McAtamney & Advisors

Australian Government

Music Australia

The Bass Line

Charting the economic contribution of Australia's music industry

Acknowledgement of Country

Music Australia acknowledges the many Traditional Custodians of Country throughout Australia and honours their Elders past and present.

We respect their deep and enduring connection to their lands, waterways and surrounding clan groups since time immemorial. We cherish the richness of First Nations peoples' artistic and cultural expressions.

We are privileged to gather on this Country and to share knowledge, culture and art, now and with future generations.

About Music Australia

Music Australia is a dedicated new body within Creative Australia which exists to support and invest in the Australian contemporary music industry, with the aim of modernising cultural infrastructure to suit the contemporary landscape. It has been deliberately designed to reach into the commercial sectors, where traditional grants funding models have been limited.

Music Australia is responsible for:

(a) supporting and promoting Australian contemporary music practice; and

(b) supporting and promoting the development of markets and audiences for Australian contemporary music practice.

Report Acknowledgements

Music Australia and McAtamney & Advisors gratefully acknowledge the contribution of Chris Carey, CEO of FastForward (FFWD) Group, who consulted with us and provided specialist industry insights and expertise throughout this project.

We would also like to thank the many government agencies, peak bodies, collecting societies, and industry organisations who contributed critical data to inform this study. See p86 for a full list.

We are grateful to the industry stakeholders who consulted with us, provided data and insights, and helped distribute our industry-wide survey through their networks, including national peak and representative bodies and key stakeholders from commercial parts of the industry. Their insights allowed us to better understand the industry and maximise the coverage and depth of insights available in the report for the many different subsectors, occupations, and work being undertaken across the industry. See pp 86–87 for a full list.

We would also like to thank the 1,064 respondents to our industry-wide survey who provided invaluable information from individual, business, not-for-profit, government and industry perspectives.

Cover image: Something for Kate bass player Stephanie Ashworth.
Credit: Rick Clifford.

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Foreword

The bass line of a song provides its framework, underpinning the more expressive elements and adding structure to the music. It's the glue that holds a song together.

In a similar way, economic structures provide the framework that hold the music industry together. Music is a cherished part of our cultural fabric, and without a strong economic foundation, the Australian music industry cannot thrive.

Yet until now, we've had no consistent measurement of the economic contribution or activity in the music industry. We've had no national, industry-wide figures to inform investment and policy interventions, identify opportunities or track employment. We have not even had a shared definition of the 'Australian music industry' to shape an economic investigation.

The Bass Line: Charting the Economic Contribution of Australia's Music Industry answers this need. *The Bass Line* is the first comprehensive, end-to-end analysis of the economic contribution of the Australian music industry. It measures the total monetary value of the industry, covering both local and international music performed, sold or streamed here, and the value of Australian music exports.

Music Australia is proud to present this landmark report. This snapshot for 2023–24 describes a $9 billion industry that directly contributed nearly $3 billion to the national economy and generated exports worth nearly $1 billion.

The Bass Line results reflect an industry that has been operating, until recently, without dedicated national government support. And it comes at a time of dramatic change in the way Australians listen to music, attend live music and discover our next favourite songs – topics explored in Music Australia's recently released research series, *Listening In*.

Key to the Australian Government's 2023 National Cultural Policy, *Revive*, was the formation of Music Australia to support and promote Australian contemporary music and develop its markets and audiences. Revive also emphasised the need to capture data to enable effective policy and investment. To facilitate these efforts and provide reliable data to the industry, we at Music Australia have committed to tracking progress against this 'base line' with annual updates. These will continue to chart the value of subcategories within the industry – from live performance to music retail – and to measure employment across these categories.

None of this would have been possible without collaborations from all corners of the industry. We're grateful to the dozens of industry organisations who shared their data with us, the many stakeholders who consulted with us, as well as to the 1,064 people from all parts of the industry who responded to our survey.

We know there are persistent gaps in the hard data we need to measure, communicate and leverage the music industry's impact. This base line study will allow us to define and target those gaps for further study. We look forward to continuing to work with the industry to build on *The Bass Line* with each new edition.

Millie Millgate

Director
Music Australia

Key Findings

Economic Contribution of Australia's Music Industry

The Australian music industry contributed an estimated $2.82 billion in direct gross value added (or GVA) in 2023–24 on estimated industry revenues of $8.78 billion. Export revenue (revenue earned from outside Australia) was an estimated $975 million over the same period.

Table 1:

Summary – Economic analysis of the Australian music industry by subsector in 2023–24

Subsector	Total Revenue ($m, 2024)	Export Revenue ($m, 2024)	Direct GVA ($m, 2024)	GVA as % of revenue
Live Music Performance	$4,830	$105	$1,440	30%
Music Recording, Production, Label Services and Distribution	$790	$485	$350	44%
Composition, Songwriting and Music Publishing	$470	$95	$155	34%
Artist Management	$195	$10	$92	48%
Synchronisation	$64	$13	$16	24%
Music Retail	$2,730	$310	$515	19%
Music Education*	>$60	n.a.	>$60	n.a.
Industry and Sector Development	n.a.	n.a.	290	n.a.
TOTAL**	**$8,775**	**$975**	**$2,815**	**32%**

* Due to data limitations, results for music education only include teaching income earned by artists.

** The total industry-wide economic contribution is *not* equal to the sum of the subsector contributions, as the total removes duplication of economic activity that is attributable across multiple subsectors.

Source: Economic analysis results.

Live Music Performance

- **In 2023, an estimated 12 million people attended contemporary live music events and festivals in Australia** – the highest attendance figures in 15 years.
- **Live music performance contributed an estimated $4.83 billion** in revenue for the Australian music industry in 2023–24.
- **Ticket sales were an estimated $2.25 billion** for all acts, including Australian and international artists. This included contemporary music concerts, pub, club, and nightclub gigs, music festivals, classical music performances, and opera.
- **Venues earned an estimated $1.8 billion in revenue**, of which $1.31 billion was earned from food and beverage sales at live music events and the remaining $490 million from venues fees and commissions on artist merchandise sales at live events.
- **Booking agents, artist managers, and crew and technical services** collectively earned an estimated $310 million in revenue.
- **Australian artists** earned an estimated $425 million in net income from live music (ie., after booking agent and artist management fees).
- **The direct economic contribution of live music performance was an estimated $1.44 billion (or 30% of revenues) in 2023–24**.

Music Recording, Production, Label Services and Distribution

- **Music recording, production, label services, and distribution generated an estimated $790 million in revenue in 2023–24**.
- **Domestic and international sales of Australian recorded music** generated an estimated $555 million in revenue, of which 70% was earned by major labels and the balance of 30% by independents.
- Streaming accounted for an estimated 70% of total recorded music revenues.
- **Over 85% of Australian artist recorded music sales** are generated internationally.
- **Artist rights** totalled an estimated $195 million.
- **Australian artist session fees** totalled just under $40 million.
- **The direct economic contribution of music recording, production, label services, and distribution was an estimated $350 million in 2023–24**.

Composition, Songwriting, and Music Publishing

- **Composition, songwriting, and music publishing contributed an estimated $470 million in revenue in 2023–24**. Approximately $95 million (or about 20%) of this income was earned from overseas.
- **Music publishing** contributed an estimated $370 million in revenue, mainly comprised of mechanical (digital distribution) royalties, international royalty payments and performing income.
- **Writers' mechanical and performing royalties paid through the Australasian Performing Rights Association (APRA) and Australasian Mechanical Copyright Owners Society (AMCOS)** contributed about $40 million.
- **The direct economic contribution of composition, songwriting, and music publishing was an estimated $155 million in 2023–24**.

Artist Management

- **Artist management contributed an estimated $195 million in revenue in 2023–24**. Live performance contributed more than half of artist managers' income.
- **There is estimated to be over 200 artist managers in Australia**, with just over two thirds operating as sole traders, and the remainder as companies.
- **Artist managers report increased complexity, risk, and lead time** required to invest in developing artists in the context of a changing industry.
- **The direct economic contribution of artist management was an estimated $92 million in 2023–24**.

Synchronisation

- **Synchronisation (sync) combines music with visual media, such as movies or video games, and is an important and growing revenue stream** for Australian composers, songwriters, labels and publishers. Sync contributed an estimated $64 million to industry revenue in 2023–24. About $13 million (or about 20%) of this income was earned from overseas.
- **Sync revenue grew** for the third year running in 2023, with Australia ranked sixth globally.
- **Publishers earned an estimated $48 million** in sync revenues, while **record labels** accounted for approximately $15 million.
- **The direct economic contribution of sync was an estimated $16 million in 2023–24**. This contribution forms a component of record label and music publishing economic contribution previously discussed.

Music Retail

- **In 2023–24, music retail contributed an estimated $2.73 billion in revenue**, including revenues from music product sales (musical instruments and pro audio) of $1.47 billion, of which 21% was export revenues.
- **Music retail comprises physical and online recorded music sales, musical instruments**, accessories, pro audio equipment, music publications, music merchandise, and instrument making, repairs, and hire.
- **Around three quarters of Australians listen to recorded music via streaming**. Subscription streaming revenue accounted for an estimated $700 million.
- **The direct economic contribution of music retail was an estimated $515 million in 2023–24**.

Music Education

- **In 2023–24, music teaching by Australian artists contributed an estimated $60 million in revenues**. Other forms of music education income were not able to be estimated due to significant data limitations and limited responses to the industry-wide survey.
- **Music education spans** early childhood to tertiary education settings as well as an extensive private tuition network, however limited economic data is available for this subsector.
- Our survey identified that **40% of teachers taught more than 21 students** per week, and nearly **80%** of all teaching was for a **musical instrument**.

Industry Support, Development and Representation

- **A diverse range of organisations support Australia's music industry** including government agencies, performing rights organisations, peak and industry bodies, awards, conferences and professional services organisation, employing more than 1,700 people.
- **In 2023–24, an estimated $153 million in music related grant funding was** awarded by state, territory and Commonwealth Government agencies to support music.
- **The direct economic contribution of this industry support, development and representation was an estimated $290 million in 2023–24**.

Industry Spotlights

Australian Artists

- In 2023–24, **Australian artists earned an estimated $860 million from working in the music industry**.
- **Artists rely heavily on live music performance and royalties**. Together, they accounted for just over 70% of this income.
- The distribution of artists' incomes in Australia is heavily skewed. **The median annual artist income is estimated at $14,700**, with the top 25% of artists (by income) earning an estimated 82% of total artist income.
- Many artists, in addition to their musicianship, are **employed in different capacities in the music industry and further afield**. On average, when accounting for artists' income from all forms of employment, the income distribution is broadly comparable with the Australian population.

First Nations Artists

- **First Nations artists have held steady representation in the ARIA charts over the last two decades, holding 4% market share**.
- **Several First Nations artists have achieved international acclaim**, including The Kid LAROI and 18yoman. **However, many challenges persist**, including creating pathways and preserving time for creative focus, low representation in decision-making, and access to financial support.
- **More targeted analysis supported by improved data is required** to measure the economic contribution of First Nations artists within the Australian music industry.

Electronic Dance Music

- With its rich and diverse history in Australia, electronic music has evolved significantly, with **strong consumer demand** and Australian artists experiencing unprecedented local and international success.
- In 2024 almost **one in four music festivals** (presented or planned) was an electronic music festival.
- Electronic artists like Rüfüs Du Sol and Dom Dolla have seen sustained **international success, while local uploads surged** to in recent years.
- According to Spotify, Australia was the **world's third-largest consumer** of electronic music in 2024. Soundcloud reported **one-third of stream on the platform** were from Australia – 50% higher than the global average.

Australian Music Exports

- **In 2023–24, Australian music export contributed an estimated $975 million in revenues**, with around half from music recording (led by digital and live performance, up 30% year-on-year) and music products (making up 30%).
- **It is estimated that 56% of Australian artists' rights** were earned from overseas streams.
- Australian **music exports rely on personal and industry networks and physical presence**, which require significant time and travel to establish and maintain.
- Despite established export pathways, steady growth in export revenues and reduced barriers to international audiences, **geographic distance remains a practical challenge** for Australian artists to navigate.

