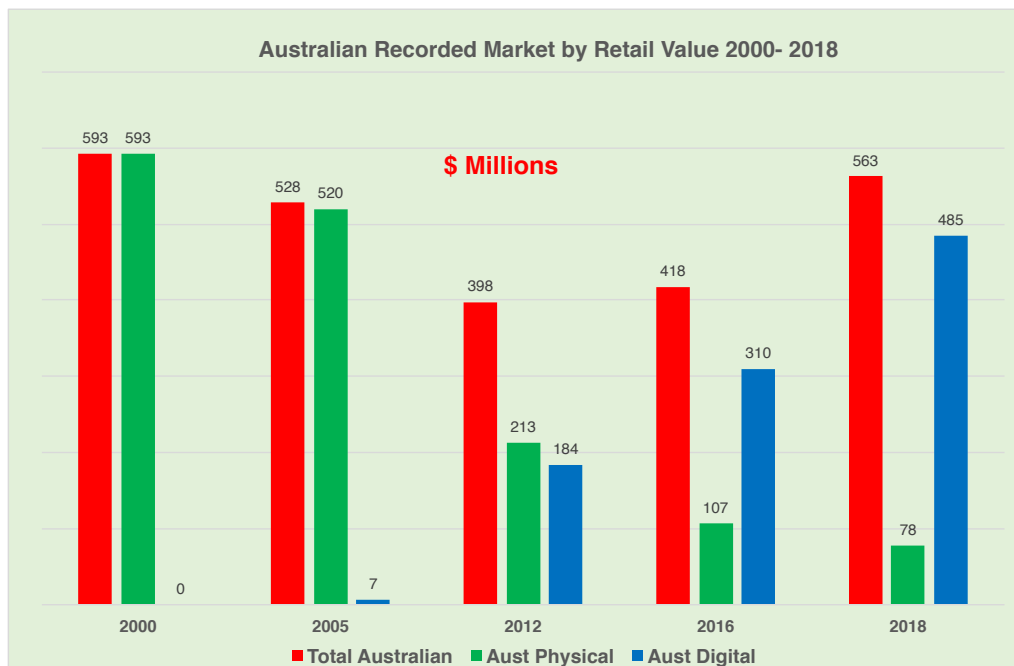


Chart 2.2.1

By the turn of the century, the decline in CD sales and revenue had already begun.

Opinions vary in explaining this ongoing decline, but illegal file sharing and industry price reductions to counter piracy are most often quoted.

Some decline was inevitable as much of the early growth was driven by consumers purchasing CDs to replace music they already owned on vinyl and/or cassette.

It is important to document the physical market as it was and as it is. Especially as we know that the CD format has held on longer in the country music sector than in other genre areas.

As already mentioned, we conservatively estimate that country music product accounts for at least 10% of the value of the Australian recorded music market.

ARIA's 2018 end-of-year wholesale value figures report \$77.5 million for physical product.

We calculate that **country music physical product generated a minimum \$9.7 million from retail sales in 2018.**

## 2.3 The Artist-to-Fan Physical Product Transaction

While the majority of download and streaming revenue generated by country music will be accounted for in ARIA-reported figures, we know that in the case of physical recorded product sales, the direct artist-to-fan retail transaction that occurs at live performances and through artist websites is significant. This transaction primarily involves the selling of CDs.

We therefore asked a number of specific questions in our Fan survey:

### Have You Purchased CDs In the Last Twelve Months?

Overall, 83% of all country music fans purchased CDs in 2018.

Even amongst the 18-35 age group who we know to be the most enthusiastic digital music consumers, the response figure was 72%.

### If You Have Purchased CDs, Where Did You get Them?

Of the overall 83% who reported purchasing a CD, 76% bought them either directly from an artist at a gig (55%) or through an artist's website (21%).

This compared to 67% who reported purchase from a bricks-and-mortar retailer (54%) or internet retailer/re-seller (13%). The breakdown by age group was:



# RECORDED MUSIC MARKET

	None	At Artist Gig	Artist Website	Retail Outlet	Online Retailer
Overall	18%	55%	21%	54%	13%
18 - 35 years	28%	40%	17%	51%	16%
36 - 55 years	19%	54%	21%	52%	15%
55+ years	9%	66%	24%	59%	38%

Table 2.3.1

Although the percentage is consistent across the age groups for CDs purchased from a retail outlet, artist website and online retailer, the 18 – 35 age group is significantly less likely to purchase CDs at gigs. This is consistent with the live performance attendance patterns we examined previously, with live performance attendance increasing as the audience ages.

These figures for direct artist-to-fan sales are significant, but will only be worthy of serious consideration if the dollar value is quantifiable.

We asked fans to identify their per-month spending on CDs. Overall, 52% of those buying CDs spent an average \$30 per month. Again, there was some variation across age groups.

48% of the 18 – 35 age group spent the monthly average, 50% of the 36 – 49 years age group and 56% of the 50+ years age group.

Of the 83% of country fans who purchased CDs in 2018, considerably more than half purchased in significant numbers (10 to 12 equivalent CDs per year) through a direct artist-to-fan transaction.

We also have the responses from amateur, semi-professional and professional artists who report their sales of physical product at live gigs.

Utilising that information, we estimate that **in 2018 artist-to-fan sales of physical recorded product at live country music performances generated an additional \$4.3 million.**

We regard this as a conservative estimate given that the ARIA figures are for wholesale value and as most country music artists are not involved with a reporting label, the possibility of double-counting is small.

## Note:

It should be remembered that the retained value/profit from these direct transaction sales of products they own will be greater for the artist than the value generated by smaller royalty sums from sales governed by a label agreement.

## 2.5 The Digitisation of Music

Music streaming platforms – free and paid subscription models, have been the logical outcome of the file sharing services established 20 years ago, and the legal downloads that gradually replaced them.

But the first ‘revolution’ merits some analysis.

### Digitisation - The Context

When Napster was launched in 1999, it foreshadowed dramatic and, as later demonstrated, irreversible changes in music consumption, the fortunes of producers and the way artists interact with their fans.

The major labels rejected an early approach from Napster to licence their product for the new platform. Instead, they were confident that they could develop, and therefore control, a new format – as they’d always done.

Many major label executives dismissed the internet’s distribution possibilities and the file-sharing applications as a ‘passing fad’.

Their successful prosecution of Napster only drove the file sharing platforms ‘underground’, with the central-server model replaced by Gnutella, Kaaza and Limewire which utilised the user’s computer as the file-sharing ‘hub’ and were much harder to shut down.

These in their turn were succeeded by an increasing number of offerings, each wave providing the industry with new challenges as increased sophistication enhanced their ability to avoid legal and regulatory efforts to terminate their activities.

In 2005, IFPI estimated that there were some 850 million illegal tracks available for download from a variety of ‘pirate’ websites.

Source: *‘IFPI Global Music Report’, 2005*

Although the recorded music industry has consistently suggested that the piracy associated with file-sharing has been mainly responsible for the dramatic post-2000 decline in physical product sales revenue, it is important not to overstate the effect.

An analysis of ARIA data for the years 2000-2011 has suggested that significant reductions in the wholesale price of recordings for the years 2008-2011 was also a significant contributing factor.

# RECORDED MUSIC MARKET

When Apple CEO Steve Jobs unveiled the 1st-generation iPod in 2001, promising “1,000 songs in your pocket”, the real change began.

Linked to the iTunes store - offering the only legal digital catalogue from all major labels, the iPod dominated. From 2001 to 2012, the iPod recorded an 80+% share of the US market, accounting for some 42% of the company’s income. By 2012, the iPod recorded 350 million unit sales worldwide.

By 2008, iTunes had become the largest music vendor in the US. By February 2010 it was the largest music vendor in the world with sales of 10 billion songs. By 2014, it reported sales of 35 billion songs.

As sales of the iPod began to decrease from 2009, Jobs – ever the visionary, punted the company’s future prosperity on the migration of music through the iTunes platform to the iPhone which had been introduced in 2007.

Technology and business pundits were originally sceptical about Apple’s ability to compete with major manufacturers like Nokia, Motorola and Ericcson.

As we have seen however, the gamble has paid off handsomely with Apple, on the back of iPhone revenue, becoming the world’s most profitable company.

The take-up of smartphones has been dramatic and universal. By the end of 2018, Statista.com reported that 4 billion people were connected to the internet with 3 billion of them using smartphones.

In 2018, Adobe conducted research which showed that after directions (74%), email (70%) and social media (65%), 53% of people used their phones to listen to music and 59% to watch online video.

Wikipedia reported that in 2018, 17 million Australians owned a smartphone – 70% of the population.

The table below highlights the impact that digitisation has had on the global and Australian markets since the turn of the century, and emphasises the fact that the Australian consumers have been much quicker to respond to streaming options than consumers in other global territories. Thus driving a faster recovery in our market.

	2000	2005	2012	2015	2018
Global Physical	100%	86%	57%	39%	27%
Aust Physical	100%	98%	54%	38%	18%
Global Digital	0%	5%	35%	45%	54%
Aust Digital	0%	2%	46%	62%	82%

Table 2.5.2

Chart 2.5.1

RECORDED MUSIC MARKET

Downloads of single tracks and albums had their ‘day in the sun’, but have now declined in significance to be equal with physical product (essentially vinyl) in terms of contribution to overall market share and value.

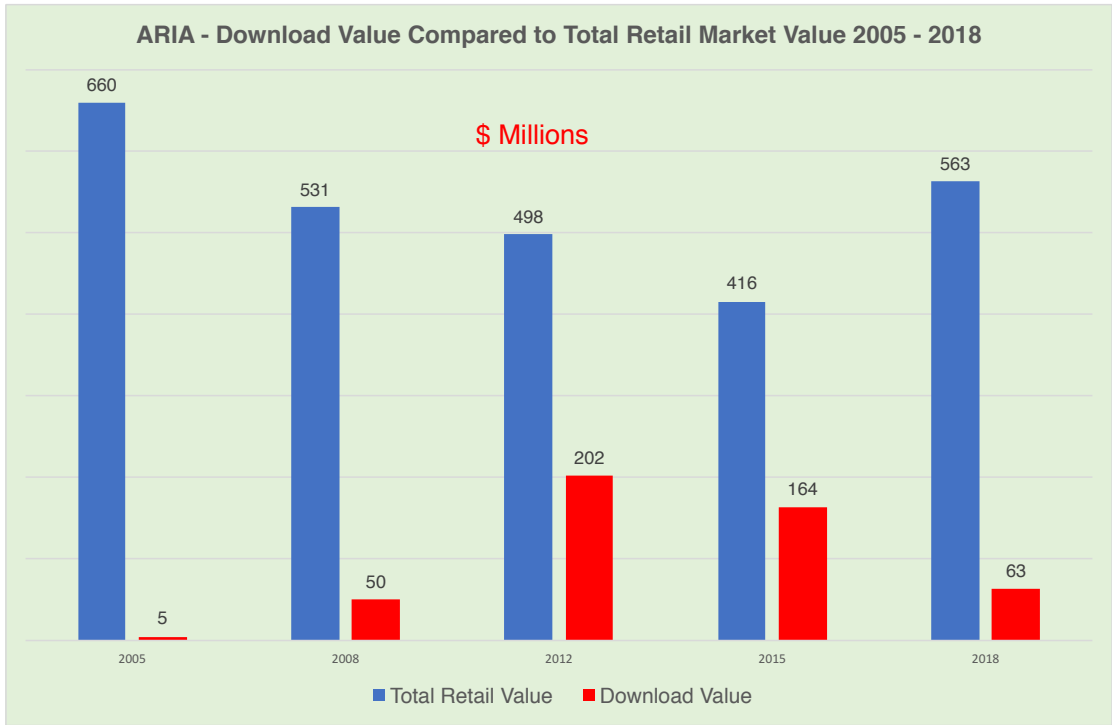


Chart 2.5.2

And, as a percentage of all format value -

	2005	2008	2012	2015	2018
Download Value	0%	9%	41%	39%	11%

Table 2.5.3

Based on the reported value of \$68.7 million In 2018, we estimate that **country music’s share of ARIA’s reported digital download revenue was \$6.9 million.**

# RECORDED MUSIC MARKET

## The Artist-to-Fan Digital Product Transaction

We also examined the digital music purchasing by fans to determine the extent of any additional revenue generated by direct artist-to-fan download transactions.

70% on average reported purchasing digital downloads in the last 12 months. This varied from a peak 76% for 18-35 year olds down to 55% for the 50+ age group. In terms of live performance, although we know that a very small number of artists provide digital files for sale at gigs (download cards, USB drives), the vast majority

of download sales are through third-party online retailers.

Although those purchasing downloads recorded an average monthly spend of \$19, it is clear that as the vast majority of transactions are not direct artist-to-fan, the value is predominantly reported in the ARIA yearly figures.

We have therefore not calculated nor reported an additional revenue/value figure for these digital downloads.

## 2.6 The Rise and Rise of Streaming

As dramatic as was the impact of digital downloads in the Australian marketplace, the decline was equally so as the format was rapidly supplanted by the consumer’s growing preference for streaming services. Music audio and video on-demand streaming now dominate the global industry, accounting for 54% of the value of the music market in 2018.

(Source: IFPI Global Music Report 2019)

In the US (74% of all recorded music product revenue) and Australia (71%), streaming is even more dominant. The majority of services each boast catalogues of 50+ million songs.

ARIA reported revenue from streaming in 2018 was \$375 million, up 42% from 2016 (\$264 million). Streaming now generates far more revenue than all other physical and digital recorded formats combined.

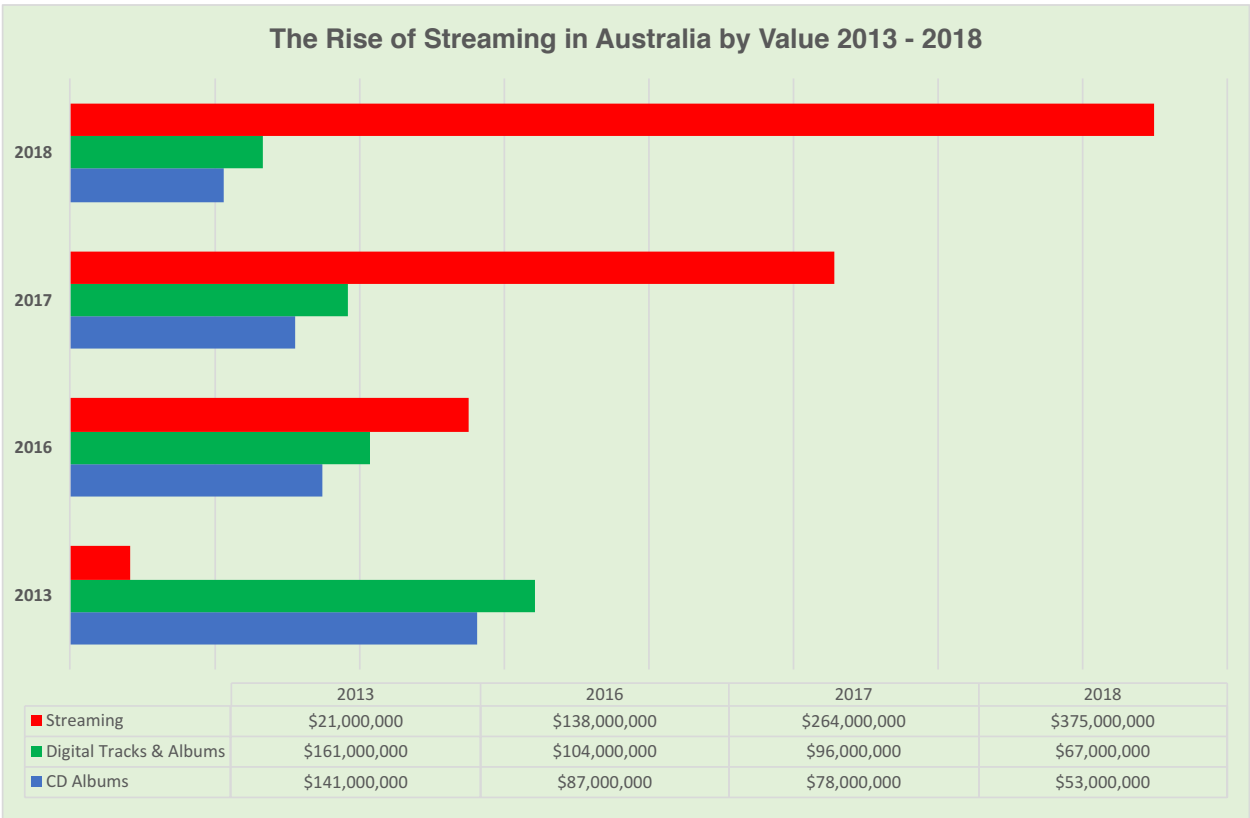


Chart 2.6.1



# RECORDED MUSIC MARKET

## The Context

In 2009 Spotify was founded in Sweden and was first available as an App through Apple's iTunes store in 2011.

Users, for the first time, could use their computers, tablets and phones to access music in the company's library rather than download files.

Initially, the platform offered an ad-supported 'freemium' account, and there was considerable doubt whether it could sustain its business model and migrate users to a paid subscription model.

Indeed, the company posted multi-million dollar losses in its early years. Investors however maintained the faith and when the company went public on the New York stock exchange in mid 2018 sales of shares valued the company at \$33 billion.

In May, 2018 Forbes Magazine identified the world's Top Ten streaming services:

NetEase (China) – 400 million users

Soundcloud – 175 million users (very few have migrated to the Soundcloud Go subscription service)

Spotify – 170 million users (71 million paid subscribers)

iHeart Radio – 100 million users

Pandora – 74 million users (only available in a few countries outside the US)

Gaana (India) – 50 million users

Apple Music – 50 million users (all subscription)

Anghami (Nth Africa/Middle East) – 33 million users

Deezer – 14 million users (9 million subscribers)

With retail giant Amazon recently announcing its own music streaming service, predictions are universal that streaming revenue will continue to increase at double-digit growth for some years to come.

While some (mainly western) markets are seen as approaching 'saturation' in terms of subscriber numbers, there is enormous potential in the world's most populous – and so far largely untapped regions – China (where only Apple music officially operates), India and South America.

The challenge of course will be developing subscription models suitable for consumers with a lower standard of living and thus far less disposable income.

Streaming has also come with its own set of challenges. At the moment many centre around the streaming giant YouTube.

Because it is a video streaming service, it is sometimes left off the list of audio streamers.

However, IFPI research reveals that 85% of YouTube's audience use the service to listen to music.

To put that in context –

That's 1.6 billion of YouTube's estimated audience of 1.9 billion per month. That's almost half the world's internet-connected audience.

This compares to Spotify's estimated 200 million per month - 12.5% of YouTube's audience.

IFPI estimated that in 2018, 46% of all global listening hours belonged to YouTube alone. More than every single paid and free audio streaming service in the world combined !

Interestingly, looking at YouTube's Top 10 songs for 2018, only two were English-language tracks. The other 8 were in Spanish.

## YouTube Industry Impact

In 2018, IFPI identified the YouTube 'value gap' as one of the most pressing issues confronting the global recording industry.

This refers to the legal and regulatory loopholes which allow YouTube to shelter behind 'safe harbour' principles, denying legal liability – and thus licensing fees, for much of the music copyright material posted, shared, downloaded and uploaded by its users. Particularly artist-owned material.

IFPI estimates that in 2018, Spotify paid \$20 per subscription user in licence fees to record companies. YouTube paid less than \$1 per user.

As has happened consistently in the digital music environment, the dominance of YouTube has spawned a number of technologies – stream rippers, which allow the extraction of the audio component of a video. It can then be downloaded and shared freely.

The YouTube value gap is currently the focus of much industry lobbying and advocacy, with regulators in the European Union attempting to regulate to address the value-gap.

YouTube has now developed a paid subscriber model called YouTube Red and suggestions are that it will merge this offering with Google Play Music. Between them, they currently have some 12 million subscribers in 117 countries.

# RECORDED MUSIC MARKET

## 2.7 Streaming For Artists

The arrival of streaming services generated fierce debate in all sectors of the industry. The volume, and sometimes virulent nature of the commentary, has increased in proportion to streaming's dominance as the preferred consumer music platform.

Some of the controversy has involved allegations of 'fake artist' scams and curated playlists created in response to payments/inducements offered by content providers. The modern equivalent of the 'payola' (pay for play) scandals that bedevilled the radio industry last century.

But for artists, criticism has most often centred around the revenue – or rather lack of, that they receive for the streaming of their work.

The table below details the payments per stream reported by the various services in 2018, and the number of streams required to generate \$1,000.

	\$ Per Stream	To Generate \$1,000
Napster	\$0.01900	52,630
Apple Music	\$0.00735	136,000
Deezer	\$0.00676	148,000
Google Play Music	\$0.00611	163,000
Spotify	\$0.00437	229,000
Amazon	\$0.00402	249,000
Pandora	\$0.00133	752,000
YouTube	\$0.00069	1,450,000

Table 2.7.1

Many artists – particularly those in the indie sector, complain that the revenue they receive does not equate with streaming information. Partly this is explained by the payment model adopted by most of the leading services.

Using a simple 'pro-rata' model, the revenue generated each month is accumulated in a central pool and then distributed to rights-holders according to the popularity of individual tracks.

Using this model, If five Keith Urban songs account for 2% of all subscriber/user plays during a month, then Keith Urban and others who own rights in those tracks will share 2% of the service's monthly revenue.

The chorus of protest is growing for the services – given their advanced technological capabilities, to develop a more equitable 'user-centric' payment model.

If a subscriber paid \$10 a month and in that time only listened to music by Missy Lancaster, Brad Cox, Morgan

Evans and Beccy Cole for example, why shouldn't the distributable part of that income (approx 70% in most cases) go to the rights holders in those works, rather than into the Urban retirement fund?

Last year, a number of music trade organisations in Finland commissioned a study to examine the implications of adopting a 'user-centric' model.

Digital Media Finland analysed anonymous premium user data supplied by Spotify.

They reported that, using the pro-rata model, 0.4% of artists received 9.9% of the total cash generated in a month.

Using a user-centric model, these same 0.4% of artists would receive 5.6% of the total.

The 4.3% difference would thus be distributed among the other 99.6% of artists.

Per stream, these micro payments might seem insignificant but, as streaming revenues continue to grow and generate billions of dollars, the pressure is growing to accept and implement a user-centric model.

Spotify has suggested that adopting such a model would significantly increase their administrative costs and cancel out the perceived benefits.

The industry is not convinced.

Hartwig Masuch, CEO of BMG, the world's fourth biggest music-rights company:

"For me it's a simple question of fairness. Some services might like to say it won't make much difference, but that doesn't matter as much as being able to tell artists 'this system is fair and this is how it works'".

(Source: *'Does Spotify Need To Change The Way It Pays Artists?'* Rolling Stone, 7th December, 2018).

Whichever model is adopted, it is important to note that the division of revenue will often be governed by contractual arrangements between the creator (artist/songwriter) and other rights holders (label/publisher). Some artists are likely to share 50+% of the distributable revenue, others as little as 10-20%.

Note:

Based on available figures, whether we are considering the fortunes of artists operating in the 'old' physical/download industry model, or in the brave new world of streaming, it seems that the percentage of artists earning significant revenue from the consumption of their recorded music is approximately the same as it was 20 or 30 years ago.

### Developments

The streaming services have not been deaf to criticism and, in an attempt to present a more artist-friendly image, have implemented a number of initiatives.

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Spotify For Artists, Apple Music For Artists and Google Play For Artists have joined older platforms (Facebook, Soundcloud, Reverb Nation, Tunecore etc) in offering a range of analytical tools to provide creators with sophisticated information on subscribers to their music.

Carrie Underwood, Spotify's most played country artist used these analytics to undertake a 'boutique' tour of the UK in 2017 where she performed at a number of Spotify-Only events specifically for subscribers.

Should YouTube Red prove a success and, as rumoured, eventually merge with Google Play, the range of Google analytics available to artists would greatly enhance their knowledge of their fan base to assist with marketing and performance/touring decisions.

Spotify has been leading developments.

In 2017 Spotify announced Secret Genius to shine a light on the creators (writers, producers, engineers) behind the platform's most popular songs. Secret Genius revealed all the songs written or produced by the same creator on a playlist, told the stories behind hits on the Secret Genius podcast, and hosted global songwriting camps throughout the year called "Songshops." Additionally, the launch of Secret Genius Studios offered up-and-coming songwriters access to the latest studio equipment, as well as opportunities to connect with each other and collaborate on future hits.

Additionally, a number of Spotify's most popular playlists (including country – see below) have been 'enhanced' with the addition of expanded – and often exclusive, features – interviews (audio/video), podcasts, new audio & video releases etc.

### 2.8 Streaming and Country Music

It goes without saying that the advent and growing importance of streaming services has provided significant benefits for country music artists at all levels of the industry, in providing a platform to expose their music to a far broader and numerically significant audience than ever before.

The benefits equally apply and flow on to all the businesses who support and present those artists on national and global stages.

Australia's newest country chart star, Morgan Evans, has created a global awareness and subscriber fan base in a fraction of the time that it took Keith Urban as our most successful country export to do so.

The numbers speak for themselves. Since winning the Country Music Association's Horizon Award in 2001 and

the Entertainer of the Year in 2005 (on his first nomination), Keith Urban has built a huge international career in country music. By the time he was Awarded his second Entertainer of the Year in 2018, he had 996,584 subscribers to his YouTube channel and 4,838,087 monthly Spotify listeners.

Despite only having 18,000 subscribers to his YouTube channel, it has taken Morgan Evans less than 12 months to accumulate 1,695,645 monthly Spotify listeners, and Australia's latest #1 on the US Country Airplay chart. By the end of 2018, 'Kiss Somebody' had sold 500,000 units and recorded 52 million streams.

### Country Streaming in the US

Because so much of country music's content is supplied to all nations by North American, predominantly US artists, it is appropriate to look at that market in some detail.

The history of success in the country music genre in the world's pre-eminent market was, for decades, inextricably tied to the fact that country has for many years been the No.1 format on AM/FM radio.

Given that significant investment was needed to mount the sort of publicity and promotional campaign that led to radio airplay and thus sales and chart position, it was almost unheard of for an artist without a label deal to make an impact.

All that changed when an unsigned singer/songwriter from Texas named Maren Morris released her debut EP in August 2015 on Spotify.

Without the benefit of a traditional PR campaign the track 'My Church' nonetheless went 'viral', attracting millions of streams and the attention of the traditional music companies on Nashville's Music Row. It also won the Grammy for Solo Country Performance.

With a major label (Columbia/Sony Nashville) quickly behind her, she has gone from strength to strength touring with major artists including Keith Urban and setting new benchmarks for a female artist in the genre.

Fast forward to March 2019. Her second album 'Girl' debuted at No.1 on the Billboard Country Chart and at No.4 on the all-genre Billboard Hot 200. With 23.96 million on-demand streams in its debut week, it smashed the previous first-week record set by Carrie Underwood's 2015 'Cry Pretty' with 14.4 million streams.

# RECORDED MUSIC MARKET

Currently Maren Morris has 17 million monthly listeners on Spotify.

Morris's success might have come as a surprise, but the established labels and the streaming services were quick to grasp the significance. The former realising that streaming needed to be a much greater component of their business, and the latter that they had probably been guilty of underestimating the potential of the genre. Spotify had established a 'Hot Country' playlist in 2008, but it's subscriber growth was less spectacular than other 'cool' genre playlists for Hip-Hop and Latin. Nevertheless by 2018 it was regularly accessed by 5 million subscribers.

The take-up rate of streaming by country fans was slower than for other genres but, from Spotify's point of view, that meant there was greater potential for growth than for other genres.

Spotify established a presence in Nashville in 2013, but upped the ante in 2016 by opening a major office. Pandora, Amazon and Apple Music have followed suit.

"Breaking new artists is a cornerstone of Spotify's strategy in Nashville, but their main focus is breaking in new fans. While the CD has long been on its way out, it remains king for country audiences, and persuading them to embrace the cloud is an ongoing battle."  
(Source: *'How The Rise of Streaming Has Radically Changed Nashville's music industry'* – USA Today, April 27th, 2017).

According to data from Nielsen, 38 percent of music sales in 2016 came from on-demand streaming. But just 24 percent of US country sales were from streaming. That's compared to 41 percent for pop and 48 percent for HipHop and R&B. That leads streaming experts to view country as having massive growth potential for streaming, and indeed, 2017 bore that out.

Year-on-year growth was 53 percent for country music compared to 36 percent for the industry as a whole.

Country continues its ascent in the US market. The US Country Music Association has recently reported (*Nielsen 'Music Connect'*) that country music's streaming revenue increased by 28% in Quarter 1, 2019.

## Streaming in Australia

Although the Australian music industry does not have access to the breadth and depth of data that global analytics firm Nielsen regularly reports for the US music industry, we nonetheless have access to a range of information that confirms the prominence of streaming services both in terms of the volume of music consumption, and the revenue that flows from that consumption.

2018 End of Year statistics reported by ARIA have documented the dramatic rise and fall of digital downloads and the subsequent rise and rise of streamed music revenue which now accounts for 71% of all recorded music value.

in 2013 when ARIA reported total sector income at \$352 million, digital product value (\$192 million) overtook physical product value (\$159 million) for the first time.

In that year streaming revenue accounted for just 6% (\$21m) of total income and just 12% of the digital income.

**Just five years later, total sector wholesale value is reported as \$526 million.**

**Digital income (\$442 million) represented 84% of the total, with streaming revenue (\$375 million) accounting for 85% of that and 71% of total income – 41% growth on 2017.**

Physical product sales continued their decline to now account for just 15% (\$74 million) of total revenue. Interestingly, vinyl sales recorded an eighth consecutive year of growth to now account for 28% of physical format revenue.

## 2.9 Streaming and The Country Music Census 2018

The intriguing question for this study is whether or not this dramatic rise in the importance of streaming across the broad music industry has been replicated in the country music genre.

There are a number of indicators to suggest that is the case.



# RECORDED MUSIC MARKET

In September 2018, Spotify released a feature story on country music to coincide with International Country Music Day (September 16th). The story contained little in the way of detailed statistics, but contained some fascinating information:

‘While the bulk of country listening takes place in the U.S., we’ve seen a 21 percent increase in the share of country music streaming outside America since 2015. And we expect to see even more growth as streaming continues to allow music to cross borders with greater ease than traditional bastions like country music radio.

## Australia

The third most popular market for country music streaming behind the US and Canada.

The fastest growing global country market  
- Spotify 2018

There’s a particularly strong appetite for country music in Australia, the third-most popular nation for country music streaming behind the U.S. and Canada – and the fastest growing market. To cater to the demand there and in neighbouring New Zealand, we recently launched two mood-oriented playlists: Country Chill and Country Party, blending talent from both nations with the latest tracks from America’s country scene.

“Country music has always had a strong presence in Australia, in line with our vast interior and open areas, known as the outback or the bush, which inspire the common themes of country music,” says Peter Stevens, Music Editor for Spotify’s Australia and New Zealand content.

“With the recent uplift in popularity of the genre, we are seeing more artists entering the spotlight. Global streaming services are providing opportunities around discovery, opening up more opportunities for global potential with our local artists.

Among the new Aussie artists to enter the fray is Morgan Evans, whose song “Kiss Somebody” has streamed more than 45 million times on Spotify. Others on the rise include Rachael Fahim, The Wolfe Brothers, Tori

Forsyth, Casey Barnes, Missy Lancaster, The McClymonts, and Travis Collins. And of course there’s Keith Urban, currently Spotify’s most-streamed artist born outside the U.S. Repping New Zealand is Kaylee Bell.”

(Source: ‘Country Music Expands Its Global Reach’ – Spotify For The Record (September 16th, 2018).

Given what has already been noted, it should come as no surprise that there is such a close correlation between the overseas artists chosen to headline at CMC Rocks Queensland – our most internationally focused music event, and those artists identified as most popular on Spotify’s ‘Hot Country’ playlist.

Most importantly of course, we have our own data from the Country Music Census 2018.

The online Fan Survey produced 4,329 detailed responses from various age groups across the nation. It is certainly the largest single-genre sampling of Australian music fans that we’re aware of.

A conscious effort was made to capture as broad a demographic and geographic mix as possible to ensure the accuracy and credibility of the results.

18 – 35 years	26% of total respondents
36 – 49 years	42% of total respondents
50+ years	31% of total respondents

The tables which follow report the responses of surveyed fans as they apply to the take-up and utilisation of streaming services.

Where appropriate, we have recorded the results from the Melbourne Live Music Census (MLMC) to provide a point of comparison with fans of other genres.