Music Media

- **Music media has played a key role** in the music industry for decades, providing a platform for critiquing and sharing the stories of artists, music, and industry, and for fans to discover new music.
- **The music media landscape is constantly evolving**, having moved from traditional print to broadcast, blogs, social media and podcasts. It is difficult to obtain robust economic data.
- **Our survey identified very few full time employee's working in music media, consistent with global trends**. Those respondents who reported working in music media generally were utilised just one or two days per week.
- **Social media, podcasts, and influencers now drive music discovery,** with niche outlets and Public Relations agencies adapting.
- While there is no shortage of artist and publicist driven digital information, music critique has shifted from comprehensive and curated analysis to **fan-based reviews and recommendations**.

Future Directions

- *The Bass Line* represents the first comprehensive **end-to-end analysis of the economic contribution** of the Australian music industry. The **methodology is repeatable** and can be built upon over time to reflect better data and evolving industry trends and drivers.
- **Further in-depth research spotlights** will collect better and more granular data and improve understanding of key aspects of the sector. Priorities include music education, the role and impact of AI, live music in pubs and clubs and a First Nations Impact Study.
- **Creative Australia and Music Australia will continue to collaborate** with the Australian Bureau of Statistics (ABS), Bureau of Communications, Arts and Regional Research (BCARR) and industry bodies to improve occupational data accuracy.
- We will work to **refine the industry and data collection, coverage and representation** to identify and collect additional data and information, for example working with pubs and clubs and local councils.
- These efforts will **collectively enhance our understanding of the Australian music** industry's economic and cultural contribution.

Bumpy at Federation Square, Melbourne International Jazz Festival 2023.
Credit: Wil Hamilton-Coates.

Acronyms

Term	Definition
AAM	Association of Artist Managers
ABC	Australian Broadcasting Corporation
ABS	Australian Bureau of Statistics
ACT	Australian Capital Territory
AFA	Australian Festivals Association
AI	Artificial intelligence
AIR	Australian Independent Record Labels Association
ALMBC	Australian Live Music Business Council
AMA	Australian Music Association
AMC	Australian Music Centre
AMCOS	Australasian Mechanical Copyright Owners Society
AMIN	Australian Music Industry Network
AMPAL	Australian Music Publishers Association Limited
AMRA	Australian Music Retailers Association
ANZSIC	Australian and New Zealand Standard Industrial Classification
APRA	Australasian Performing Rights Association
ARIA	Australian Recording Industry Association
ATO	Australian Taxation Office
BCARR	Bureau of Communications, Arts and Regional Research
CBAA	Community Broadcasting Association of Australia
DSP	Digital Service Provider
EDM	Electronic dance music
GVA	Gross value added
IFPI	International Federation of the Phonographic Industry
LPA	Live Performance Australia
LMO	Live Music Office
MEAA	Media Entertainment & Arts Alliance
MPEG	Music Producer and Engineers' Guild

Term	Definition
NATSIMO	National Aboriginal and Torres Strait Islander Music Office
NSW	New South Wales
NT	Northern Territory
OFTA	Office for the Arts
OSCA	Occupation Standard Classification for Australia
PPCA	Phonographic Performance Company of Australia Ltd
QLD	Queensland
RMIT	Royal Melbourne Institute of Technology
SA	South Australia
TAS	Tasmania
UK	United Kingdom
VMDO	Victorian Music Development Office
VIC	Victoria
WA	Western Australia

The Australian String Quartet perform with Japanese shamisen virtuoso Noriko Tadano at UKARIA Cultural Centre, June 2023. Credit: Kane Moroney.

1. Introduction

Music is the most accessed art form in Australia. Preserving, supporting, and maximising its heritage, value, and impact is vitally important to our social fabric, communities, and the economy.

91%
Australians listening to recorded music (2022)[1]

10%
Australians playing a musical instrument (2022)[3]

$860m
Estimated Australian artist income (2024)

48%
Australians aged over 14 years attending a live music event in the last 12 months (2025)[2]

3.5m
Australians creating music (2022)[4]

$470m
Estimated Australian writer and publisher income (2024)

The benefits and transformative impacts of music in both global and Australian contexts have been extensively researched.[5] Indeed, Australians identify and ascribe social, cultural, and economic importance to music.[6] However, there are persistent and significant gaps in the hard data needed to measure, communicate, and leverage the music industry's impact deeply and universally. This is increasingly important given the fundamental changes occurring in how people consume and participate in music, the way musicians work and are remunerated, and how the music industry operates.

Economic contribution is an important – but not the only – dimension of impact. It provides a universal measure of value and is a fundamental input to policy and investment decisions that can affect meaningful change. Several studies have analysed the economic contribution of different parts of Australia's music industry (particularly live music) and in different geographies. However, to-date, there has not been a consistent national or industry-wide definition of 'the music industry' and a robust measurement of its economic contribution.

Revive: A New National Cultural Policy prioritised the need to better reflect the contemporary labour market and ensure cultural and creative industries data (including music) supports effective policy and investment.[7] Music Australia, and music industry participants more broadly, also acknowledge this need.

1.1 Purpose and Scope

The Bass Line Report establishes the first nationally consistent methodology and analysis of the direct economic contribution of Australia's music industry. Its scope is to establish:

- A definition of Australia's music industry suitable for the purpose of economic analysis;
- A credible methodology to estimate direct economic contribution now and over time; and
- Estimates of the direct economic contribution, direct employment, and value of export revenues of the Australian music industry, based on the established methodology, for the period from July 2023 to June 2024 (ie the financial year (FY) 2023–24).

1 Creative Australia. (2023) *Creating Value: Results of the National Arts Participation Survey, Music Fact Sheet.*
2 Music Australia 2025, *Listening In: Insights on live music attendance.*
3 Creative Australia. (2023) *Creating Value: Results of the National Arts Participation Survey, Music Fact Sheet.*
4 Creative Australia. (2023) *Creating Value: Results of the National Arts Participation Survey, Music Fact Sheet.*
5 Fielding, K. Glisic, I, Trembath, J. (2019) *Transformative: Impacts of Culture and Creativity, Insight Series*, A New Approach and The Australian Academy of Humanities, November 2019.
6 The Parliament of the Commonwealth of Australia. (2019). *Report on the inquiry into the Australian music industry House of Representatives Standing Committee on Communications and the Arts*, March 2019.
7 Creative Australia (2024). *Australia's live music industry, Submission 74*. Inquiry into the challenges and opportunities within the Australian live music industry Submission.

The following table further details the scope.

Metric	Definition	Treatment
Direct economic contribution		
Total Income	The total income (revenue) generated by the activities of music related businesses and professionals working across the music industry.	In scope
Export Income	The component of total income from the music industry's operations that is earned outside Australia.	
Direct Gross Value Added (GVA)	The direct economic contribution of the industry's activities, measured as the net profit generated by the industry's activities plus the salaries and wages of Australians directly employed in the industry. The profit component of GVA is adjusted for levels of Australian ownership, as foreign-owned profit does not ultimately stay in Australia.	
Direct Employment	The number of jobs directly supported by the music industry.	
Indirect economic contribution		
Indirect GVA	The economic contribution of activity upstream and downstream from the music industry occurring because of the music industry's activity. An example of an indirect contribution arises from additional spending by visitors associated with an activity occurring in the music industry (eg, additional spending on accommodation and restaurants, that would not have otherwise occurred, by people because of their attendance at a live music event).	Not in scope
Indirect Employment	The number of jobs supported by the upstream and downstream industries because of the music industry's activity.	

Extensive research, industry engagement, and primary data collection has been undertaken to ensure the report is based on the most contemporary data and evidence available. This first edition of *The Bass Line* focusses on direct economic contribution only to maximise the robustness of the analysis. It is Music Australia's expectation that *The Bass Line* will be a longitudinal measurement series that is extended and refined over time to reflect the changing nature of the industry and new and evolving data.

1.2 Report Structure

This report is structured as follows:

- **Section 2** summarises the approach;
- **Section 3** details the direct economic contribution of Australia's music industry;
- **Section 4** details the direct employment within Australia's music industry;
- **Section 5** contains 'spotlights' into specific areas of Australia's music industry, including artist income, First Nations artists, electronic dance music (EDM), Australian music exports, and music media;
- **Section 6** suggests priorities to strengthen the analysis and longitudinal measurement over time; and
- **Appendix A** details the definitions, analysis approach, data and research sources, and limitations.

2. Approach

The economics of the Australian music industry are complex. The industry includes a diverse range of artists and industry professionals. Many also work multiple roles, including outside the industry, to earn income. The industry includes a diverse mix of small and large businesses and not-for-profit (NFP) entities which typically also derive income through multiple channels. Many of the key income flows across the industry, particularly in relation to rights, are based on long-standing commercial conventions and principles. However, the industry is also facing rapid technological changes that are transforming how music is produced, distributed, and consumed. This change is adding further complexity to the way in which value is created and disseminated.

In this context, the starting point in measuring economic contribution was to establish a clear industry definition to form the basis of counting. With this established, the focus turned to the available data and how this could be used to measure the economic contribution of the industry as defined.

Several government, industry, and academic stakeholders have commissioned and published economic analysis studies on different parts of the Australian music industry. These have typically focused on live music performance and state-level whole-of-industry analysis. Internationally, several jurisdictions – particularly the United Kingdom (U.K.), United States (U.S.), and Canada – have also commissioned and published similar work. These precedents and benchmarks provide useful context and have been considered in developing this report. However, they have not been directly applied to estimate the contribution of the Australian music industry due to several challenges:

- There is no definitive agreed definition of the Australian music industry.[8]
- There is no single source of data to capture industry activity, and existing data, where available, is not captured consistently or comprehensively.[9]
- The Occupation Standard Classification for Australia (formerly the Australia and New Zealand Standard Classification of Occupations, or ANZSCO) , while used for several existing industry data collections, has several gaps and limitations.[10]
- While various economic analyses have been undertaken for different parts of the music industry in Australia and internationally, they are not directly comparable because they are each based on different purposes, scopes, definitions, datasets, and assumptions.
- When comparing approaches at country and regional level, the structuring of industry subsectors and their workings can vary significantly.

In the above context, this analysis was approached from first principles over three steps:

- Step 1 – Establishing an end-to-end definition of the Australian music industry suitable for economic analysis, including industry subsectors, key activities, and occupations, informed by established datasets, available benchmarks, and consultation with industry stakeholders;
- Step 2 – Identifying and collecting all available data and information, including extensive stakeholder engagement and additional new primary research in the form of an industry-wide survey; and
- Step 3 – Undertaking the analysis for each industry subsector based on the extent of available data and appropriate supporting assumptions.

Stakeholder engagement was critical in building understanding of the purpose and scope, identifying and gathering data, and seeking feedback on the definitions used. The time commitment from all stakeholders consulted is acknowledged by Music Australia. The full approach is detailed in Appendix A.

8 Creative Australia, (2024), *Australia's Live Music Industry, Submission 74*, retrieved from https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Livemusicindustry/Submissions, accessed 18 October 2024.

9 Creative Australia, (2024), *Australia's Live Music Industry, Submission 74*, retrieved from https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Livemusicindustry/Submissions, accessed 18 October 2024.

10 Following a review, the Australian Bureau of Statistics released the Occupational Standard Classification for Australia to replace ANZSCO, retrieved from https://www.anzscosearch.com/osca-replaces-anzsco-in-australias-occupational-classification-system/#:~:text=OSCA%20Replaces%20ANZSCO%20in%20Australia's%20Occupational%20Classification%20System,-January%2017%2C%202025&text=On%206th%20December%202024%2C%20the,Australia%20(OSCA)%20version%201.0.

William Barton, Melbourne International Jazz Festival, 2023. Credit: Max Roux.

3. Economic Contribution of the Australian Music Industry

This section discusses the economic analysis results. It contains a summary view and sections detailing the current picture and economic landscape within each subsector of the Australian music industry based on available data and research.

3.1 Results Summary

The direct economic contribution of Australia's music industry in 2023–24 is estimated at $2.82 billion. This was approximately 32% of total estimated music industry revenues of $8.78 billion. The results of the economic analysis for each of the industry subsectors are as follows.

Table 2:

Summary – Economic analysis of the Australian music industry by subsector in 2023–24

Subsector	Total Revenue ($m, 2024)	Export Revenue ($m, 2024)	Direct GVA ($m, 2024)	GVA as % of revenue
Live Music Performance	$4,830	$105	$1,440	30%
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Music Retail	$2,730	$310	$515	19%
Music Education*	>$60	n.a.	>$60	n.a.
Industry and Sector Development	n.a.	n.a.	$290	n.a.
TOTAL**	**$8,775**	**$975**	**$2,815**	**32%**

* Due to data limitations, results for music education only include teaching income earned by artists.

** The total industry-wide economic contribution is not equal to the sum of the subsector contributions, as the total removes duplication of economic activity that is attributable across multiple subsectors.

Source: Calculations based on collective analysis and sources as outlined throughout the remainder of Section 3 and the detailed approach in Appendix A.

The subsequent sections of this chapter detail the direct economic contribution and current landscape within each of the subsectors in further detail

3.2 Live Music Performance

Activities and events where musicians are paid to perform music for a live audience

$4.83b
Revenue (2024)

$105m
Export revenue (2024)

$1.44b
Direct Gross Value Added (2024)

30%
GVA as % of revenue

Live music is considered vital to Australia's creative economy and social and cultural participation, with an estimated 47% of Australians attending live music events or festivals in 2022.[11,12]

Key statistics:

13.6m
Estimated number of attendees at live music events (excluding pubs, clubs, and nightclubs) (2023)

$2.25b
Estimated ticket sales for live music events in Australia (2023)

$1.31b
Estimated attributable food and beverage and merchandise revenue at live music events (2023)

$25m
Australian writer and publisher income from live music (2024)

The Live Performance Australia (LPA) *2023 Ticket Attendance and Revenue Report* noted that contemporary music and festivals accounted for 12 million attendees (46.6% of total live performance attendance) in 2023. Attendance was driven heavily by an increase in concert tours by international artists, including Ed Sheeran, Harry Styles, and Paul McCartney.[13] Classical music attracted 1.3 million attendees and opera attracted 0.3 million attendees – the highest attendance figures in 15 years.[14] Based on the LPA *2023 Ticket Attendance and Revenue Report*, the attendance and revenue breakdown by state and territory was as follows.

Table 3:

State and territory share of attendance and ticket revenue (contemporary music, festivals (contemporary music), opera, and classical music)

	NSW	VIC	QLD	WA	SA	ACT	TAS	NT
Attendance	34%	31%	18%	9%	5%	1%	1%	<1%
Ticket revenues	50%	27%	15%	3%	3%	1%	1%	<1%

Source: Live Performance Australia, (2024), Live Performance Industry in Australia, 2023 Ticket Attendance and Revenue Report.

11 Creative Australia, (2023), *Creating Value: Results of the National Arts Participation Survey Music Factsheet*.
12 Creative Australia 2024, *Australia's Live Music Industry, Creative Australia submission 21 May 2024*. House of Representatives Standing Committee on Communications and the Arts.
13 Live Performance Australia, (2024), *Live Performance Industry in Australia, 2023 Ticket Attendance and Revenue Report*.
14 Live Performance Australia, (2024), *Live Performance Industry in Australia, 2023 Ticket Attendance and Revenue Report*.

Despite strong attendance and large ticket revenues, artists and the live music industry more broadly face a challenging economic environment and increased uncertainty.

In March 2025, the House of Representatives Standing Committee on Communications and the Arts released its Inquiry Report, entitled *Am I Ever Gonna See You Live Again? Yes way! You bet! Oh yeah!*[15] into the challenges and opportunities within the Australian live music industry.[16] Several major themes were evident across inquiry submissions, stakeholder insights gathered in preparing this report, and in other recent research published by Creative Australia and Creative Skills Australia[17]:

- **Venue closures** – A 2023 APRA AMCOS analysis identified the permanent closer of more than one third of small to medium live music venues between 2020 and 2023.[18]
- **Rising costs** – Promoters staging events in larger venues noted venue and site infrastructure cost increases and limited availability of large, suitable sites to be an ongoing challenge,[19] while others highlight insurance and travel as increasing the risk of doing business and a decline in earnings.[20]
- **Shifting attendance patterns and consumer behaviours** – Recent research revealed that more people are attending live music at major venues in 2024 (when compared to 2019), however fewer are attending live music at pubs and clubs. A decline in young audiences attending festivals[21], less frequent attendance at live music events[22] and purchasing of tickets (for non-stadium events) much closer to the event[23,24,25] is leading to increased uncertainty for venues, promoters, and artists.[26] Ancillary spending by consumers at events – such as merchandise, food, and beverages – is also reportedly reducing, and further impacting revenues.[27]
- **Location, transport and impacts of age limits on smaller venues** – A lack of nearby venues and transport are identified significant barriers to attending a live music event.[28] In addition, due to alcohol regulations under 18s have limited access to live music in small to medium venues, limiting audience development and engagement.[29]

15 The Parliament of Australia (2025), *Am I ever going to see you live again? Yes way! You bet! Oh yeah!*, House of Representatives Standing Committee on Communication and the Arts.

16 The Parliament of Australia, (2024), *Inquiry into the challenges and opportunities within the Australian live music industry*, https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Livemusicindustry, accessed 18 October 2024.

17 Creative Australia and Service and Creative Skills Australia, (2025) *Creative Workforce Scoping Study Report: Addressing the challenges with critical skills and sustainable careers*, Full Report.

18 Burke, K, (2023), "Australia's live music scene 'decimated', with 1,300 venues lost since pandemic", *The Guardian*. https://www.theguardian.com/culture/2023/oct/20/australias-live-music-scene-decimated-with-1300-venues-lost-since-pandemic, accessed 18 November 2024.

19 TEG's 2024 *Submission by TEG to the Standing Committee on Communications and the Arts, Inquiry [sic] into and report on the challenges and opportunities within the Australian live music industry, 30 April 2024, Submission 60* estimated increased costs to the live music industry of 30-40 per cent across production equipment, venues, site infrastructure, and labour over the last three years; as well as challenges to the availability of large, flexible sites for large scale events and festivals. Retrieved from https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Livemusicindustry/Submissions, accessed 18 October 2024.

20 The Parliament of Australia (2025), *Am I ever going to see you live again? Yes way! You bet! Oh yeah!*, House of Representatives Standing Committee on Communication and the Arts.

21 Creative Australia, (2024), *Soundcheck Two: Analysis of Australian music festival models and operations*.

22 Creative Australia, (2023), *Creating Value: Results of the National Arts Participation Survey*.

23 Adams, M, (2024), *Experts say audiences are buying tickets closer to events, causing 'lack of certainty' in industry*, Retrieved from ABC News https://www.abc.net.au/news/2024-05-19/ticket-sales-australia-arts-music-theatre-industry/103820858, accessed 8 November 2024.

24 The Parliament of Australia (2025), *Am I ever going to see you live again? Yes way! You bet! Oh yeah!*, House of Representatives Standing Committee on Communication and the Arts.

25 Music Australia (2025), *Listen In: Insights on Live Music Attendance*.

26 Creative Australia, (2024), *Soundcheck Two: Analysis of Australian music festival models and operations*.

27 Bolster Tixel (2024), *Front Row Centre, Ticketing State of Play 2024* – Australia, https://publuu.com/flip-book/430479/1405857, accessed 23 November.

28 Music Australia (2025), *Listen In: Insights on Live Music Attendance*.

29 The Push, (2024), *Submission to the parliamentary inquiry into the challenges and opportunities within the Australian live music industry, Submission 105*, retrieved from https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Livemusicindustry/Submissions, accessed 18 October 2024.

- **Cost of living pressures** – Cost is identified as the primary barrier to live music attendance.[30] While attending music and live events is a priority for consumers[31], these costs are competing with other financial concerns[32] and priorities that influence ticket purchasing behaviour, including purchasing fewer tickets and making 'safer choices' with known headline artists.[33]
- **Loss of skilled workers from the sector** – Stakeholders report critical skills shortages in the live industry, particularly in technical, creative (eg lighting design) ticketing, publicity and production roles,[34,35] arising from the loss of many skilled workers during the COVID-19 pandemic,[36] as well as unattractive working conditions, burn out, lack of opportunities and unstable salaries.[37]

Emerging research has also highlighted the need for greater consideration around the impacts of market concentration on live music, and how technology platform algorithms can affect audience discovery, access, and consumption of Australian music in the context of increasing digital share of consumption.[38]

The following sections detail the activity of artists, promoters, booking agents, venue bookers, the crew and technical services who help stage live music performances, and venue owners and operators, who together contribute to live performances.

30 Music Australia (2025), *Listen In: Insights on Live Music Attendance*.

31 Creative Australia, (2024), *Australia's Live Music Industry*, Submission 74, retrieved from https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Livemusicindustry/Submissions, accessed 18 October 2024.

32 Patternmakers (2023), *Audience Outlook Monitor: Audiences (2023).*

33 Bolster Tixel (2024), *Front Row Centre, Ticketing State of Play 2024* – Australia, https://publuu.com/flip-book/430479/1405857,accessed 23 November.

34 Creative Australia (2024), *Arts Workforce Scoping Study – Interim Findings Prepared by Creative Australia and Services and Creative Skills Australia (SaCSA) October 2024*.

35 Creative Australia and Service and Creative Skills Australia, (2025) *Creative Workforce Scoping Study Report: Addressing the challenges with critical skills and sustainable careers*, Full Report.

36 Live Performance Australia, (2024), *Submission - 2024 Skills Priority List LPA feedback to Jobs and Skills Australia (JSA) to inform the 2024 Skills Priority List*. Based on results from the LPA Member survey on skills and employment needs in the arts and entertainment industry (2023–2024).

37 Creative Australia and Service and Creative Skills Australia, (2025) *Creative Workforce Scoping Study Report: Addressing the challenges with critical skills and sustainable careers*, Full Report.

38 The Parliament of Australia (2025), *Am I ever going to see you live again? Yes way! You bet! Oh yeah!*, House of Representatives Standing Committee on Communication and the Arts.

3.2.1 Artists

Key statistics:

10,800
Number of active Australian artists, musicians, songwriters, and composers (2023)

$410m
Australian artist income from live music (2024)

48%
Estimated proportion of artist income earned from live music (2024)

29%
Artist share of live music direct GVA (2024)

Australian artists rely heavily on live performance, which accounted for an estimated $410 million – or 48% – of artists' music-related income in 2023–24. An additional $20 million of artist income was generated through merchandise sales at live music events. While not directly comparable, a survey undertaken in 2023 by the Australian Broadcasting Corporation (ABC) found an even higher reliance on live music income, at 58%, though used different income categories and did not report average income levels.[39] Artists who earn lower incomes from live music and royalties typically supplement more of their income from teaching and session fees and undertake more paid work outside the music industry compared with those earning higher incomes from music. Further details on artist incomes are provided in the *Industry Spotlight* section of the report.

Some artists who answered the industry-wide survey provided information about the types and frequency of live performances they undertook across different venues. While these responses are not necessarily representative of all artists, they do provide insight into the cross-section of artists' performances. Those artists who responded reported usually performing one to two different types of live performances. Most performed contemporary music (75% of artists) and performances in settings not specifically dedicated to music, such as musical theatre, weddings, and events (49% of artists).

Table 4:

Percentage of live performing artists performing different types of live music

Type of performance	Results (n=226)
Contemporary music performances	75%
Music performances in settings not specifically dedicated to music (eg, musical theatre, cabaret, weddings, events, and other settings)	49%
Music festivals	32%
Classical music performances	23%
Opera performances	6%

Note: Totals do not sum to 100% because artists perform in multiple different performance types.
Source: Results of the industry-wide survey.

39 Australian Broadcasting Corporation, (2023), *What's up in Australian music? Social media stress, big DIY energy and multiple jobs*, https://www.abc.net.au/triplej/programs/program-unearthed/whats-up-in-australian-music-survey-results-feature/102988278, accessed 20 October 2024.

Artists responding to the survey reported performing an average of 68 times in 2023–24. The most frequent performance venues were pubs, clubs, and bars (27% of performances) and concert halls and theatres (14% of performances).