# RECORDED MUSIC MARKET

## Country Fans & Streaming

### Do you subscribe to a streaming service?

	CM Census 2018	MLMC 2017
Yes	66%	69%
No	34%	31%

	Overall	18-35Yrs	36-49Yrs	50+Yrs
Spotify	48%	66%	47%	32%
Apple Music	24%	30%	24%	17%
Google Play	6%	5%	5%	6%
Other	7%	8%	8%	5%

Table 2.9.1

Spotify is clearly the preferred platform and it comes as no surprise that the take-up is greatest in the younger age group.

### If you are a subscriber, what is the nature of your account?

	Overall	18-35Yrs	36-49Yrs	50+Yrs	MLMC
Paid Subscription	60%	81%	58%	40%	71%
Free Subscription	40%	19%	42%	60%	29%

Table 2.9.2

The older age group, while embracing streaming, has not as yet migrated from the ad-supported free models to the paid subscription model which is dominant in the 18-35 demographic.

The comparison provided by information from the Melbourne Live Music Census is interesting but it needs to be noted that, as that study targeted audiences attending live performances in small venues, the sample was less representative of the 55+ years demographic than this study.

Removing this older group from calculation produces almost exactly the same percentage as recorded in the Melbourne study. It suggests that country music fans have taken to streaming with the same passion and in the same numbers as general popular music fans.

The rise of audio streaming services and on-demand video streaming is clearly changing the way fans listen to country music and how they discover new country music.

Playlists, predominantly on Spotify, are clearly favoured by the under 35's, while the older 50+ group still clearly favour listening to music from their own collection (CDs and digital downloads).

Streaming appears to have provided an additional listening/discovery option for fans, enhancing rather than replacing existing options and practices.

# RECORDED MUSIC MARKET

## Country Fans & Streaming - Continued

Attendance at live performance is prominent across all age-groups and word-of-mouth – including Facebook recommendation, is still important in terms of fans sharing information on new country they discover.

Given that YouTube, as a ‘mature’ platform, is used across the demographic, it is no surprise that it has launched YouTube Red to try to migrate it’s huge audience to a subscription model.

### How do you listen to country music?

	Overall	18-35Yrs	36-49Yrs	50+Yrs
From Own Collection	76%	66%	78%	84%
At Live Performances	60%	53%	63%	63%
Streaming Playlists	56%	84%	56%	32%
YouTube	48%	55%	46%	46%

Table 2.9.3

This compares to overall music listening for the general Australian population recorded by the Australia Council in 2016 – From own music collection – 87%; Online – 76% (32% in 2009); Radio and TV – 90%.

(Source: ‘Connecting Australians: National Arts Participation Survey’ – Australia Council For The Arts, 2017)

### How do you discover new country music?

	Overall	18-35Yrs	36-49Yrs	50+Yrs
Word of Mouth	52%	55%	52%	50%
At Live Performances	48%	42%	47%	53%
Facebook	42%	45%	45%	39%
Recommended Playlists	38%	64%	34%	21%
YouTube	33%	40%	31%	30%

Table 2.9.4

In terms of comparison with country music listening habits reported in the pre-streaming 1997 study, radio was obviously the major source for fans. In that study, we reported that an average of 45% of fans got their country music from commercial radio and 31% from community radio.

It is therefore somewhat surprising to report that these figures have hardly altered for 2018, with 46% of respondents listening to country music on commercial radio and 37% on community radio.

If we add internet radio (23%), it confirms just how important the medium remains in the streaming age, although it is more popular among older fans.

## Fan Listening Preferences

Before leaving our consideration of country and streaming, it is interesting to note that the ability for fans to connect with and enjoy a much greater volume and diversity of music, much of it emanating from the world’s largest country market, does not seem to have affected the strong affection fans have for local artists. When asked to identify what percentage of country music they listened to was by Australian artists, the overall average across all age groups was 53%.

The percentages hardly differed by age – 50% for the 18-35 years group, 51% for the 36-49 years group and 55% for the 50+ years group.

The only comparative figures are from an AMR:Quantum Harris report commissioned by the CMAA in 2000. In that study, fans were asked to indicate a preference. 42% reported preferring music by Australian artists and 23% by American artists.

There was significant variation between age groups in that report with the younger age group preferring American and the older age group Australian.

This variation now appears to have balanced out. An interesting and not totally expected finding. (Source: ‘Country Music Market Research – Wave 5’ – AMR:Quantum Harris, 2000)

# RECORDED MUSIC MARKET

Although no detailed data is available, the Country Music Association (US) reported the findings of a survey they conducted in 2016 which noted:

34% of Australians listen to country music

44% rank country in their top 3 favourite genres

Australia is the fastest growing country music market in the world

(Source: 'Country Music Consumption Habits:Australia' – CMA, 2016)

## Australian Country Streaming Revenue

Applying the country music market share outlined in the Methodology section, we estimate that **the value of country music streaming revenue as reported by ARIA for 2018 was \$37.5 million.**

### 2.10 Additional Recorded Revenue

In 2018, the Phonographic Performance Company of Australia distributed \$43 million collected from the

licensing of thousands of Australian businesses to its registered members for the public performance of their recordings.

In a 2017 report prepared for the Australian Independent Record Label Association, DeLoitte Access Economics estimated that only 50% of the PPCA's distribution related to products distributed by labels reporting to ARIA.

(Source - 'Air Share: Australian Independent Music Market Report 2017' – DeLoitte Access Economics, 2018)

We estimate that **country music's share of this additional revenue was \$2.1 million.**

The report further noted that in 2015, the independent label sector generated \$66 million which was not covered by ARIA sales reporting.

We estimate that **the value of unreported independent label country music sales for 2018 was \$6.6 million.**

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## Conclusion

Thanks to the dramatic embrace of digital technologies and products - particular subscription streaming, the Australian music market has rebounded from a decade and a half of decline to approach (93% at the end of 2018) the value level recorded in 1997.

It has done so far more rapidly than has been the case in the overall global market which is at 68% of its 2000 value. Country music's increasing commercial success over the period has played an important role in that recovery.

**We conclude that in 2018, country music recorded product sales had recovered at a faster rate than the general music industry and, generating value of \$65.2 million, had exceeded the peak of \$62.6 million recorded in 1997.**



## Streaming and The Future

Earlier this year, investment banker Goldman Sachs issued its 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 - live performance revenue from \$26 billion to \$38 billion and publishing revenue from \$6 billion to \$12.5 billion, 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 to music streaming service providers.

As we have noted previously, the leading providers have already experienced dramatic growth. Spotify reported 87 million subscribers as of September 2018. Up from 28 million in 2015. Apple's November 2018 total of 56 million was up from the 10 million it recorded in 2015.

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 (58% of the market) will maintain significant market share (estimated 48%), they will be challenged by Amazon, YouTube and Facebook and, especially by providers in emerging markets such as China and India. China's Tencent, currently the world's third-largest streaming provider is predicted to increase its current 11% market share to 23% by 2030, surplanting Apple as the world's No.2 provider.

The growth is very much driven by millennials and genZ (18-34 years) who are spending more on music than any other age group, and increasingly streaming their music to smartphones - that rate is expected to increase from 18% in 2019 to 37% in 2030 in developed markets.

The report identifies two potential threats to growth:

1. Labels and artists pressuring streaming services to limit their free subscription offerings and/or pressuring them to increase their premium model prices.
2. If streaming services bypass labels to sign artists directly, the possibility of labels retaliating by withdrawing their catalogues. Which could, in a worst-case scenario issue in a whole new era of piracy.

However, the report concludes that neither of these is likely to occur given the 'resurrection' in industry fortunes that streaming has provided and is predicted to continue to do so.

## And for Australian Country Music ?

**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 our genre will benefit substantially from the predicted growth.**

# THE LABELS



### 2.11 The Context

Soon after it was established in the early 1930s, British company EMI (Electric and Music Industries) established an Australian branch.

They competed for the next few decades with other British majors Decca now part of Universal) and Columbia and HMV (later merged with EMI).

From the 1960s, they faced increasing opposition from US recording labels basically established to take advantage of entertainment products generated by their core operations, Warners (Warner Brothers Pictures) established 1958; Universal (Universal Pictures) established 1962 and CBS (CBS Broadcasting - later Sony) established 1964.

From the late 1940s, when EMI imprint Regal Zonophone signed emerging talents Tex Morton, Slim Dusty, Smoky Dawson, Reg Lindsay and Chad Morgan, major labels have played an important part in the recording careers of Australian country music artists. In Australia, the majors were joined by a small publishing and record company - Festival Records, established

in the early 50s. It scored a significant 'win' when it gained the Australian rights to 'Rock Around The Clock' which had been rejected by EMI Australia. It became a significant player when bought by Rupert Murdoch's News Corporation and bought Mushroom's record label in 1998.

In the early 70s, local labels received a considerable boost when Australian radio stations placed an airplay ban on product from major labels. A number of independents - W&G, Spin and Fable were quick to organise covers by Australian artists of major label hits from overseas.

In 1974, the Australian Broadcasting Corporation followed the well established practice by creating ABC Music to retail recorded product from their radio and TV products. They have become a significant player in Australian country music.

In terms of the majors, Universal continues to be the dominant country music force through direct signings and distribution of independents.

### 2.11 Current Signings

#### ABC Music (Through Universal)

Felicity Urquhart, Beccy Cole, The Lovelocks (Can), Hit Country Vol 3 (Various), Travis Collins, Hit Country 2018 (Various), After The War (Various), Adam Brand, The Wolfe Brothers, Gord Bamford (Can), Lachlan Bryan & The Wildes, Hit Country Vol 2 (Various), Drew McAlister, Caitlyn Shadbolt, Hit Country (Various), Travis Collins & Amber Lawrence, Lee Kernaghan, Christie Lamb, Hit Country 2017 (Various), Jody Direen, The Field Brothers, Sunny Cowgirls, Tami Neilson.

**Mushroom - Bloodlines** - Troy Cassar-Daley

#### Universal Labels

**EMI** – Carrie Underwood (USA), Eric Church (USA), Keith Urban, Luke Bryan (USA), Paul Kelly, Roseanne Cash (USA).

**Island Australia** – Ruby Boots, The McClymonts.

**Lost Highway** – Shane Nicholson, Ruby Boots, Catherine Britt, Imogen Clark, Jason Walker, Adam Eckersley Band

**Sony** – Adam Harvey, O'Shea, Missy Lancaster

**Warners** – Morgan Evans, Shannon Noll, Blake Shelton, Busby Marou, John Williamson, Kasey Chambers, Neil Young (Can), Robert Plant (UK), Sturgill Simpson (USA).

# 3: Songs & Songwriting





## 3: SONGS & SONGWRITING

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, identity ... etc.

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 everything.

Without that legal regime, those who devote their energies to composing original works and those who invest in promoting and marketing 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.

Music copyright is an important element of a broader category of creativity gathered together and identified as intellectual property. It includes design, patent and trademark regulation and legislation, upon which so many parts of our industry rely.

### 3.1 The Context

A report prepared for the Australian Copyright Council by Price Waterhouse – *'The Economic Contribution of Australia's Copyright Industries 2002-2014'*, reveals just how important the sector has become.

The copyright industry sector employed more than one million Australians in 2014 – 8.7% of the workforce. This placed it just behind the Netherlands (8.8%) and ahead of the USA (8.6%) and Canada (5.6%). In 2014, it generated economic value of \$111 billion (7.1% of GDP), greater than manufacturing and health care.

In terms of GDP value-add (\$115 million) it was the 4th largest industry sector behind Financial Services (\$126 million), Mining (\$124 million) and Construction (\$122 million).

Music, based on the copyrights attached to the creative works, their recording, communication to the public and

live performance, has always played a central role in this industry sector.

There are three major PRO's (Performing Rights Organisations), whose operations we will examine in detail:

1. The Australasian Performing Right Association (APRA)
2. The Australasian Mechanical Copyright Owners Society (AMCOS)
3. The Phonographic Performance Company of Australia (PPCA).

For the purposes of this section APRA, as it represents the songwriters, is by far the most important.

### 3.2 PRO's and the Australian Scene



#### APRA AMCOS

APRA currently represents 100,000 registered Australian and New Zealand songwriters, who temporarily assigned some of their exclusive rights granted by the Australian Copyright Act (1968) to APRA, allowing it to issue paid licences to those wishing to communicate the works to the public via radio, TV, streaming etc, and/or present the works in live performance in venues, at festivals etc.

AMCOS, on the other hand, issues licences to those wanting to reproduce the works for commercial purposes. These typically include major and independent labels, digital download services and streaming platforms.

The mechanical royalties they collect through these licenses are distributed to their 20,000 publisher members: major companies, smaller independents and self-published songwriters.



# SONGS & SONGWRITING

## PRO's Continued

Both organisations are non-profit, so the significant monies generated by these licences, minus administrative costs, are paid direct to individual writers/composers or shared with publishers depending on whether or not those parties have a contractual agreement in place.

APRA's revenue has consistently increased across the two decades we are considering, whereas AMCOS revenue, tied as it is to commercial reproduction of the works, has been impacted by the same format changes we observed in the previous recorded music section.



### PPCA

The Phonographic Performance Company of Australia is a national, non-profit organisation that represents the interest of Australian recording artists and record labels. PPCA is authorised by its licensors to issue blanket licences for the broadcast, communication and public performance of sound recordings and music videos.

It currently licenses some 60,000 Australian businesses and distributes the proceeds to thousands of Australian labels and artists who own their own recordings.

Obviously the numbers in the latter category continue to increase as technologies have significantly reduced recording costs and enabled many more artist to produce and own their recordings.

Because they are both involved in licensing the same range of performance rights, APRA and the PPCA have developed a single licence – 'One Music', to simplify the process for businesses wanting to utilise the works and the recorded performance of those works.

The financial impact of the digitisation of music as it has affected songwriters, has been no less dramatic than the effects already documented in the recorded music market.

In 2009, the revenue generated by downloads and streaming was only 2.4% (\$4.3 million) of the total APRA AMCOS revenue of \$182.1 million.

By 2018, digital revenue accounted for 32% (\$134.5 million) of total revenue of \$410 million.

That total was made up of - On demand video \$18.4 million (up 30% on 2017); Audio streaming \$81.9 million (up 32% on 2017) and User Generated Content (Facebook, YouTube etc) \$21.9 million (up 30% on 2017).

### Members & Revenue – Then & Now

The number of writers, compositions and payments have all risen dramatically in recent years.

In our original 1997 study, we reported an APRA membership of 24,736 writer members who shared \$66.7 million in distributed revenue from a total of \$78.8 million.

**At that time, 1,463 (6%) identified themselves as country writers.**

**By 2018, the percentage of those identifying as country writers had increased dramatically to 14% (13,978) of Australian-based members.**

In 2018, approximately half the APRA membership received royalties.

Between 1997 and 2018, APRA membership increased by 302% - from 24,717 to 99,000. Total APRA AMCOS group revenue increased by 414% (\$78 million to \$419 million) and the revenue distributed to members increased by 442% (\$67 million to \$363 million).

## APRA Members & Financial Performance 1997-2018

	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
<b>TOTAL Distributed</b>	<b>\$67 million</b>	<b>\$183 million</b>	<b>\$253 million</b>	<b>\$363 million</b>

Table 3.2.1

### Note:

The number of paid works is not available for 1997 nor 2009, and AMCOS did not report separate member numbers nor income until the early 2000s.

Of the 99,000 registered writer/composer member registered with APRA in 2018, 11,500 were resident in New Zealand, 2,100 in other overseas territories and addresses were not supplied for a further 14,500.

## APRA MEMBERS BY RESIDENCE

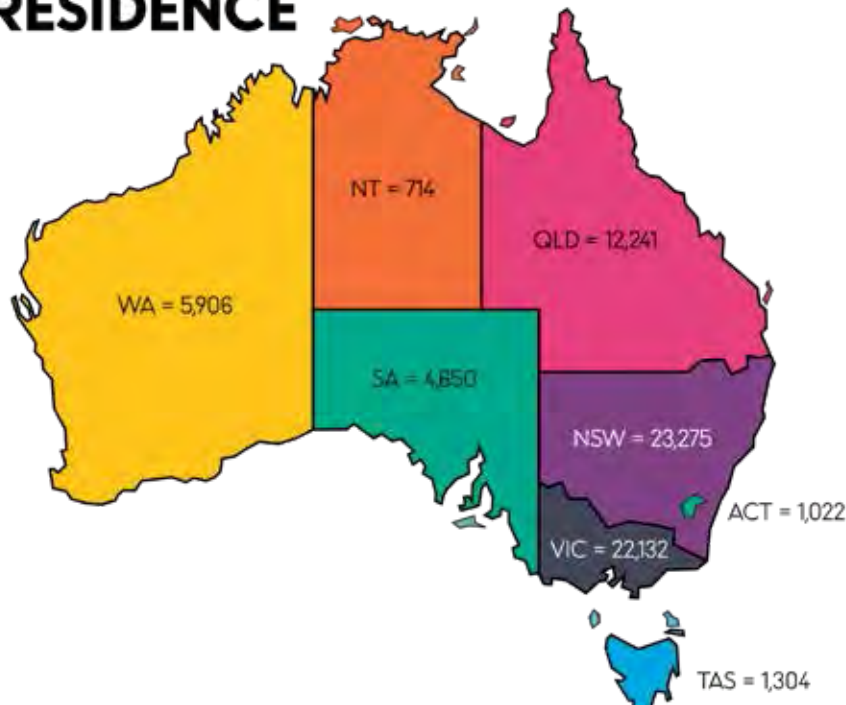


Figure 3.2.1 -Reproduced by Permission APRA AMCOS

Excluding those in territories outside Australia, the state and territory breakdown in 2018 was - ACT 1.4%; NSW 32.6%; NT 1.0%; QLD 17%; SA 6.5%; TAS 1.8%; VIC 31%; WA 8.2%.

# SONGS & SONGWRITING

## 3.3 Country Writers - Domestic

We asked our artist sample to identify their creative activity, 89% identified themselves as a vocalist and 71% as an instrumentalist.

Most importantly for this section, 96% identified as songwriters. Of those, 92 % are registered APRA members.

	APRA	PPCA
Overall	92%	24%
Professional	93%	35%
Semi Professional	93%	38%
Amateur	91%	14%

Table 3.3.1

The low figure for Amateur PPCA membership is easily explained by the fact that only a small number of this group has released commercial recordings to the market.

Interestingly, the membership rates are much higher than those recorded for the broader popular music sector measured in the Melbourne Live Music Census 2017.

In that study, 71% of surveyed artists were APRA members and 11% were registered with the PPCA.

This suggests that songwriting is a significantly more important creative driver in the country genre.

Of APRA's 99,000 members in 2018, those identifying as country writers represented 14% (13,978).

Of those, 1,624, were NZ-based, 270 overseas-based in another territory and 1,039 did not provide an address.

Of the Australian-based total of 71,244, 14% (11,035) of writers identified themselves as composing 'country'. These writers also reported composing in other genres: Pop/Rock (71%), Blues/Roots (47%) and Alternative (37%).

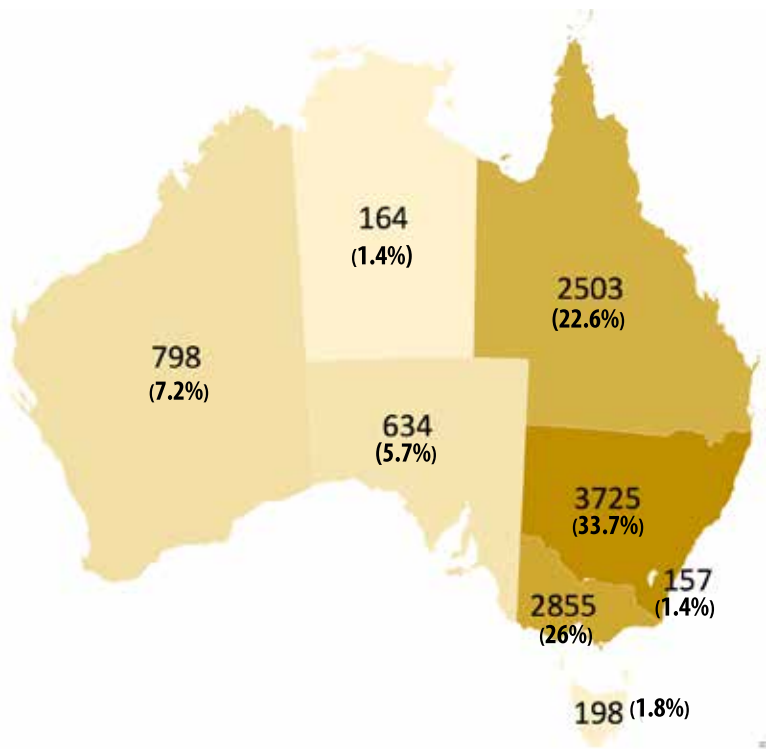


Figure 3.3.1

**In 2014, 11.4% of APRA's 81,733 writers identified as 'country'.  
By 2018 that number had increased to 14% of the 99,000 total.**

# SONGS & SONGWRITING

So, comparing the percentage of country writers to the overall writer total in each state –

	2014	% Total Writers	2018	% Total Writers
ACT	38	0.5%	157	1.4%
NSW	3,313	35.0%	3,725	33.7%
NT	145	1.5%	164	1.4%
QLD	2,096	22.0%	2,503	22.6%
SA	540	5.7%	634	5.7%
TAS	461	4.9%	198	1.8%
VIC	2,457	26.0%	2,855	26.0%
WA	643	6.8%	798	7.2%

Table 3.3.2

The increase in the number of country writers has been consistent across the states and territories with the small decrease in overall percentage in NSW being shared across the areas with the exception of Tasmania.

## 3.4 Writers - Postcode Analysis

In 2013/2014, APRA analysed its member database to produce a report which identified the residential postcodes of writers in various genres. From information supplied by APRA, we have been able to conduct a similar analysis for 'country' writer members registered in 2018. The following table compares the data from 2013/2014 with 2018.

	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

Table 3.4.1

Tamworth regained the country 'crown' by recording 88 'country' writers, compared to Northcote's 86. They were well clear of the Lismore region in 3rd place with 70 writers.

Only 6 writers separated Lismore in 3rd from Thornbury/Preston in 7th/8th.

### Note 1

The results for 2018 need to be treated with a little caution as they are based on registered writers as opposed to the 2013/14 figures which are based on writers who received royalties. Unfortunately, their paid writer list was not available at the time of publication.

### Note 2

The results for regional areas include multiple postcodes in an area with significantly larger populations – eg. The Central Coast, centred around Gosford, includes some 20 areas with a single postcode and a population of 325,000. Toowoomba likewise, with a population of 115,000. This compares with a suburb like Thornbury with a population of 18,500.

The most notable feature of all three lists is the fact that adjacent suburbs in Melbourne's inner northern suburbs (Northcote, Brunswick, Thornbury, Preston, Coburg), continue to dominate the Top Ten country postcodes, despite the fact that median house prices in these suburbs are \$1 million+.

On a like-by-like comparative basis (62,000 population), Northcote, Brunswick and Thornbury registered a combined total of 219 country writers compared to Tamworth's 88 in 2018.

Similarly, on the same approximate population aggregation, adjacent suburbs in Sydney's inner west (Petersham, Enmore, Marrickville, Newtown, St Peters) registered 158 country writers.

## 3.5 Writers - Earnings

Although income from live performances constitutes the major source of income for our 582 surveyed artist/songwriters, royalties generated by their compositions still constitute a significant income source.

	Amateur	Semi Pro	Professional
Live Gig Fees	80%	59%	51%
Live Gig Rec Sales	9%	13%	19%
Live Gig Merch Sales	4%	10%	11%
Songwriting Royalties	3%	7%	11%
Recording Royalties	2%	5%	8%

Table 3.5.1



# SONGS & SONGWRITING

## 3.6 The Nashville Connection



Figure 3.5.1 -Reproduced by Permission TMN

Australia's country music artists have long coveted success on the world stage, particularly in the USA. Even the most 'Australian' of performers, Slim Dusty, who traditionally avoided the capital cities in his own country, accepted an invitation (1997) to perform at the Grand 'Ole Opry in Nashville.

Keith Urban was the first of our modern crop of country artists to relocate to Nashville in 1992. It took some years for his country rock style to connect with the local community, but he was determined and had a couple of 'believers' in his corner. Ex-pats Barry and Jewel Coburn had established a publishing company (TenTen Music) based on Alan Jackson's success and signed Urban to his first US deal. Their support and that of fellow ex-pat Jeff Walker at PR company Aristomedia helped him through the initial lean years.

He was followed in 2001 by fellow Star Maker winner Kylie Sackley who, to the surprise of many in the Australian industry, decided not to pursue what seemed guaranteed to be a successful local performing career and instead relocated to Nashville to pursue her dream as a songwriter. She was right! Penning hits for Faith Hill and Leanne Rymes put her firmly on the local industry radar.

Since then, a steady stream of Australian artists and business operatives have made regular visits to 'Music City USA' to write, record and do business.

We have just seen the value of those regular visits with Morgan Evans scoring Australia's most recent No. 1 on the US Country Airplay Chart in 2018 with his US debut 'Kiss Somebody'. This success was the outcome of a decade of strategic actions.

In 2004, Jeff Walker established a Global Showcase event as part the CMA's annual festival (FanFest then). Over subsequent years, many Australians have joined artists from the UK, Canada and Europe in this event - Alyece Simmonds, Travis Collins, Troy Kemp, Mark and Jay O'Shea, Morgan Evans (2007 was his first show), Jasmine Rae, Troy Cassar-Daley, Kirsty Lee Akers, The McClymonts, Sinead Burgess, Dianna Corcoran, Joe Robinson, Adam Harvey and Kaylee Bell.

In 2009 Sounds Australia was established to market artists and businesses at marquee international events. Hundreds of Australian acts are now presented annually at some twenty events on five continents.

In 2010, Sounds Australia developed a partnership with the emerging Americana Music Association. Since then, over 200 Australian artists have participated in their annual Americanafest event which has become the city's fastest-growing and second largest music event.

This latter initiative was very much driven by ex-pat producer Mark Moffatt who worked tirelessly, first as chair of the Americana Music Association's International Committee and then as President, to alert the organisation to the global potential of the genre. The initial Australian involvement of five performers in the 2010 Americanafest had grown to 50 artists and writers by 2018.

At the same time, prominent Sydney agent and founder of the CMC brand, Rob Potts, was advocating greater international involvement with equal passion, as Australia's first board member and International Committee Chair of the US Country Music Association.

Their efforts were followed by others. The Australia Council for the Arts established a 3-month songwriting and mentorship program in Nashville. The Australian Americana Music Association was formed and now boasts 400+ members.

APRA AMCOS launched the first SongHubs program in Nashville, partnering Australian writers with locals and resident Australians. It notably partnered Morgan Evans and ex-pat writer Chris DeStefano. Their collaboration produced the songs for Morgan's stunningly successful US and Australian debut.

In 2016, APRA AMCOS appointed Mark Moffatt as its first Nashville 'ambassador', and the following year established a Nashville office managed by Moffatt.

## SONGS & SONGWRITING

Nashville is undergoing a boom with an estimated 100 people moving there per week. Among them are some 110 Australian writers currently residing there.

Underlining the increasing importance of international markets, **overseas performance reports submitted by Australians have increased from 2,845 in 2012 to 7,095 in 2018.**

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

### 3.7 The Nashville Aussie Experience

During the 2018 Americanafest event, a number of these Australian residents were kind enough to spare time to share their experiences: Kylie Sackley, Phil Barton, Tommy Emmanuel, Jeremy Dylan, Emma Swift, Jordie Lane and Clare Reynolds, Lindsay Rimes, Nash Chambers, Mark and Jay O'Shea, Mark Moffatt and Sam Hawksley.

Some had an upbringing steeped in traditional country, others came to the genre later in their professional lives. As a precociously talented 18-year old, Tommy Emmanuel sent a cassette to his idol Chet Atkins who was then A&R manager at RCA. This he did a number of times wanting to establish himself as a writer. Instead, he headed to England where he began to establish his formidable international reputation as a performer, before moving permanently to Nashville in 2003.

Despite having very few contacts to provide introductions and help her navigate the Nashville industry and writing community, Kylie Sackley was determined to establish herself as a writer and made the big move very early in her career. This, despite being crowned as winner of the Star Maker talent quest which seemed set to see her establish a domestic career as a top-flight performer.

Phil Barton, Lindsay Rimes and Chris DeStefano all had established performing and/or production careers in Australia across multiple genres. Country was not their predominant involvement, but as they became aware of Nashville's growing importance as a songwriting hub for all genres, they made the move.

Despite Kasey Chamber's No.1 Americana chart success ('Rattlin' Bones') and a number of successful and

applauded performances at Americanafest, manager and producer Nash Chambers waited until 2018, when the genre had achieved sufficient momentum and popularity to justify the relocation of their families.

With few exceptions, the writers/artists interviewed made a number of visits before deciding to become part of the Nashville community.

They were quick to point out the significant investment involved. The application process to secure an O-1 visa allowing them to work temporarily costs a minimum \$15,000. A Green Card .... lots lots more!

All felt trepidation and excitement in equal parts. "There's so much talent here. It's so competitive, it's terrifying. You just feel very small, and that can work for you or against you. Fortunately, I let it work for me and made a jump here. It all comes down to having the right attitude and showing you're serious about being a part of the industry here." (Lindsay Rymes).

"I definitely sense that through our successes we have created a feeling that making it on the global stage is possible, and that has given Australian writers and artists a limitless possibility to dream big." (Phil Barton).

"Head down, bum up, go for it, don't take no for an answer, and work really, really hard. And get better at what you do every single day". (Kylie Sackley).

They chased their dream all the way to Nashville. Their universal advice is simple: Take the leap.

# SONGS & SONGWRITING



Australian writers in the last few years have entered the International Songwriting Competition in record numbers.

Established in 2001, it has become the world's largest with tens of thousands of entries in 21 categories. Last year, Australian writers made up 10% of semi-finalists. By far the greatest number for any country outside the USA. Our Country and Americana writers have enjoyed considerable success.

Of course many Australian writers are involved in local competitions and associations and the TSA (Tamworth Songwriters Assoc) Awards has become a significant annual event for many country writers.

The legendary in-the-round songwriting nights conducted by the Nashville Songwriters Assoc at the iconic Bluebird Cafe are on every travelling writers' bucket list.

ISC	Placing	Honourable Mention
2014	1st Adam Eckersley	Casey Barnes, Rick Price Gena Rose Bruce Ruby Boots Cyndi Boste
2015		Gretta Ziller Troy Cassar-Daley Jared Porter, Kaylee Bell Jasmine Rae Tracy McNeil Loren Kate Halfway
2016		Kirsty Lee Akers Shane Nicolson Matt Ellis, Paul Chesne Matt Joe Gow Katrina Burgoyne Josh Rennie-Hines
2017	1st Shane Nicholson	Casey Barnes Matt Ellis Gretta Ziller Shane Nicholson

Figure 3.6.1

## 3.8 Collaboration

With more Australian country writers increasingly involved in collaborative writing, particularly in the US marketplace, we asked our artist/writers a specific question about the agreements they put in place with collaborators.

	Overall	Amateur	Semi Pro	Professional
Verbal Agreement	31%	31%	23%	34%
Written Agreement	5%	3%	8%	4%
Use APRA Registration	56%	56%	68%	56%

Table 3.8.1

Given the significant potential for income generation, it is notable that so many writers rely on the royalty splits reported to APRA when they register their works or on a verbal agreement, rather than having any written agreement re authorship and ownership.

However, these findings are in line with those recorded for writers surveyed during the Melbourne Live Music Census projects.

## 3.9 PPCA

We noted earlier that country music artist membership of the PPCA was significant - 35% for those identified as professional and 38% for those identifying as semi-professional.

It is interesting to compare the results with those obtained through artist participation in the Melbourne Live Music Census of 2017.

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

Table 3.9.1

## SONGS & SONGWRITING

The significant membership rate among country music artists suggests they are well aware of the importance of revenue generated by 61,000 business licenses issued by the PPCA in 2018 which generated \$50.3 million in overall revenue for a distributable total of \$43.1 million. Unlike APRA the PPCA does not classify members by genre.

We asked our surveyed artists specific questions about the tracks they had recorded during 2018 for commercial release.

How those were financed and how they were distributed. The table below confirms that a significant number of tracks were recorded and self-distributed.

These results explain the high PPCA registration with rates of 70% for self-financed - and therefore owned, recordings among semi professional and professional artists.

	Overall	Semi Pro	Professional
Tracks for Commercial Release	56%	70%	75%
Avg 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%

Table 3.9.2

### 3.10 Conclusion

As we have observed, APRA AMCOS revenue has risen consistently across the last two decades. In 2018, 47,600 members received royalties for 1.4 million songs and compositions.

APRA's Gross Revenue was \$ 323.3 million in 2018 (a 314% increase on 1997 and a 208% increase on 2009), and AMCOS's Gross revenue was \$95.9 million (a 40% increase on 2009).