Table 5:

Average number of performances per year, by venue type, for live music artists

Performance venue	Results (n=214)
Pubs, clubs, and bars	27.2
Concert halls and theatres	13.9
Outdoor public spaces	8.0
Community centres	4.2
Nightclubs	3.9
Town halls	2.5
Arenas	0.4
Stadiums	0.2
Other	8.0
Total number of performances	**68.2**
Average annual live performance income (for artists answering the survey)	**$15,350**

Note: Excludes outlier responses of over 300 performances per year.
Source: Results of the industry-wide survey.

Continuing to improve data collection to better understand the full cross-section of artists' activity, participation across music genres, and in different settings, will be important in future versions of *The Bass Line*.

3.2.2 Live Music Venues

Key statistics:

~2,700
Number of live music venues nationally

$1.8b
Estimated venue income from venue hire, F&B, and merchandise commissions at live music events (2023)

28%
Venues share of live music direct GVA

Many different types of venues present live music, including:

- Large and small venues specifically dedicated to presenting live music;
- Multi-purpose venues that host a range of live performances, including live music;
- Venues not specifically dedicated to music that host music occasionally, either as a primary purpose or as part of an event with a different purpose, such as a wedding; and
- Non-traditional venues with temporary infrastructure to enable live music performance (eg, an outdoor festival).

There is no definitive data available on live music venues, though it has been estimated there is up to 2,700 venues nationally[40] with 795 in NSW alone.[41] Some reports capture index information around certain venue types (eg, pubs and clubs or larger multipurpose venues) and limited financial data (eg, revenue only). However, such reports are usually limited to a specific local council or state/territory geographic level. Further, there are challenges in testing the veracity of available data, as it is complex, reported in different ways, and difficult to aggregate.

That said, it is well-recognised that the landscape of live music venues is constantly changing and has been significantly impacted in recent years. In the context of the pandemic restrictions and changes in the economic landscape, an estimated one third of small to medium venues closed between 2020 and 2023.[42] Live music festivals are also in a state of flux, with examples of both significant cancellations (eg, Groovin the Moo, Splendour in the Grass, and Falls Festival) and some community-based festivals continuing to thrive (eg, Meredith).[43] Venue operators and industry stakeholders report increasing challenges around venue operation and maintenance, ensuring sufficient ancillary income, changing compliance obligations, and the need to reach new audiences (eg, through all-ages events and increased venue accessibility).[44,45]

40 Estimated number of national venues by Live Nation, citing Sound NSW's *State of the Scene 2024* and Music Victoria's 2022 music census, which recorded approximately 1,000 live music venues in 2022. Retrieved from Live Nation website – https://www.livenation.com.au/facts#:~:text=Live%20Nation%20operates%20less%20than,models%20as%20these%20other%20players., 24 November 2024.

41 Sound NSW (2024), *State of the Scene 2024: Review of the NSW live music industry.*

42 Burke, K, (2023), "Australia's live music scene 'decimated', with 1,300 venues lost since pandemic", *The Guardian*. https://www.theguardian.com/culture/2023/oct/20/australias-live-music-scene-decimated-with-1300-venues-lost-since-pandemic, accessed 18 November 2024.

43 Bolster Tixel (2024), *Front Row Centre, Ticketing State of Play 2024* – Australia, https://publuu.com/flip-book/430479/1405857,accessed 23 November 2024

44 Music NSW's 2024 *Inquiry into the challenges and opportunities within the Australian live music industry, Submission 15*, noted a range of financial challenges related to capital works and maintenance, financial sustainability and regulation facing music venues. In addition, the submission highlights the connection between resolving these issues being able to attract and/or cater for new audiences. Retrieved from https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Livemusicindustry/Submissions, accessed 18 November 2024

45 A group of smaller independent musicians, DJs, promoters, agents and venues' 2024 *Submission to the Standing Committee on Communications and the Arts, Inquiry into and report on the challenges and opportunities within the Australian live music industry, Submission 10* noted a range of challenges related to venue maintenance and operation in relation to the inquiry's terms of reference, seeking specific feedback about venue suitability and location. Retrieved from https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Livemusicindustry/Submissions, accessed 18 November 2024

Venues are owned and operated by a range of private sector providers, state and territory governments, and local councils. State and territory governments and larger companies tend to own and operate major venues. For example, NSW's largest live music venue, Accor Stadium, is owned by Venues NSW and hosted Harry Styles, Taylor Swift, and The Weeknd, while Adelaide Venue Management, a public corporation formed by the South Australian Government, operates several venues, including the Adelaide Entertainment Centre. Individuals and smaller private interests tend to own and operate individual venues or groups of smaller venues. Some larger companies also own and operate larger portfolios of smaller venues. Though the sample was not significant, 10 respondents to the industry-wide survey reported collectively owning 13 live music venues, with more than half comprising pubs, clubs, bars, and nightclubs.

The following table summarises the coverage of the larger private owners and operators of Australian live music venues. This is not intended to be exhaustive, but to provide an overview of many of the medium and large venues typically used for major contemporary music concerts and tours in Australia.

Table 6:

Overview of major private live venue owners and operators in Australia

Company	Key venues used for live music
ASM Global ASM Global, headquartered in Los Angeles, California, is a global venue management company specialising in the operation of large venues such as stadiums, arenas, theatres and convention centres. ASM was acquired in 2023 by global entertainment services firm Legends, which has been majority owned by US-based investment firm Sixth Street Partners since its acquisition in 2021.	Operating interests: • Qudos Bank Arena (Sydney) • RAC Arena (Perth) • Brisbane Entertainment Centre • Newcastle Entertainment Centre • Aware Super Theatre (Sydney) • BCEC Great Hall (Brisbane) • Cairns Convention Centre • Brisbane Convention and Exhibition Centre • International Convention Centre Sydney (Sydney) • Suncorp Stadium (Brisbane) • Venues operated by VenuesLive, which is partially owned by ASM Global, including CommBank Stadium (Parramatta), Optus Stadium (Perth), HBF Park (Perth) and Industree Group Stadium (Gosford).

Company	Key venues used for live music
Live Nation Entertainment Live Nation Entertainment is a vertically integrated and publicly listed American entertainment company with global operations across: • Venue ownership and operation. • Promoting and producing live music concerts, festivals and tours, including via its subsidiaries including Mellen Events, Secret Sounds and Kicks Entertainment. • Ticketing services, having merged with Ticketmaster in 2010 and subsequently with Moshtix in 2019. • Merchandising. • Artist management, through its Artist Nation operation. • Branding, sponsorship and advertising.	Operating interests: • Anita’s Theatre (Wollongong) • Fortitude Music Hall (Brisbane) • The Palais Theatre (Melbourne) • Hindley Street Music Hall (Adelaide) • The Triffid (Brisbane) • Festival Hall (Melbourne) • Kings Park (Perth) • Nikola Estate (Swan Valley) Ticketing services provided by Ticketmaster: • Anita’s Theatre (Wollongong) • Fortitude Music Hall (Brisbane) • The Palais Theatre (Melbourne) • Festival Hall (Melbourne) • Kings Park (Perth) • Nikola Estate (Swan Valley) Ticketmaster also provide ticketing services to a range of small to medium venues for live music performance not listed. Ticketing services provided by Moshtix: • Hindley Street Music Hall (Adelaide) • The Triffid (Brisbane) • Lion Arts Factory (Adelaide) • Altar Bar (Hobart) • Brunsick Ballroom (Melbourne) • The Vangaurd (Sydney) • Freo.Social (Perth) • Northcote Theatre (Melbourne) • The Duke of George (Perth) • Oxford Art Factory (Sydney). Moshtix also provide ticketing services to a range of small to medium venues for live music performance not listed.

<table>
<tr><th>Company</th><th>Key venues used for live music</th></tr>
<tr><td>Ticketek Entertainment Group (TEG)

TEG is a vertically integrated live entertainment, ticketing and technology business owned by US-based private equity firm Silver Lake Technology Management LLC since its acquisition in 2019, with operations across:

• Venue ownership and operation, via Qudos Bank Area and TEG Venues.
• Producing and promoting live music concerts and festivals, via TEG Live and TEG Dainty.
• Ticketing services, via Ticketek, Ticket World, Ticket Charge, Eventopia, Softix and Ticketek Marketplace.
• Data analytics and research, via Ovation.
• Brand partnerships and hospitality, via TEG Sponsorship and VIP Now.</td><td>Operating interests:

• Qudos Bank Arena (Sydney) (operated by ASM Global)

By way of example, the ticketing services for large venues provided by Ticketek include:

• Accor Stadium (Sydney)
• Qudos Bank Arena (Sydney)
• Sydney Cricket Ground
• Melbourne Cricket Ground
• Rod Laver Arena (Melbourne)
• John Cain Arena (Melbourne)
• Her Majesty's Theatre (Melbourne)
• Suncorp Stadium (Brisbane)
• Brisbane Entertainment Centre
• Brisbane Convention and Exhibition Centre
• Perth Convention and Exhibition Centre
• Gold Coast Convention and Exhibition Centre
• Newcastle Entertainment Centre
• National Gallery of Australia (Canberra)
• Adelaide Entertainment Centre
• Adelaide Oval
• Perth Theatre Trust
• RAC Arena (Perth)
• International Convention Centre Sydney.

Ticketek provide ticketing services for a vast range of small, medium and large music and theatre venues nationally (for example the Horden Pavilion in Sydney or the Orange Civic Theatre) however these are not included for brevity.</td></tr>
<tr><td>Australian Venue Co (AVC)

AVC – owned by PAG Private Equity, a Hong Kong-based alternative investment firm, since its acquisition in 2023 – owns and operates over 200 hospitality venues across Australia, including pubs, bars and restaurants.</td><td>While these venues are not specifically dedicated to music, they feature many live performances by artists and bands.</td></tr>
</table>

Sources: ASM Global 2024, *Home*; Australian Venue Co. 2024, *Who we are*; Billboard 2016, *Live Nation enters Australia's venues space with Palais Theatre Contract*; Live Nation, *Introducing: Hindley Street Music Hall, Adelaide's fresh new music & entertainment venue*; Live Nation, *Live Nation expands operations in Western Australia through strategic acquisition of Mellen Events*; Live Nation 2018, *Brisbane's new premier live music venue backed by leading promoter Live Nation*; PAG 2023, *PAG to Acquire Australian Venue Co from KKR; Qudos Bank Arena 2023, News – Qudos Bank Arena: Top Ten Venue*; Silver Lake 2019, *TEG Announces Strategic Investment by Silver Lake*; Sixth Street 2024, *Sports, Media, Entertainment, and Telecom*; TEG 2024, *The TEG Family*; TEG 2024, *Ticketek Renews Partnership With Suncorp Stadium*; The Music 2023, *Live Nation Takes Over Lease Of Iconic Venue Festival Hall*; Ticketek 2024, *About Ticketek*.

Industry stakeholders consulted identified the importance of finding new opportunities to support music at a grassroots level. A recently proposed opportunity includes partnerships with local governments and community organisations (eg, bowling clubs and Returned and Services Leagues (RSL) clubs) that often have large infrastructure portfolios with latent capacity that could accommodate live music.[46]

46 Eliezer, C (2024), Are Community-Owned Music Venues The Solution? We Look At Some Options, *The Music*, retrieved from https://themusic.com.au/industry/are-community-owned-music-venues-the-solution-we-look-at-some-options/1PBqxsnly8o/23-05-24, accessed 24 November 2024.

Pondan Idaman, Northcote Social Club, 2023.
Credit: Young Ha Kim.

3.2.3 Promoters

Key statistics:

32
Companies licensed as National Event Promoters from 1 January 2025 with OneMusic Australia

12m
Estimated number of attendees at contemporary music events and festivals (2023)

$1.84b
Contemporary music concert and festival ticket revenue (2023)

28%
Promoter share of live music direct GVA

Music promoters play a critical role through organising and promoting live music performances such as concerts and music festivals. In doing so, promoters work with artists, music venues, booking agents, and other key personnel and businesses and assume the commercial risk of the event. There are significant gaps in existing data on promoters working in the music industry. Accordingly, the industry-wide survey sought to better understand promoter activity.