In 2018, \$362.8 million was distributed to APRA and AMCOS members (a 440% increase on 1997, and a 200% increase on 2009).

Total Group Revenue	\$420.2 million	
Total Distributable Income	\$362.8 million	
Digital Revenue	\$134.5 million	32.0%
Public Performance	\$85.8 million	20.4%
Television	\$85.7 million	20.4%
Radio	\$46.9 million	11.2%
International	\$44.9 million	10.7%
Recordings	\$11.4 million	2.7%

Table 3.10.1

Given that in 2018, 14% of APRA writers identified as 'country, we are confident in applying our 10% industry share to report that:

**Country music compositions and recordings were responsible for generating \$36.3 million of APRA AMCOS's distributed income to members in 2018.**





## SONGS & SONGWRITING

# THE PUBLISHERS



Publishers, through their exploitation and commercialisation of the compositions – the songs that lie at the creative and economic centre of music business, have always played a key role in the popular music industry.

### 3.9 Historical Context

Music publishing as it applies to popular music is usually dated from the last decades of the 19th century when songwriters and businessmen (predominantly ex-salesmen) gathered in a Manhattan district that became known as Tin Pan Alley to create and exploit popular music compositions. Prior to this, music publishing, effectively the selling of sheet music, had been confined to religious and classical music.

Songwriters came to Tin Pan Alley publishers in the hope of being paid for their compositions. Some sold them outright, others accepted a staff position and a regular income in exchange for their compositions which were owned by the publisher.

Popular entertainers frequented Tin Pan Alley in the hope of finding songs to feature in their performances. A feature of these early years was the 'song plugger'. These were individuals – often in a team, whose job it was to attend major live events (later radio stations) to perform the newest songs in an attempt to generate sheet music sales.

At this time the US law that protected the owners provided an exclusive copyright for 24 years with the possibility of a 14 year extension. Once these publishers came together to form an association (1890s), they began lobbying to extend the duration of copyright.

Until the Second World War, publishers were the

dominant business force in the music industry.

But the dominance of radio, which increasingly relied on music to entertain its ever expanding audience and advances in recording techniques and reproduction technologies would soon see record companies supplant publishers as the economic drivers of the modern music industry.

This was particularly so when record labels adopted the Hollywood 'star' model and began vigorous (and successful) promotional and marketing sales campaigns based on their artist's fame/popularity as much as on the songs they were performing.

Of course it is important to remember that at this time almost none of these recording artists were performing their own compositions.

Over 160 businesses associated with this 'new' music - record labels, studios, publishers and writers moved just up the road in Manhattan to the Brill Building, which has become synonymous with the new era that Rock and Roll ushered in.

Many of the early stars of the genre, Elvis Presley most famously, still relied on songs written by others. Many of them located in the Brill complex.

It wasn't until the Beatles and the Beach Boys enjoyed

# SONGS & SONGWRITING

## Historial Context - continued

such spectacular commercial success with their own compositions, that an increasing number of artists – dubbed singer/songwriters, began recording their own songs.

Some of course, such as Bob Dylan, had been doing so since the early 60s.

The increased opportunities for additional revenue created by the exploitation of an artist's own compositions once again thrust publishers into the spotlight, as most writers sought the expertise and business clout of major publishers to maximise their earnings.

With the narrative strength, authenticity of lyrics and the emotional appeal of simple melodies and instrumentation being accorded a greater status by fans and consumers than applies in many other popular genres, the major publishers and collection societies were quick to grasp the potential of country. Nashville competed successfully with bigger cities – New York, Chicago, LA to attract major offices to what has become one of the world's major songwriting centres.

## 3.10 In Australia

Popular music publishing became a serious business in Australia too, not long after Tin Pan Alley was established.

One of the first was J. Albert & Son who started as a music retailer in the last years of the 19th century in Sydney.

By 1902, they had added music publishing to their activities, soon doing deals to purchase the copyrights to distribute the works of British and American music publishers in this country.

Frank Albert was a founding member and director of the Australian Broadcasting Company and, in 1926, the company co-founded APRA.

Ted Albert famously created Albert Productions, Australia's first independent record label which signed The Easybeats, Billy Thorpe & The Aztecs and AC/DC among others. In 2016, the company's publishing arm was sold to BMG.

Although the world's leading music publishing companies have a long-established presence in the Australian music marketplace, there has always been a strong independent presence here.

None has been more successful than the publishing

arm of a truly iconic music conglomerate established by Michael Gudinski. A year after setting up Mushroom Records in 1972, Mushroom Music Publishing was launched. Both have been home to some of Australia's best known artist and writers.

Although the recording arm was sold to Warners in 1998 just after its 25th anniversary celebrations, the publishing arm has been retained and has played an important role in administering and promoting the works of Australian country writers.

And of course in our genre, the ABC has played a vital role. The ABC Commercial Division was set up to provide an additional revenue source for the corporation through the exploitation initially of products associated with the network's programming.

ABC Music established in 1974, began with the same internal product focus, but soon grasped the potential for activities outside the programming content. Country music was identified as a niche market not being serviced by larger, more commercially-focused companies. So ABC began signing country music artists to its label and added an ABC Music Publishing arm.

With a national network or regional Local Radio stations, there was a ready-made outlet to promote the works of country artists and writers.

This was significantly enhanced in 1993 when, responding to accusations of a city-centric bias, the ABC commissioned a 2-hour national country music program hosted from Townsville by local broadcaster John Nutting. 'Saturday Night Country' proved very successful and helped ABC Music and Publishing justify their investment in country and continue to provide opportunities in an otherwise limited marketplace.

*“When the business of music was the business of songs, publishers ruled. When music became part of the entertainment industry, the record companies gained ascendancy. They in turn lost their dominance when the music business became part of the information age ruled by digital giants. Now that songs are again at the centre of our industry .... ?”*

Gerd Leonard 2016

# SONGS & SONGWRITING

## 3.11 Current Signings

Country music artists currently signed to/represented by independent or multinational publishing companies in Australia include:

### Mushroom

Beccy Cole, Caitlin Harnett, Catherine Britt, Dan Parsons, Drew McAlister, Felicity Urquhart, Harry Hookey, Ian Moss, James Blundell, Karl Brodie, Kasey Chambers, Matt Fell, McCalister Kemp, Melody Pool, Mia Wray, Ruby Boots, Sara Storer, Shane Nicholson, Shane Howard, Taasha Coates, The Dingoes, The San Sebastian, The Wilson Pickers, Tim Wheatley, Travis Collins, Troy Cassar-Daley, William Crighton.  
Justin Townes Earle (USA), Sturgill Simpson (USA).

### Universal

John Schumann, Lee Kernaghan, Neil Murray  
Alabama Shakes (USA), Chris Brown (USA), Glenn Frey (USA), Kane Brown (USA), Keith Urban (USA).

### Sony/ATV

Paul Kelly, Lindsay Rimes, Alan Jackson (USA), Blake Shelton (USA), Chris DeStefano, Eric Church (USA), Rascal Flatts (USA), Hank Williams (USA), Kelsea Ballerini (USA), Kenny Chesney (USA), Luke Bryan (USA), Miranda Lambert (USA), Willie Nelson (USA), Darius Rucker (USA), Thomas Rhett (USA), Taylor Swift (USA).

### Warner Chappell

Chris Stapleton (USA), First Aid Kit (Swe), John Hiatt (USA), Kacey Musgraves (USA), Robbie Robertson (Can), Ryan Bingham (USA), The Jayhawks (USA).

### BMG Music Publishing

Alabama (USA), Jim Lauderdale (USA), Johnny Cash (USA), Nathaniel Rateliff (USA), The Civil Wars (USA), Woody Guthrie (USA).

### Native Tongue

Henry Wagons, Jenny Queen,

### ABC Music Publishing

Sara Storer, The Wilson Pickers, Beccy Cole, Drew McAlister, Lachlan Bryan, Mike Carr, Ruby Boots, William Crighton, Jordie Lane, Taasha Coates.

## 3.12 Copyright Mechanics

Publishing has had to adapt to the same changes as the rest of the music industry.

From a time when music was experienced solely as a live performance and could then be reproduced and enjoyed privately by the purchase of sheet music, consumption options have increased dramatically and, with them, the variety of income streams associated with then communication of musical compositions.

For some, it has been a liberating experience, allowing them to take full control of all aspects of their creative practice in direct transactions with fans and customers. For others, it has proved a daunting experience.

In order to grasp the complexity of the current music publishing scene, we need only consider the current range of revenue/royalty possibilities, which have been dramatically expanded by digitisation.

### MECHANICAL ROYALTIES – Physical Product, Digital Download & Streaming

Every time a physical is sold or manufactured the writer/s of the work earn a mechanical royalty, generated from the reproduction of the song. Physical mechanicals are collected by AMCOS. Mechanicals from Downloads are paid through aggregators to publishers/writers, as are mechanicals for streaming through the service provider.

### PUBLIC PERFORMANCE ROYALTIES

Every time there's a live performance of a composition, there's a royalty generated. The royalty depends on the licence negotiated by APRA with the entity presenting the performance – pub, club, concert hall, festival ...etc. It is usually based on a percentage of box office revenue or live music budget.

### COMMUNICATION TO THE PUBLIC ROYALTIES

When AM/FM radio, network TV, bars, restaurants, airlines, offices, movie theatres...etc use music to create ambience/atmosphere to enhance their business, they require a licence from APRA. The revenue generated by these licenses is distributed to the owners of the compositions.

### SYNCHRONISATION LICENSE FEE (Distribution)

If a film or TV company, production company, advertising agency needs a licence from the owner of composition to include the work on a soundtrack or in a commercial, they need to pay for the synchronisation license. The license fee is a one-to-one negotiation usually based on several things like the length of the use, how it's being used (background or up front), the format and the popularity of the production.

## Copyright Mechanics Continued

### MECHANICAL SYNCHRONISATION ROYALTIES

There's also a mechanical royalty generated from the "Reproduction" copyright. That is a per unit royalty

payment owed to the songwriter based on the number of units manufactured items that include the song – eg. a greeting card, toy, video game, etc.

### PRINT ROYALTIES

As the name suggests, this royalty, has to do with printed materials—lyrics, sheet music, tablature, etc.

### DIGITAL DOWNLOAD MECHANICAL ROYALTIES

Song distributed and sold as downloads through music services like iTunes, Amazon, Google Play etc, generate a mechanical royalty for every unit that's downloaded.

The rate mirrors that for physical sales and is generally paid through an aggregator directly to a publisher or writer.

### STREAMING MECHANICAL ROYALTIES

Interactive streaming services like Spotify where subscribers can choose songs, stop, go backwards, create playlists, etc., pay a reproduction royalty.

Rates per stream vary from provider to provider and are paid to writers or publishers.

### STREAMING PUBLIC PERFORMANCE ROYALTIES

When a song is streamed on an interactive streaming service like YouTube, Spotify etc, it also counts as a 'Public Performance'. Rates are negotiated between service providers and PRO's (APRA AMCOS).

### DIGITAL NON-INTERACTIVE "STREAMING" PUBLIC PERFORMANCE ROYALTIES

A songwriter royalty, paid by the digital streaming service – eg. iHeart Radio and based on a licence negotiated between the entity and PRO (APRA AMCOS).

### DIGITAL SYNCHRONISATION LICENSE

Sync also applies to the digital world.

Plus Facebook, YouTube, Ringtones .... The list keeps growing. And, with the list, the opportunities for additional revenue.

## 3.13 Artists and Publishing

Bearing in mind that the vast majority of country writers in Australia do not have a publishing agreement, we know from our survey respondents that for country music artists, songwriting royalties are their second most significant source of income after live performance.

Song Royalty Income	Amateur	Semi Pro	Professional
0%	35%	13%	9%
1-10%	61%	69%	63%
10-20%	3%	17%	23%
21-30%	1%	1%	5%

Table 3.13.1

No wonder then that writers usually seek a publishing contract as their first major industry involvement. And not just for assistance in navigating the writer's way through the royalty labyrinth.

Not only can publishing success provide leverage for negotiating other contractual agreements, but through their nurturing of writers – a core part of their role, publishing companies can progress the careers, and therefore livelihood, of lesser-known writers by involving them in collaborations with more established and better-known practitioners.

These collaborations have been a distinctive feature of our scene for some years, with local publishers organising and often funding writing trips. Particularly to Nashville.

An Australian co-write has a much better chance of success – that is cut by a US artist, when the collaborator is a known writer in that market.

## 3.14 Publishing Revenue

As is the case across the music industry, recording and reporting income streams has become a much more involved process in the digital age with so many more distribution channels for compositions, and so many more service providers involved in servicing the music listening and viewing public.

As a further complication, the fact is that publicly available data on publishing is much more difficult to source than the equivalent sales/revenue data annually reported by ARIA for the Australian recorded product market and by IFPI for the global market. AMPAL which represents the major music publishers in Australia conducts an annual survey but only the total revenue is available.

These major publishers are also members of AMCOS but then so are many thousands of self-published artist/writers.

We can however examine what is available to draw some conclusions.



# SONGS & SONGWRITING

## Publishing Revenue Continued

AMPAL reported that in 2018, music publishing in Australia and New Zealand generated \$250 million from all sources.

We do not have a market breakdown, but obviously Australian produced the lion's share.

Assuming Australian publishers accounted for \$200 million of that revenue total, and the applying the conservative industry share of 10% that we have consistently done throughout, we estimate that country music in 2018 was responsible for generating a minimum of \$20 million in publishing revenue.

AMCOS reported \$95 million in mechanical royalty income in 2018. This would indicate a total of \$9.5 million for country-generated mechanicals only and not income derived by publishers through synchronisation and other licenses negotiated directly with end users. Further, the AMCOS total included income for writers contracted to major publishers, but we know from the annual Year in Review that 90% of AMCOS's members are unpublished writers.

This estimate is corroborated by 2018 publishing earnings reported by the Music Publishers Association (US) which showed publishing income as 30% (\$6 billion) of the total value reported for the overall music market (\$19.5billion).

Applying this share to ARIA's reporting of the value of recorded product sales for 2018, also indicates a mechanical royalty value of \$10 million.

We are therefore confident in reporting that **country music generated \$20 million in publishing revenue in 2018.**

**In the 1997 report the total was \$3.78 million.**

### Note

We will only include \$10 million in our overall calculations in order not to double count mechanical royalty income already reported in the AMCOS yearly revenue.

# 4: Airwaves & Airplay



## 4: RADIO

### 4.1 The Beginnings

Radio has always played a central role in promoting the popularity of country music - especially in establishing the first generation of the genre's 'stars'.

Music in general was rapidly embraced by the burgeoning broadcast industry established in Australia in the early 1930s with the creation of a national, government-owned Australian Broadcasting Commission, and the issuing of some 40+ commercial licences initially in the capital cities.

Sydney's 2UE is the last survivor of that initial license period, having been established in 1935.

The ability of radio to reach and engage new audiences in a vast landscape, had broadcasters searching for content to gain listeners and, in the case of the commercial stations, vital sponsors.

Audiences, previously restricted to consuming music through live performances were instantly engaged and adopted the 'new' technology with great enthusiasm.

Music quickly became a central content component both through the playing of recordings and the broadcast of musical variety programs from their studios.

This coincided with the development of wire recorders which allowed programs to be recorded and re-broadcast and later syndicated to other stations.

### 4.2 Country Comes To Radio

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

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

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

In 1932, Herbert Henry Brown's 'Coral Island Boys' attracted a sponsorship after recording 'western' songs from toothpaste manufacturer Pepsodent. 'Smoky and the Pepsodent Rangers' were the first western group to be broadcast live on Melbourne's 3KZ in 1935. By 1937 he had his own show which was re-broadcast in NSW through 2CH. The show spawned a number of comic books and live shows and 'The Adventures of Smoky Dawson' was a radio mainstay until the 60s. Dawson's persona was 'Australia's favourite cowboy', with his faithful sidekick Jingles, his horse Flash and their young friend Billy fighting the evil outlaw Grogan, adhering to Smoky's 'code of the west', pausing for a song, a moral and sometimes a bowl of cornflakes, courtesy of the program's sponsor.

On the show Dawson provided renditions of a magpie, kookaburra, rooster, turkey, pig, cow, an impatient horse, a posse with bloodhounds (with the bandit being shot), a pack of dogs fighting and next door's dog howling in the middle of the night. He reprised these 'til the end of his days.

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

Tex Morton was also well-aware of the power of radio to reach the corners of a vast land and, in 1942, launched 'All Set and Saddled' on Sydney's 2UW. It was essentially a variety show featuring Morton, his sidekick Shorty Ranger, singing partner Sister Dorrie and the Roughriders. The show included songs about cowboys, traditional Australian bush ballads, short plays with a boys' own-style adventure plot and comic banter. The show was intentionally informal, often unscripted, to create the illusion that the audience (in the studio and at home), were listening in to a bunch of mates gathered for a "fair dinkum Australian get-together".

Although Morton adopted the dress and accoutrements



# RADIO

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

Radio provided a wonderful opportunity for the early pioneers to promote their performances and, almost without fail, they took to the road on the back of relentless radio promotion.

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

## 4.3 The Community Radio Sector

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

A Public Broadcasting Association was formed with the intent of offering a variety of content that was not necessarily provided by the larger commercial radio stations. Community radio outlets carry news and information programming geared toward the local area. Specialised music shows are also often a feature. Community stations can be valuable assets for a region and typically avoid content found on commercial outlets such as Top 40 music, sports and breakfast/drive-time personality talk-back.

Community radio's 450+ radio services provide an important, supportive 'home' for country music, particularly across its regional heartland. That's where our story begins.

Community radio continues to be a force in Australia's broadcasting landscape. Of the 82% of Australians who report listening to Australia on a weekly basis, 63% listened to commercial radio, 36% to ABC/SBS radio and 28% to community radio.

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

Interestingly, the rate of listening has increased most among 15-24 year olds over the last five years.

(Source: McNair yellowSquares - 'Community Radio Listener Survey 2017' for the CBAA).

The Australian Consumer Media Authority is the federal government body responsible for regulating the communications sector, including the issuing of TV and radio licenses.

It currently lists 360 community licensees: ACT 6, NSW 101, NT 42, QLD 77, SA 30, TAS 13, VIC 60 and WA 37.

The Community Broadcasting Association of Australia is the peak body representing the sector. It currently has over 290 member stations actively broadcasting nationwide. The CBAA's members include 85% of Australia's permanently licensed community radio stations. (Source: [www.cbaa.org.au/about](http://www.cbaa.org.au/about))

According to CBAA data from 14,000 surveyed listeners

- There are 5.3 million Australians (25% of the population) listening to community radio every week for an average 15 hours per week. An increase of 1 million listeners since 2006.
- 19% of those listeners listen exclusively to community radio.
- 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%).

(Source: McNair yellowSquares - 'Community Radio Listener Survey 2017')

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

## 4.4 The Community & Country Census

The CBAA alerted it's members to the specific online survey we designed to elicit responses from station operators and presenters.

We received 77 responses, two of which were from stations reporting no country music airplay. Of the 75 detailed responses, 32 came from metro areas and 43 from regional and remote areas.



## RADIO

This compared to 68 responses we recorded for the original study in 1997. The numbers therefore provide not only a comprehensive snapshot of the sector, but also a valuable basis for comparison between this study and the original.

As in the original study, NSW which has the largest number of stations, had the greatest responses rate with 31. The other states and territories reported: ACT 1, Queensland 16, Victoria 15, South Australia 5, Tasmania 3, Western Australia 3 and the Northern Territory 1.

### 4.5 The Community Station Profile

On average, the surveyed stations have been operating for 15 years. 59% have been operating for 20+ years.

92% of the stations responding received financial sponsorship. The level of sponsorship for country music programs is the same as for general music programming.

When asked to describe their work force:  
Full Time Workers – the average was 2.5 across the sector. 46% had no FT workers, while 5% reported 10. FT  
Part Time Workers – the average number was 3.5.  
Casual Workers – the average was 2 workers. 78% employed no casuals.

The sector, as we know relies heavily on volunteers across all areas of operations.

Stations reported an average of 22 volunteers, with 52% reporting 30+.

When asked to compare these staffing levels with 12 months ago, 63% reported the level as about the same. However, 27% reported increased levels.

### 4.6 Community Country Programming

Australian music programming varied between 5% (8% of respondents) and 90+% (8% of respondents). The average across all respondents was 41%.

**The is almost exactly the same as the 40% Australian airplay recorded in 1997.**

Country music programming as a percentage of overall music played varied from as little as 10% (9% of respondents) to 90+% (11% of respondents).

**The average across all stations was 24%, an increase on the average of 18% recorded in 1997.**

Asked to identify the proportion of their country airplay that was by Australian artists, the average across the sector was 58%.

The chart below identifies the variety of types of country music the respondent stations/presenters played in 2018.

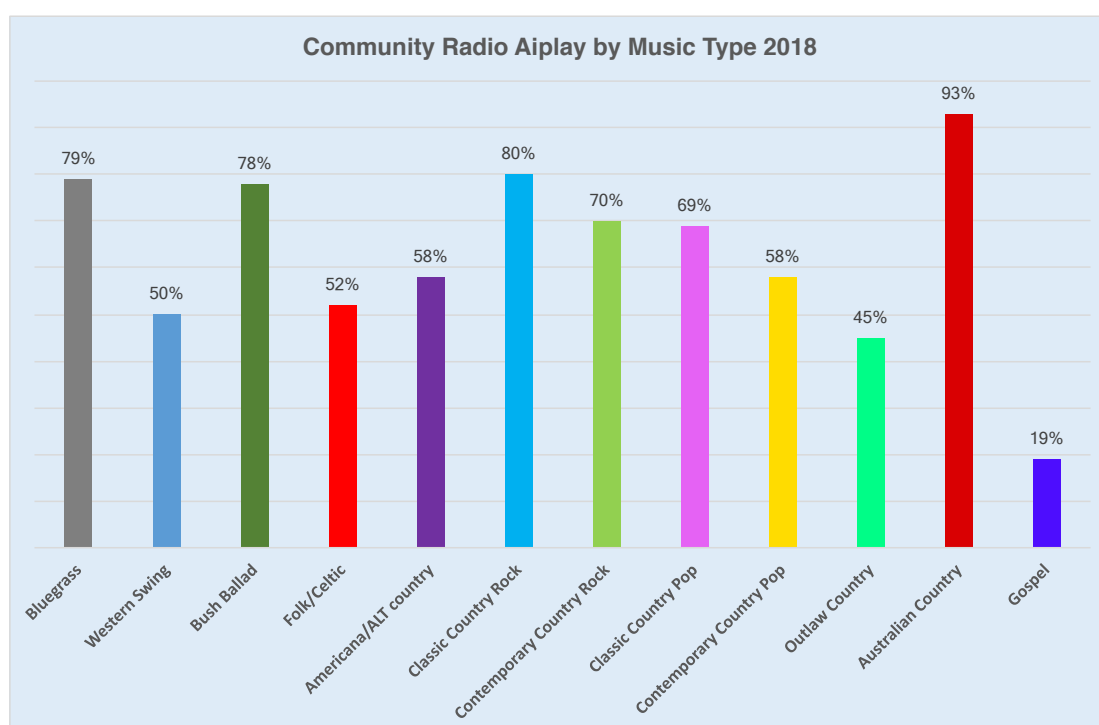


Chart 4.6.1

## RADIO

Asked to identify their listeners' favourite type of country, they reported:

Australiana country	23%
Classic country rock	20%
Classic country pop	17%
Contemporary country rock	16%
Bush ballad	11%
Contemporary country pop –	11%

The table below details the hours committed to country music airplay across a single week.

	Mon - Thurs	Friday	Saturday	Sunday
0 Hours	5%	23%	19%	28%
2-4 Hours	29%	41%	43%	44%
5-8 Hours	33%	12%	15%	13%
9-15 Hours	9%	5%	6%	10%
15+ Hours	16%	5%	3%	2%

Table 4.6.1

**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.**

The number of average weekly hours per station doubled from the 19 recorded in 1997 to 37 hours in 2018.

**The responding stations 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

Table 4.6.2

Respondents were asked to compare the listening audience for country compared to other music programs on their station.

33% were not sure.

8% reported that their listening audience was 'substantially increased' or 'somewhat increased' (20%) as opposed to only 2% who reported that the country listening audience was 'somewhat decreased' and the 0% for 'substantially decreased'.

36% estimated the audience stayed the same.

## 4.7 Community - Artists & Industry

One of the CBAA's most important initiatives has been the establishment of AMRAP (Australian Music Radio Airplay Project) and its AirIt distribution program. Artists, labels, 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 copy of the tracks for airplay or to add to their library. AirIt will send them a physical CD of tracks they select if they so desire. This is a free service.

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

When asked to identify the primary source of their new country music, AirIt's importance was confirmed.

Source of Music	%
From AMRAP (AirIt)	26%
Presenter's own collection	18%
Artists supply physical product	13%
Artists supply digital product	10%
From labels	8%
From Artist Managers	6%
From Facebook	4%
From YouTube	3%
From Publicists	3%
From Distributors	2%

Table 4.7.1

We noted previously just how important live performances are in generating the major portion of an artist's income, both from fees and direct retail transactions involving recordings and other merchandise.

Community radio obviously provides a vital opportunity for potential fans to connect with new music and artists.

# RADIO

We asked our artists where they had received airplay in the last twelve months:

	Amateur	Semi Pro	Professional
ABC National Radio	22%	48%	45%
ABC Local/Regional	34%	60%	59%
Country Music Channel	15%	23%	38%
Community Radio - Regional	76%	88%	87%
Community Radio - Metro	49%	77%	72%
Commercial Radio - Regional	22%	37%	42%
Commercial Radio - Metro	6%	21%	25%
Internet Radio	45%	53%	76%

Table 4.7.2

Community radio stations also play an important part in providing artists with a direct connection to fans and potential gig attendees through interviews.

90% of stations conduct interviews with artists, the average being 7-8 per month. These interviews are often initiated by the presenter (31%), but often by the artist or their manager/publicist (24%). Only 4% are initiated by a label and/or distributor.

Community stations are also pro-actively involved in sponsoring, promoting and attending events. In the last twelve months, 60% of our respondents were officially involved in an average of 5 events.

## 4.8 Community - Industry Health

Community broadcasters regularly deal with emerging artists or those at mid-career level. Their opinions on the general health of the industry provide a valuable insight.

**They are overwhelmingly of the opinion that the current country music industry is in good health and in better shape than it was five years ago.**

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%

Table 4.8.1

## 4.9 Community Radio Employment

The CBAA reports that the community radio sector creates over 600 Equivalent Full Time jobs.

Based on that figure and the responses of our sample, **we estimate that in 2018 country music programming was responsible for creating 144 Full Time Equivalent jobs across the sector. The large volunteer workforce created an additional 109 FTE jobs in 2018.**

We also know from our respondents that the level of sponsorship of country music programs is consistent with other programming.

So, based on the CBAA's reporting, **we estimate that country music programming on community radio in 2018 generated \$28.8 million.**

## Conclusion

Despite the much greater access fans now have through a variety of platforms to discover and consume country music, we know from our 4,329 survey responses that 19% of fans report getting their gig information from community radio and 21% discover new music through the medium.

For artists, the existence of an extensive network – particularly in country music's rural and regional heartland, provides vital outlets for airplay and with opportunities for direct interaction with fans through interviews.

# RADIO

## 4.10 Commercial Radio - The Sector

In October 2018, there were 19.6 million Australians (14 years +) listening to weekly radio. 13.7 million of them to commercial stations.

In 1997, a AMR:Quantum Harris research project commissioned by the Country Music Association of Australia reported that 45% of people who enjoyed listening to Australian music got that music from commercial radio. It was fascinating to discover that almost exactly the same percentage - 43% of the 4,300+ respondents to the 2018 fan survey, also identified commercial radio as a source.

The difference of course, is that in 1997 apart from live performance, listening to your own music collection and the odd bit of country on TV, radio was the ONLY other way to consume.

Of course digitisation and new technologies have changed the nature of 'broadcasting' just as dramatically as they have almost every aspect of our industry.

As with the community radio sector, commercial licences are regulated by ACMA (Australian Consumer Media Authority).

Until a decade ago, they were issued for transmissions on the AM or FM band. In 2018, there were 104 AM licensees across the nation and 152 FM licensees.

In 2009, Australia began rolling out a digital, capital city network, adopting the DAB+ standard. Hobart, Darwin and the ACT have only recently joined the network. By the end of 2018, there were 154 digital licensees:

Sydney	32
Melbourne	31
Brisbane	26
Perth	24
Adelaide	20
Hobart	6
ACT	9
Darwin	5

All the major networks, including the ABC and SBS and some 37 community radio stations make their content available digitally in the capitals. The ability to have genre-specific offerings has dramatically altered the broadcasting landscape.

One of the features across all AM/FM networks has been the creation of station-specific Apps which allow people to stream content to their 'smart' devices live, or in catch-up mode.

**Commercial radio advertising revenue rose 3.40% to \$809.421 million in the five markets for January to December 2018 compared to the same time in 2017.**

"The industry worked hard throughout 2018 to continue to attract advertisers and listeners, making buying radio easier through the automated holdings system and listening even more accessible via Radio-App, DAB+, FM or AM, in the car on the phone and through smart speakers," said CRA chief executive officer Joan Warner.

Melbourne was the strongest market throughout the 2018 calendar year compared to the 2017 calendar year, with ad revenue up 7.58% to \$259.821 million. Sydney rose 1.35% to \$248.663 million and Brisbane was up 2.42% to \$125.308 million. Perth recorded a 1.15% increase to \$106.113 million and Adelaide rose 1.21% to \$69.516 million.

## 4.11 Commercial Radio & Country

In 1997, we had just seen the demise of KICK, a Sydney-based experiment to establish a dedicated country music FM station. Following that closure, country music airplay was primarily restricted to community radio stations based mainly in regional areas and in a small number of cases some high profile, 'fan' presenters in the capitals – eg. John Laws and Ray Hadley in Sydney.

In this scenario, the ABC's national 'Saturday Night Country' provided a vital outlet for promotion and exposure, especially for emerging artists who were/unlikely to attract the attention of capital city presenters on major AM/FM stations.

In 2018, the ABC announced – amidst considerable protest, that it was moving 'Saturday Night Country' from the AM band to digital in metro areas. (See ABC section below).

Digitisation of the broadcast sector and the take-up of the associated technologies by consumers and licensees has dramatically increased the potential for more country music airplay and more listeners.

### KIX Country

In terms of commercial radio, the KIX network plays a vital role for country music artists, fans and businesses.



## ACROSS SYDNEY, MELBOURNE, BRISBANE, ADELAIDE AND PERTH

**MORE THAN 10.7 MILLION PEOPLE**

listen to commercial radio each week

**+270,000  
listeners or  
+2.6% since  
2017**

**More than 7.7 million**  
people tune into commercial  
breakfast\* radio weekly,  
+2.6% in the last 12 months

\*Mon-Fri 05.30-09.00

**Nearly 6.9 million**  
people tune into commercial  
drive\* radio weekly,  
+1.8% in the last 12 months

\*Mon-Fri 16.00-19.00

**10-17 year olds**  
are listening to more  
commercial radio –  
time spent listening increased  
by 28mins per week YOY

\*Mon-Sun, all day

## TOTAL DAB+ DIGITAL RADIO

More than

**4.2 MILLION**

people 10+ listened to  
DAB+ digital radio each  
week in the 5 metropolitan  
capital cities in 2018

Total DAB+ only  
listening has increased  
**27.2% or 399,000**  
in the last 12 months

More than

**30.4%**

of people 10+ in  
the 5 metropolitan  
capital cities listen to  
a DAB+ digital radio device

DAB+ listening in the car has increased **48.7%** in the last year

up from **26.6%** in 2017

Source: GfK Radio Ratings Surveys I-8 2017 vs Surveys I-8 2018, All People 10+ Mon-Sun 12mn-12mn, unless otherwise stated.

For more information, visit [radioalive.com.au](http://radioalive.com.au)

# RADIO

In 2015, Grant Broadcasters based in Bundaberg, re-branded their 'Hot Country' and 'Top Country' brands as 'KIX Country'.

The network comprises 57 stations nationwide, mainly on the FM band and based mainly on stations in regional Queensland and NSW.

Based on licence information from ACMA, 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 larger audience. It was a clear 'favourite' among our fan respondents.

(Source: Australian Consumer Media Authority – Broadcasting Licence Areas, December 2018).

Territory	Frequency	Territory	Frequency	Territory	Frequency
<b>ACT</b>	Digital	<b>QLD</b>		<b>QLD</b>	
<b>NSW</b>		Townsville	98.9FM	Lowood	88FM
Tamworth	87.6FM	Mackay	93.9FM	Inglewood	98.1FM
Muswellbrook	94.5FM	Yeppoon	96.1FM	<b>NT</b>	
Goulburn	100.7FM	Rockhampton	92.7FM	Darwin	92.3FM
Cooma	87.6FM	Gladstone	88FM	Darwin	Digital
Jindabyne	88FM	Bundaberg	97.1FM	<b>SA</b>	
Nowra	101.1FM	Harvey Bay	92.3FM	Port Lincoln	87.6FM
Sthn Highlands	1215AM	Maryborough	92.3FM	Port Pirie	87.6FM
Batemans Bay	87.6FM	Saraji	92.1FM	Berri & Renmark	1557AM
Bermagui	87.6FM	Dysart	90.9FM	Barossa Valley	90.5FM
Tathra	87.6FM	Middlemount	96.1FM	<b>WA</b>	
Eden	87.6FM	Alpha	100.7FM	Perth	Digital
Pambula	87.8FM	Moura	88FM	<b>VIC</b>	
Bega/Merrimbula	88FM	Injune	101.9FM	Geelong	89.3FM
Moruya	88FM	Surat	92.1FM		
Narooma	97.7FM	Toogoolawah	88FM		

Table 4.11.1

## Flow FM

Is a small commercial network of 20 stations broadcasting to regional and remote South Australia, Victoria, the Northern Territory and the Riverina in NSW.

Operating for 20 years with an adult contemporary format, country music comprises approximately 25% of its overall music programming. Music by Australian artists is approximately 60% of that content.

## 4.12 ABC Radio

ABC Local is a network of 52 stations on the AM band covering every state and territory.

ABC Local Radio Stations		
<b>ACT</b>	<b>QLD</b>	<b>VIC</b>
Canberra	Brisbane	Ballarat
<b>NSW</b>	Gold Coast	Central Vic
Broken Hill	Far North	Gippsland
Central Coast	North Queensland	Goulburn Murray
Central West	Nth West Queensland	Melbourne
Coffs Harbour	Tropical Queensland	Mildura Swan Hill
Illawarra	Western Queensland	Shepparton
New England Nth West	Wide Bay	South West Vic
Newcastle	<b>SA</b>	Western Vic
North Coast	Adelaide	<b>WA</b>
Riverina	North & West	Esperance
South East NSW	Riverland	Goldfields
Sydney	South East	Great Southern
Upper Hunter	Eyre Peninsula	Mid West & Wheatbelt
Western Plains	<b>TAS</b>	North West
<b>NT</b>	Hobart	Perth
Alice Springs	Northern Tasmania	South West
Darwin		

Table 4.12.1

# RADIO

## ABC Continued

Based on response to a specific survey, we estimate that in 2018, some 16,000+ hours of country music was programmed across the Local Radio network.

	Mon-Thurs	Friday	Saturday	Sunday	TOTAL HRS
Station Week	3	0	1.5	1.5	6
Station Year	156	0	78	78	312
Network Year	8,112	0	4,056	4,056	16,224

Table 4.12.2

## Saturday Night Country

Historically, it is hard to argue that 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 that it would no longer be broadcast on capital city AM, 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.

## ABC Employment

The 8 capital city stations employ 213 full time staff, while 44 regional stations employ 450 full time staff and approximately 100 part time and casual staff.

Based on response to a specific survey, we estimate that in 2018, some **16,000+ hours of country music was programmed across the ABC Local Radio network.**

## 4.13 Digital Radio & Country

In terms of the take-up innovations and new technologies, Australians are often referred to as 'early adopters'. This has been no different in the area of digital radio. Commercial Radio Australia has commissioned several reports to highlight the impact of digital broadcasting:

- 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.
- Sixty-five per cent of all new vehicles sold in Australia (745,000) were factory-fitted with DAB+ radio in 2018.
- Weekly listeners to DAB+ radio rose 16% to 4.21 million Commercial digital-only stations gained 315,000 listeners.
- The number of DAB+ portable and home receivers in market totalled 2.56 million at the end of 2018, and the number of vehicles with DAB+ reached 2.17 million. (Source: Commercial Radio Australia Press Release, February 2019)

And of course, in terms of digital radio content, the emergence of smart speakers is adding to the delivery choices of consumers.

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 have access to a smart speaker up from zero 18 months prior.

Australian smart speaker adoption was so rapid in 2018, that the user base relative to population now exceeds the U.S., despite having the devices available for less than half the time.

Google Home has dominated market (exceeding 68%), with Amazon's Alexa a distant second with only 14.2% of the installed base while Apple HomePod claims 5.5%.

What's really interesting is that 46% of owners use them daily to ask questions (88%), stream music (85%) and check the weather (84%).

Music as the dominant content is confirmed by the fact that 48% of the general questions asked are about music. Listening to radio (other than sports and news) rates 6th on the list of uses at 67%.

## RADIO

There's great potential for music providers – radio and others, to develop third-party voice Apps to be integrated into these systems.

(Source: 'Smart Speaker Consumer Adoption Report' – Voicebot.ai, March 2019)

### TRIPLE M Country

Triple M is 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.

### iHeart Radio

Developed from the Clear Channel media group in the US in 2008. It provides live access to hundreds of digital radio stations in eight major markets around the world. 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. iHeartCountry Australia has been available for 3 years.

It reports that classic and contemporary rock, contemporary country pop and Australian 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".

The following table details listeners (000's) to digital broadcasters.

Source: Commercial Radio Australia - Quaterly Surveys.

000's Listeners	January 2018	April 2018	December 2018
<b>ABC COUNTRY</b>			
Sydney	42	53	38
Melbourne	29	30	35
Brisbane	9	18	16
Adelaide	7	7	10
Perth	7	8	11
<b>MMM Country</b>			
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
<b>KIX Country</b>			
Perth	Not Available	4	8

Table 4.13.1

In terms of growth, Melbourne is the leading market with country music having captured 13% of the digital listening audience in that city.

	January 2018	April 2018	December 2018
Sydney	6%	10%	7%
Melbourne	5%	8%	13%
Brisbane	4%	10%	10%
Adelaide	5%	5%	7%
Perth	3%	5%	8%

Table 4.13.2

KIX Country was a clear winner when fans were asked to identify their favourite country music radio station.

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

Table 4.13.3



## 4.14 A Final Word From AMPCOM

AMPCOM (Australian Music Performance Committee) was originally tasked with monitoring the playing of minimum percentages of new-release Australian music on commercial radio as designated by the code of practice developed by The Australian Communications and Media Authority (ACMA).

Although it no longer has responsibility for that monitoring, it reports annually on the Conent Returns supplied by Commercial Radio Australia.

The table below provides a summary of the genre percentages reported for commercial radio airplay over the last two decades.

**Country music has been the outstanding performer. It has consistently recorded the second highest percentage after Rock/Pop/Dance, and has nearly doubled its 2000 airplay share - clearly outperforming all other recorded genres.**

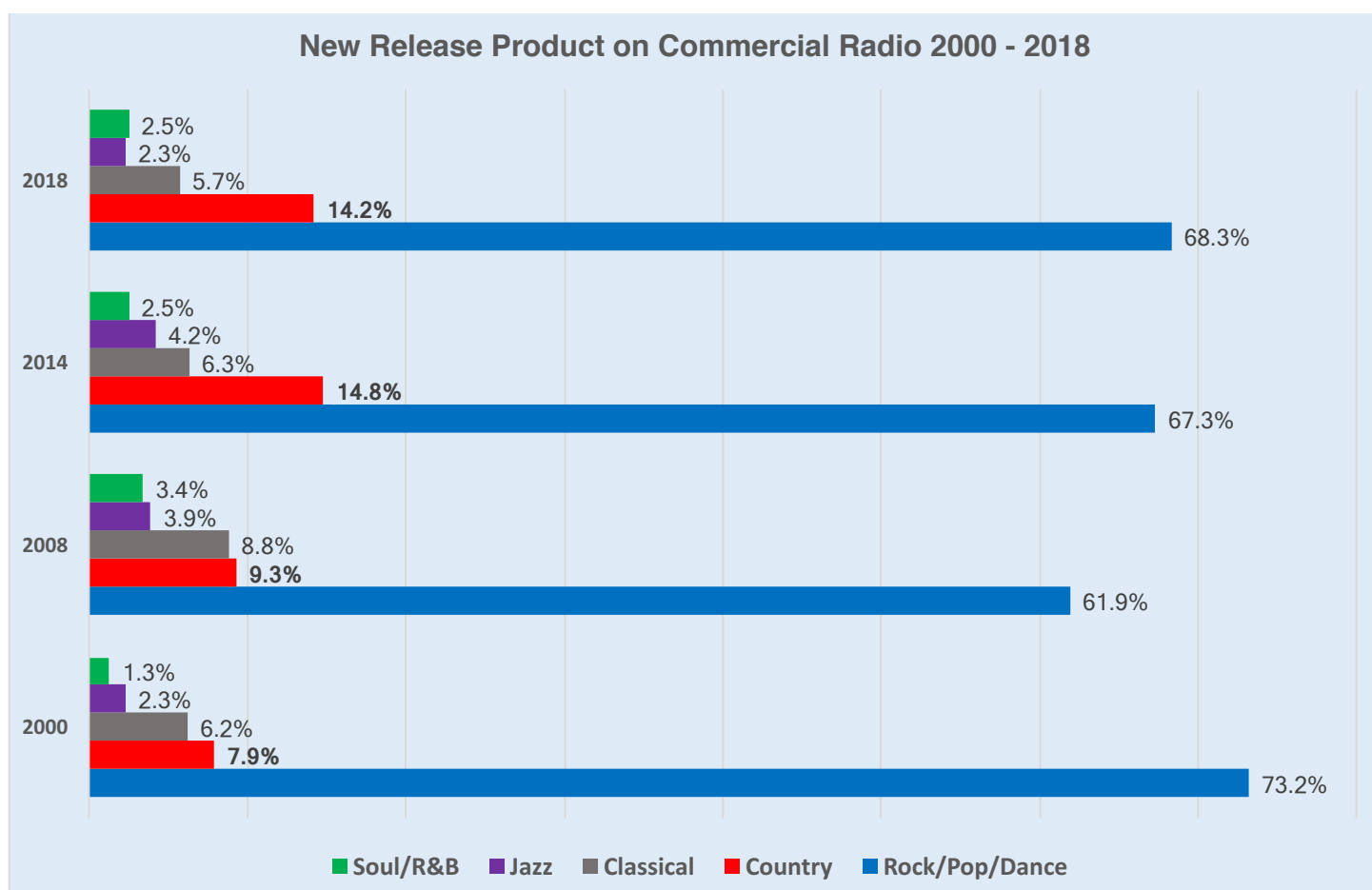


Chart 4.14.1

**In 2000, country music's percentage represented airplay for 1,116 new releases. By 2018, that figure had more than doubled to 2,468.**

# THE CHARTS

## 4.15 ARIA

ARIA TOP 100 COUNTRY ALBUMS CHART					2018
TY	TITLE	Artist	CERTIFIED	COMPANY	CAT NO.
1	GRAFFITI U	Keith Urban	<G>	CAP/EMI	6741357
2	SO COUNTRY 2018	Various		SME	19075841172
3	THIS ONE'S FOR YOU	Luke Combs		COL/SME	19075829282
4	CREAM OF COUNTRY 2018	Various		SME	19075807912
5	MUSIC FOR CRUIZIN': COUNTRY TO COAST	Various		SME	88985459912
6	WHAT MAKES YOU COUNTRY	Luke Bryan		CAP/EMI	5770521
7	GREATEST HITS	Shania Twain	<P>3	UMA	9863141
8	RIPCORD	Keith Urban	<P>2	CAP/EMI	4744465
9	JUST GREAT COUNTRY SONGS	Various		SME	19075873052
10	THE VERY BEST OF SLIM DUSTY	Slim Dusty	<P>5	EMI	3743287
11	CAMPFIRE	Kasey Chambers & The Fireside Disciples		WAR	5419700636
12	34 NUMBER ONES	Alan Jackson	<P>	ARI/SME	88697786812
13	THE VERY BEST OF	Alan Jackson	<P>	RCA/SME	82876601122
14	THE SOUND OF NASHVILLE	Various		SME	88985356412
15	ULTIMATE... COUNTRY	Various		LEG/SME	88875085562
16	GREATEST HITS: 18 KIDS	Keith Urban	<P>2	CAP/EMI	5076855
17	HIT COUNTRY 2018	Various		ABC/UMA	5383695
18	THINGS THAT WE DRINK TO	Morgan Evans		WAR	9362490549
19	NOW	Shania Twain		MER/UMA	5771132
20	KANE BROWN	Kane Brown		RCA/SME	88985470372
21	REARVIEW TOWN	Jason Aldean		SME	19075839752
22	MEN OF COUNTRY 2018	Various		SME	19075865512
23	MONTEVALLO	Sam Hunt		MCA/UMA	3797250
24	CRY PRETTY	Carrie Underwood		EMI	6767335
25	MILESTONES...20 YEARS	Adam Brand		ABC/UMA	6752416
26	KILL THE LIGHTS	Luke Bryan		CAP/EMI	4723505
27	CRASH MY PARTY	Luke Bryan		CAP/EMI	3749976
28	BUTCHERBIRD	John Williamson		WAR	5419702417
29	CREAM OF COUNTRY 2017	Various		SME	88985354642
30	SO COUNTRY 2017	Various		SME	88985422442
31	THE ESSENTIAL JOHNNY CASH	Johnny Cash	<P>4	COL/SME	C2K86290
32	HIT COUNTRY 2017	Various		ABC/UMA	5377755
33	TRAVELLER	Chris Stapleton		MER/UMA	3757743
34	LIFE CHANGES	Thomas Rhett		BIG/UMA	3003232
35	GREATEST HITS SO FAR...	Zac Brown Band		ATL/WAR	7567867108
36	THE VERY BEST OF DOLLY PARTON	Dolly Parton	<P>	RCA/SME	88697060742
37	THE ESSENTIAL	Dixie Chicks	<P>	SME	88697759862
38	SPEAK NOW	Taylor Swift	<P>2	BIG/UMA	2749395
39	THE STORY SO FAR	Keith Urban	<P>2	CAP/EMI	6245182
40	40 YEARS OF PRIDE	Charley Pride		RCA/SME	88883737422
41	HERE'S TO THE GOOD TIMES	Florida Georgia Line		BIG/UMA	3723866
42	THE GLEN CAMPBELL COLLECTION	Glen Campbell		CAP/EMI	5775072
43	GREATEST HITS	Troy Cassar-Daley		BDL/UMA	BLOOD33
44	HIT COUNTRY - ULTIMATE PARTY	Various		ABC/UMA	5351433
45	CMAA WINNERS 2018	Various		UTV/UMA	5381580
46	THE ESSENTIAL ALAN JACKSON	Alan Jackson		ARI/SME	88691967972
47	COUNTRY HEART	The Wolfe Brothers		ABC/UMA	6740743
48	DAN + SHAY	Dan + Shay		WAR	9362490642
49	THE NASHVILLE TAPES	Adam Harvey		SME	19075863592
50	SLOWHEART	Kip Moore		MCA/UMA	5770517

Figure 4.15.1

# THE CHARTS

ARIA TOP 100 COUNTRY ALBUMS CHART (51 - 100)					2018
TY	TITLE	Artist	CERTIFIED	COMPANY	CAT NO.
51	THE ULTIMATE COLLECTION	John Denver		SME	88691944512
52	TAILGATES & TANLINES	Luke Bryan		CAP/EMI	0704122
53	GREATEST HITS DECADE #1	Carrie Underwood		ARI/SME	88875008762
54	GENUINE: THE ALAN JACKSON STORY	Alan Jackson		RCA/SME	88725406392
55	MEN OF COUNTRY 2016	Various		SME	88985354632
56	HIS FAVOURITE COLLECTION	John Williamson		WAR	5419724752
57	STORYTELLER	Carrie Underwood		ARI/SME	88875105392
58	HIT COUNTRY 2016	Various		ABC/UMA	5364164
59	BEAUT UTE ANTHEMS 2018	Various		ABC/UMA	5385315
60	TOBY KEITH 35 BIGGEST HITS	Toby Keith		MER/UMA	1752422
61	NASHVILLE #1S, VOL. 4	Various		SME	19075805602
62	GOLDEN HOUR	Kacey Musgraves		MCA/UMA	6738570
63	OLD BOOTS, NEW DIRT	Jason Aldean		SME	88875067442
64	ANYTHING GOES	Florida Georgia Line		BIG/UMA	3798674
65	GLEN CAMPBELL'S TWENTY GOLDEN GREATS	Glen Campbell		EMI	7486132
66	UNAPOLOGETICALLY	Kelsea Ballerini		SME	19075904102
67	MY KINDA PARTY	Various		SME	88985481242
68	FROM THE BACKCOUNTRY	Graeme Connors		ABC/UMA	6773746
69	LIONESS	Beccy Cole		ABC/UMA	6787299
70	MEN OF COUNTRY 2017	Various		SME	88985466432
71	FROM A ROOM: VOLUME 1	Chris Stapleton		MER/UMA	5742069
72	WHEN WAS THE LAST TIME	Darius Rucker		CAP/EMI	5742690
73	LEGEND: THE BEST OF WILLIE NELSON	Willie Nelson		COL/SME	88697731602
74	DIG YOUR ROOTS	Florida Georgia Line		BIG/UMA	3002481
75	HIT COUNTRY AUSTRALIA VOLUME 2	Various		ABC/UMA	5381453
76	#1'S... AND THEN SOME	Brooks & Dunn		ARI/SME	88697499222
77	THE GREAT COUNTRY SONGBOOK	Troy Cassar-Daley & Adam Harvey	<P>	SME	88765434052
78	JOHNNY CASH: FOREVER WORDS	Various		LEG/SME	19075832492
79	FROM A ROOM: VOLUME 2	Chris Stapleton		MER/UMA	5797062
80	RELOADED: 20 #1 HITS	Blake Shelton		WAR	9362492442
81	CURRENT MOOD	Dustin Lynch		BRB/WAR	538304072
82	PLAYLIST: THE VERY BEST OF THE DIXIE CHICKS	Dixie Chicks		LEG/SME	88697819922
83	TAYLOR SWIFT	Taylor Swift	<P>	UMA	1787469
84	FUSE	Keith Urban	<P>	CAP/EMI	9122002
85	A HELL OF A CAREER!	John Williamson		WAR	5310584302
86	BRAVE AND THE BROKEN	Travis Collins		ABC/UMA	6768411
87	ADAM & BROOKE	Adam Eckersley & Brooke McClymont		LHAU/UMA	6707218
88	THE ESSENTIAL	John Denver		RCA/SME	88697070082
89	ULTIMATE HITS	Lee Kernaghan	<G>	ABC/UMA	8800919
90	THE 25TH ANNIVERSARY ALBUM	Lee Kernaghan		ABC/UMA	LEE9898
91	EXPERIMENT	Kane Brown		RCA/SME	19075867532
92	HAPPY ENDINGS	Old Dominion		RCA/SME	88985429392
93	WILD ONES	Kip Moore		MCA/UMA	3768885
94	THE ESSENTIAL	The Highwaymen		LEG/SME	88697791572
95	ANTHEMS - A CELEBRATION OF AUSTRALIA	John Williamson	<G>	WAR	5310593592
96	DRIVING HOME FOR CHRISTMAS	Lee Kernaghan		ABC/UMA	3798306
97	TEXOMA SHORE	Blake Shelton		WAR	9362490959
98	THE GREATEST HITS COLLECTION	Brooks & Dunn	<P>	ARI/SME	07822188522
99	THE REST OF OUR LIFE	Tim McGraw & Faith Hill		ARI/SME	88985433212
100	CHRISTMAS WITH DANIEL O'DONNELL (LIVE)	Daniel O'Donnell		BGJ/SME	19075891642

Figure 4.15.2

The performance of Australian artists on the sales (ARIA) and airplay (The Music Network) charts in 2018, underlined a great year for Australian country music.

# THE CHARTS

## 4.15 ARIA - Continued

The performance of Australian artists on the sales (ARIA) and airplay (The Music Network) charts in 2018, underlined a great year for Australian country music.

13 of ARIA's Top 50 (including four by Keith Urban) and 24 of the Top 100 country albums were by Australian artists. This compares with the 19 Australian artist albums that featured on the overall Top 100 album chart.

The Top 10 best selling 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

Table 4.15.1

Of the Top 100 country albums, 24 were by Australian artists and 76 by Overseas artists.

In terms of the overall Australian artist album chart for 2018, Keith Urban's Graffiti U came in at No.3 behind Amy Shark and Vance Joy.

In terms of the overall album chart, Graffiti U came in at No.19. The top album for 2018 was The Greatest Showman.

In the Top 100 albums, 19 were by Australian artists and 81 by Overseas artists.

Morgan Evan's Day Drunk was No.18 on the Australian Artist Singles Chart.

### ARIA Aussie Country No.1's

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 Nashville Tapes (1 week), 'Butcherbird' (2 weeks), 'Things That WFe 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 sold 488,751 units compared to 393,612 units in 2017.**

**A 24% increase.**

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

### Gone – But Obviously Not Forgotten

We cannot consider the Australian country music charts without documenting the amazing achievement of one particular recording – 'The Very Best of Slim Dusty'.

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

It has sold over 500,000 copies (5 x Platinum certification) and has had an amazing chart ride.

In 2002, ARIA reported the first 'genre' Top 20 albums, and 'The Very Best of Slim Dusty' came in at No. 20 on the Country chart. In 2005, after his passing, it ended the year at No.5.

By 2010, it had slipped to No.45. However, it ended 2018 as the No.10 best-selling country album in Australia. Amazing!

### \* Note

Pink Floyd's 'Dark Side of the Moon' (1973), spent 741 weeks on the Billboard 200 Album Chart, but was then added to the Catalogue Chart which documents classic albums that still "sell well". It spent a total of more than 1500 weeks on the two charts.

Slim's remains the only album to ever achieve 1,000 weeks on a single genre chart.

## 4.15 Airplay - The Music Network

TMN – The Music Network, has been compiling industry charts since the 90s, and is unquestionably the authoritative source on airplay statistics.

The TMN Country Airplay Chart is compiled using weighted weekly spins from seven contributors across Australia. The chart incorporates data from ABC Country, KIX Country, Country Music Channel (CMC), Triple M Country, iHeartRadio Country, 98.9 FM and Hot Country Network. Spins for country artists on commercial radio are weighted and included in the weekly chart.



# THE CHARTS

## 4.16 TMN Airplay - Continued

In 2017, Peter Tuskan who compiles TMN's airplay charts, pondered the oft-occurring disparity between airplay and sales charts. A number of label executives offered the opinion that with consumers able to cherry-pick singles in digital download format and/or from streaming service providers, airplay often does not translate into sales as recorded by the ARIA charts.

(Source: 'How Country Music airplay and Sales Matched Up in 2017' - TMN January, 2018)

Morgan Evans, who dominated the TMN Country Airplay Chart in 2018, would seem to bear this assertion out.

### TMN Country Airplay Singles - Quarter 1, 2018

Four of the Top 5 songs were by Australian artists

1	Drive On	Lee Kernaghan
2	When it Rains, it Pours	Luke Combs
3	Kiss Somebody	Morgan Evans
4	Bad	Caitlyn Shadbolt
5	Take Me Back	Kirsty Lee Akers
6	Body Like a Back Road	Sam Hunt
7	Livin' On Summertime	Gord Bamford
8	The Rest of Our Life	Tim McGraw & Faith Hill
9	Parallel Line	Keith Urban
10	Po' Boyz	The Davisson Brothers

Table 4.16.1

### TMN Country Airplay Singles - Quarter 2, 2018

Keith Urban's 'Parallel Line' was No.1 for all 13 weeks.

1	Parallel Line	Keith Urban
2	Crawl, Beg & Cry	Brad Butcher
3	Brake Lights	Morgan Evans
4	Most People Are Good	Luke Bryan
5	Ain't Seen It Yet	The Wolfe Brothers
6	Heatwave	Missy Lancaster
7	Po' Boyz	The Davisson Brothers
8	Loaded	Tim McGraw & Faith Hill
9	Runaway Train	Andrew Swift
10	Babe	Sugarland ft. Taylor Swift

Table 4.16.2

### TMN Country Airplay Singles - Quarter 3, 2018

Morgan Evan's 'Day Drunk' began its record run topping the 3rd Quarter Top 10 for 11 weeks.

1	Day Drunk	Morgan Evans
2	Babe	Sugarland ft. Taylor Swift
3	Cry Pretty	Carrie Underwood
4	Simple	Florida Georgia Line
5	Red Dirt	Catherine Britt & TCCHs
6	Like We Used To	The McClymonts
7	Neon Smoke	Gord Bamford
8	Tequila	Dan + Shay
9	Milestones	Adam Brand
10	High Horses	Travis Collins

Figure 4.16.3

### TMN Country Airplay Singles - Quarter 4, 2018

'Day Drunk' continued its dominant run in the 4th Quarter. It not only topped the country airplay chart, but reached No.1 on the TMN Hot 100, a feat not achieved by a country artist since Taylor Swift's 'Love Story' in 2009.

1	Day Drunk	Morgan Evans
2	Hotel Key	Old Dominion
3	Simple	Florida Georgia Line
4	Sunrise, Sunburn, Sunset	Luke Bryan
5	I'd Rather Be a Highwayman	Adam Harvey
6	Desperate Man	Eric Church
7	She Got The Best of Me	Luke Combs
8	What I Don't Know	Rachael Fahim
9	No Sad Song	The Wolfe Brothers
10	Party Downunder	Adam Brand

In this quarter, it also reached No.1 on the Hot 100 Australian chart, edging out such notables as Dean Lewis, Amy Shark and 5 Seconds of Summer. It reached No. 4 on the Contemporary Hot Radio Top Ten.

It ended the quarter tying for 3rd for the all-time record number of weeks spent at No.1 (24) on any of the TMN airplay charts (1. Taylor Swift 'Love Story' - 33 weeks, 2. The Eagles 'How Long' - 32 weeks).

'Parallel Line' spent 21 weeks at No.1.

## THE CHARTS

### 4.17 TMN Airplay Summary 2018

The airplay year was dominated by Keith Urban and Morgan Evans who between them, occupied the No.1 spot on the Hot Country chart for 45 weeks.

**Australian Artists accounted for 20 of the 40 tracks that spent the most weeks in the 2018 year's chart.** The table below details the tracks that spent the most weeks in the 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

Figure 4.17.1

## 4.18 Conclusion

In terms of radio airplay and associated sales, it was a wonderful year for Australian country music. It 'belonged' to our newest star Morgan Evans who, having dominated local airplay charts scored his first No1 US hit when his debut single 'Kiss Somebody' topped the Aircheck/Mediabase country airplay chart. As the year ended, his first album 'Things That We Drink To' entered the Billboard Country Top 10. He was paid the ultimate compliment by the International Federation of Phonographic Industries by being featured as a case study in their 2018 Global Report.

GLOBAL MUSIC REPORT 2018: STATE OF THE INDUSTRY

45  
CASE  
STUDY



MORGAN EVANS

A NEW GENERATION OF NASHVILLE MUSIC STAR

Warner Music Nashville, Warner Music

Morgan Evans is not your typical Nashville music star. For a start, he was born in Newcastle, Australia. For another, his music style, harnessing the power of a loop pedal, has drawn more comparisons to Ed Sheeran than Kenny Rogers.

None of this has stopped Evans from becoming a fast-rising star of the Nashville music scene. He signed to Warner Music Nashville in 2017 and released his single, *Kiss Somebody*, later that year. It has generated more than 21 million on demand streams in the US alone and Evans was named by Amazon Music, Billboard, Google Play and Pandora among others on their 2018 'Artists to Watch' lists.

John Esposito, Chairman and CEO of Warner Music Nashville, says: "I knew Morgan was a special talent from the first time I heard him play. He was signed to our Australian company, but harboured the ambition to come and build his career in the U.S. We were only too delighted to take him on and support him as he builds his career here."

Evans began his music career in high school, playing in a local rock band. In 2007, he won a competition called the Road to Tamworth and, for his prize, flew to Nashville and recorded a single. Subsequently signed to Sony BMG in Australia, he released his debut EP, *Big Skies*, which received airplay on Australian country music stations.

By 2012, Evans had signed a deal with Warner Music Australasia. He released his eponymous debut album, which became a Top 20 hit in the mainstream Australian album chart. He also became a huge celeb-

rity on the Australian country music scene, opening tours for the likes of Taylor Swift.

The next logical step for Evans was to relocate full-time to Nashville, which he did in 2017. He also moved labels from Warner Music Australasia to Warner Music Nashville.

Evans says: "Moving to Nashville was a big deal. It felt daunting at times, but I've always loved Nashville music and I wanted to dive right in. You're surrounded by the best songwriters and musicians in the world and you pretty soon need to make a choice to be intimidated or inspired."

Evans is one of a new generation of Warner Music Nashville international priority acts. Streaming is gaining traction among traditional Nashville music fans, which is helping propel artists into the global charts and introducing their music to a wider international audience.

Esposito explains: "In the same way that the adoption of streaming in Latin America helped propel Latin music into the global charts, the transition to streaming by Nashville music fans offers us an unprecedented opportunity. In the past we've only occasionally seen traditional country stars crossover to the mainstream, but now Nashville music is much more a part of the mainstream in the US and overseas."

Evans recently spearheaded his international campaign with performances at the UK's Country2Country (C2C) music festival in London and Glasgow. Now in its sixth year, C2C has become a major global platform for Nashville acts.

Esposito says: "It's amazing. The audience sang along to every word of our artists' sets. This is music that isn't getting played on British radio yet. People are discovering it elsewhere and streaming is obviously a massive door opener for us. Our UK labels are putting their hands up to work with Nashville artists because they sense there's a real opportunity here."

Evans concludes: "I was stoked to be asked to play London and Glasgow for C2C. I think that Nashville music can travel around the world and has a home wherever fans value great storytelling and amazing tunes."

**"I think that Nashville music can travel around the world and has a home wherever fans value great storytelling and amazing tunes."**

Morgan Evans

2017 was a standout year for other reasons as well. In December, he married American singer-songwriter Kelsea Ballerini. He wrote the song *I Do* about their wedding and it went on to become a Top 10 hit in Australia. He started 2018 on a high too, touring with the likes of Cole Swindell and James Blunt, while working in-studio with producer and songwriter Chris DeStefano on his forthcoming second album.

Morgan Evans photo courtesy of Warner Music Group

Figure 4.18.1

## COUNTRY MUSIC & TV

Having enjoyed some success in the early decades of Australian television where several country music shows were included in the mix of popular music 'variety' programs - most notably, several hosted by Reg Lindsay, country music had disappeared from the TV landscape by the 80s.

Then along came -

### ABC 'Landline'

In 1991, the ABC launched a new, national, rural affairs program 'Landline'. It had an immediate problem: Landline founder and first executive producer Kerry Lonergan had set out to make a television program that brought country news and life into every living room in Australia.

It was his idea to fill the program's first shows with cheap, entertaining content in the form of country music videos.

Lonergan said the idea came out of necessity. "As they say, necessity is the mother of invention and we had to find a way to fill 58 minutes," he said.

"Our budget wasn't big enough for us to send people out in the field and the paddocks around Australia and return with 10, 12 or 15-minute stories of proper content, so we had to find a way to fill about 15 per cent of that.

A suggestion was, let's play some country music clips. Well, that [was] a good idea but unfortunately there were very few clips around, so that's why we started to make our own."

With the financial support of ABC Music who had a number of young, emerging talents signed to their new label, a number of clips were made in Brisbane (where the show was based), and often centred around the Gympie Muster and Tamworth festivals.

Landline videos brought emerging stars like Lee Kernaghan and Troy Cassar-Daley to the attention of a national audience, the latter crediting Landline with helping him win his first Male Vocalist of the Year Gold Guitar (1996).

A Landline-made video ('May Your Fridge Be Full of Coldies' by Greg Champion) won the inaugural Gold Guitar for Best Video when the category was introduced in 1993.

Landline also made regular videos for young singer Felicity Urquhart. "Without Landline music clips, I would never have experienced my first taste of what that was all about, it was a huge opportunity to be in front of a camera," she said.

Much to the chagrin of country artists, the program and its clip making ceased in 1999.

### CMC - Country Music Channel

When Foxtel launched its cable/satellite service in Australia in 1995, one of its early channel offerings was 'Music Country' which was basically a re-broadcast of US content.

In 2004, the network created its own country music-specific offering.

CMC was, for many years, the prime (and only) outlet for country music videos on Australian TV. On the strength of its initial success it partnered with legendary Sydney promoter and agent Rob Potts to establish a series of three-day festivals branded 'CMC Rocks'.