Table 7:

Overview of sole traders and businesses working as promoters who responded to the industry-wide survey

Category	Respondents
Sole traders working as promoters	56
Sole traders working as promoters who also own a music business	8
Businesses working as promoters	–
Businesses working as promoters that are owned by individuals	–

Note: Sole traders and businesses may operate across multiple areas of the music industry.
Source: Results of the industry-wide survey.

About 6% (n=56) of sole traders (n=946) reported working as promoters, with an average commitment of one to two days per week (1.7 days). About one fifth (20%) reported working three or more days per week.

Sole traders who reported working as promoters earned an average of $30,500 across all their music-related work, with about one quarter (26%) earned overseas. They reported employing, on average, 1.6 people each, with average employee expenses of $3,500, suggesting casual and/or part time arrangements with very light utilisation. Employee expenses reported do not include income drawn by sole traders.

No businesses operating as promoters responded to the survey.

Table 8:

Financial data for sole traders and businesses working as promoters

	Sole traders (n=56)	Businesses
Average total income	$30,500	n.a.
Average salaries and wages expenses	$3,500	n.a.
Average total expenses	$21,100	n.a.
Export income share (% of total income)	26%	n.a.
Average employment (full time, part time, casual)	1.6	n.a.

Note: Figures are rounded to the nearest $100.

Note: Results are for music-related income only and exclude activity that occurs outside the music industry.

Note: Results show figures for all music-related activity. Not all income is attributable to music promotion because many sole traders and businesses undertake different activities in the music industry.

Source: Results of the industry-wide survey.

Most promoters reported promoting less than 10 Australian and/or international artists. Only two respondents reported promoting more than 200 Australian artists and 200 international artists.

Table 9:

Coverage of Australian promoters of Australian and international artists, by number of artists promoted

Number of artists being promoted	Number of respondents promoting Australian artists (n=15)	Number of respondents promoting international artists (n=9)
Less than 10 artists	12	7
11–50 artists	1	-
51–100 artists	-	-
101–199 artists	-	-
More than 200 artists	2	2

Source: Results of the industry-wide survey.

Some promoters also provided geographic breakdowns of income, which showed approximately one fifth of income from overseas and SA, NSW, and VIC accounting for about 60% of domestic income. However, these results were for a very low sample size and should not be considered representative of the industry.

Table 10:

Geographic breakdown of promoter income (sole traders and businesses)

Jurisdiction	Results (n=9)
South Australia	21%*
New South Wales	19%*
Victoria	19%*
International	19%*
Western Australia	11%*
Queensland	6%*
Northern Territory	3%*
Australian Capital Territory	1%*
Tasmania	1%*

* Results should be interpreted with caution due to the low sample size.
Note: Totals may not add due to rounding.
Note: Averages are not weighted for income.
Source: Results of the industry-wide survey.

Further more detailed data collection will be required in future editions to better understand and map geographic breakdowns with appropriate weightings to revenue and attendance.

3.2.4 Booking Agents

Key statistics:

$50m
Estimated booking agent income (2024)

$5m
Estimated booking agent income from overseas (2024)

2%
Booking agent share of live music direct GVA

Booking agents support artists to schedule and book performances, negotiate commercial arrangements, and develop, support, and manage relationships with venues, promoters, artist managers, sponsors, and other stakeholders. Booking agents usually operate on a commission of 10% of net ticket sales less any agreed costs.

Like promoters, there are significant gaps in existing data on booking agent activity across the industry, meaning the industry-wide survey was a key source of information.

Table 11:

Overview of sole traders and businesses working as booking agents who responded to the industry-wide survey

Category	Respondents
Sole traders working as booking agents	80
Sole traders working as booking agents who also own a music business	9
Businesses working as booking agents	16
Businesses working as booking agents owned by individuals	10

Note: Sole traders and businesses may operate across multiple areas of the music industry.
Source: Results of the industry-wide survey.

About 9% (n=80) of sole traders (n=946) reported working as a booking agent, with an average commitment of one to two days per week (1.3 days). 94% reported working three days or less per week as booking agents. These sole traders earned an average of $37,700 across all their music-related work, with about 12% earned from overseas. They reported employing, on average, 1.7 people each, with average employee expenses of $2,900, suggesting casual and/or part time arrangements with very light utilisation. Employee expenses reported do not include income drawn by sole traders.

Table 12:

Financial data for sole traders and companies working as booking agents

	Sole Traders (n=80)	Companies (n=16)
Average total income	$37,700	$2,257,400
Average salaries and wages expenses	$2,900	$586,000
Average total expenses	$22,000	$2,082,100
Export income share (% of total income)	12%	33%
Average employment (full time, part time, casual)	1.7	6.9

Note: Figures are rounded to the nearest $100.

Note: Results are for music-related income only and exclude activity that occurs outside the music industry.

Note: Results show figures for all music-related activity. Not all income is attributable to music promotion because many sole traders and businesses undertake different activities in the music industry.

Source: Results of the industry-wide survey.

Some booking agents who responded to the survey indicated their roster sizes, as outlined below.

Table 13:

Coverage of Australian booking agents of Australian and international artists, by roster size

Roster size	Number of agents booking Australian artists (n=11)	Number of agents booking international artists (n=8)
1 artist	1	1
2–5 artists	4	1
6–9 artists	2	2
More than 10 artists	4	4

Source: Results of the industry-wide survey.

Some booking agents provided further information in relation to the geographic breakdown of income, based on where live music events on their rosters were staged. Due to the low sample size, these figures should be considered illustrative and do not necessarily represent the industry more broadly. For those who responded, Victoria, New South Wales, Queensland, and Tasmania collectively account for nearly three quarters of booking agent income.

Table 14:

Geographic breakdown of booking agent income (sole traders and businesses)

Jurisdiction	Results (n=9)
Victoria	22%*
New South Wales	21%*
Queensland	17%*
Tasmania	12%*
International	11%*
Western Australia	10%*
South Australia	5%*
Australian Capital Territory	1%*
Northern Territory	1%*

* Results should be interpreted with caution due to the low sample size.
Note: Totals may not add due to rounding.
Note: Averages are not weighted for income.
Source: Results of the industry-wide survey.

Close Counters at Strawberry Fields.
Credit: Max Roux.

3.2.5 Crew and Technical Services

Key statistics:

~7,500
Crew and technical services staff across Australia (2019–20)

$140m
Estimated crew and technical services income (2024)

7%
Crew and technical services share of live music direct GVA

Crew and technical services professionals manage and coordinate the technical requirements of live music performances, including (but not limited to) sound, lighting, and stage management. The most recent estimates from 2019–20 suggested approximately 4,700 sound crew, 1,700 lighting crew, 600–700 stage managers and a further 500 crew members undertaking various roles in live music in Australia.[47] Robust data is not available to quantify the impacts of the pandemic on the crew and technical services workforce. However, qualitative and anecdotal evidence suggests there are challenges associated with crew shortages.[48,49]

The industry-wide survey responses provide some insight into crew and technical services activity in the music industry.

Table 15:

Overview of sole traders and businesses working as booking agents who responded to the industry-wide survey

Category	Respondents
Sole traders providing crew and technical services	61
Sole traders providing crew and technical services who also own a music business	5
Businesses providing crew and technical services	5
Businesses providing crew and technical services owned by individuals	2

Note: Sole traders and businesses may operate across multiple areas of the music industry.
Source: Results of the industry-wide survey.

About 7% (n=61) of sole traders (n=946) reported providing crew and technical services, and on average, did so for 0.9 days per week. 81% reported working two days or less per week providing crew and technical services. These sole traders earned an average of $27,400 across all their music-related work, with about 13% earned from overseas. They reported employing, on average, 1.5 people each, with average employee expenses of $2,600. Employee expenses reported do not include income drawn by sole traders.

47 Bureau of Communications, Arts and Regional Research (2023) *Australia's live music sector: an occupation-based analysis.*
48 Live Performance Australia, (2024), *Submission - 2024 Skills Priority List LPA feedback to Jobs and Skills Australia (JSA) to inform the 2024 Skills Priority List.* Based on results from the LPA Member survey on skills and employment needs in the arts and entertainment industry (2023–2024).
49 Creative Australia and Service and Creative Skills Australia, (2025) *Creative Workforce Scoping Study Report: Addressing the challenges with critical skills and sustainable careers*, Full Report.

Results for businesses providing crew and technical services are not reported in detail due to the low sample size. However, the following observations are made based on the responses received:

- Income was derived locally, with negligible export (overseas) earnings;
- There was a heavy reliance on contractors and casual staff, at nearly 90% of employment reported; and
- On average, businesses reported profit of around 20% of income.

These observations were consistent with stakeholder engagement feedback received. Stakeholders specifically raised concerns about the insecurity of engagements, consolidation of crew and technical services businesses, and the administrative burden of contracting.

In addition, recent responses to an employer survey conducted by Creative Australia identified acute shortages of predominantly mid-career lighting designers and production and technical workers, including production assistants, production managers, sound technicians and stagehand crew. Consultation conducted with industry for the same study noted that these skills shortages impacted workplace safety and posed risks to both artists and crew.[50]

Table 16:

Overview of sole traders and businesses providing crew and technical services

	Sole Traders (n=61)	Companies
Average total income	$27,400	n.r.
Average salaries and wages expenses	$2,600	n.r.
Average total expenses	$15,800	n.r.
Export income share (% of total income)	13%	n.r.
Average employment (full time, part time, casual)	1.5	n.r.

n.r. Figures are not reported to preserve confidentiality due to the low sample size.

Note: Figures are rounded to the nearest $100.

Note: Results are for music-related income only and exclude activity that occurs outside the music industry.

Note: Results show figures for all music-related activity. Not all income is attributable to crew and technical services because many sole traders and businesses undertake different activities in the music industry.

Source: Results of the industry-wide survey.

50 Creative Australia and Service and Creative Skills Australia, (2025) *Creative Workforce Scoping Study Report: Addressing the challenges with critical skills and sustainable careers*, Full Report.

Credit: Maja Baska.

3.3 Music Recording, Production, Label Services, and Distribution

The development, manufacturing, distribution and promotion of Australian music recordings

$790m	$485m	$350m	44%
Revenue (2024)	Export Revenue (2024)	Direct Gross Value Added (2024)	GVA as % of revenue

Nine in ten Australians listen to recorded music, and on average, 100,000 music recordings are uploaded to streaming services daily.[51,52] In 2023, the global recorded music market was valued at an estimated US$28.6 billion – its ninth consecutive year of growth – with streaming revenues accounting for around two thirds of revenue.[53] In 2023, local music sales of Australian and international artists totally approximately $676 million.[54] This reflects growth of 11.3% from 2022, positioning Australia as among the top 10 global markets for recorded music. Streaming revenues made up nearly 80% of this income.[55]

The figures reflected in this section only count revenue associated with sales of Australian artists' music, and the associated artists' rights, both in Australia and internationally.

The recorded music industry has experienced significant consolidation globally and in Australia. In the early 2000s, five major record labels operated in Australia. Today, three record labels – Universal Music Australia, Sony Music Entertainment Australia, and Warner Music Australia – account for an estimated 70% of the market.[56,57] The remaining 30% of the market is comprised of an estimated several hundred independent labels.[58] There are frequent new entrants, mergers, and exits in the independent label market, and several organisations provide just one or more distinct label services (eg, production, manufacturing, distribution, and/or promotion).[59,60]

Indeed, together with consolidation of the market, there have also been long term changes in artists' representation by labels and distributors, with an increasing proportion not accessing support or only accessing certain types of support. Of the 361 artists who responded to this area of the industry-wide survey, more than half (54%) did not access any label or distribution support. A further quarter were not signed to a label but accessed selected distribution services.

51 Creative Australia. (2023) *Creating Value: Results of the National Arts Participation Survey, Music Fact Sheet*.
52 A number of sources estimated between 99,000 and 100,000 recordings daily including the International Federation of the Phonographic Industry, *Investing in music, Investing in artists; Driving long-term creative and commercial success*, https://www.ifpi.org/our-industry/investing-in-music/, accessed 17 October 2024; and Luminate, 2024 Year-end music report.
53 International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition*.
54 The Australian Recording Industry Association Ltd. (n.d), 2024 ARIA Yearly Statistics.
55 International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition*.
56 Kelly, T (2024), "Down, and Under Pressure: The Decline of Local and Non-Anglo Best-Selling Recording Artists in Australia 2000–2023", *International Journal of Music Business Research* 13(1).
57 Deloitte Access Economics (2020), *AIR Share, Australian independent music market report*, for the Australian Independent Record Labels Association.
58 Deloitte Access Economics (2020), *AIR Share, Australian independent music market report*, for the Australian Independent Record Labels Association.
59 Deloitte Access Economics (2020), *AIR Share, Australian independent music market report*, for the Australian Independent Record Labels Association.
60 Organisation for Recorded Culture and Arts (2024), *Setting the Stage: How Music Works*.