The first three were held in Thredbo, NSW under the 'CMC Rocks The Snowys' banner, beginning in 2008. The initial lineup reflected the partner's determination to establish a major country event with a mix of local and international artists, Mia Dyson, Brian Cadd, John Butler Trio, Shea Fisher, The McClymonts, Jim Lauderdale, Catherine Britt, Steve Forde, Adam Harvey, Shannon Noll, Sugarland, Gary Allan, and Patty Griffin.

The channel was part of Foxtel's early success in the Australian market and, at its height, it established the CMC Awards show which was held in conjunction with the CMC Rocks festival.

It was particularly significant for the genre in regional Australia providing one of the few choices for consumers wanting to access country music video content.

While the festival event - now held at Willowbank Raceway in Ipswich under the 'CMC Rocks Queensland' banner, with Chugg Entertainment (and now Mushroom/Frontier) joining the partnership, the Country Music Channel's own fortunes have been significantly impacted by the emergence of a number of video-on-demand streaming providers.



## COUNTRY TV - Continued

Initially, the rise of Facebook and YouTube as a video source began to impact the audience and, as bandwidth options increased for consumers, Netflix and now Stan have steadily eroded Foxtel's market share across its range of offerings. (Source: Roy Morgan TV Ratings Research, Jan 2019).

CMC has been impacted as have all other channels. A brief experiment to offer CMC as part of 'Foxtel Play' (a \$10-a-month streaming option targeted at customers not wanting the full in-home Foxtel installation) was withdrawn in 2017.

The CMC Awards show was not held in 2018 and,

with the roll-out of the NBN and 5G on the horizon, it seems as though CMC is in a fully-fledged fight for survival.

Its current challenge is underlined by one of the findings from our Fan survey respondents who, when asked to identify their sources for 'discovering new country music', placed CMC well down the list of preferred options. The table reflects the rise of digital competitors who now offer interviews and country music news (as well as videos of course), that were once almost exclusively available on CMC.

	18-35 Years	36-55 Years	55+ Years
Commercial Radio	26%	34%	40%
Community Radio - including ABC	15%	19%	34%
Internet Radio	24%	21%	20%
Word of Mouth	56%	51%	50%
Live Gigs	43%	46%	53%
Facebook	45%	45%	38%
Instagram	21%	7%	5%
Soundcloud	3%	2%	2%
YouTube	40%	31%	30%
CMC	11%	16%	13%
Streaming Playlists	64%	38%	21%

Table 4.19.1

## Reality TV

So-called 'Reality TV' have been a worldwide ratings phenomenon for a decade and a half. Usually based on celebrity judges and public voting gradually eliminating contestants until a 'winner' is revealed. Many have found music a perfect basis for contests, and Australian Idol - the first to air in 2004, has been successfully succeeded by a number of variations on the theme - X Factor, The Voice and Australia's Got Talent.

Country music has scored a number of notable successes. In 2004, Shannon Noll was runner-up in the first season of Australian Idol. He was signed to BMG, and his cover of rock classic 'What About Me' topped the ARIA charts and was certified multi-platinum.

Subsequent singles and albums have achieved significant chart and sales and helped establish a significant country music career.

Twenty-year old Judah Kelly, fresh from graduating from the Country Music Academy, won the 6th season of The Voice in 2017, propelling him to national attention.

Recent series have featured a number of emerging and mid-career country music artists.

## OTHER COUNTRY MUSIC MEDIA

### Print

For two decades, the monthly Tamworth-based *'Country Music Capital News'* and Queensland-based quarterly *'Country Update Magazine'*, have provided essential support to country artists, event organisers and labels.

Although circulation has obviously been impacted, like all print media, by the rise and rise of digital competitors and their embrace of their products by consumers, they continue to provide a valuable outlet.

*'Capital News'* was sold by Fairfax Media to Tamworth Regional Council several years ago and its ability to continue as a monthly publication has been largely based on the Official Guide it prepares and retails at the annual Toyota Tamworth CM Festival.

Melbourne-based *'Rhythms'* magazine, for much of its publishing life primarily 'indie' music in content, has become a staunch supporter of the Americana/roots/Alt Country genre in recent years.

These publications are still very much part of the mix, but less important than they once were.

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# 5: Cultural & Social Value



stones mateship emotional makes feel friends makes happy  
 friendship sing great always country Makes feel good  
 songs travel connection real people experience  
 community uplifting music work



## 5: CULTURAL & SOCIAL VALUE

### Introduction

This section owes a great deal to research conducted for two major reports – *'The Economic and Cultural Value of Live Music in Australia 2014'* (University of Tasmania for The Live Music Office & Partners, 2015) and *'Valuing Live Music: The UK Live Music Census 2017'* (Webster, Brennan, Behr, Cloonan and Askill – Edinburgh University 2018).

Their expertise in identifying both economic and non-economic capital generated by music creation, production and consumption and detailing the subsequent community benefits underpins much of the following commentary.

We will examine the physical, human, social and symbolic capital created in the country music sector.

### 5.1 Physical Capital

As the Live Music Office report states: "The physical assets and infrastructure generated by Australia's live music scene are more wide-reaching and substantial than might be assumed at a glance. They extend beyond where music is performed to include rehearsal spaces; recording studios; performance and business training institutions; staging, production and hire companies; logistics and touring companies; the business premises of labels, publishers, music and equipment retailers, promotion and management companies; instrument and music equipment manufacturers; and the media where recorded and live music is promoted and broadcast".

The vibrant social dynamic of the music industry means that infrastructure also includes the neighbourhoods where musicians and other creative individuals choose to live. The 'cultural clusters' that house the bars, clubs and cafes they frequent and are a vital ingredient in contributing to the specific atmosphere of a city, town or region that fosters and nurtures a contemporary creative environment and, consequentially, a vibrant music scene.

When Paul Kelly joined 20,000 fans and artists on the streets of Melbourne in the 2010 SLAM (Save Australia's Live Music) rally to protest draconian licensing laws, he

was marching as he said to preserve the small pub and club venues; the 'universities' where he "learned and honed his music craft".

It is the venues where music is performed that are the most obvious indicator of the importance of physical capital. One need look no further than Sydney where four years of the enforcement of 'Lock Out' laws to address late-night, alcohol-related violence has resulted in the closure of hundreds of venues and devastated that city's live music scene.

From our fan and artist survey responses, and those collected by the UK Live Music Census team, it is apparent that venues are valued which have symbolic, narrative, social, aesthetic and material value, and are prized by many for their role in musical development and their accessibility and sometimes, their scarcity.

Many venues also have narrative value, especially those of long-standing. Respondents to both our surveys commented that they have been attending or performing in their chosen venue for a long time, in some cases for decades, and thus the venue had been a constant and significant presence in their lives.

A sense of ownership or belonging came through in many responses, with a number of musicians and fans, using the word 'home' to describe their chosen venue.

A common thread among respondents to both surveys is that venues are sites in which people construct and negotiate meaning. Often the site of particular – usually positive – memories, often of seeing favourite artists but also because of particularly memorable events or periods of their life.

For musicians, narrative value also includes 'milestone' events, such as their first gig, the first time they got paid as a performer, or the first time they performed at a particular type of event or venue, thus marking a shift in status or opportunity.

For fans, a particular venue can be the place where they marked a particular occasion: an anniversary for instance, seeing an act for the first time or meeting a significant person such as a friend or future partner.



## CULTURAL & SOCIAL VALUE

A unique example of physical capital in our genre is the Country Music Club which, as we will note below, provides a 'home': a supportive environment for artists taking their first career steps and for those who are fans of the genre, but also take pride in nurturing the next generation of performers.

We also need to note that, in recent times, informal performance spaces such as small halls, caravan parks, cruise ships and private residences have added to the stock of small venue physical capital.

House concerts in particular have added an intriguing social dimension where interaction between friends, neighbours and artists occur on a much more intimate basis than is usual in more formal venue settings.

Even though they are mostly 'temporary' in terms of their physical structure, festival venues also play an important part in contributing to physical capital. They are identified by performers and fans alike as sites for an annual reunion with friends and 'family', literal and musical.

Many respondents to the fan survey proudly highlighted the fact that generations of their family had 'grown up' attending some of our longest-running festivals, and that introducing their youngsters to the music of favourite artists was one of their great pleasures.

While most of our major country music festivals take place on greenfield sites, Tamworth is the notable exception.

For its 10-day duration the whole town becomes a venue for music performance and interaction. In fact, research conducted by the city for Destination NSW and responses to our own fan survey show that enjoying the general atmosphere of the town at festival time is the single most important driver of attendance. When it became obvious that the Town Hall had insufficient capacity to host the festival's marquee 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 has 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'.

Before moving on from a consideration of physical capital, we should also note that for many fans and artists the character or aesthetic – the look and feel of the venue, is often important in enhancing the event experience - décor, sound quality, intimacy, quality and diversity of programming.

In voting for their favourite venues, artists and fans both indicated their support for those who support local and/or emerging artists. Fans appreciated the potential to discover new music and artists.

### 5.2 Human Capital

The OECD has identified human capital as critical to the well-being of communities.

They define it as, "the knowledge, skills, competencies and attributes embodied in individuals that facilitate the creation of personal, social and economic well-being".

The Live Music Office adopts a broader approach to consider not only acquired cognitive skills and explicit knowledge but also the physical and mental health and wellbeing benefits enjoyed by producers and consumers from their engagement in live music in particular.

They suggest that human capital is best appreciated as the sum of three elements - psychological capital, knowledge capital, and physical health.

#### 5.2.1 Psychological Capital

In recent years, businesses especially have come to realise that the well-being of clients, customers and employees can enhance workplace performance, generate individual commitment, loyalty and satisfaction, and positively effect constructive organisational change.

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 increasing 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'.

## CULTURAL & SOCIAL VALUE

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.

Attendees at major events, festivals in particular, highlighted their sensory experience. The staging, lighting, volume, general atmosphere often inducing a physical reaction to enhance the emotional engagement, e.g. singing along, moving to the music, dancing.

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.

### 5.2.2 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 TAFE 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 country artists confirm acquiring these skills through formal channels.

Formal training has expanded beyond the secondary and tertiary 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 to work with local practitioners.

Acknowledging the importance of Nashville as a core songwriting, music production and touring hub – not just for country music, APRA AMCOS opened a dedicated office there in 2017. As well as offering ongoing workshops, networking sessions and industry advice, the office has hosted two SongHubs country-specific programs targeting the 100+ Australian writers, producers and performers currently resident there. These have notably included some of our most notable country exports – Kylie Sackley, Phil Barton and Lindsay Rimes. It was famously at the first of these programs that Morgan Evans met and began collaborating with Chris DeStefano.

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 (or 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.

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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 another 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.

Finally, we should note that there is a growing body of scientific evidence to suggest that the general performance of school-age students across the curriculum is significantly enhanced when they are involved in music-related activities and/or formal study.

### 5.2.3 Physical health

Beyond, the general sense of well-being already noted, there is a paucity of 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.

**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.

### 5.3 Social Capital

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

Our research, based on survey responses, lines up with the findings of others that improved social capital was the most frequently identified benefit associated with live music by both producers and consumers. Consumers identified feeling more connected, happy and engaged while producers spoke of the role venues played in facilitating community.

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.

Music, historically either a primarily solitary listening experience or a physical, communal experience in a live audience, has taken on a whole new experiential dimension with individual and fan/group social media accounts extending interactions far beyond the direct experience.

For example, 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, debating favourite acts and industry issues and lobbying for artists to be included on next year's bill.

As our sampling of 4,000+ confirms, country music fans are no less enthusiastic in their embrace of



## CULTURAL & SOCIAL VALUE

social media platforms and instruments than those who support other music genres.

As well as utilising their accounts and group memberships to interact with other like-minded people, they increasingly get their event/gig information utilising Facebook events and recommend and share 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 increasingly prioritised direct engagement with existing and potential fans to increase their reputation and status, attendee numbers and thus their attraction to prospective sponsors.

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 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 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 market.

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

### 5.4 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 hierarchies.

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 other 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 one of the fastest growing cities in the nation.

The successful marketing and exploitation of the symbolic capital it has accumulated has made it a priority destination for country writers and performers from around the world.



## CULTURAL & SOCIAL VALUE

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'.

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.

# Appendix

# 6: Country's Backstory





## 6: COUNTRY'S BACKSTORY

Many reading this report will be familiar with much of what follows. But such has been the growth in popularity of the country music genre in the decades of this century, particularly amongst a younger audience, some may find the beginnings of our music's journey of interest.

Our thanks to Max Ellis for permission to borrow extensively from his exhaustive, consummate research and documentation of Australia's country music past.

The histories of Australian and American country music have been intertwined since commercial 'birth' some one hundred years ago.

This is unsurprising, given that so many of the shared musical influences grew out of the migration (in the US case) or transportation (in ours) of Anglo Celtic folk music melodies and the instruments that are still feature in the genre.

### 6.1 The Beginnings

Drawing on this tradition and incorporating other influences, eg. gospel, jazz, African, Mexican, the southern states of the US developed a distinctive folk music initially labelled 'hillbilly' from its origins in the Appalachian Mountains region.

Its initial base was greatly expanded when new recording technologies were employed in 1927 at Bristol, Tennessee (officially recognised by US Congress as "the birthplace of country music"), where recording sessions captured the early work of pioneers such as The Carter Family and Jimmie Rogers.

The spread of radio created a national audience for entertainment programs, with 'barn dance' shows broadcast all over the south and from Chicago in the north to California in the west. The most important of these, the Grand 'Ole Opry, first aired in 1925 by WSM in Nashville.

The term 'country' music began to replace the term 'hillbilly' in the 1940s as cowboy or western music, which had developed independently from the same roots and was popularised by Hollywood films, was absorbed into the genre.

Other major influences in what we identify as 'country' were added by Bill Monroe's 'mountaineer' string band music based heavily on Scots fiddle tunes, which became known as Bluegrass, and by Texan Bob Wills who incorporated jazz and big band dance music to develop 'western swing'.

This latter sub-genre added electric guitar and drums to the predominantly acoustic, string-based instrumentation of guitars, fiddles and banjos.

This early mix was completed by small ensemble music based on western swing and the ranchera music of the southern border states which featured guitar, bass, dobro or steel guitar and (later) drums. It became known as Honky Tonk, and its foremost exponent, Hank Williams, is revered to this day.

Australia too had developed its own, mainly regional, folk music based on Anglo Celtic ballads and dance tunes which were lyrically adapted by the transported convicts and bush workers to reflect their experiences in a new and often forbidding land.

However, this music – later dubbed 'bush/folk music' was almost exclusively performed in regional areas, and only came to the attention of a wider audience through the literary popularity of Henry Lawson, Banjo Paterson and Will Ogilvie writing for *The Bulletin* in the 1880s and 1890s.

Their 'bush ballads', about droving, loneliness and isolation, droughts and floods, stockmen and horsemanship, shearing, bushrangers etc founded a tradition that still forms an important sub-genre of our country music.

Federation and WWI generated a national pride and a more global outlook than the 'colony' had previously experienced. While colonial influences still remained dominant in sport and popular literature, in the cinemas and dance halls it was American music that dominated – jazz, big band, Tin Pan Alley songs, were what Australians were increasingly listening to.



## COUNTRY'S BACKSTORY

During the 1920s and 30s recordings by Jimmie Rogers and The Carter Family achieved popularity through the widespread adoption of the gramophone, and radio became an essential entertainment medium for many. At the same time, Australians became exposed in the cinemas to an increasing diet of Hollywood films featuring 'singing cowboys'. Gene Autrey, leading the Sons of The Pioneers was the most notable of these early stars.

By 1929 some 300,000 Australian households had a radio licence and were regularly exposed to a variety of American music.

Bob Dyer (later of TV 'Pick A Box' fame), began touring Australia in the early 1930s performing a 'hillbilly ukelele' set in a vaudeville show. He became an instant syndicated 'hit' when contracted by 3DB Melbourne to do a series of programs featuring hillbilly music.



One of his early listeners was a young New Zealander who had moved to Australia.

Tex Morton led an itinerant bush-worker existence until he won a 2KY Sydney talent quest performing hillbilly music.

Between 1936 and 1943, Tex Morton – The 'Yodelling Boundary Rider,' recorded 93 songs for the Columbia Regal Zonophone label and quickly became one of the best-selling artists of his era. He is commonly regarded as the 'father' of Australian country music.

His predominantly solo recordings featuring voice and simple pick-and-strum guitar accompaniment – and of course yodel, had a profound effect on youngsters like Slim Dusty and Buddy Williams just setting off on their own musical journeys. This was particularly so when he abandoned his early American repertoire for songs with local lyric content.

Although he wasn't the first Australian 'hillbilly' recording artist, he was the first to present himself as living the life he sang about, rather than playing a 'role'. He was quick to adopt the western dress of the singing cowboys, and borrowed heavily from Roger's song style and subject matter.

This authenticity was as important for country fans then as it remains today, even though many of his songs were

unashamedly sentimental songs about a 'mythic homeplace with beloved and faithful parents and a patient sweetheart'. (*'The Yodelling Boundary Rider'*, Toby Martin p.33)

He realised early in his career that few Australian artists could survive on recording royalties alone and, in 1938, created a travelling show to tour the nation.

His western or rodeo shows which combined music performances with roughriding, buckjumping, boxing, whip-cracking and sharp-shooting, proved the template which Slim Dusty and Buddy Williams and many others would fine-tune for the rest of the century.

Morton was only too well-aware of the power of radio to reach the corners of a vast land and, in 1942, launched 'All Set and Saddled' on Sydney's 2UW radio. It was essentially a variety show featuring Morton, his sidekick Shorty Ranger, singing partner Sister Dorrie and the Roughriders. The show included songs about cowboys, traditional Australian bush ballads, short plays with a boys' own-style adventure plot and comic banter.

The show was intentionally informal, often unscripted, to create the illusion that the audience (in the studio and at home), were listening in to a bunch of mates gathered for a "fair dinkum Australian get-together". (Martin p.29).

By the 1930's, the 'bush myth', the idea that what made Australia special was the bush and the pastoral industry in particular – that had become a central plank of national identity, was starting to seem a bit crude and unsophisticated for a modern country like Australia.

Connecting the bush myth to the hillbilly craze was a marketing masterstroke.

The stockman, synonymous with the cowboy, could be associated with the glamour, recorded sound, cinema and modernity of America. In this way, Morton effectively gave the old nationalist clichés a modern and international currency.

The similarities, but also the rivalries which existed between Australians and Americans (peaking during WWII), were exploited by Morton during his radio and touring shows.

A number of well-publicised personal difficulties saw him depart for North America in 1950 where he toured successfully for a decade as a hypnotist 'The Great Morton'. He returned in 1959, but had no musical impact apart from a minor hit about a racehorse – 'The Goondiwindi Grey' in 1973.

## COUNTRY'S BACKSTORY

However, it is hard to overestimate the impact of Tex Morton because, as already mentioned, the next generation was inspired by the example of a local success, and determined to follow in his footsteps.

Buddy Williams grew up on a dairy farm near Dorrigo and followed Tex into the Columbia Studios in Sydney in 1939 - a boy from the country writing and singing his own songs about his life in the Australian bush.

Buddy was shortly followed into the studio by the first Australian country woman to record solo. Queenslander Shirley Thoms quickly became a favourite on the airwaves.

Meanwhile in Melbourne a young singer and all-round entertainer started adding hillbilly music to his Hawaiian radio show. Recording in 1935 as 'Smoky and the Pepsodent Rangers', theirs was the first 'country' heard on Melbourne radio (3KZ). At its peak, 'The Adventures of Smoky Dawson' was broadcast on 69 stations around the nation, and its 'hero' became one of Australia's best loved country music characters.

War dominated the early 40s but by 1946 a new legend was emerging.

David Gordon Kirkpatrick, born on a small dairy farm at Nulla Nulla Creek near Kempsey NSW, adopted the stage name Slim Dusty and in 1946, recorded the first of over a thousand songs he would release during the next 55 years. He became one of our most successful and enduring entertainers... an Australian icon, writing and singing about the land he loved.

But Slim, a competent songwriter himself, understood the value of a team, and assembled a stable of writers, including Stan Coster and Gordon Parsons, who supplied him with some of his most notable successes. His artistic collaboration and lifelong partnership with Joy McKean helped ensure his pre-eminence and longevity.

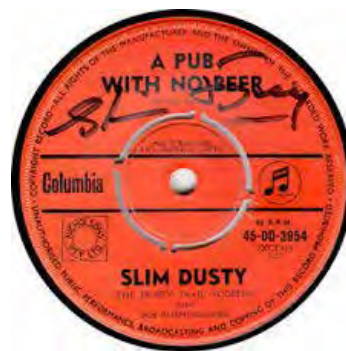
In the late 40s and 50s, as country reigned on radio, more new stars appeared. They included Tim McNamara, Reg Lindsay and the McKean Sisters in Sydney, the Trailblazers in Melbourne, Bob Fricker in Adelaide, the Harmony Trail in Shepparton and Lismore's Radio Ranch Club.

The 'Adventures of Smoky Dawson' was heard on hundreds of radio stations all over Australia and later, seen on TV.

Country Music took to the road in a tradition that continues today, with the Buddy Williams Show being joined on the outback tent-show circuit by the Slim Dusty Show, the Rick and Thel Show and many others.

The familiar Regal Zonophone and Columbia labels expanded their repertoires, and ARC launched the Rodeo label.

The 1950s saw consolidation of the Slim Dusty phenomenon... launched by Australia's first major radio chart hit, the Gordon Parsons penned "Pub With No Beer" recorded and released by Slim in 1957. With a tune almost identical to Stephen Foster's 'Beautiful Dreamer', It was an instant hit locally, and became the first Australian single to achieve No.1 chart success internationally when Dutch and German versions ('Café Zonder Bier') topped the charts in Belgium and Austria, with Slim's version being the first Australian song to chart in Britain (No.3). "The Pub" became the best selling 78rpm record of all time and the only 78 to achieve Gold sales status.



1960 ushered in the micro groove long play stereo record and the cassette. The new formats produced another local and international hit when local pop/rock artist Lucky Starr recorded country music singer Geoff Mack's 'I've Been Everywhere'. Offered to Canadian country singer Hank Snow, it became Australia's first country No.1 in the US when Mack, using an atlas supplied by his publisher, changed the Australian references to cities and towns in North America.

Similar lyrical changes have produced New Zealand, Japanese, UK, Czechoslovakian, Finnish, German, Texan, English and Irish versions which have maintained its popularity to this day.

## COUNTRY'S BACKSTORY

In the 60's country took to Television. In 1964 'The Country and Western Hour' was produced in Adelaide, compered by Roger Cardwell and later Reg Lindsay.

But in the '60s our country music was already reflecting the major changes which were re-shaping popular music around the world.... Rock and Roll.

In a relatively short time from the late 50s, Rock & Roll swept all before it, supplanting other genres of popular music, dominating the city stages and radio and TV airwaves. It drove country music into the backblocks where travelling shows struggled to keep it alive. It took almost a decade for that decline to be reversed.

### 6.2 Nashville & The US

During the conservative post-war years, country music followed the lead of popular music crooners in an attempt to broaden country music's 'mainstream' appeal. This often involved replacing the genre's traditional instruments with lush orchestrations.

While this approach achieved some commercial success, it also alienated many traditional fans.

However, everything was about to change.

The emergence of Rock 'n Roll produced turmoil in US country as it did in every genre, with a new generation of artists embracing and incorporating the new musical influences to create 'rockabilly'. Much to the distress of many traditionalists centred around the Grand 'Ole Opry which, having initially embraced a young Elvis Presley, soon shunned this new generation of performers.



But rock swept all before it, quickly dominating the airwaves. The standardisation of radio playlists in order to create rock/pop 'hits', and of course sell airtime to sponsors, had a devastating effect on country airplay.

Coinciding with these new musical developments, was the establishment of the Country Music Association which set out to resurrect the fortunes of country.

It's central strategy centred on a campaign – 'country comes to town', to persuade disc jockeys and radio programmers that country was an adult and sophisticated music with a potential appeal much broader than its rural heartland.

As one of the CMA founders noted - "If country music does not become more accepted nationally ... if we do not saturate the country with good publicity, if we do not educate the public, we must be prepared to suffer the consequences".

The decline in the number of country stations across the nation (a product of both the rock-and-roll boom and the trend toward Top 40 formats) figured prominently in the CMA's vision of a genre in struggle. In 1953, 65 percent of the nation's radio stations played country music at some point in the day; by 1961, the CMA estimated that only 36 percent were playing any country at all.

A CMA letter lecturing disc jockeys and radio station managers on the importance of country radio shows made the perceived prejudice against which they were fighting explicit: "There may be some frankly ashamed to admit that they listen to 'Corncob Hoedown.' The industry has come a long way in recent years and no one can deny that Country & Western has grown up. We are not a group of raggedy, country boys and girls with missing front teeth. We have acquired status. In choosing a title for your show, make it one that a listener would not hesitate to tell a friend about".

Clearly worried about the rustic associations conjured by a title like "Corncob Hoedown," the letter emphasised country's new class distinction. The CMA saw a serious, respectful presentation of its music as the best way to approach the adult market.

This conscious re-imaging coincided with the genre's business operations – publishers, labels, studios, agents etc, concentrating in a new urban 'home' in midtown Nashville that quickly became known as Music Row.

They endorsed the CMA's campaign but, just as importantly, embraced and encouraged changes in the music itself to underline its broad appeal.

The recorded product that emanated from the Music Row studios became known as the 'Nashville Sound'. The general musical components of the Nashville Sound were background choir groups and orchestrated strings instead of steel guitar and fiddle, and a lead vocal that consciously avoided the nasal twang often associated with



## COUNTRY'S BACKSTORY

country vocals.

The remarkable efficiency of the Music Row studios and the availability of high-class session musicians meant that the sounds they produced appeared on hundreds of country records across performers, labels, and sometimes even other genres.

However, not everyone embraced this so-called pop/country synthesis with the same enthusiasm as the genre's commercial operators.

The instrumentation changes associated with the Nashville Sound gave rise to heated debates about whether or not the new sound could still be called 'true country,' and these debates often centred specifically on the geography of the fans and the locations where the new music was conceived and produced. One particularly passionate fan crystallised the oppositional sentiment by arguing that country music was the authentic music of the specifically rural and working-class people of America, and that the musical changes brought about by the Nashville Sound were destroying this connection. His passionate 1965 letter to the editor (USA Today) pitted money-grubbing city folks against true country music fans:

"Country Music belongs first to the labouring and rural people of this country. They have no musical training and often can't even read music, but when the day's work is done they can take down the old guitar, banjo, or fiddle and play the simple songs that tell about their way of life in a fashion that the finest symphony orchestras in the world can never imitate. They don't want your horns or drums -- they don't want your chorus singing and violins.. All that stuff is for the city people who jumped on the country music bandwagon when there turned out to be so much money in it".

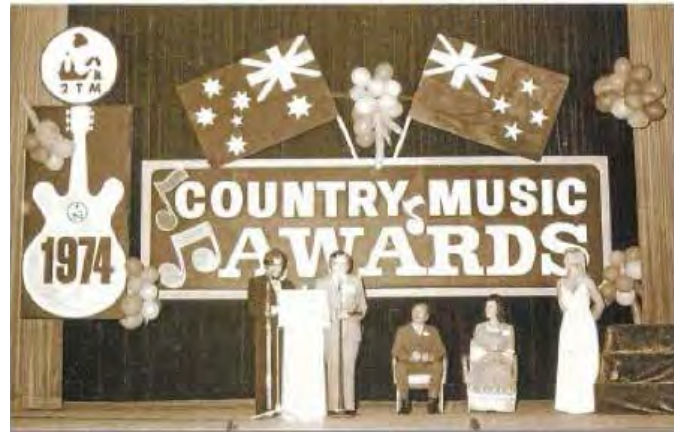
### 6.3 Meanwhile ... Back 'Home'

Radio airplay and exposure was also a prominent concern in Australia, where Rock and Roll had the effect of overwhelming what little country programming there was on commercial stations.

Without a peak organisation to replicate the CMA's efforts in the US, it was left to a group of individuals to advocate on behalf of the genre and its practitioners.

In 1965 John Minson an advertising copywriter and passionate country fan, persuaded his bosses at 2TM to endorse his idea for an Australian country music program,

"Hoedown", playing predominantly Australian music. It was an immediate success with support from artists and fans alike and in 1969, the people at 2TM recognised the potential, and came up with the concept of Tamworth, as Australia's "Country Music Capital".



With radio-promoted stage shows, and the Country Music Club Jamboree and Talent Quest, Tamworth became the mecca for artists and fans.

It encouraged 2TM to stage the first Australasian Country Music Awards, presenting the first of the now famous Golden Guitar trophies to Joy McKean for 'Lights On The Hill' written for husband Slim.

As tens of thousands of fans flocked to the January long weekend, 2TM started adding the Hands of Fame, Roll of Renown, Bluegrass championships, buskers and other events around the Awards. The Tamworth Country Music Festival was on its way.

Meanwhile, country music broadened its audience appeal, with artists like Suzanne Prentice, Jean Stafford, 1901, Saltbush, Anne Kirkpatrick and Lindsay Butler joining the established stars on the Awards stage and Nev Nicholls packed the Texas Tavern in Kings Cross entertaining Americans on R&R from Vietnam. Many of these new artists embraced the musical stylings of the 'Nashville Sound', but they co-existed happily (mostly) with the strong 'traditional' elements of Australian country increasingly popularised as the Slim Dusty juggernaut continued to tour the length and breadth of the nation's regions.

And bluegrass, undergoing a revival in the US in the early 70s, experienced a surge in popularity here, while trucking music hit the highway.

New television shows included John Williamson's "Travellin' Out West" and later in the decade in TV shows compered by Reg Lindsay and Johnny Chester.



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On radio from 1977, Nick Erby's weekly 'Country Jamboree' was heard all over the nation while in America Jewell and Arthur Blanch carved out stellar careers, following in the footsteps of ex-rodeo riders Ted and Tom LeGarde who had pioneered the road to North America (Canada and then Nashville) in the late 50s.

A new generation of country talent thrilled a new generation of fans and, after a decade of consolidation, the foundations were well and truly laid for a popular resurgence of country music in Australia.

### 6.4 Back Across The Water ...



The decade of the 60s in the US was one of upheaval due to Civil Rights unrest, Vietnam War protest and widespread counter-culture reaction to the conservatism of the McCarthy era.

Widespread interest in a 'return to American values' had a musical impact, in country's case characterised by a resurgence of interest in the traditional elements that underpinned 'real' country music, as opposed to the perceived 'manufactured' products produced under the 'Nashville Sound' banner.

One of the most significant events occurred when Johnny Cash invited Bob Dylan to visit and record in Nashville.

Dylan had progressed, through his protest songs, from folk 'troubadour' to music icon, and was familiar with Nashville's renowned session players.

He returned after the first Nashville sessions for the album 'Blonde on Blonde' (1966), to create and record 'Nashville Skyline' (1969), regarded then and now as amongst his finest work - "Nashville Skyline achieves the artistically impossible: a deep, humane, and interesting statement about being happy. It could well be his best album." (*Rolling Stone*, 1970)

Kris Kristofferson, shaking up the establishment with his

own songs, was in no doubt about Dylan's impact – "Our generation owes him our artistic lives because he opened all the doors in Nashville when he did 'Blonde on Blonde' and 'Nashville Skyline'. The country scene was so conservative until he arrived. He brought in a whole new audience. He changed the way people thought about it – even the Grand Ole Opry was never the same again".

His involvement with Nashville and country had an immediate impact inspiring, among others, a Florida-born, LA-based youngster named Ingram Cecil Connor III, who was busy developing his 'Cosmic American Music'. As Gram Parsons, he enjoyed a short career with The Byrds and then The Flying Burrito Brothers. His influence far outweighed his commercial success and he is widely credited as one of the pioneers of 'country rock', a fusion of traditional and rock elements.

His work built on a harder-edged honky tonk sound that had emerged from the migration of (mainly) southern workers to California's aircraft factories during WWII. Buck Owens and Merle Haggard were leading lights in the development of what became known as the 'Bakersfield Sound'.

In the early 70s, a group of 'long-haired, west coast boys' – the Nitty Gritty Dirt Band, conceived a recording project to pay homage to the pioneers of country from the 40s, 50s and 60s. 'Will The Circle Be Unbroken' was released as a 3-LP package in 1972, featuring Earl Scruggs, Mother Maybelle Carter, Doc Watson, Merle Travis, Roy Acuff and Vassar Clements among others. Bill Monroe, the 'Father of Bluegrass' and 60 at the time, declined to be involved.

The commercial success of these recordings introduced country music to a whole new generation – both in the US and Australia. This effect was to be repeated decades later with the release of the 2000 Coen Brothers film 'Oh Brother Where Art Thou'.