Wah Wah Melbourne.
Credit: Monique Pizzica.

Table 17:

Overview of artists' label and/or distribution services arrangements

Arrangement	Proportion of artists (n=361)
I do not access any label and/or distribution support	54%
I am not with a label but access selected distribution services	25%
I am with a major label	2%
I am with an independent label	9%
I have my own label	9%
Prefer not to say	1%
Total	**100%**

Source: Results of the industry-wide survey.

The changing music landscape continues to reshape the entire industry, impacting not just artists but all parts of the value chain, including record labels, distributors and label service providers. Record labels, which invested an estimated US$7.1 billion globally in artist and repertoire (A&R) and marketing in 2023,[61] face mounting pressures as the industry grows more complex. Despite projected market growth, the challenges of navigating this dynamic environment make profitability and sustainability tougher for all.

While the global recorded music market is forecast to reach an estimated US$151.4 billion by 2030,[62] the industry, including record labels, grapple with significant issues including digital piracy and streaming fraud, and the disruptive influence of generative artificial intelligence.[63] These issues create a challenging landscape, where even substantial investments by record labels may not guarantee ease of success for any stakeholder in the industry.

61 International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition*.

62 Goldman Sachs (2024) *Music in the Air: Focus on monetisation, Emerging Markets and AI; updating global music industry forecasts*, 1 May 2024, https://www.goldmansachs.com/pdfs/insights/pages/music-in-the-air--focus-on-monetisation,-emerging-markets-and-ai--updating-global-music-industry-forecasts-f/music-redaction.pdf, accessed 22 October 2024.

63 International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition*.

3.4 Composition, Songwriting, and Music Publishing

Income received by Australian composers, songwriters, and music publishers for the composition and ongoing exploitation, licensing, and management of the rights of composers and songwriters across various media

$470m	**$95m**	**$155m**	**34%**
Revenue (2024)	Export Revenue (2024)	Direct Gross Value Added (2024)	GVA as % of revenue

Composers and songwriters are the fundamental originators of music and apply their creative skills to conceive of new works for publication, recording, and/or performance across Australia and internationally. A diverse ecosystem of major and independent music publishers and self-published artists generate revenue through performance royalties, mechanical royalties, synchronisation licences, and digital streaming related to the original compositions and songs they represent.

3.4.1 Composition and Songwriting

Key statistics:

$95m
Income paid through royalties (mechanical and performing rights) and other arrangements to Australian composers and songwriters (2024)

~40%
Estimated proportion of composer and songwriter income paid through collecting societies and publishers (2024)

A 2023 survey of professional artists in Australia found that:

- 85% of composers (n=40) played a musical instrument or sang;
- Three quarters of musicians (n=59) composed music; and
- More than 80% undertook self-guided learning to pursue their artistic carer as composers.[64]

There are few reliable estimates of the number of composers and songwriters, particularly those who compose or write professionally as a primary part of their professional work with the intent to earn income. Of APRA AMCOS' nearly 100,000 Australian writer members, more than 58,000 were entitled to receive royalty payments in the 2023–24 financial year.[65] However, it is important to note these payments may be for works created by retired composers or songwriters, rather than individuals currently engaged in composing or songwriting as part of their professional work. In addition, royalties may be paid to multiple parties for a given work, in addition to the primary composer.

The mechanical and performing royalties included in this section are net distributions made to Australian composers, songwriters, and music publishers by APRA and AMCOS. This is one portion of the monies received and distributed by APRA and AMCOS. The economic contribution of APRA and AMCOS' salaries and wages are reflected in Section 3.9 Industry Support, Development, and Representation.

64 Creative Australia (2024), *Artists as Workers: An Economic Study of Professional Artists in Australia*, 2024 report prepared by David Throsby and Katya Petetskaya for Creative Australia.

65 Based on information provided by APRA AMCOS in December 2024.

Creative Australia's major report, *Artists As Workers: An economic study of professional artists in Australia*, estimated the workforce size across a wide range of arts and music related occupations. Importantly, these estimates adjusted for the estimated level under-representation of artists in ATO and ABS statistics who work periodically, part time, or in multiple roles. This study estimated there was 1,100 composers and songwriters actively working in this capacity as part of their professional work in Australia in 2023.

Composers and songwriters earned an estimated $95 million in 2023–24 in royalties, commissions, synchronisation placement fees, and other arrangements. The distribution of this income is skewed, with a high proportion earning relatively low incomes from composition and songwriting, and a lower proportion earning average and higher incomes.

The industry-wide survey achieved a high response rate from composers and songwriters, though the results under-represent those earning higher incomes from composition and songwriting. Respondents, on average, reported earning $8,700 from composition and songwriting as sole traders. They reported working about 1.6 days in this role and deriving most of their income from other music-related pursuits and sources of employment outside the music industry. Only those reporting to work full time as composers and songwriters earned significantly higher than this amount, at $37,200 per annum. On average, these respondents also reported earning a substantial component of income from outside the music industry.

Table 18:

Overview of sources of income for sole traders working as composers/songwriters

	Sole trader			Other capacities	
Number of days per week worked as a composer/songwriter	**Composition income**	**Other music-related income**	**Expenses to earn music income**	**Non-music-related income**	**Total income from all work**
Up to 1 day/wk *(n=129)*	$5,600	$20,000	($12,800)	$44,900	$57,700
1-2 days/wk *(n=68)*	$4,200	$33,300	($13,600)	$33,000	$56,900
2-3 days/wk *(n=25)*	$8,200	$16,400	($15,100)	$41,900	$51,400
3-4 days/wk *(n=25)*	$9,000	$25,400	($18,400)	$32,500	$48,500
Full time *(n=27)*	$37,200	$12,200	($23,400)	$16,200	$42,200
Average *(n=274)*	**$8,700**	**$22,900**	**($14,800)**	**$37,700**	**$54,500**

Note: Figures are rounded to the nearest $100.
Source: Results of the industry-wide survey.

Many of the businesses responding to the survey and indicating involvement in composition and songwriting were primarily based elsewhere in the value chain, with many being bands or labels. Due to the nature of the survey data, it was not possible to separate composition and songwriting revenue for these businesses. As a result, the data and sample size were not sufficient to report results separately in this section for businesses.

Many composers and songwriters rely on a combination of income sources, including royalties, commissions, sheet music sales and performance fees.[66] Those answering the survey indicated nearly half comes from commissions, one third from royalties, and the balance from synchronisation placement fees and other types of commercial arrangements.

Table 19:

Sources of composition income for composers and songwriters

	Results (n=185)
Commissions/upfront fees	49%
Royalties	34%
Synchronisation placement fees	6%
Arrangements	1%
Other	10%

Note: Totals may not add due to rounding.
Source: Results of the industry-wide survey.

Respondents further indicated that an average of two thirds of this income is paid directly to the composer or songwriter, and another quarter through a collecting society.

Table 20:

Methods of receipt of composition income by composers and songwriters

	Results (n=181)
Paid directly to the composer/songwriter	66%
Paid through a collecting society	27%
Paid through a publisher	5%
Other	2%

Note: Totals may not add due to rounding.
Source: Results of the industry-wide survey.

66 United States Copyright Office. (2020). *Musicians' Income*. https://www.copyright.gov/music-modernization/educational-materials/musicians-income.pdf, accessed 18 October 2024.

While recorded music, film, and television are popular mediums for composers and songwriters, composers continue to find and grow new sources of revenue, for example gaming, which emerged in the late 1990s and early 2000s. A 2022 survey of composers identified that 53% of game music workers had received income for game music composition work in the previous year.[67]

Table 21:

Mediums of composition for Australian composers and songwriters

	Results (n=215)
Records/albums	73%
Film	20%
Television	13%
Advertising	11%
Musical theatre	11%
Gaming	8%
Opera	7%
Other	40%

Source: Results of the industry-wide survey.

67 Keogh, B., Golding, D., Hardwick, T. 2023. *Australian Music and Games 2023 Benchmark*. Queensland University of Technology and Swinburne University of Technology. http:// doi.org/10.5204/rep.eprints.243139.

Jessica Cottis, Chief Conductor and Artistic Director of the Canberra Symphony Orchestra, thanked the audience at the conclusion of the Llewellyn Series #2: Electric Blue on 26 April 2023.
Credit: Thomas Lucraft.

3.4.2 Music Publishing

Key statistics:

57
Number of AMPAL members (2024)

$370m
Estimated Australian publisher revenue (2024)

$86m
Estimated Australian publisher export revenue (2024)

$60m
Estimated Australian publisher GVA (2024)

A range of major and smaller independent music publishers and self-published artists operate in Australia.[68] Music publishers and licence holders generate revenue from performance royalties, mechanical royalties, synchronisation licences, and digital streaming. Each type of publishing revenue has different collection and distribution processes, which makes publishing a complex part of the industry.

Like other parts of the industry, shifts in music consumption – particularly the rise of streaming services –have impacted music publishing and traditional revenue models. As with other parts of the music industry, artists can now easily self-publish, by-passing the traditional model of music publishers and labels. This creates both opportunities and challenges.

As well as self-publishing, a range of artists have also sold their portion of their publishing rights for their music back catalogues in recent years. With a range of high profile, high value sales of music back catalogues (including Bruce Springsteen, Stevie Nicks, Bob Dylan and Tame Impala), a range of music royalty investment funds have emerged as a platform for both investors and artists.[69]

While the definitive number of Australian music publishers is not known, the Australian Music Publishing Association Ltd (AMPAL) had 57 members on 30 June 2024 collectively representing 70% of the economic value of the music publishing sector.[70]

Australia is a significant market within the Asia Pacific region and is projected to realise steady revenue growth in the coming years driven by streaming royalties, performance rights, and digital service provider (DSP) revenues.[71]

68 Independent Music Publishers Forum (2020), *Independent Music Publishing Global Market View 2020*.
69 Koplin, I (2023), *Sound Investments: The Opportunities and Risks of Music Royalties as an Asset Class*, https://www.abfjournal.com/sound-investments-the-opportunities-and-risks-of-music-royalties-as-an-asset-class/, accessed 16 January 2025.
70 Australian Music Publishers Association Limited (n.d), retrieved from https://www.ampal.com.au/, accessed 16 January 2025.
71 MIDiA Research (2024), *2024-2031 Global music publishing forecasts: Managed change*; prepared by Mark Mulligan for MIDiA research.

3.5 Artist Management

Activities associated with the professional development and management of artists' careers

$195m Revenue (2024)	**$10m** Export Revenue (2024)	**$92m** Direct Gross Value Added (2024)	**48%** GVA as % of revenue

Artist managers play a crucial role in developing and guiding the careers of artists they represent.

Historically, artist management tended to support artists through a relatively consistent career trajectory – developing the artists, signing the artist with a record label, recording an album, promoting the album, and touring. Artists had more limited direct engagement with fans and relied heavily on traditional media and advertising channels for promotion. Managers provided support and advice to the artist along that trajectory by investing time in the artist's professional development, cultivating networks, negotiating contracts, and acting as the intermediary between the artist and industry stakeholders.