In 1974, Australia received its most notable recognition to date in the US market when popular cross-over artist Olivia Newton-John, received the Country Music Association's Top Female Vocalist award. It didn't please the country 'purists' but it was evidence that fans had become more comfortable with the fusion of traditional country with elements from rock and pop.

The commercial success that followed saw country become the dominant radio format in regional US markets.

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It helped launch the stellar careers of Dolly Parton and Alan Jackson, spawned chart-topping recording stars in Shania Twain and Garth Brooks, and reached a highwater mark with the world domination of Taylor Swift.

### 6.5 Back Home Again

The last two decades of the 20th century saw continued growth for country music in Australia.

While the pioneers still entertained their audiences, a new generation of artists like Johnny Chester, Jewell and Arthur Blanch, John Williamson, Bullamakanka, and the Flying Emus thrilled new fans, laying the foundations for today's Australian country music. John Williamson's 'True Blue' became an instant Australian classic.

In 1979, Grand Junction won the inaugural 2TM Star Maker quest, the first in a long list of winners through the 1980s and 90s, which included Lee Kernaghan, Keith Urban, Gina Jeffreys, Beccy Cole and James Blundell.

In 1981 Country's own newspaper, *Country Music Capital News*, went monthly and was soon followed by other publications.

In the late eighties the compact disc came in, micro-groove records went out and recording technology got better and cheaper.

And in the 80s we lost some of the pioneers. Tex Morton and Tim McNamara died in 1983, Buddy Williams in 1986 and Alan Hawking in 1988.

The Webb Brothers partnered with the Apex Club to establish a fund raising music event near the regional town of Gympie. It quickly became a major event in a strong country market that had lacked a major event. In 2018 the Gympie Music Muster celebrated its 37th year.

Lee Kernaghan burst on to the scene with 'Boys From The Bush', attracting record-breaking concert audiences. He would soon start selling records in numbers previously only seen in the rock/pop world.

The new crop of young stars - Gina Jeffreys, Colin Buchanan, Beccy Cole, Adam Brand, Kasey Chambers and Graeme Connors began winning Golden Guitars.

They were joined on main stages by young indigenous performer Troy Cassar-Daley who had literally emerged from busking on Peel Street during the Tamworth Festival. Following in the footsteps of pioneers like Dougie Young and Jimmy Little, he would ensure the ongoing popularity of country among the Australian Aboriginal and Torres Strait Islander peoples which dated back to the travelling tent shows of the 40s, 50s and 60s.

In 1992, Keith Urban, having made his mark on the local scene, took the plunge and relocated to Nashville. His first Grand 'Ole Opry appearance soon followed, backing Slim Dusty on the hallowed Ryman stage.

In the same year, the country music industry formed its own governing body, the Country Music Association of Australia Inc.

The CMAA launched the College of Country Music in 1997 and commissioned a range of research projects to promote the genre.







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Its first major undertaking was the staging of the Golden Guitar Awards which it did from 1993 in conjunction with the Tamworth City Council. The awards, which had become one of Australia's best known music events, had moved from the Town Hall to a big top, a factory, a club, a school hall and a rodeo arena.

Country music had everything except a home for its marquee celebration.

In 1998, after 20 years of campaigning, the country music industry staged their CMAA 'Concert of the Century', to celebrate the opening of the Tamworth Regional Entertainment and Convention Centre. The Awards found a home, attracted a long term sponsor in Toyota and national TV and radio coverage.

Also in that year, a third major country music festival was established at Denilquin in regional NSW. The Deni Ute Muster quickly became a popular and permanent fixture on the country calendar.

The century ended with two significant recording events. In Nashville, Keith Urban released his debut US recording, producing the first of 18 songs which would top the Billboard country charts.

While in Australia, Kasey Chambers stepped away from fronting her family in the Dead Ringer Band and released her ground-breaking solo album 'The Captain' which would see her crowned ARIA's Best Female Artist for the first time.

The new century continued the expansion of the genre as Slim Dusty's catalogue crept closer to its own century celebration, a milestone reached in July 2000. The achievement was recognised world-wide by a massive TV audience when Slim closed the Sydney Olympics singing Waltzing Matilda.

Tamworth Festival continued to attract crowds of 70 to 80 thousand and was listed as one of the top 10 music festivals in the world by the Melbourne *Age* in 2001. In 2003 the Awards celebrated it's 30th anniversary.

Kasey Chambers, lamenting her failure to attract commercial radio play, penned the iconic 'Not Pretty Enough' which ironically produced the genre's first major cross-over hit.

The song topped the ARIA charts, was the most added radio song of the year, was awarded APRA Song of the Year and saw her win the first of her three ARIA awards for Best Female Artist. Keith Urban continued his US chart success and was named the CMA's Male Vocalist of the Year, a feat he repeated the next year when he was also named Entertainer of the Year (2005).



Lee Kernaghan took to the road, playing to vast audiences in his Pass The Hat Around tours which raised some \$13.5 million for farming communities around the nation.

But the year before, an era ended.

On September 19th 2003, Slim Dusty died.

At his state funeral, there was an unprecedented flood of tributes from every part of the community and from Australians from all walks of life.

### Fast Forward....2018

And what a year it was for Australian country!

Our brightest, established stars continued to shine with Keith Urban being again anointed as the CMA's Entertainer of the Year, while Kasey Chambers became the youngest female ever to be inducted into the ARIA Hall of Fame.

But it was the emergence of a new star, that created the biggest buzz.

Young Newcastle singer/songwriter Morgan Evans took the country world by storm, topping sales and airplay charts in Australia and the US.

Among his many achievements in a stellar year, he not only topped the Australian country airplay chart, but also reached #1 on the mainstream all-genre airplay chart. A feat not achieved by a country artist since Taylor Swift in 2009.

We eagerly anticipate the unfolding of next chapter in this fascinating and enduring musical story.

# 7: The Academy

*the*  
**AcADemy**

EST 1997 • AUSTRALIA





## *FROM COLLEGE & CAMERATA TO ACADEMY*

Responding to the fact that artists in the country genre tend to start their careers earlier than those in other genres and are predominantly self/parent-managed, the Country Music Association of Australia, soon after it was established in 1993, began to discuss and plan something unique - a residential skills and business/career development program for aspiring country music writers, performers and musicians.

There had been workshops, masterclasses and writing retreats before, but nothing on the planned scale - two weeks of intensive songwriting, instrumental practice, performance and business studies. All culminating in a major graduation concert featuring new songs written by students and our leading songwriters during the program.

It was decided that the perfect time to run the program was prior to the annual Tamworth Country Music Festival which many of the prospective students would already be planning to attend to begin or continue their performing careers - busking, talent contests, walk-ups, open mics and support spots.

With the overwhelming support of senior artists, the industry and the Tamworth community and Council, the first College of Country Music (as it was then) was conducted at Calrossy Anglican School in 1997.

It soon became apparent that there were a significant number of talented performers and musicians too young (under 18) to attend this senior program. A junior, one-week 'Camerata' was developed in 2001 and proved as popular as did the senior College. Since 2009 they have operated as Junior and Senior Academy.

Since their inception, these two programs have graduated 700+ students.

The first senior program produced our first 'winner' with Lyn Bowtell taking out the 1997 Star Maker competition just days after graduating from the program.

Lyn returned as Director of the Junior and Senior Academy programs in 2016.

The focus is on career development and skills enhancement, and the fact that so many of the graduates have gone on to achieve recognition from the industry is testament to its success, with graduates taking out 16 of the last 22 Star Maker competitions and, led by graduates Sara Storer, Adam Eckersley, The McClymonts, Lyn Bowtell, Amber Lawrence, The Sunny Cowgirls and The Davidson Brothers, Golden Guitars for Female and Male Vocal, Female Artist of the Year, APRA Song of The Year, Vocal Collaboration, Instrumental of the Year, Group Duo of the Year, Album of the Year, New Talent Of The Year and multiple ARIA Awards.

A feature of the program is the fact that so many of the genre's major artists and music business operators share their experience and knowledge as tutors, guest speakers, mentors, specialist teachers and co-writers.



## *FROM COLLEGE & CAMERATA TO ACADEMY*

The singer/songwriters - on the basis of application, are divided into three groups with an attempt to balance musical skills, personality and gender. Each group has a designated Leader/Tutor. The students entering the instrumental stream receive specialist tuition in their own group and form the backing band for all groups at the graduation concert at the end of the two weeks.

After a first-day induction and get-to-know session, an informal concert gives Academy staff a chance to fine-tune the groups (if necessary) to achieve a balance of vocal and instrumental skills. The students are then allocated to their leaders, whose primary task is to assist with the writing of original songs to be performed at the final, public concert, and 'work' begins in earnest on day two.

After breakfast at 8am, each day begins with warm-up exercises and a morning session with special guests covering a range of topics - eg. songwriting, music business, performance, music theory etc. Most of the day is devoted to songwriting in groups and/or with visiting special guest writers or speakers, followed by evening sessions of specialist skills and, later in the program, intense rehearsals.



The search also begins to lock in the vital sponsors and scholarship donors. Students apply by written submission, video and digital recording, from all states and territories and New Zealand to be accepted into the singer/songwriting stream (23) or the instrumental stream (6).

The singer/songwriters, on the basis of application, are divided into three groups with an attempt to balance musical skills, personality and gender. Each group has a designated Leader/Tutor. The students entering the instrumental stream receive specialist tuition in their own group and form the backing band for all groups at the graduation concert at the end of the two weeks.



## FROM COLLEGE & CAMERATA TO ACADEMY

The curriculum for Senior and Junior Academy is constantly reviewed and fine-tuned to deliver maximum benefit, but two years ago we added a one-on-one business/career planning mentoring session for each senior student (parent in the case of Junior Academy), conducted by ex-graduate and current star Amber Lawrence.

The unique nature and timing (just before the Festival) of the program, makes the Academy a perfect story for local media, and print and TV journalists visit the campus regularly to interview staff and students. Groups of students also visit local radio for interviews and performances to promote their music and the Academy.

With the internet providing such a potent communication and promotional tool, we now have a dedicated Social Media Coordinator on staff to assist students - already significant users, in maximising their skills.

A 'flash mob' performance at a local shopping centre during this year's Academy had been viewed and shared on Facebook over 100,000 times by the end of the week.

As always of course, the focus remains on creative production, so rehearsing and presenting the 40-odd newly written songs to be performed at the graduation concert is the focus of the second week. The concert, presented in one of Tamworth's most famous concert venues - Blazes Showroom at Wests, provides a wonderful finale and has become one of the 'must see' Festival shows. The graduates then take the stage as the opening act on the Festival Opening Concert to show the thousands their stuff. Perfect!



### Star Maker

One of the highlights of the annual Tamworth Country Music Festival is the Toyota Star Maker quest. It is seen the major career stepping-stone for young artists on their way to the Golden Guitar Awards which are country music's ultimate peer acknowledgment of success.

Keith Urban, Lee Kernaghan and Beccy Cole started their ascent by winning this national competition.

Lyn Bowtel, a student in the Senior College (as it was then) at the time, was the first of our graduates to win Star Maker.

Since then, College/Academy senior graduates have featured as regular winners.





## FROM COLLEGE & CAMERATA TO ACADEMY

### Star Maker Winners

1997	Lyn Bowtell
1999	Brendan Walmsley
2000	Grant Richardson
2001	Kylie Sackley
2002	Kieran Lancini
2003	Todd Williams
2004	Travis Collins
2005	Sam McClymont
2007	Kirsty Lee Akers
2009	Liam Brew
2010	Luke Austen
2013	Kaylee Bell
2015	Mickey Pye
2017	Rachael Fahim
2019	Blake O'Connor

### Notable Alumni

The Baileys attended the very first Junior Camerata and all three are doing amazing things. Kurt is managing Gang of Youths and Charlene and Crystal are both singing in the pop field.

Jessica Mauboy attended Camerata in 2003 after winning the Telstra Road To Tamworth, and has subsequently enjoyed significant success.

The Bailey sisters (now called Baylou), attended Camerata and have had significant success with Victoria picking up a Golden Guitar for New Talent Of The Year.

Aleyce Simmonds attended the first and second Camerata and has since won Golden Guitars for Female Artist Of The Year.

Ashleigh Dallas attended Junior Academy in 2008 and has since won Golden Guitar Awards in two categories.

Liam Kennedy-Clark was a finalist twice in Toyota Star Maker and has a stellar career performing, as a musician and a Producer.

Brothers Three featured in X factor as top ten finalists

Judah Kelly featured on The Voice, winning the show in 2017

Caitlin Shadbolt is signed to Sony and has a spectacular career in country pop.

Katelyn, Liam and Casey O'Donoghue, siblings from Charters Towers, have their own band Home Grown and featured on The Voice.

Imogen Clark attended Junior Academy in 2010. She has gone on to be nominated for Golden Guitar Awards and has a stellar career.

These students have gone forward to achieve significant goals but in reality every student receives a life-changing experience that propels them forward in the music career that they imagine for themselves. Many continue through to the Senior Academy and many simply continue their chosen path forward but forever enriched by the experience of attending Academy.





## FROM COLLEGE & CAMERATA TO ACADEMY

### Academy - Professional & Career Development

9% of the 582 respondents to our Artist Survey had attended Junior Academy (or Camerata as it was), and 16% had attended Senior Academy (or College).

We were keen to get their feedback on the value of the programs in terms of their personal, professional development and career advancement through the industry information and networking opportunities provided.

#### Junior

	Very Useful	Useful	Neutral	Not Useful	Poor
Prof Development	41%	35%	14%	2%	1%
Career Development	40%	40%	17%	2%	1%

#### Senior

	Very Useful	Useful	Neutral	Not Useful	Poor
Prof Development	57%	25%	15%	2%	1%
Career Development	55%	23%	17%	2%	3%



# 8: Artist Survey Findings





We received detailed responses from **582 country music artists**. This compares to the 343 responses we received for the 1997 report.

We made every effort to sample practitioners at all levels of career development, and achieved an appropriate balance.

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'**.

We also achieved a balance between artists resident in metro areas, regional cities and rural/regional communities.

Where appropriate, we have compared our findings with those reported in our original report and with the detailed artist surveys conducted as part of the Melbourne Live Music Census projects in 2012 and 2017.

## Question Responses

### Question 1

**What is your gender identity ?**

**N = 582**

**Overall - Male 61% - Female 39%**

Professional - Male 55% - Female 45%

Semi-Pro - Male 56% - Female 44%

Amateur - Male 64% - Female 36%

### Question 2

**How old are you ?**

**N = 582**

Under 18	3%	41-49	19%
18-24 years	6%	50-59	22%
25-29	5%	60-69	13%
30-35	13%	70+	5%
36-40	11%		

### Question 3

**Where do you live ?**

**N = 582**

Capital City	190	33%
Regional City	139	24%
Regional & Rural	253	43%

Location	Capital City	Regional City	Regional & Rural
ACT	8		
NSW	39	59	116
Northern Territory	8	0	9
Queensland	34	48	54
South Australia	12	7	7
Tasmania	6	0	4
Victoria	63	16	52
Western Australia	20	9	11

**Question 4****Are you an Australian citizen or permanent resident ?****N = 582**

91% were Australian citizens, 5% were permanent residents, 5% were New Zealand citizens and 1% had dual citizenship.

**Question 5****Do you identify as Aboriginal or Torres Strait Islander ?****N = 582**

Yes - 5%

No - 95%

**Question 6****Have you relocated to take advantage of industry opportunities ?****N = 571**

From rural/regional area to Town (less than 50,000 pop) - 9%

From rural/regional area to major city - 11%

From town to major city - 7%

From interstate - 9%

From overseas - 4%

None of these - 60%

**Question 7****Are you ?****N = 579**

A vocalist - 88%

An instrumentalist - 71%

A songwriter - 96%

**Question 8****How long have you been performing live in public ?****N = 580**

1-2 Years	4%
2-5 Years	5%
5-8 Years	9%
8-12 Years	8%
12-15 Years	8%
15-20 Years	13%
20-25 Years	14%
30-35 Years	14%
35-40 Years	8%
40+ Years	17%



**Question 9****What instrument/s do you REGULARLY use in your performances ?****N = 572**

Voice	92%
Acoustic Guitar	84%
Electric Guitar	39%
Mandolin	6%
Keyboards	14%
Drums	12%
Ukelele	6%
Percussion	10%
Banjo	5%
Fiddle	2%
Computer	7%
Bass	6%
Harmonica	4%

**Question 10****Have you had formal music training ?****N = 571**

No formal training (self taught)	55%
AMEB	11%
School music program	20%
TAFE	7%
University	8%
Conservatorium	4%
Private Lessons	48%
Industry Courses (Academy, workshops, retreats etc)	16%

**Question 11****What type of country do you enjoy listening to/watching?****N = 575**

Bluegrass	63%
Western Swing	41%
Bush Ballad	30%
Traditional Country	60%
Folk/Celtic	45%
Roots/Americana	68%
Contemporary Country Rock	53%
Classic Country Rock	59%
Contemporary Country Pop	38%
Classic Country Pop	39%
Outlaw Country	38%
Australiana Country	48%

**Question 12****Which types of country do you REGULARLY perform ?****N = 573**

Bluegrass	13%
Western Swing	12%
Bush Ballad	17%
Traditional Country	39%
Folk/Celtic	25%
Roots/Americana	48%
Contemporary Country Rock	42%
Classic Country Rock	39%
Contemporary Country Pop	27%
Classic Country Pop	24%
Outlaw Country	14%
Australiana Country	32%

**Question 13****On average, what percentage of your time per week is spent on your musical activities ?****N = 573**

	Time Spent Per Week
0-10%	4%
10-20%	16%
20-30%	21%
30-40%	12%
40-50%	10%
50-60%	10%
60-70%	11%
70-80%	6%
80-90%	5%
90-100%	5%

**Question 14****What percentage of your income is generated by being a musician/writer/performer ?****N = 563**

	Percentage of Income from Music		
	Amateur	Semi Pro	Professional
0-10%	63%	0%	0%
10-20%	18%	0%	0%
20-30%	19%	0%	0%
30-40%	0%	0%	0%
40-50%	0%	47%	0%
50-60%	0%	31%	0%
60-70%	0%	22%	0%
70-80%	0%	0%	9%
80-90%	0%	0%	10%
90-100%	0%	0%	81%

**Question 15****How do you supplement your music income ?**

N = 574

	Amateur	Semi Pro	Professional
Don't Supplement	17%	3%	58%
P-T work in music industry	11%	16%	5%
Casual work in the music industry	9%	27%	12%
P-T work outside industry	45%	20%	1%
Casual Work outside industry	28%	43%	11%
Receive Govt benefit	17%	43%	7%
Receive student allowance	1%	16%	1%
Sponsorship	1%	2%	5%
Family/Partner support	14%	11%	23%

**Question 16****How and what do you perform ?**

N = 574

	Amateur	Semi Pro	Professional
Solo - all original	25%	38%	37%
Solo - all covers	6%	18%	14%
Solo - original & covers	56%	58%	67%
Duo - all original	10%	11%	13%
Duo - all covers	5%	9%	8%
Duo - original & covers	29%	33%	30%
Group - all original	19%	33%	27%
Group - all covers	8%	16%	8%
Group - original & covers	35%	38%	33%

**Question 17****What percentage of the music you perform is original ?**

N = 578

	Amateur	Semi Pro	Professional
0-10%	18%	11%	8%
10-20%	15%	11%	9%
20-30%	9%	7%	13%
30-40%	7%	9%	7%
40-50%	6%	7%	8%
50-60%	3%	7%	5%
60-70%	7%	2%	9%
70-80%	19%	9%	9%
80-90%	10%	20%	15%
90-100%	20%	18%	16%

**Question 18****If you perform solo, do you use a backing band ?**

N = 582

Always - 6%, Sometimes - 37%, Rarely - 24%, Never - 34%

**Question 19****How far do you REGULARLY travel to perform ?****N = 567**

	<b>Amateur</b>	<b>Semi Pro</b>	<b>Professional</b>
1-10 Kms	25%	40%	23%
11-30 Kms	31%	42%	30%
31-50 Kms	28%	48%	37%
51-100 Kms	37%	53%	38%
101-200 Kms	23%	57%	41%
201-300 Kms	25%	55%	54%
Interstate	21%	53%	66%
Overseas	6%	18%	30%

**Question 20****How do you usually travel to LOCAL gigs ?****N = 571**

Walk - 3%, Public Transport - 6%, Own vehicle - 96%, Taxi - 1%, Uber - 5%, Hire vehicle - 1%

**Question 21****How do you usually travel to REGIONAL and/or INTERSTATE gigs ?****N = 563**

Own vehicle - 91%, Hire vehicle - 20%, Public Transport - 5%, Plane - 44%

**Questions 23 - 27****Estimate the number of gigs you played in the last 12 months at the following events/venues****N = 563**

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

**Question 28****What percentage of your live performances are FREE (no fee) ?****N = 563**

<b>% Free</b>	<b>Amateur</b>	<b>Semi Pro</b>	<b>Professional</b>
0%	18%	27%	38%
1-10%	30%	49%	47%
10-20%	9%	4%	5%
21-30%	4%	4%	1%
31-40%	3%	0%	0%
41-50%	5%	7%	3%
51-60%	4%	2%	2%
61-70%	3%	2%	2%
70%+	23	0	0%



## LIVE PERFORMANCE & INCOME STREAMS

### Questions 29 - 38

Can you estimate your AVERAGE fee for the following types of live performance ?

N = 577

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

### Question 39

What percentage of your music income comes from paid live performance ?

N = 575

Live Gig Income	Amateur	Semi Pro	Professional
0%	11%	0%	2%
1-10%	8%	2%	3%
10-20%	8%	4%	1%
21-30%	3%	2%	1%
31-40%	3%	4%	7%
41-50%	2%	16%	8%
51-60%	3%	5%	9%
61-70%	3%	11%	12%
71-80%	12%	20%	13%
81-90%	22%	20%	14%
91-100%	28%	15%	30%

### Question 40

What percentage of your income comes from songwriting royalties (APRA AMCOS/Publishing) ?

N = 577

Song Royalty Income	Amateur	Semi Pro	Professional
0%	35%	13%	9%
1-10%	61%	69%	63%
10-20%	3%	17%	23%
21-30%	1%	1%	5%

**Question 41**

What percentage of your income comes from record sales at gigs and/or from your website ?

N = 534

Artist Record Sales Income	Amateur	Semi Pro	Professional
0%	45%	13%	21%
1-10%	43%	51%	45%
10-20%	8%	13%	20%
21-30%	2%	13%	7%
31-40%	2%	6%	5%
41-50%	0%	4%	2%

**Question 42**

What percentage of your income comes from record royalties ?

N = 541

Record Royalty Income	Amateur	Semi Pro	Professional
0%	75%	53%	48%
1-10%	23%	41%	44%
10-20%	2%	4%	6%
21-30%	0%	2%	2%

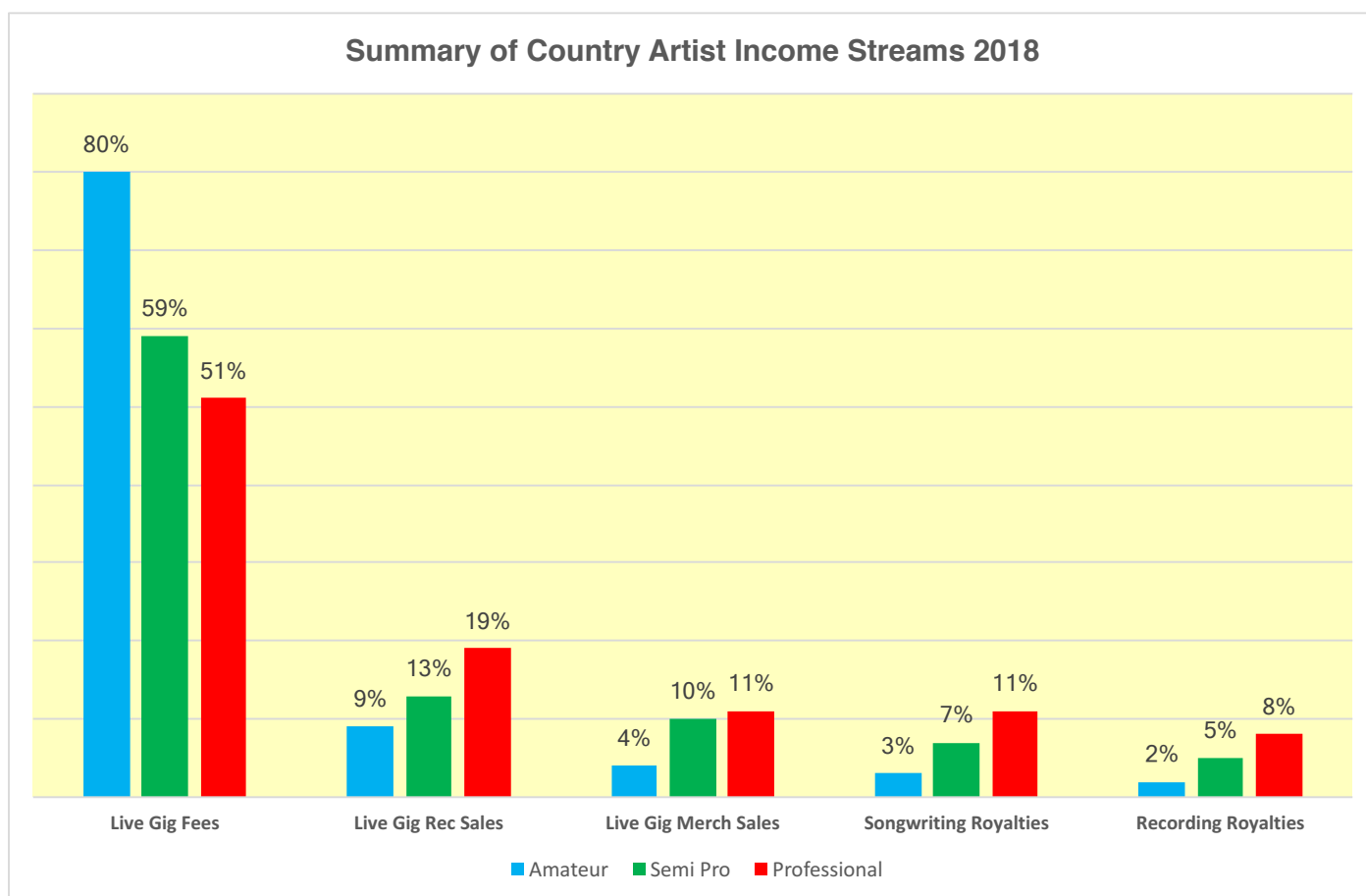
**Question 43**

What percentage of your income comes from merchandise sales at gigs ?

N = 540

Gig Merch Sale Income	Amateur	Semi Pro	Professional
0%	68%	45%	37%
1-10%	29%	40%	44%
10-20%	2%	10%	15%
21-30%	1%	5%	4%

## SUMMARY OF ARTIST INCOME STREAMS



## ARTIST RECORDINGS

### Question 44 - 45

**In the last 12 months, how many DEMO tracks did you record, and how many for COMMERCIAL release ?**

**N = 551**

In terms of DEMOS - 27% of Amateurs did no recording, Semi Pro - 23% no recording, Professiona - 22% no recording.

In terms of tracks for COMMERCIAL release - 10% of amateurs did no recording, Semi Pro - 30% no recording, Professional - 20% no recording.

The average number of tracks for those that did record -

	Amateur	Semi Pro	Professional
Demo Tracks	6	13	18
Commerical Release Tracks	0	10	13

**Question 46****Where and with whom did you record ?**

N = 521

	Semi Pro	Professional
Home studio - self-produced	33%	37%
Home studio - with producer	19%	29%
Commercial studio - self-produced	23%	15%
Commercial studio - with producer	49%	50%

**Question 47****How were the recordings financed ?**

N = 521

	Semi Pro	Professional
Self Financed	92%	80%
Prize	2%	2%
Family/Friends/Partner support	7%	13%
Major label	2%	7%
Independent label	7%	12%
Grant	7%	2%

**Question 48****How were the recordings distributed ?**

N = 521

	Semi Pro	Professional
Demos - not distributed	26%	28%
Self-distributed - physical at gigs	60%	54%
Self-distributed - physical through own website	47%	35%
Self-distributed - digital through own website	37%	30%
Through 3rd party distributor - physical	26%	19%
Through major label (physical & digital)	7%	9%
Through independent label physical & digital)	40%	31%
Soundcloud	7%	14%
Bandcamp	9%	13%
Through iTunes etc - downloads	44%	39%
Through streaming service	37%	40%

**SUMMARY OF COMMERCIAL RECORDINGS**

	Overall	Semi Pro	Professional
Tracks for Commercial Release	56%	70%	75%
Avg 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%



We asked a number of questions related to recorded product sales. We specified that these questions were to be answered by UNSIGNED artists ONLY, so that we did not double count sales reported by major and independent labels.

#### Question 49

Can you estimate your sales of PHYSICAL singles and EPs for the last 12 months ?

N = 501

Sales	Amateur	Semi Pro	Professional
0	10%	5%	5%
1-100	60%	47%	32%
101-200	12%	10%	14%
201-300	10%	8%	10%
301-400	8%	5%	11%
401-500	0%	3%	3%
501-700	0%	5%	4%
710-1000	0%	5%	6%
1001-1500	0%	5%	7%
1501-2000	0%	4%	3%
2001-3000	0%	3%	3%
3001-4000	0%	0%	2%

#### Question 50

Can you estimate your sales of PHYSICAL albums for the last 12 months ?

N = 501

Album Sales	Amateur	Semi Pro	Professional
0	15%	5%	6%
1-100	54%	37%	29%
101-200	12%	17%	14%
201-300	12%	11%	10%
301-400	3%	3%	11%
401-500	2%	10%	4%
501-700	2%	3%	4%
710-1000	0%	3%	9%
1001-1500	0%	3%	3%
1501-2000	0%	5%	3%
2001-3000	0%	3%	5%
3001-4000	0%	0%	2%

#### Question 51

Can you estimate your sales of single DOWNLOAD tracks for the last 12 months ?

N = 500

Download Sales	Amateur	Semi Pro	Professional
0	20%	5%	5%
1-100	60%	41%	32%
101-200	10%	13%	12%
201-300	6%	4%	10%
301-400	2%	3%	6%
401-500	1%	4%	4%
501-700	1%	3%	5%
710-1000	0%	3%	4%
1001-1500	0%	3%	2%
1501-2000	0%	5%	3%
2001-3000	0%	3%	5%
3001-4000	0%	3%	2%
4001-5000	0%	0%	3%
5001-7000	0%	0%	3%
7000-10000	0%	5%	2%
10000+	0%	0%	2%

#### Question 52

Can you estimate your sales of single DOWNLOAD albums for the last 12 months ?

N = 500

Download Album Sales	Amateur	Semi Pro	Professional
0	30%	14%	15%
1-100	52%	43%	37%
101-200	7%	12%	13%
201-300	4%	6%	8%
301-400	4%	3%	4%
401-500	1%	3%	3%
501-700	2%	5%	3%
710-1000	0%	3%	4%
1001-1500	0%	3%	4%
1501-2000	0%	5%	3%
2001-3000	0%	0%	5%
3001-4000	0%	0%	0%
4001-5000	0%	0%	0%
5001-7000	0%	0%	0%
7000-10000	0%	3%	0%
10000+	0%	0%	0%

**Question 53**

Can you estimate your number of STREAMED tracks for the last 12 months ?

N = 501

Music Stream Numbers	Amateur	Semi Pro	Professional
0	26%	11%	9%
1-100	39%	31%	32%
101-500	15%	9%	12%
501-800	5%	8%	9%
801-1200	4%	3%	2%
1501-2000	2%	7%	3%
2001-4000	4%	7%	10%
4001-7000	2%	3%	6%
7001-10000	2%	3%	3%
10001-15000	3%	4%	5%
15001-25000	2%	0%	2%
25001-40000	1%	4%	0%
70001-100000	1%	3%	1%
100001-200000	0%	3%	3%
200001-300000	0%	1%	1%
300001-500000	0%	0%	1%
500000+	0%	3%	1%

**SUMMARY OF COMMERCIAL RECORDINGS**

The unsigned artists responding to the survey, reported the following recorded product sales at gigs, from their own website, through independent distributors, through internet aggregators and streaming services.

	EPs & Singles	Albums	D'load Singles	D'load Albums	Streams
Amateur	22,000	27,000	30,000	17,000	386,000
Semi Pro	86,000	79,000	181,000	97,000	4,389,000
Professional	104,000	115,000	231,000	79,000	4,163,000
<b>TOTAL</b>	<b>212,000</b>	<b>221,000</b>	<b>442,000</b>	<b>193,000</b>	<b>8,938,000</b>

**Question 54**

In the last 12 months have you created promotional videos ?

N = 493

	Amateur	Semi Pro	Professional
No Videos	55%	31%	35%
1-5 Self-created	22%	24%	25%
1-5 Amateur Videographer	6%	5%	12%
1-5 Professional videographer	19%	33%	32%
6-10 Self-created	5%	11%	5%
6-10 Amateur Videographer	1%	4%	1%
6-10 Professional videographer	1%	7%	4%

**Question 55**

How were those videos financed ?

N = 592

	Amateur	Semi Pro	Professional
All self-financed	79%	77%	77%
Some self-financed	1%	11%	10%
All financed by label	1%	1%	5%
Some financed by label	1%	3%	5%
Financed by grant	0%	0%	0%
Financed by sponsorship	0%	3%	0%
Done as a favour	4%	14%	5%

## ARTIST ENGAGEMENT - MARKETING & PROMOTION

### Question 56

Which of the following internet/digital tools do you have/use ?

N = 567

	Amateur	Semi Pro	Professional
Own Website	54%	82%	79%
Facebook Page	89%	95%	100%
Instagram	49%	64%	81%
YouTube Channel	60%	71%	86%
Soundcloud Page	39%	52%	48%
Artist Page on other site	22%	35%	32%
Bandcamp Page	21%	20%	23%

### Question 57

Do you maintain the content yourself ?

N = 566

	Amateur	Semi Pro	Professional
Always	77%	66%	71%
Mostly	12%	27%	24%
Sometimes	4%	5%	5%
Rarely	3%	2%	0%
Never	3%	0%	0%

### Question 58

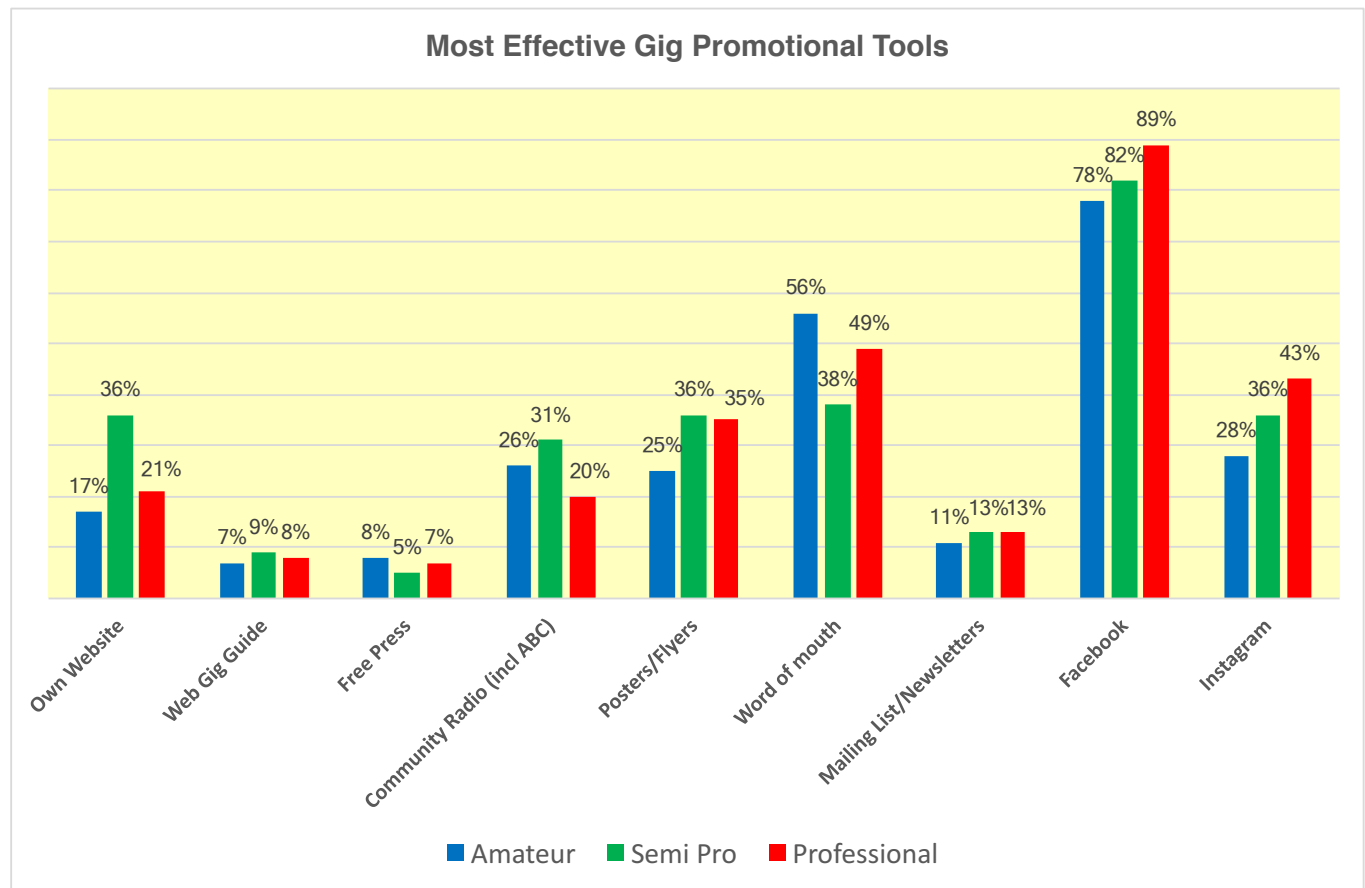
How do you promote your gigs ?

N = 567

	Amateur	Semi Pro	Professional
Own Website	43%	71%	71%
Web Gig Guide	30%	58%	43%
Free Press	23%	40%	27%
Paid print advertising	6%	24%	21%
Community Radio (incl ABC)	36%	60%	58%
Commercial Radio	1%	13%	11%
Posters/Flyers	52%	75%	64%
Word of mouth	71%	84%	76%
Mailing List/Newsletters	21%	44%	40%
Facebook	82%	91%	96%
Instagram	43%	58%	69%
Commercial/Cable TV	1%	4%	5%
Don't Promote Gigs	6%	4%	1%

**Question 59****Which promotion do you find the most effective ?**

N = 571

**Question 60****Which of these artist analytical tools have you used ?**

N = 551

	Amateur	Semi Pro	Professional
Shazam Connect	1%	4%	1%
Spotify for Artists	31%	51%	45%
Apple Music for Artists	11%	18%	19%
Google Play for Artists	5%	11%	5%
Google analytics (Facebook etc)	8%	19%	23%
None of these	60%	42%	49%



**Question 61****In the last 12 months, have appeared on/been involved in the following ?****N = 569**

	<b>Amateur</b>	<b>Semi Pro</b>	<b>Professional</b>
Country Music Press - feature	8%	20%	29%
Country Music Press - general story	15%	35%	41%
Local Print Media - feature	35%	45%	65%
Local Print Media -general story	42%	65%	57%
Metro Print Media - feature	6%	17%	14%
Metro Print Media - general story	7%	27%	19%
3rd Party Website - feature	27%	35%	40%
3rd Party Website - general story	25%	57%	45%
Regional TV - feature	4%	17%	11%
Regional TV - general story	8%	27%	19%
Metro/National TV - feature	1%	5%	8%
Metro/National TV - general story	3%	1%	10%
Community Radio - feature	60%	87%	83%
Community Radio - general story	42%	55%	65%
Commercial Radio - feature	15%	42%	37%
Commercial Radio - general story	8%	35%	38%

**Question 62****In the last 12 months have recordings received airplay on ?****N = 569**

	<b>Amateur</b>	<b>Semi Pro</b>	<b>Professional</b>
ABC National Radio	22%	48%	45%
ABC Local/Regional	34%	60%	59%
Country Music Channel	15%	23%	38%
Community Radio - Regional	76%	88%	87%
Community Radio - Metro	49%	77%	72%
Commercial Radio - Regional	22%	37%	42%
Commercial Radio - Metro	6%	21%	25%
Internet Radio	45%	53%	76%

**Question 63****In the last 12 months have your videos been exposed on ?****N = 570**

	<b>Amateur</b>	<b>Semi Pro</b>	<b>Professional</b>
ABC National TV	0%	5%	9%
ABC Regional TV	0%	3%	6%
Country Music Channel	18%	24%	47%
Community Regional TV	2%	3%	11%
Community Metro TV	4%	0%	5%
Commercial Regional TV	0%	5%	9%
Commercial Metro TV	0%	0%	5%
YouTube - shared by others	53%	81%	75%
YouTube - own channel	62%	73%	83%
Facebook - shared by others	71%	84%	90%
Facebook - posted on your page	70%	84%	90%
Instagram - shared by others	23%	51%	56%
Instagram - your own account	30%	57%	62%

## ARTIST & BUSINESS

### Question 64

Which of the following do you regularly employ ?

N = 571

	Amateur	Semi Pro	Professional
Manager	14%	27%	30%
Agent	14%	51%	56%
Publicist	25%	33%	46%
Sound Engineer	27%	40%	57%
Road/Stage Crew	5%	21%	41%
Tour Manager	1%	12%	13%
Graphic Designer	15%	20%	24%
Stylist	2%	3%	5%

It is interesting to compare results from artist respondents to the Melbourne Live Music Census 2017. We have excluded the 'Amateur' demographic from the Country Music Census figures.

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

### Question 65

What is your business structure ?

N = 571

	Amateur	Semi Pro	Professional
Sole Proprietor	68%	64%	69%
Partnership	14%	20%	14%
Private Company	2%	9%	7%
Trust	1%	0%	2%
Not Sure	14%	7%	7%

### Questions 68 - 70

If you are in a partnership, do you have a written agreement? Whether or not in a partnership, do you have an ABN? Are you registered for GST? ?

N = 569

	Amateur	Semi Pro	Professional
Written partnership agreement	15%	17%	17%
Have ABN	76%	87%	93%
Registered for GST	22%	29%	37%

**Question 71**

Are you a member of any of the following professional organisations?

APRA (Australasian Performing Right Association); AMCOS (Australian Mechanical Copyright Owners Society); PPCA (Phonographic Performance Company of Australia); CMAA (Country Music Association of Australia); AMAA (Americana Music Association of Australia); TSA (Tamworth Songwriters' Association); ABBA (Australian Bush Balladeers Association); Folk Alliance; State Music Association; MEAA (Media Entertainment & Arts Alliance).

N = 570

	Amateur	Semi Pro	Professional
APRA	91%	93%	93%
AMCOS	2%	5%	7%
PPCA	14%	38%	37%
CMAA	27%	57%	71%
AMAA	9%	11%	9%
TSA	19%	20%	28%
ABBA	1%	3%	3%
Folk Alliance	5%	13%	6%
State Music Association	9%	11%	15%
MEAA	2%	2%	3%
None	5%	0%	3%

Mindful that we are comparing a largely metro-based group of artists (Melbourne Live Music Census 2017) with a group of country artists much more widely spread geographically, it is nonetheless interesting to note that country artists exhibit a much greater involvement in their business affairs, particularly in terms of membership of appropriate industry organisations.

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

**Question 72**

If you collaborate, do you usually have ?

N = 567

	Amateur	Semi Pro	Professional
Verbal agreement on royalty split	31%	23%	36%
Written agreement on royalty split	3%	7%	6%
Use APRA to record royalty split	66%	70%	58%

**Question 73**

Have you applied for a government grant (local, state, federal) for any of the following ?

N = 569

	Amateur	Semi Pro	Professional
Songwriting	23%	27%	34%
Recording	39%	37%	32%
Touring - regional	21%	41%	32%
Touring - national	16%	27%	27%
Touring - international	11%	23%	20%
Marketing/Promotion	12%	23%	25%
Showcasing - domestic	6%	9%	8%
Showcasing - International	9%	18%	21%
Professional Development	7%	10%	15%

**Question 74**

If you have applied, have you been successful ?

N = 569

	Amateur	Semi Pro	Professional
Grant Success	25%	38%	34%

**PROFESSIONAL & CAREER DEVELOPMENT - THE ACADEMY****Question 75**

Have you been involved in the Junior Academy or Camerata program ?

N = 481

Yes - 9% No - 91%

**Questions 76 & 77**

How would you rate the JUNIOR program in terms of Professional Development (music/songwriting skills etc) and Career Development (industry info/networks etc)?

N = 53

	Very Useful	Useful	Neutral	Not Useful	Poor
Prof Development	41%	35%	14%	2%	1%
Career Development	40%	40%	17%	2%	1%

**Question 78**

Have you been involved in the Senior Academy (or College of Country Music) ?

N = 53

Yes - 16% No - 84%

**Question 79 & 80**

How would you rate the SENIOR program in terms of Professional Development (music/songwriting skills etc) and Career Development (industry info/networks ?

N = 53

Prof Development	57%	25%	15%	2%	1%
Career Development	55%	23%	17%	2%	3%



## MUSIC & WELLBEING

### Question 81

Has your hearing been affected by your music practice ?

N = 536

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

### Question 82

If your hearing has been affected, what did you do ?

N = 536

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

### Question 83

Do you regularly wear hearing protection ?

N = 536

	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%

### Question 84

Apart from your hearing, has your industry practice affected your physical health ?

N = 534

	Amateur	Semi Pro	Professional
Yes	23%	38%	44%
No	72%	58%	54%
Not Sure	5%	4%	2%

### Question 85

If yes, what did you do ?

N = 534

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

**Question 86****Has your industry practice affected your mental health ?****N = 541**

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

**Question 87****What action did you take ?****N = 541**

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

**THE MUSIC ENVIRONMENT****Question 88****Have you had an experience that made you feel uncomfortable or unsafe at a country music event/venue you played? ?****N = 522**

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

**And based on gender**

	<b>Male</b>	<b>Female</b>
Often	2%	3%
Sometimes	14%	22%
Rarely	21%	25%
Never	63%	50%

The sense of safety and comfort is highlighted by comparing country music artists with the broader genres artists who responded to the Melbourne Live Music Census 2017.

	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%

### Question 89

If you have felt unsafe or uncomfortable, who made you feel that way ?

N = 116

Venue staff	12%
Audience member/s	75%
Security staff	11%
Another performer	10%

### Question 90

What made you feel unsafe or uncomfortable ?

N = 116

Physical Threat	21%
Poor venue health & safety	16%
Poor venue security	26%
Audience behaviour - general	20%
Audience behaviour - individual	64%
Gender discrimination	16%
Age discrimination	9%
Racial abuse/discrimination	4%
Sexual harassment	3%

### Question 91

What did your experience lead you to do ?

N = 116

Leave venue/event early	33%
Report incident to venue staff	26%
Report incident to security staff	22%
Report incident to police	2%
Confront the offender	25%
Take no action	38%

## A BIGGER INDUSTRY

### Question 91

Which of the following would help increase attendance at country music events ?

N = 574

Cheaper event tickets	42%
Cheaper accommodation	45%
Better/more comfortable venue facilities	29%
Better sound quality	30%
Better visibility	21%
Improved disability access	16%
More diverse venues	37%
More diverse musical offerings	37%
Better event promo/info	41%
Increased airplay for Australian artists	80%
More Australian artists at major events	61%
More international artist at major events	18%
More oppotunities for emerging artists	67%
Better public transport	18%
Earlier event start/finish times	16%



# 9: Fan Survey Findings

AUSTRALIA'S BIGGEST INTERNATIONAL COUNTRY & ROOTS FESTIVAL

**CMC Rocks the Hunter 2014**

FOR THE FIRST TIME EVER IN AUSTRALIA

**TOBY KEITH**  
JOINED BY  
**GRETCHEN WILSON**

CLAY WALKER • ELI YOUNG BAND  
THOMPSON SQUARE • KELLIE PICKLER  
LEE KERNAGHAN • CRAIG CAMPBELL  
LOVE AND THEFT • JIM LAUDERDALE  
PAUL THORN • JAMES REYNE  
BLACKJACK BILLY • JEDD HUGHES  
BUSBY MAROU • MORGAN EVANS  
THE GREEN CASH • SHANE NICHOLSON  
REVEN DENOVY & THE FLOOD  
ADAM BICKENSHAY BAND  
LUKE O'NEAL • PETER MCWHITTER  
JOEY DIERKEN • ALSTYCE NEMMINGS  
MUSTERED COURAGE  
KAYLEIGH KAIN • LACHLAN BRYAN  
JAYKE DENHAM • KAYLEE BELL  
THE DAVENSON BROTHERS  
JASON GREY • WE THE GHOSTS  
COREY COLEMAN • WAGGONS  
THE VIKER CREEK BAND  
UPPER HARTMAN  
HOSTED BY ROBERT WARRICK  
AND MORE & BARRON CARR

36 INTERNATIONAL & LOCAL ARTISTS,  
3 DAYS OF NON-STOP MUSIC OVER 3 STAGES  
**FRI 14, SAT 15 & SUN 16 MARCH**  
HOPE ESTATE, HUNTER VALLEY

FESTIVAL & CAMPING TICKETS ON SALE NOW!  
BUY TICKETS AT: [CMCROCKS.COM](http://CMCROCKS.COM)

TICKETS SELLING FAST!

AMBER LIVINGSTONE

**Amworth Live**

MOUNT HUNTER COUNTRY MUSIC STAMPEDE 12-13-14 OCTOBER 2018

THE MOUNT HUNTER COUNTRY MUSIC STAMPEDE IS RETURNING BIGGER THAN EVER IN 2018!!

FEATURING

**ADAM HARVEY** **ADAM BRAND**

**SATURDAY 13 OCTOBER**

TICKETS ON SALE SOON!  
**K RANCH ARENA**  
180 MONKS LANE, MOUNT HUNTER

We received detailed survey responses from **4,329 country music fans**. To our knowledge, the most comprehensive sampling of fans of any genre undertaken in this country.

There were **1,212 responses (28%)** from fans aged between **18 and 35 years**; **1,341 (31%)** from fans aged between **36 and 49 years** and **1,775 (41%)** responses from fans aged **50 years and over**.

They came from every state and territory with 35% from metropolitan cities and suburbs, 25% from regional cities and 40% from regional/rural areas.

We are confident that the sample accurately reflects the behaviour and attitudes of Australian country music fans and, where appropriate, we have compared their responses with those recorded in other relevant studies on fan/patron behaviour.

## Question Responses

### Question 1

**What is your gender identity ?**

**N = 4,329**

Male - 40%, Female - 60%. Which almost exactly reverses the gender balance from the artist survey.

### Question 2

**What is your age ?**

**N = 4,329**

In detailed breakdown - Under 18 - 1%, 18-24 years - 9%, 25-29 - 9%, 30-35 - 10%, 36-40 - 11%, 41-49 - 20%, 50-59 - 21%, 60-69 - 18%, 70+ - 5%.

Across the age groups there was a balanced sample of responses in terms of gender.

	% Respondents	Male	Female
18-35 years	28%	24%	28%
36-49 years	31%	28%	32%
50+ years	41%	46%	38%

### Question 3

**Where do you reside ?**

**N = 4,329**

As with the artist survey, we achieved an excellent balance between states and territories and between cities, towns and rural areas.

	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%
<b>TOTAL</b>	<b>1512</b>	<b>1132</b>	<b>1685</b>	<b>4329</b>	
	<b>35%</b>	<b>25%</b>	<b>40%</b>		

**Questions 4 & 5****Are you an Australian Citizen or Permanent Resident ?**

N = 4,307

Australian Citizen - 89%, 7% Permanent Resident, 3% New Zealand citizen, 1% dual national.

**Do you identify as Aboriginal or Torres Strait Islander ?**

Yes - 4%, No - 96%

**Question 6****What is your current work status ?**

N = 4,320

	Overall	18-35 Years	36-49 Years	50+ Years
Self Employed	14%	11%	18%	17%
Employed full time	43%	54%	53%	28%
Employed part time	13%	13%	16%	11%
Employed casually	10%	15%	9%	8%
Home duties full time	6%	6%	7%	4%
Home duties part time	3%	3%	5%	2%
Retired	16%	0%	0%	32%
Unemployed seeking work	2%	3%	2%	2%
At school	1%	3%	0%	0%
At Tafe/Uni	6%	16%	4%	1%
Unable to work	3%	1%	3%	4%

**Question 6****How long have you been a country music fan ?**

N = 4,322

1-2 Years	1%
3-5 Years	2%
5-10 Years	4%
10-15 Years	6%
15-20 Years	8%
20-25 Years	9%
25-30 Years	11%
30-40 Years	13%
40+ Years	46%

### Questions 7

Which type of country music do you enjoy listening to ?

N = 4,319

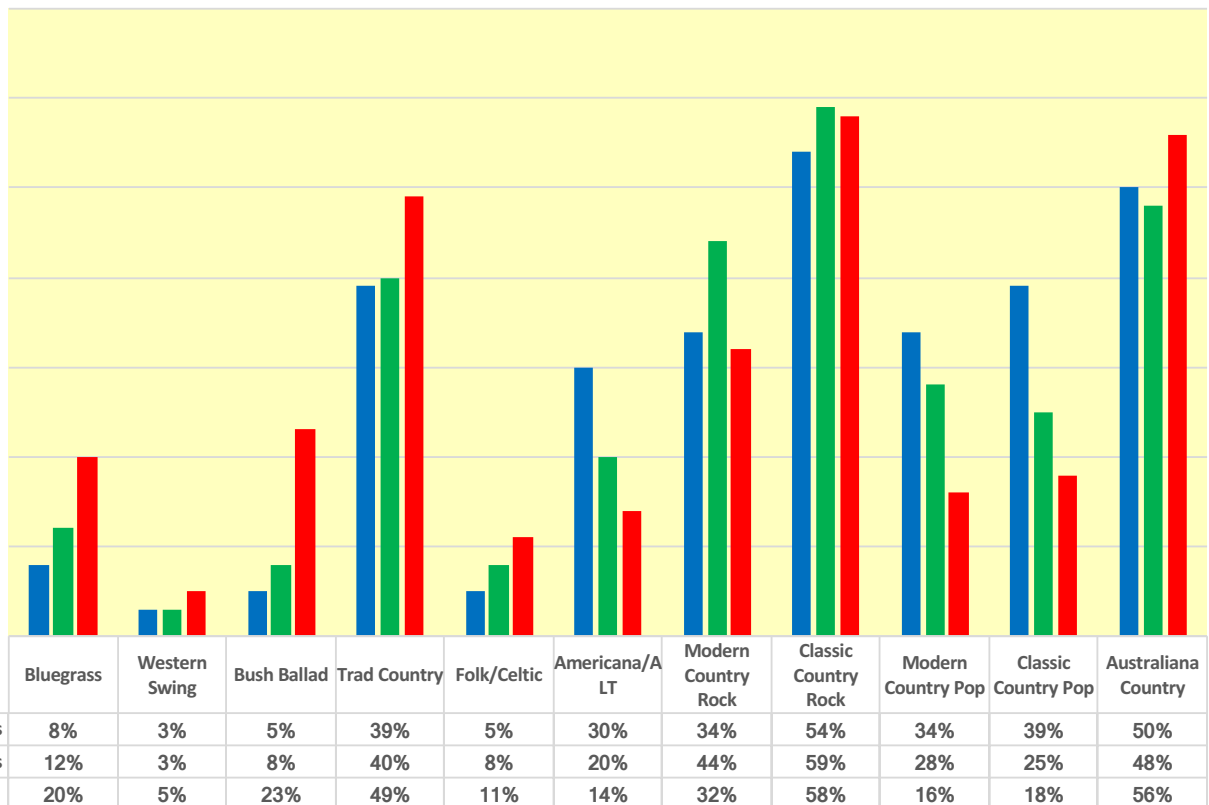
	18-35 years	36-55 years	56+ years
Bluegrass	33%	44%	51%
Western Swing	27%	20%	28%
Bush Ballad	33%	34%	49%
Trad Country	72%	69%	71%
Folk/Celtic	23%	29%	36%
Americana/ALT	59%	49%	37%
Modern Country Rock	64%	72%	60%
Classic Country Rock	82%	82%	79%
Modern Country Pop	58%	56%	40%
Classic Country Pop	71%	63%	51%
Outlaw Country	46%	37%	31%
Australiana Country	76%	73%	78%

### Question 8

Which type of country music is your favourite ?

N = 4,316

Favourite Country Music By Age Group



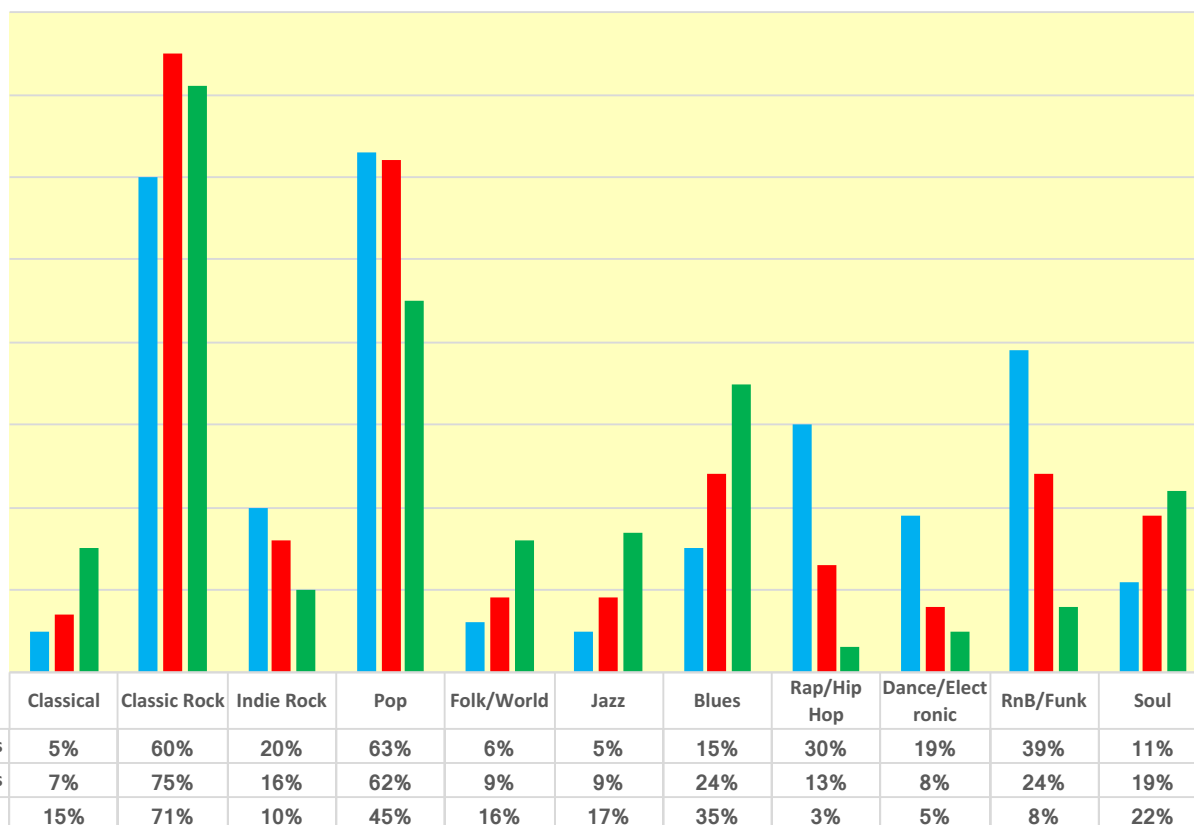


### Questions 9

Besides country, what other music do you REGULARLY listen to ?

N = 4,319

Country Fans Other Music Listening 2018



### Question 10

Can you estimate what percentage of your total music listening is devoted to country ?

N = 4,322

	18-35 Years	36-55 Years	56+ Years
0-5%	0%	1%	0%
5-10%	1%	1%	1%
10-20%	2%	3%	3%
20-30%	1%	5%	4%
30-40%	4%	4%	5%
40-50%	7%	6%	8%
50-60%	8%	9%	11%
60-70%	14%	14%	15%
70-80%	17%	13%	16%
80+%	45%	44%	37%

Listening to country music is not as dominant in the older age group as it is in the two younger groups but, on average, 40% of country music fans spend 80%+ of their time listening to country.

**Question 11****What percentage of your country listening is to music by Australian artists ?****N = 4,315**

	18-35 Years	36-55 Years	56+ Years
0-5%	3%	2%	1%
5-10%	6%	6%	3%
10-20%	10%	12%	6%
20-30%	18%	12%	8%
30-40%	14%	12%	8%
40-50%	19%	18%	15%
50-60%	12%	13%	16%
60-70%	8%	12%	17%
70-80%	4%	7%	12%
80+%	5%	8%	13%

While the preference for Australian and overseas artists is evenly divided in the two younger demographics, there is a clear preference for local artists among the older age group.

**Question 12****How do you listen to country music ?****N = 4,315**

	18-35 Years	36-55 Years	56+ Years
Commercial Radio	34%	44%	46%
Community Radio	19%	23%	38%
Internet Radio	24%	30%	23%
Live Gigs	54%	63%	64%
Facebook	27%	27%	29%
Instagram	13%	7%	4%
Soundcloud	6%	3%	3%
YouTube	55%	45%	45%
Sreaming - Phone	84%	63%	33%
Streaming - Other Device	29%	16%	11%
Own Music Collection	66%	74%	84%

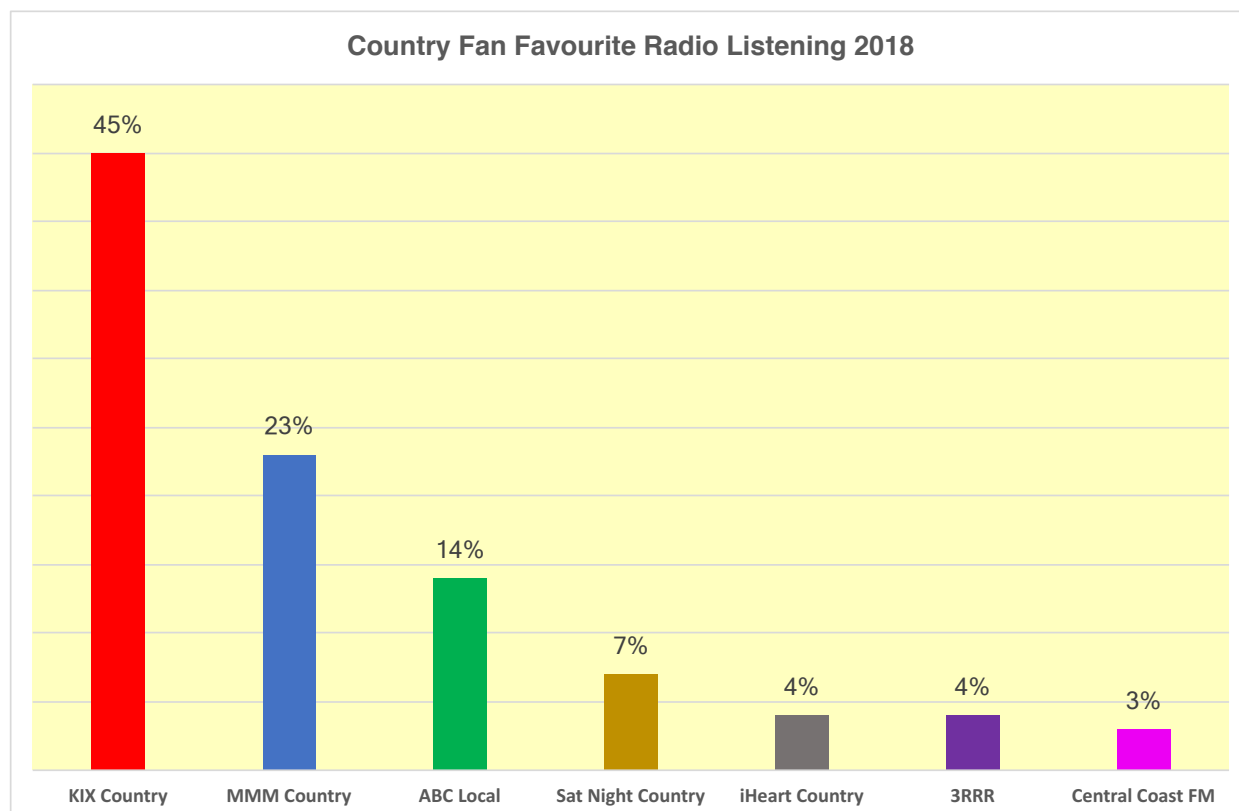
From what we have observed in terms of general music industry trends, streaming is becoming increasingly important, especially in the younger demographic where it dominates.

Commercial radio is still a vital source of music for all, while community radio increases in importance as the audience ages.

Older fans are far more likely to listen to music from their own collection and to attend live gigs.