Stakeholder engagement, the industry-wide survey, and literature demonstrate a marked shift in the nature and responsibilities of artist managers over time. The ability for artists to distribute music and interact directly with fans via digital platforms has been a significant disruptor of artist managers' roles.[72] Indeed, an increasing proportion of artists are self-managed. Over time, emphasis has shifted to artist managers acting as collaborators, advisors, and strategic partners throughout what is now a more complex artist career trajectory. Roles that have emerged for artist managers include providing business strategy, guidance on creative decisions, marketing, data analysis,[73] and fan engagement and management.[74] The evolving nature of their role has reportedly increased workloads and the level of early-stage investment of time and resources required to support artists. However, the expected future returns remain uncertain, and collectively this represents increased financial risk to artist managers.[75,76]

72 Association of Artist Managers (2022), *National Cultural Policy Submission* https://www.aam.org.au/cps2022, Accessed 18 October 2024.
73 Pizzolitto, E. (2023). "Music in business and management studies: a systematic literature review and research agenda" *Management Review Quarterly*.
74 Hujran, Omar et al (2020), *Big Data and its Effect on the Music Industry*.
75 Association of Artist Managers (2022), *National Cultural Policy Submission* https://www.aam.org.au/cps2022, accessed 18 October 2024.
76 Music Managers Forum (2024), *Managing Expectations: Management Deals Guide*.

A substantial response from artist managers was achieved in the industry-wide survey.

Table 22:

Overview of sole traders and businesses working as artist managers who responded to the industry-wide survey

Category	Respondents
Sole traders working as artists managers	119
Sole traders working as artists managers who own a music business	21
Businesses working as artists managers	55
Businesses working as artists managers owned by individuals	28

Note: Sole traders and businesses may operate across multiple areas of the music industry.
Source: Results of the industry-wide survey.

About 13% (n=119) of sole traders (n=946) reported working as artist managers for an average of two-to three days per week (2.4 days). About one third (34%) reported working three or more days per week as an artist manager. Sole traders working as artist managers earned an average of $36,000 across all their music-related work, with about one fifth (22%) earned from overseas. They reported employing, on average, 1.7 people each, with average employee expenses of $4,500, suggesting casual and/or part time arrangements with very light utilisation. Employee expenses reported do not include income drawn by sole traders.

A substantial amount of artist management activity also occurs through businesses. Businesses engaged as artist managers reported average income of about $871,000, of which about one third (32%) was earned from overseas. They employ 6.6 people, on average.

Table 23:

Financial data for sole traders and businesses working as artist managers

	Sole Traders (n=118)	Businesses (n=55)
Average total income	$36,000	$871,200
Average salaries and wages expenses	$4,500	$221,400
Average total expenses	$18,100	$794,000
Export income share (% of total income)	22%	32%
Average employment (full time, part time, casual)	1.7	6.6

Note: Figures are rounded to the nearest $100.
Note: Results are for music-related income only and exclude activity that occurs outside the music industry.
Note: Results show figures for all music-related activity. Not all income is attributable to artist management because many sole traders and businesses undertake different activities in the music industry.
Source: Results of the industry-wide survey.

Artistic Director Brendan Joyce with students of Queen's Beach State School in Bowen, as part of – Queensland's Chamber Orchestra's regional tour, 2023.
Credit: Morgan Roberts.

Consistent with the changes in the ways artists' career paths can develop, the industry-wide survey highlighted the substantial level of investment made by artist managers in the expectation of a potential future return. The results highlight the long period of development typically required and the levels of consistency of income from artists that are reported.

Table 24:

Time investments reported by artist managers to support long term artist career pathways

Number of artists being promoted	Number of artist managers (sole traders and businesses) (n=47)	Average number of artists/ ensembles providing consistent income (n=45)	Average number of years of development support from signing to receipt of steady payments (n=44)	Average number hours each week invested with no short-term payoff (but with an expectation of a potential future payoff) (n=45)
1 artist	9	0.9	4	12
2–5 artists	23	1.5	8	33
6–9 artists	11	3.1	8	38
10 or more artists	4	n.r.	n.r.	n.r.

n.r. Figures are not reported to preserve confidentiality due to the low sample size.
Source: Results of the industry-wide survey.

3.6 Synchronisation

The use of music in visual media, including TV shows, music videos, videos of performances, animations, video games, and advertisements

$64m Revenue (2024)	**$13m** Export Revenue (2024)	**$16m** Direct Gross Value Added (2024)	**24%** GVA as % of revenue

Synchronisation (sync) involves the licensing of music for use in visual media, including film, television, advertising, video games, and online content. Sync licensing is an important revenue stream for composers, songwriters, record labels, and music publishers, with income derived from upfront license fees and ongoing royalties. Sync revenue grew for a third successive year in Australia in 2023, and Australia ranked sixth globally based on reporting by IFPI.[77]

When they can be secured, sync placements provide important opportunities for artists. However, there is an increase in the use of stock and AI-generated music to avoid lengthy licensing processes and potentially higher licensing fees involved in using original music.[78] There has also been a decline in the value of individual sync opportunities as they have trended to higher-volume, faster-turnaround requests. As an illustration, Australian band Jet released *Are you gonna be my girl* in 2003, and the song subsequently featured in the 2004 Apple iPod commercial, boosting Apple and Jet's visibility and sales in several markets.[79] More recently, Australian artist Tones & I released an album, an EP, and around a dozen singles, including the worldwide number one song, *Dance Monkey*. Subsequently, 12 of these songs appeared in 55 sync placements.[80]

Sync licensing can also support the re-discovery of original music and breathe new life into old songs. Peter Allen's 1980 song, *I Still Call Australia Home*, has become iconic for Australians, helped in part through the song's strong association with the Qantas brand. Qantas has used the song in its advertising over a long period of time, exposing new generations of Australians to it and using nostalgia to evoke an emotional response and positive brand association. Such examples highlight the potential opportunity of sync placements in popular media and their ability to boost royalty income long after a song's release.

Sync also continues to see significant growth in gaming.[81] While opportunities in the metaverse[82] and NFTs[83] have lost some of their original momentum, they also offer potential avenues for growth.[84]

77 International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition*.

78 Stingmore, T (2024) "The Music Sync Industry is headed for an iceberg. It needs and upgrade". *Music Business Worldwide*, https://www.musicbusinessworldwide.com/the-music-sync-industry-is-headed-for-an-iceberg-it-needs-an-upgrade/, accessed 21 October 2024

79 Bain, K, (2022), "Ipod Commercials Defined an Era for Music Marketing: The 10 Most Iconic Ads", *Billboard*, https://www.billboard.com/music/music-news/best-ipod-commercial-syncs-1235069303/, accessed 31 October 2024.

80 Kopp, B (2023), "The Expanding Universe of Music Sync: How It Works, Understanding The Opportunities", *Grammy Awards News* https://www.grammy.com/news/music-sync-explainer-how-it-works-opportunities-getting-paid-future-of-sync accessed 21 October 2024.

81 Keogh, B., Golding, D., Hardwick, T. 2023. *Australian Music and Games 2023 Benchmark*. Queensland University of Technology and Swinburne University of Technology. http:// doi.org/10.5204/rep.eprints.243139.

82 Wende Crowley, Sony Music Publishing's Senior VP of Creative Marketing, Film & TV, quoted in an article for *Grammy Awards News* in 2023 noted that they are watching the development of the metaverse closely for synchonisation opportunities https://www.grammy.com/news/music-sync-explainer-how-it-works-opportunities-getting-paid-future-of-sync accessed 21 October 2024.

83 Kopp, B (2023) 'The Expanding Universe of Music Sync: How It Works, Understanding The Opportunities', *The Grammy News*, 4 May, https://www.grammy.com/news/music-sync-explainer-how-it-works-opportunities-getting-paid-future-of-sync accessed 21 October 2024. Wende Crowley, Sony Music Publishing's Senior VP of Creative Marketing, Film & TV quoted.

84 Sounds Australia, (2024), *Fast-Tracking Australian Music Success Globally, 2023 Annual Report*.

Untitled Goose Game, image courtesy House House.

3.7 Music Retail

The sale and/or hire of music recordings and associated merchandise, music equipment, and instruments (including making and repairs)

$2.73b
Revenue (2024)

$310m
Export Revenue (2024)

$515m
Direct Gross Value Added (2024)

19%
GVA as % of revenue

Music retail in Australia is comprised of a range of physical and online sales of recorded music, musical instruments, accessories, audio equipment, music publications, music merchandise, and instrument making, repairs, and hire.

3.7.1 Physical and Digital Music Recordings

Key statistics:

79%
Proportion of digital and physical music sales in Australia across non-ad-supported and ad-supported audio streaming services (2023)

$700m
Australian subscription audio streaming revenues (2023)

$110m
Estimated Australian artist rights income from global streaming (2023)

1.3%
Estimated global market share of Australian music (2023)

Australians' appetite for recorded music is strong, but the way music is paid for and consumed has, and continues, to change. Three quarters of Australians listen to recorded music through free and paid streaming services, with paid streaming service subscriptions increasing from 36% in 2019 to 50% in 2022.[85,86] In 2023, streaming revenues accounted for about 70% of total Australian recorded music revenues.[87]

For physical revenues, CD's and music video have steadily declined since 2019.[88] In 2023, CD revenues had more than halved from 2019, and music videos are now less than a third of what they were in 2019. While physical sales continue to decline relative to digital sales, sales for vinyl records increased by 14.1%, and represented 70% of total physical sales.[89] This is consistent with global trends, which have seen vinyl sales grow consecutively over the last four years.[90]

Based on data provided by ARIA and Phonographic Performance Company of Australia (PPCA), the International Federation of the Phonographic Industry (IFPI) *Global Market Report 2024* provides the following breakdown of digital and physical revenues as a percentage of total combined physical and digital music revenues in Australia in 2023.

85 Creative Australia, (2023), *Creating Value: Results of the National Arts Participation Survey*, Music factsheet.
86 Creative Australia, (2023), *Creating Value: Results of the National Arts Participation Survey*, Music factsheet.
87 International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition.*
88 International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition.*
89 International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition.*
90 Goldman Sachs (2024) *Music in the Air: Focus on monetisation, Emerging Markets and AI; updating global music industry forecasts*, 1 May 2024, https://www.goldmansachs.com/insights/goldman-sachs-research/music-in-the-air--focus-on-monetisation--emerging-markets-and-ai

Table 25:

Share of total combined digital and physical music revenues by digital and physical revenue streams in 2023

Revenue stream		Share of total music sales (%)
Digital	Permanent downloads	2%
	Mobile personalisation and other digital	<1%
	Subscription audio streaming	69%
	Ad supported audio streaming	10%
	Video streaming	9%
Physical	Vinyl	6%
	Compact disc (CD)	3%
	Music video	<1%

Source: International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2024, Premium Edition*.

The long-term shift from physical sales of recorded music to digital and streaming has changed the way money flows to artists. In the past, artists earned a share of each physical album sale, usually between 10 and 20% of the retail price. For streaming, royalties are typically between $0.004 and $0.0084 per stream, which is paid to rights holders (eg, record labels, publishers, and artists). Streaming services also pay a percentage of total revenue, usually between 50 and 80%, to rights holders.

How Money Flows to Artists from Streaming Services

- **Record Labels** receive a significant portion of the streaming revenue, as they own the master recordings and negotiate licensing agreements with streaming services.
- **Music Publishers** who own the rights to the composition (lyrics and melody), receive a percentage of the streaming revenue, typically ranging from 10% to 20%.
- **Artists** receive a percentage of the streaming revenue, which can vary depending on their contract with the record label. This percentage is often a fraction of the total revenue, typically ranging from 10% to 20%.
- **Music Distributors** can also take a percentage of the streaming revenue for their services, which can range from 10% to 20%.

The streaming revenue landscape is complex, with multiple stakeholders and varying percentages, making it challenging for artists to understand and navigate. In addition, many stakeholders report a lack of transparency in the streaming industry and resulting difficulties in tracking earnings.

The industry-wide survey highlighted the difficulty presented by the shift from physical revenues to digital and streaming revenues for artists. While streaming offers a range of benefits, per-stream payouts are low, making it difficult for some artists to earn a living or sustain their careers through streaming alone.

3.7.2 Music Instrument Making and Repair

Key statistics:

415
Estimated number of full time Australian instrument makers and repairers (2023)

$32m
Estimated income from music instrument making and repair (2024)

Musical instrument makers and repairers in Australia operate under various business models, including luthiers, repairers, and technicians working in retail store repair workshops or wholesaler/manufacturing businesses, manufacturing workers, those in standalone repair/maintenance businesses, and independent contractors or sole traders.[91] It is noted that many musicians, particularly students, hire musical instruments. However, data was not available to understand the revenues or employment generated by this activity in isolation from other activities (for example a conservatorium of music hiring an instrument to students, or a retail store hiring instruments to the public).