**Question 13****How do you discover new country music ?****N = 4,316**

	18-35 Years	36-55 Years	56+ Years
Commercial Radio	26%	34%	40%
Community Radio - including ABC	15%	19%	34%
Internet Radio	24%	21%	20%
Word of Mouth	56%	51%	50%
Live Gigs	43%	46%	53%
Facebook	45%	45%	38%
Instagram	21%	7%	5%
Soundcloud	3%	2%	2%
YouTube	40%	31%	30%
CMC	11%	16%	13%
Streaming Playlists	64%	38%	21%

**Questions 14****Which is your favourite country music radio station ?****N = 4,309****Question 15****If you purchased physical recordings in the last 12 months, where did you get them ?****N = 4,295**

	At Artist Gig	Artist Website	Retail Outlet	Online Retailer	None
Overall	55%	21%	54%	13%	18%
18 - 35 years	40%	17%	51%	16%	28%
36 - 55 years	54%	21%	52%	15%	19%
55+ years	66%	24%	59%	38%	9%

In 2018, 82% of country fans purchased physical product. The younger group are less likely to purchase physical product, and when they do, are less likely to do so at a gig.

**Question 16**

If you purchased digital recordings over the last 12 months, where did you get them ?

N = 4,315

	Artist Website	iTunes	Other Online Retailer	None
Overall	13%	53%	12%	30%
18 - 35 years	10%	61%	12%	25%
36 - 55 years	13%	56%	14%	25%
55+ years	16%	44%	11%	38%

**Question 17**

On average, how much do you spend PER MONTH on physical recorded product ?

N = 4,321

	Overall	18-35 Years	36-55 Years	55 Years +
\$0	20%	30%	19%	10%
\$1 - 15	24%	26%	28%	29%
\$15 -30	28%	22%	22%	35%
\$30 - 50	16%	12%	16%	19%
\$50 - 75	6%	3%	5%	5%
\$75 - 100	2%	1%	2%	3%
\$100 - 150	1%	0%	1%	1%

Of the 82% overall who purchased physical product in the last 12 months, the average fan reported spending \$32 per month.

Half of this product was purchased through a direct transaction with the artist – gig and/or website.

**Question 18**

On average, how much do you spend MONTH on digital recorded product ?

N = 4,322

	Overall	18-35 Years	36-55 Years	55 Years +
\$0	34%	26%	29%	43%
\$1 - 15	33%	36%	36%	28%
\$15 -30	22%	24%	23%	20%
\$30 - 50	8%	9%	8%	6%
\$50 - 75	2%	3%	2%	2%
\$75 - 100	1%	1%	1%	1%
\$100 - 150	0%	0%	0%	0%

Of the 70% overall who purchased digital product in the last 12 months, the average fan reported spending \$18 per month. iTunes dominated sales.

These figures confirm the observations made elsewhere in this report that country music fans consume physical (especially) recorded music product at a higher rate than those involved in other genres.

The \$50 average per month spend (physical + digital) reported by our respondents was considerably more than the equivalent reported in the Melbourne Live Music Census 2017 (\$35) and the UK Live Music Census 2018 (\$25).



**Questions 19****Do you subscribe to a streaming service. If so, which one ?****N = 4,316**

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

**Questions 19A****What type of subscription do you have ?****N = 4,316**

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

The majority of the older demographic are signed up for ad-supported, free services. The younger demographic on the other hand, are not interested in this model.

A number of fans are signed up to more than one service.

It is fascinating to compare these responses with those from the Fan Survey conducted as part of the *'Melbourne Live Music Census 2017'*. That report found that 72% of fans had a streaming subscription with 71% paying for the service. The Melbourne study only had a 10% respondent rate in the 55+ year category as opposed to the 41% recorded in this survey.

If we remove the older category here in order to create a more like-for-like comparison, 80% of country fans aged between 18 and 55 years had a streaming subscription (Melbourne 72%), with 72% paying (Melbourne 72%).

**Country fans have, on average, taken to streaming as enthusiastically as have general music fans.**

**Question 20****If you have a paid streaming subscription, how much do you pay per month ?****N = 4,316**

	<b>18-35 Years</b>	<b>36-55 Years</b>	<b>55 Years +</b>
\$0	19%	37%	61%
\$1 - 10	17%	14%	9%
\$10 - 15	47%	32%	21%
\$15 - 20	14%	13%	6%
\$20 - 30	3%	4%	2%
\$30+	1%	1%	1%

The average was \$13 per month.

**Question 21****How do you share music with others ?****N = 4,318**

	18-35 Years	36-55 Years	55 Years +
Don't Share	9%	19%	24%
Share digital files	21%	13%	8%
Word of mouth	76%	60%	54%
Facebook	55%	54%	36%
Instagram	23%	9%	3%
Other social	17%	8%	5%
Mixtapes	2%	1%	1%
CDs	23%	24%	35%

**Question 22****Why do you go to country music gigs ?****N = 4,319**

The reasons for going to gigs are remarkably consistent across the demographic. Younger fans in particular value the social experience – ‘being with like-minded people’; ‘spending time with family/friends’; ‘meeting new people’, as much as they do the music.

	18-35 Years	36-55 Years	55 Years +
Fan of the artist	91%	90%	86%
Fan of the event/venue	42%	38%	37%
Fan of country music generally	82%	75%	74%
Entertainment - Good day/night out	83%	76%	71%
For inspiration/new ideas	11%	9%	7%
A spiritual/inspiring experience	10%	11%	9%
To be in the same room as artist	24%	20%	20%
To discover new music	49%	41%	35%
To feel energised/excited/Uplifted	39%	34%	32%
Sense of belonging with like-minded	37%	28%	26%
Deeper understanding of the music	14%	11%	11%
To meet new people	38%	23%	22%
To meet the artist	35%	31%	31%
To relax - escape everyday worries	48%	47%	45%
Spend time with family/friends	63%	61%	46%
To support the venue/event	41%	36%	44%

**Questions 25 - 30**

**In the last 12 months, how many live country music performances did you attend at the following type of event/venue ?**

**N = 4,315**

	<b>18-35 Years</b>	<b>36-55 Years</b>	<b>55 Years +</b>
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

**Questions 31**

**Where do you get your information about live gigs ?**

**N = 4,329**

	<b>18-35 Years</b>	<b>36-55 Years</b>	<b>55 Years +</b>
Artist mailing list	28%	31%	30%
Artist website	28%	36%	35%
Other website	25%	31%	33%
Facebook events	91%	89%	67%
Flyers/Posters	21%	20%	23%
Word of mouth	69%	65%	62%
Other social media	38%	24%	15%
Community radio	15%	16%	30%
Commercial radio	17%	24%	25%
TV	26%	23%	30%
Local newspapers	9%	12%	23%
Metro newspapers	1%	1%	4%
Magazines	5%	3%	8%
Phone App	11%	8%	6%

**Question 32 - 36**

**How much do you spend PER MONTH on tickets/door entry to country music gigs? ?**

**N = 4,311**

	<b>Festival</b>	<b>Concert</b>	<b>Club/Pub</b>	<b>CM Club</b>	<b>TOTAL</b>
No Spending	13%	20%	35%	62%	
Av Ticket Spend per Month	\$97	\$75	\$53	\$28	
Av Attendance	3	6	10	2	
Box Office	\$1,095,906	\$1,558,350	\$1,490,890	\$92,120	<b>\$4,237,266</b>

The spending was almost identical across the demographic, so the results are representative of the total response.

The revenue has already been calculated and included in the Live Music section.

### Comparative Data

We have the benefit of information provided for the *Melbourne Live Music Census 2017* and the *UK Live Music Census 2018*.

The table below summarises those findings and ours for fans who reported spending a minimum average of \$35 per month on live music tickets/door entry.

	Conc/Fest Tix	Pubs/Clubs
<b>Country Census 2018</b>	66%	48%
<b>UK Live Census 2018</b>	46%	37%
<b>Melbourne Live Census</b>	61%	40%

### Questions 37 - 44

**Estimate your ancillary spending (food/beverage, merchandise and transport), at each Festival, Major Concert and Club/Pub gig. ?**

**N = 4,305**

	NO Spend	Food & Beverage	Transport	Merchandise	TOTAL
Festival Av	8%	\$125	\$70	\$56	
Festival Spend		\$1,493,250	\$836,220	\$668,976	\$2,998,446
Major Concert Av	17%	\$78	\$50	\$33	
Major Concert Spend		\$1,121,016	\$1,077,900	\$711,414	\$2,910,330
Club/Pub Av	23%	\$52	\$35	\$26	
Club Pub Spend		\$1,733,160	\$1,166,550	\$866,580	\$3,766,290
<b>TOTAL ANCILLARY</b>		<b>\$4,347,426</b>	<b>\$3,080,670</b>	<b>\$2,246,970</b>	<b>\$9,675,066</b>

Again, there was almost no difference in the ancillary spending across the whole demographic. This revenue has also already been included in the Live Music section.

We do not have comparative data for all categories from other studies, but we do note that country music fans spent an average 10-20% more on food and beverage than Melbourne music fans, and 50% more on merchandise at equivalent gigs.

### Question 45

**How do you usually travel to and from gigs ?**

**N = 4,316**

	18-35 Years	36-55 Years	55 Years +	Overall
Public Transport	33%	29%	19%	26%
Private Car	90%	94%	94%	93%
Hire Car	5%	3%	3%	4%
Bike	1%	0%	0%	0%
Walk	11%	7%	6%	8%
Taxi	16%	15%	10%	13%
Plane	12%	12%	13%	13%
Coach	2%	3%	4%	3%
Uber	21%	15%	7%	13%

**Question 46****How far do you usually travel to attend country music gigs ?****N = 4,316**

	18-35 Years	36-55 Years	55 Years +	Overall
1-5 Kms	1%	2%	3%	2%
5-10 Kms	4%	4%	6%	5%
10-20 Kms	7%	6%	10%	8%
20-35 Kms	6%	9%	9%	8%
35-50 Kms	9%	10%	10%	10%
50-100 Kms	18%	19%	18%	18%
100+ Kms	55%	50%	44%	49%

**Question 47****If you travel to a gig that requires an overnight stay, do you usually - ?****N = 3,851**

	18-35 Years	36-55 Years	55 Years +	Overall
Stay with friends	13%	11%	9%	11%
Camp	52%	33%	16%	31%
Use own caravan	2%	9%	20%	12%
Use caravan park	1%	2%	3%	2%
Book motel	15%	29%	36%	28%
Book hotel	12%	11%	6%	9%
Book Air BnB	2%	2%	2%	2%
Don't Overnight	4%	5%	8%	6%

**Question 48****When you travel away from home for a country music event, can you estimate how much you spend per day in the local community away from the event venue ?****N = 3,782**

	18-35 Years	36-55 Years	55 Years +	Overall
\$0	5%	6%	6%	5%
\$10-50	22%	18%	21%	21%
\$50-100	37%	37%	36%	36%
\$100-\$150	19%	20%	21%	20%
\$150-200	10%	9%	9%	9%
\$200-250	5%	6%	4%	5%
\$250+	3%	4%	3%	3%

95% of those surveyed spend an average of \$90 per day either in the local community hosting the event or communities in the surrounding region.



**Question 49****Who are your three favourite country music artists ?****N = 4,319**

Allocating votes on a 3, 2 and 1 basis for 1st, 2nd and 3rd preferences, the artists who were the most popular across the age groups were –

	<b>Top 20 - 18-35 yrs</b>		<b>Top 20 - 36-55 yrs</b>		<b>Top 20 - 56+ yrs</b>
1	Luke Bryan		Keith Urban		Beccy Cole
2	Luke Combs		Lee Kernaghan		Adam Harvey
3	Lee Kernaghan		Beccy Cole		Troy Cassar-Daley
4	Keith Urban		Adam Brand		Lee Kernaghan
5	Kip Moore		Garth Brooks		Keith Urban
6	Carrie Underwood		Luke Combs		Kasey Chambers
7	Florida Georgia Line		Tim McGraw		John Williamson
8	Sunny Cowgirls		Kasey Chambers		Alan Jackson
9	Garth Brooks		Travis Collins		Sara Storer
10	Adam Brand		Troy Cassar-Daley		Slim Dusty
11	Tim McGraw		Luke Bryan		Graeme Connors
12	Kasey Chambers		Alan Jackson		The Bushwackers
13	Alan Jackson		Adam Harvey		Adam Brand
14	Slim Dusty		Wolfe Brothers		The McClymonts
15	Travis Collins		The McClymonts		Amber Lawrence
16	Beccy Cole		Carrie Underwood		Garth Brooks
17	John Williamson		Kip Moore		Travis Collins
18	Morgan Evans		John Williamson		Simply Bushed
19	Wolfe Brothers		The Bushwackers		Wolfe Brothers
20	Troy Cassar-Daley		Dolly Parton		Tom Mawell

**Question 50****Which are your three favourite music festivals ?****N = 4,317**

1	Tamworth CM Festival
2	Deni Ute Muster
3	CMC Rocks
4	Gympie Music Muster
5	Groundwater CM Festival
6	Mildura CM Festival
7	CMA Nashville
8	Cruisin' Country
9	Big Red Bash
10	Dashville Skyline
11	Way Out West
12	Central Coast CM Festival

Again, we allocated 3,2 and 1 points for 1st, 2nd and 3rd preferences.

Tamworth CMF was a clear winner, and the first four were clear-cut favourites. Second and third positions were separated by only a handful of votes.

Honourable mentions go to Boyup Brook, Central Coast CM Festival and Woodford and Port Fairy folk festivals who all polled just outside the top rank.

**Question 51****Three favourite country music venues ?****N = 4,317****Top 40 Overall -**

Place	Venues
1	West's League Tamworth
2	Rod Laver Arena Melbourne
3	TRECC Tamworth
4	Longyard Hotel Tamworth
5	Brisbane Entertainment Centre
6	Rooty Hill RSL Sydney
7	Capitol Theatre Tamworth
8	Qudos Arena Sydney
9	The Pub Tamworth
10	Toyota Park Tamworth
11	Forum Theatre Melbourne
12	Johnny Ringos Brisbane
13	Enmore Theatre Sydney
14	Hope Estate Hunter Valley
15	Lefty's Old Time Music Hall Brisbane
16	West Diggers Tamworth
17	Town Hall Tamworth
18	Gateway Hotel Geelong
19	Lizzotte's NSW
20	Palias Theatre Melbourne
21	Albert Hotel Tamworth
22	Hallam Hotel Melbourne
24	Palms at Crown Melbourne
25	Tivoli Brisbane
26	York on Lilydale Melbourne
27	Services Club Tamworth
28	Tamworth Hotel
29	Gt Western Hotel Rockhampton
30	Grand 'Ole Opry Nashville
31	Spotted Mallard Melbourne
32	DAG Sheep Station Nundle NSW
33	Joe Maguire's Tamworth
34	Moonshiners (Family Hotel) Tamworth
35	Kinross Woolshed NSW
36	Twin Towns Services Club NSW
37	Adelaide Entertainment Centre
38	Commercial Club Albury NSW
39	Caravan Music Club Melbourne
40	Retreat Hotel Melbourne

**Favourite Large Venue -**

Place	Large Venues
1	Rod Laver Arena Melbourne
2	TRECC Tamworth
3	Brisbane Entertainment Centre
4	Capitol Theatre Tamworth
5	Qudos Arena Sydney
6	Toyota Park Tamworth
7	Forum Theatre Melbourne
8	Enmore Theatre Sydney
9	Hope Estate Hunter Valley
10	Town Hall Tamworth
11	Palias Theatre Melbourne
12	Palms at Crown Melbourne
13	Grand 'Ole Opry Nashville
14	Adelaide Entertainment Centre
15	Empire Theatre Toowoomba

**Favourite Small Venue -**

Place	Small Venues
1	West Leagues Tamworth
2	Longyard Hotel Tamworth
3	Rooty Hill RSL Sydney
4	The Pub Tamworth
5	Johnny Ringos Brisbane
6	Lefty's Old Time Music Hall Brisbane
7	West Diggers Tamworth
8	Gateway Hotel Geelong
9	Lizzotte's NSW
10	Albert Hotel Tamworth
11	Hallam Hotel Melbourne
12	Tivoli Brisbane
14	York on Lilydale Melbourne
15	Services Club Tamworth
16	Tamworth Hotel
17	Gt Western Hotel Rockhampton
18	Spotted Mallard Melbourne
19	DAG Sheep Station Nundle NSW
20	Joe Maguire's Tamworth
21	Moonshiners (Family Hotel) Tamworth
22	Kinross Woolshed NSW
23	Twin Towns Services Club NSW
24	Commercial Club Albury NSW
25	Caravan Music Club Melbourne
26	Retreat Hotel Melbourne
27	Corner Hotel Melbourne
28	Oasis Hotel Tamworth
29	Canterbury Hurlstone RSL Sydney
30	Union Hotel Melbourne

**Questions 52 - 57****Specialist Questions**

We are in no doubt that Choose Your Cruise's generous donation of an oceanview balcony stateroom on Cruisin' Country 2019, helped to generate a record fan response to our survey. So, we asked some specific questions on their behalf.

**Question 52**

**How would you rate your Cruisin' Country musical experience ?**

N = 519

Excellent	69%
Good	23%
Satisfied Expectations	7%
Below Expectations	1%
Poor	0%

**Question 53**

**How would you rate Cruisin' Country in terms of value for money ?**

N = 519

Excellent	49%
Good	38%
Satisfied Expectations	11%
Below Expectations	1%
Poor	0%

**Question 54**

**How likely would you be to recommend Cruisin' Country to others ?**

N = 519

Very Likely	63%
Likely	20%
Neutral	13%
Somewhat Unlikely	2%
Wouldn't Recommend	1%

Another of our major research partners was the Tamworth Regional Council. We included several specific question about the Tamworth Toyota Country Music Festival.

**Question 55**

**How many times have you been to the Tamworth Country Music Festival ?**

N = 4,309

	18-35 Years	36-55 Years	55 Years +	Overall
0	61%	45%	29%	42%
1 to 2	23%	26%	23%	24%
3 to 4	8%	9%	10%	9%
5 to 7	5%	8%	13%	9%
8 to 10	1%	3%	4%	3%
11 to 13	1%	2%	4%	3%
14 to 17	1%	2%	3%	2%
18 to 20	0%	1%	2%	1%
20+	1%	4%	11%	6%

**Question 56****On average, how long do you/did you stay ?****N = 2,285**

	18-35 Years	36-55 Years	55 Years +	Overall
1 Day	14%	8%	4%	7%
2-3 Days	38%	27%	17%	24%
4-5 Days	23%	28%	22%	24%
6-7 Days	9%	9%	16%	12%
8-10 Days	16%	28%	41%	32%

**Question 57****Why do you go to the Tamworth Festival ?****N = 2,285**

	18-35 Years	36-55 Years	55 Years +	Overall
Enjoy thje general atmosphere	78%	78%	82%	80%
Discover new country acts	63%	64%	70%	67%
See favourite artists	69%	75%	81%	77%
Socialise with friends/family	57%	57%	55%	56%
Meet/network with musicians	20%	21%	19%	20%
Attend the Awards	13%	17%	21%	18%
Attend other non-music events	9%	8%	11%	10%

**FAN WELFARE & WELLBEING****Question 58****Have you had an experience that made you feel unsafe or uncomfortable at a country music event/venue you attended ?****N = 4,311**

	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%

We are delighted to report that 90% of fans across all age groups feel safe and comfortable at country music gigs. As we did with the Artist response, we filtered the response by gender.

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

We are in the fortunate position of being able to compare responses not only with country music Artists in this current study, but also with fans and artists who answered exactly the same question in the *Melbourne Live Music Census 2017*.

The results are illuminating, in confirming that both fans and artists attending country music gigs have experienced far less 'unsafe' behaviour than their equivalents in the broader popular music communities.

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

### Question 59

If you had such an experience, what made you feel that way ?

N = 456

The very small number who recorded feeling unsafe/uncomfortable at a country music gig identified the following reasons -

	18-35 Years	36-55 Years	55 Years +	Overall
Poor venue health & safety	9%	6%	9%	8%
Poor venue security	14%	13%	12%	13%
Crowd behaviour - general	26%	24%	14%	22%
Crowd behaviour - individual/s	61%	53%	49%	55%
Age discrimination	5%	2%	4%	4%
Gender discrimination	7%	3%	2%	4%
Racial abuse	3%	2%	2%	2%
Physical threat	7%	6%	7%	7%



**Question 60****Who made you feel that way ?****N = 956**

	<b>18-35 Years</b>	<b>36-55 Years</b>	<b>55 Years +</b>	<b>Overall</b>
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%

Intoxication of audience members, was identified overwhelmingly as the greatest contributor to feeling uncomfortable or unsafe.

**Question 61****What action did you take ?****N = 954**

	<b>18-35 Years</b>	<b>36-55 Years</b>	<b>55 Years +</b>	<b>Overall</b>
Leave venue/event early	17%	20%	27%	21%
Report incident to venue staff	8%	13%	14%	11%
Report incident to security staff	14%	14%	12%	13%
Report incident to police	2%	3%	2%	3%
Confront the offender	14%	11%	8%	11%
Take no action	66%	60%	54%	61%

**Question 64****What would increase attendance at country music events/venues ?****N = 4,321**

	<b>18-35 Years</b>	<b>36-55 Years</b>	<b>55 Years +</b>	<b>Overall</b>
Cheaper event tickets	63%	58%	53%	57%
More Australian artists at major events	39%	40%	46%	42%
Increased airplay for Australian artists	32%	40%	49%	41%
More international artist at major events	53%	41%	22%	37%
Cheaper accommodation	29%	32%	40%	35%
More oppotunities for emerging artists	29%	32%	33%	32%
Better/more comfortable venue facilities	22%	25%	25%	23%
Better event promo/info	27%	22%	26%	25%
More diverse venues	22%	22%	17%	20%
Better visibility	19%	13%	20%	17%
Better public transport	16%	16%	14%	16%
More family friendly events	5%	14%	19%	13%
Better sound quality	10%	10%	15%	12%
Earlier event start/finish times	8%	9%	12%	10%
More diverse musical offerings	10%	9%	9%	9%
Improved disability access	7%	6%	9%	7%

### Question 65

**What words best describe your emotional, social and cultural experience at a country music gig?**

**N = 519**



## 10: Conduct, Methodology & Sources





# Conduct & Methodology of the Census

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 and involved a variety of sources and methods.

## Project Summary

In 1996 the CMAA commissioned research by then board member Dobe Newton to create the *'Industry Profile of Country Music in Australia'* (1997) report.

It was the first such study undertaken for the country music sector, and its findings 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 a description and valuation of practitioner/business operations, employment statistics and event revenue generation data.
2. To measure and record 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.

The project was planned and undertaken in the anticipation that the findings will 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 support the creation, presentation and distribution of country music.

It will also provide all industry stakeholders and businesses with a powerful, credible and consistent narrative to inform their own decision making.

The data will enhance the promotion of the genre and ensure the continued viability of operations and the thousands of genre-related jobs created annually in Australia.

Specifically -

1. Up-to-date and relevant information on practitioner activity 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 detailed 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. Will provide practitioners and stakeholders with important and quantifiable data to inform and strengthen approaches to potential supporters in the private and public sectors.



## Conduct & Methodology 2

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 all the way up the chain to those involved in national deliberations.

### Logistics

#### Desk Research

A large number of secondary sources – reports, articles, books, blogs, websites etc have provided essential information, especially in terms of industry context.

We are indebted to industry colleagues and interviewees for alerting us to many of these sources.

#### Interviews

A number of interviews were conducted across the sector with prominent operatives.

The author's involvement in country music since the early 80s enabled him to activate a number of personal networks and relationships in eliciting information.

In some cases, the information was provided on a confidential basis in return for a written undertaking that we would only report cumulative data for a particular area of operation rather than identify individual businesses/organisations.

It was especially pleasing to be able to conduct face-to-face interviews with a number of writers, artists and producers currently resident in Nashville which has become an increasingly important part of the Australian country music story.

#### Surveys

A number of online surveys were developed for practitioners and operatives across the genre.

They were designed to provide data on the creative practice of artists and songwriters, revenue from events and product sales, media activity, employment and consumer behaviour and preferences.

The two most extensive were those developed for country music Artists and Fans. With **582** and **4,329** responses respectively, it was the most extensive sampling ever undertaken for our genre.

Having conducted the original country music research (1997) and two Melbourne Live Music Census projects (2012 & 2017), the author was in the enviable position of being able to use the surveys developed for those as a template. By replicating some of the questions which are generic to fans and artists in all music genres, it was thus possible to draw a number of comparisons to provide insights and inform the current findings where appropriate.

In terms of the Fan survey, a conscious effort was made to ensure the sample was balanced in terms of gender, age and location to ensure credible and nationally representative responses.

This was achieved with the help of a number of organisations and businesses who distributed the survey link to their fan and patron databases and mailing lists.

Private and public Facebook groups were also invaluable in promoting the survey and links.

In some instances where survey responses from a sector were smaller than the estimated total, we have combined data from a number of industry sources with opinions gathered from consultation with a number of industry experts to aggregate results.

However, this process has only been undertaken selectively and always with a conservative approach.

Where any uncertainty exists, we have 'noted' information, but have not relied on it for key findings.

We are therefore confident that the key findings reported are accurate and provide a verifiable analysis of the country music genre in 2018.





## Conduct & Methodology 3

The approach adopted for this research is largely based on a quantitative analysis.

Partly, this was determined by the limited resources available which precluded, for instance, an input/output modelling approach. Mostly however, it was a conscious decision to avoid, wherever possible, the jargon and economic formulae which have made a number of academic reports unnecessarily confusing and somewhat difficult for lay readers to understand.

As the purpose of the report is to provide practitioners, business operatives and fans with a clear and readily digestible set of key findings, I believe this approach was justified and appropriate.

Because it is 20 years since the last detailed research into the country music sector, a conscious decision was made to include a large amount of background information and historical context so that those without a detailed understanding of or involvement in our industry will have a greater appreciation of the genre and how and why it takes its place as a significant player in the current Australian music industry.

We trust our more informed colleagues will indulge any repetition, in the interests of confirming country music's importance to the broadest possible audience.

### **Definition of a Live Gig**

As live performance is, and always has been, a prominent and important feature of our genre, it is important to explain and qualify the reported data.

There are many definitions of what constitutes a live music performance.

For the purposes of this study (and many others) a live music performance is defined as 'a creative presentation of music by a featured performer in the presence of an audience gathered in a public space where appropriate technology is utilised to communicate that performance to those in attendance'.

A 'featured' performer is one who is specifically named in advertising/promotion. Where performers were not named – eg. 'open mic' nights, 'club nights' etc, they have not been included in our determination of regular presentation.

This allows us to err on the side of caution in our calculations.

### **Live Performance Australia – Revenue & Attendance – Major Venues**

LPA's annual Revenue & Ticket survey has been relied on by all previous studies for definitive information on audience numbers and box office revenue from presentations at large venues (arenas, theatres, concert halls, festivals etc) across the performing arts.

Their auditors, Ernst & Young, collate revenue information supplied by major ticketing agencies and reporting by an extensive group of performing arts presenters – organisations, companies, venues, promoters.

Their annual report obviously does not include those who ticket their own events direct to the public, but these are relatively few in number in the major events sector.

In terms of the smaller venues – pubs, clubs, bars etc, the task of measuring live performance with accuracy is much more difficult in the absence of any reporting agency.

It is however essential, as confirmed by the two Melbourne Live Music Census reports, which demonstrated the 'iceberg effect', with the bulk of live performance taking place in venues that traditionally fly under the statistical radar.

We have the benefit of artist responses to their survey, and conducted a detailed examination and analysis of gig listings - hard-copy and digital, to gather appropriate information.



## Conduct & Methodology 4

Where detailed information was unavailable or unverifiable, no definitive assumptions have been made.

### Revenue Reporting

Where reporting involves a consideration of global markets, particularly for recorded music product sales, we have converted currencies to \$AU to provide direct and clear comparison.

### Ancillary Spending

This is spending by patrons - in addition to event/performance entry charges, that occurs when they attend a live performance.

In calculating this spending we have based the calculation on the results from our Fan survey (4,329) and the information shared by a number of major events organisers and promoters.

In order to verify that information, we also have the benefit of a number of previous, authoritative reports: the *'Melbourne Live Music Census 2012 & 2017'* (Music Victoria), *'The Adelaide Live Music Census 2016 & 2017'* (Music SA & Live Music Office), *'The Economic and Cultural Value of Live Music in Australia in 2014'* (University of Tasmania, The Live Music Office and partners), *'Wish You Were Here 2017: The Economic Contribution of Live Music to the UK Economy'* (UK Music) and *'Valuing Live Music: UK Live Music Census'* (2018).

These confirm our survey findings that tickets account for only 20-25% of patron outlay, and that spending on food, drink, transport, merchandise and accommodation associated with attendance at live music performances accounts for approximately 65% of overall outlay.

In calculating this ancillary spending we have discounted the audience figures to reflect youth involvement and those audience survey respondents who report spending \$0 on food, drink, transport, merchandise and accommodation connected with their attendance at live music gigs.

Taking the lead from the 2018 *'UK Live Music Census'*, we asked our Fans to identify their off-site spending in the local community/region when patrons travel considerable distances – as they often do, to and from country music events.

This produced some interesting insight into the value of 'music tourism' in regional Australia where most of our major events occur.

We are confident that the sample sizes (see individual sections) are appropriate to verify the reported findings.

### Country's Industry Share

In 1997, we estimated that for the purposes of calculating revenue and value, country music as a genre had a 7% market share.

The reported figures in this study are based on an estimate of 10% market share.

We are confident that this figure is realistic, indeed conservative, being based on and substantiated by our research and a broad range of industry indicators.



## Conduct & Methodology 5

The indicators include -

- The detailed feedback from 4,329 country music fans and 582 artists provides the most robust sample ever achieved for a single music genre in this country.
- 14% of registered APRA members identify as 'country' writers, and 91% of artist respondents are members. APRA revenue has more than doubled since our original study.
- The live audience for major country music events – and hence the revenue generation and spending associated with them, has more than doubled since 1997.
- Artists and businesses now have greatly enhanced opportunities to promote and monetize products and services. All evidence suggests they have done so at increased levels.
- Major industry indicators report robust growth across popular music genres. With the notable exception of ARIA sales and revenue which, thanks largely to dramatically increasing streaming income, are at last on the upward trend after a decade in the financial doldrums.
- Information supplied to us by ARIA confirms that sales of the Top 50 country albums in 2017 and 2018 represented 15% and 19% of the total sales for the Top 50 all-genre albums for those years.
- Sales of the Top 50 country albums increased by 20+% in 2018 compared to 2017. Industry analytics company Statista.com has consistently credited country music in Australia with a 8-9% industry share across the last 10 years.
- Streaming service Spotify has reported significant growth in the country genre, and identified Australia, in 2018, as the fastest-growing country market in the world and the third-largest overall.
- Industry experts consulted during the course of this study, endorse the market share we have allocated.
- AMPCOM, which reports on new release Australian music on commercial radio, identified country music's content share at 14.2% in 2018. It was the second most popular genre after pop/rock/dance, doubling its airplay share since 2000 and, in terms of growth, outperforming all other genres.

### **Note on Survey Percentages**

Many of the questions we asked in our surveys, particularly those developed for country music artists and fans, were multiple choice with respondents asked to answer 'all that apply'. In those instances the percentages recorded are often in excess of 100%. The intent was to elicit and provide as much information as possible on practices and behaviours. Where this has occurred, the percentages have been adjusted as appropriate in order that those results NOT impact the integrity of the overall reporting.





## Conduct & Methodology 6

### **Exclusions**

It should be noted that there are a number of major events that have a (sometimes significant) country music component.

For example – the Melbourne, Adelaide, Perth and Sydney Festivals, Womadelaide, Bluesfest, Port Fairy Folk Festival, Woodford Folk Festival, St Kilda Festival, Vivid, Moomba ... and dozens of smaller festivals in towns and suburbs across the nation.

The largest of these events sit in Live Performance Australia's 'multi category' festivals. As the popularity of the genre has increased, so has the country program component.

However, although noted, it is not possible to accurately quantify this component for the purposes of this report. While there is no doubt that significant income/spending takes place, further work needs to be done to analyse the detail of country music programming.

### **Disclaimer**

This report does not claim to be THE definitive source of all information on the country music sector. It lacks, for instance, the measurement tools and economic expertise to accurately measure the 'value add' of the genre. That work remains to be done.

We owe a very considerable debt to a number of authors and researchers whose work has greatly added to our knowledge and appreciation of the importance of music presentation and consumption. They are acknowledged in the body of the report where specific information has been sourced.

The report contains some comments, observations and conclusions.

Many are based on the collected survey data, and information gleaned from industry reports and studies. Some however, are more general in nature and are based on the author's 48-year professional involvement in Australia's music scene as a performer, administrator, industry consultant, researcher, educator and project manager.

Any errors or omissions are entirely the responsibility of the author and not those of the many individuals and agencies who have so generously contributed to this work.



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A Report Prepared for the CMAA

By

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