In addition to sales of music products, over half of music retailers[92] offer instrument servicing and repair. However, over 60% of retailers and over 45% wholesalers note significant skills shortages in this area.[93] There is an estimated 830 (415 full time equivalent) people working as instrument makers and repairers in Australia.[94,95] Seventeen people who responded to the industry-wide survey reported working as instrument makers and repairers, most of whom (71%) reported working one day per week and a further 12% reported working two to three days per week.[96]

3.7.3 Music Products

Key statistics:

~3,900
Estimated employment associated with music products retailers (2024)

$445m
Value of music product imports (2024)

$310m
Value of music product exports (2024)

79%
Share of export revenues for microphones and stands (2024)

In addition to physical and digital sales of recorded music, the sale of music products, which includes musical instruments, print music, consumer pro audio and lighting, and music technology, supports several wholesale and retail businesses and employment. The music products market is broadly defined as a mature industry. Whilst pro-audio and software are relatively modern, most instruments have remained unchanged for centuries. In Australia, 17% of people create music themselves by singing, playing musical instruments, or writing, mixing and composing music,[97] with music product sales per capita estimated to be $12.31.[98] The music products market in Australia is mainly comprised of small and family businesses, at 85% of retailers and 79% of wholesalers. These smaller retailers and wholesalers employ an average of seven and 14 employees, respectively.[99]

91 Australian Music Association (2024), *Australian Music Association Market Report*.
92 Australian Music Association, (2024), *State of the Industry*, retrieved from https://australianmusic.asn.au/new-report-state-of-the-industry/, accessed 12 November 2024.
93 Australian Music Association, (2024), *State of the Industry*, retrieved from https://australianmusic.asn.au/new-report-state-of-the-industry/, accessed 12 November 2024.
94 Australian Music Association (2024), *Australian Music Association Market Report*.
95 The Australian Government's Jobs and Skills Australia website provides occupation level data based on 2021 Census data. This figure relates specifically to the ANZCO 399515 classification for 'Musical Instrument Makers and Repairers'
96 These figures are extracted from the results of the industry-wide survey conducted for this report.
97 Creative Australia, (2023) *Creative Value: Results of the National Arts Participation Survey, Music factsheet*.
98 Music Trades, (n.d) *The Global Music Industry 2024 Edition, Global Markets music products sales around the world*.
99 Australian Music Association (2024), *Australian Music Association Market Report*.

Local and international sales declined in 2023, with Australian product sales down 14%.[100] Notwithstanding a significant increase in music product sales during the pandemic, there has been overall growth since 2019 but most categories declined in terms of units and value.[101] In the global context, worldwide sales in leading markets, of which Australia is ranked ninth with 1.7% of the global market, were down 5%.[102] This decline, in context is largely thought to be the industry's return to the pre-pandemic norm.[103]

Global trends noted as contributing factors to this decline include unstable global markets, and a market correction following pandemic increases.[104] At a local level, in a survey of Australian music product wholesalers and retailers, half reported that their business was 'significantly worse off' in July 2024 compared to July 2023.[105]

3.7.4 Merchandise

Key statistics:

$185m
Estimated music merchandise sales in Australia (2024)

~75%
Estimated share of merchandise sales at live music events

$65m
Estimated value of Australian artist gross merchandise sales (2024)

3%
Share of Australian artist income from merchandise (after venue/retailer cut and costs) (2024)

A 2023 survey of 1,300 local bands, artists and music makers found that merchandise sales accounted for 8.4% of their annual income.[106] While globally, the industry notes that touring artists can earn between 10% and 35% of their revenue through merchandise sales.[107] Our analysis found merchandise sales accounted for about 3% of Australian artists' income in 2023–24 after costs were removed.

Recent figures for merchandise sales at live music events across the USA showed that 22% of attendees purchased merchandise.[108] To illustrate the importance of merchandise as a revenue stream for many artists, it was estimated in this same research that while the average income from a digitally streamed song is US$0.00318, the average cost of a band T-shirt (the most popular merchandise item sold at live music events)[109] is US$36. It is noted however, that the standard percentage fee that venues take from merchandise profits ranges from 10% to 40%, and those rates often vary between soft merchandise (clothing, hats, tote bags) and hard merchandise (vinyl, CDs, cassette tapes).[110] This has resulted in many artists calling for venue's to lower their merchandise fees and take a more simplified and consistent approach.[111]

100 NAMM, (n.d), *2024 NAMM Global Report.*
101 NAMM, (n.d), *2024 NAMM Global Report.*
102 Music Trades, (n.d) *The global music industry 2024 Edition, Global Markets music products sales around the world.*
103 NAMM, (n.d), *2024 NAMM Global Report.*
104 Music Trades, (n.d) *The Global Music Industry 2024 Edition, Global Markets music products sales around the world.*
105 Australian Music Association, (2024), *State of the Industry*, retrieved from https://australianmusic.asn.au/new-report-state-of-the-industry/, accessed 12 November 2024.
106 Australian Broadcasting Corporation, (2023), *What's up in Australian music? Social media stress, big DIY energy and multiple jobs*, https://www.abc.net.au/triplej/programs/program-unearthed/whats-up-in-australian-music-survey-results-feature/102988278, accessed 20 October 2024.
107 John, B (2017), *Bands can earn a truly insane amount of money from merch these days*, retrieved from https://tonedeaf.thebrag.com/just-how-much-do-artists-earn-from-merch-these-days/.
108 atVenu (n.d), *2024 Year in Review, Artist Merchandise Edition*, retrieved on 11 April 2025, from https://www.atvenu.com/features/artist-merchandise-trends-year-in-review-2023, which includes data from venues ranging from small (0-500) to major (20,000+) across all genres and US states.
109 atVenu (n.d), 2024 *Year in Review, Artist Merchandise Edition*, retrieved on 11 April 2025, from https://www.atvenu.com/features/artist-merchandise-trends-year-in-review-2023, which includes data from venues ranging from small (0-500) to major (20,000+) across all genres and US states.
110 Corcoran, N (2023), *The Fight Between Musicians and Venues Over Merch Profits Is a Big Deal With a Simple Solution*, retrieved from https://pitchfork.com/features/article/artist-merch-cuts-venues/.
111 Corcoran, N (2023), *The Fight Between Musicians and Venues Over Merch Profits Is a Big Deal With a Simple Solution*, retrieved from https://pitchfork.com/features/article/artist-merch-cuts-venues/.

3.8 Music Education

Specialist music education and programs provided by artists/musicians and/or qualified music educators

Creativity in education is widely accepted as beneficial to social, academic, and personal development, learning outcomes, and workforce skills development. Research identifies creative skills as essential for future work environments[112] and finds that children who encounter arts activities at school – such as learning a musical instrument – are more likely to participate in arts as adults.[113]

Music education in Australia spans from early childhood to higher education and professional practice. The music education sector is supported by both public and private providers and includes a wide range of activities involving professional tutors, musicians, academics and supporting operational staff providing private lessons, school programs, tertiary-level training and degrees, community initiatives, private and conservatorium-level training.

Key statistics:

> $60m
Revenue and direct Gross Value Added (2024)[114]

66%
Artists' teaching income derived from private students and primary and secondary school settings

There is no existing data or information on the depth and breadth of key parts of the music education ecosystem, including the number and value of private education providers, particularly in the tertiary sector. However, given the importance of education and its economic contribution, it is important to establish a baseline measurement and understanding of the contribution of music education provision across primary, secondary, tertiary and the private music education sectors.

Primary and secondary music education research offers some insight, noting declines in high quality music education programs (from 23% in 2010, to 16% in 2020), and schools that offer a band or orchestra (from 48% in 2010, to 40% in 2020), and the challenges for school leavers in accessing musical instruments when they leave school.[115]

112 Creative Australia 2024, *Music and arts education in NSW Creative Australia submission to the Joint Select Committee on Arts and Music Education and Training in New South Wales*.

113 Oskala A et al 2009, *Encourage children today to build audiences for tomorrow: Evidence from the Taking Part survey on how childhood involvement in the arts affects arts engagement in adulthood*, Arts Council England.

114 Due to significant data limitations in relation to music education, the income and GVA estimate only comprises teaching income earned by Australian artists in 2023–24. Other sources of economic activity in music education, including (but not limited to) tertiary institutions, conservatoriums of music, and private academies are not captured in this analysis. Further, detailed data collection and consultation will be required in future editions of the report to address these data gaps. As a result, the estimate for education is not considered a full estimate and should be treated with caution.

115 Community Music Victoria (2023), *The Sound of Silence: School Leavers and the Vanishing Music Experiences in Australia*, retrieved from https://cmvic.org.au/news/the-sound-of-silence-school-leavers-and-the-vanishing-music-experiences-in

In recent years, several state and territory education agencies have developed music education strategies and frameworks[116] which acknowledge the value of quality music education in school-based settings. These strategies respond to calls for a more structured approach to music education in the classroom, improved teacher training and capacity, better utilisation of specialist music educators, and improved curriculum integration.[117] An example of this includes South Australia's Music Education Strategy (2019–29), with key initiatives including the music educational professional development packages and the Music Innovation Fund, supporting the professional development of music educators and facilitating new opportunities for children and young people to participate in music education.[118] In addition, in 2024 the NSW Government established a joint select committee to inquire into and report on arts and music education and training in New South Wales.

There is a disparity in the provision of music education across independent and public schools, and schools in metropolitan and rural locations.[119] At the secondary level, in addition to instrument tutoring and music theory, elective subjects can include music industry related training such as audio, production and staging as an industry pathway.

Outside the classroom, a range of private educators and nonprofit organisations (eg, conservatoriums and youth orchestras) provide specialist music education and tutoring for primary and secondary students. At a tertiary-level, a range of universities, including those with conservatoriums of music, provide degree-level training primarily for instrument, singing, conducting, and music theory and education. Technical and Further Education (TAFE) also provides training in a range of instruments, music theory, technical (eg, audio and staging), and business related courses.

There are several private education providers, for example JMC Academy, Australian Institute of Music, and Industri Education. These providers specialise in a range of courses spanning audio engineering, music business, and industry studies, technical production, as well as instrument tutoring and music theory. The industry-wide survey captures a snapshot of the type of music teaching, teaching income sources and number of students being taught by music teachers each week.

There is very limited data available regarding music education, including for employment. The most recent figures identify 11,800 private teachers, of which 87% worked part time in this capacity.[120] The industry-wide survey was completed by 112 musicians who reported working as music teachers for part or all their time. Around three quarters (77%) of these respondents reported teaching an instrument, with over 40% also reporting teaching music theory.

116 Andriani, R, (2022), "Music education for Australian students depends on which state they live in", ABC, https://www.abc.net.au/listen/classic/read-and-watch/news/australian-music-education-depends-on-state-students-live-in/101283354, accessed 31 October 2024.

117 Alberts I The Tony Foundation (n.d), *Music Education: Right from the Start, An Understanding of Quality School Music Education*, Alberts_Music-Education-Quality-Framework_A4_V3.pdf, accessed 31 October 2024.

118 Government of South Australia (n.d), *Strategies and Initiatives*, retrieved from https://www.education.sa.gov.au/schools-and-educators/strategies-and-initiatives , accessed 23 May 2025.

119 The Music Trust Submission to the Review of the Australian Music Curriculum in 2014 cited work by Ian Harvey, having extrapolated from existing statistical data that 88 per cent of independent schools, and only 23 per cent of government schools do not offer music education presented by specialist music teachers. The date of the Ian Harvey analysis was not made available, the information was retrieved from https://musictrust.com.au/music-education/advocacy-argument/submission-to-the-review-of-the-australian-curriculum-2/, accessed 31 October 2024.

120 The Australian Government's Jobs and Skills Australia website provides occupation level data based on 2021 Census data. This figure relates specifically to the ANZCO 249214 classification for 'Music Teachers (Private Tuition).

Table 26:

Proportion of music teachers providing different types of music instruction

Type of teaching	Respondents (n=112)
Instrument	77%
Music theory	42%
Voice/singing	23%
Music history/musicology	14%
Other (eg, composition, songwriting, audio, production)	26%

Source: Results of the industry-wide survey.

For those music teachers who provided income details (n=108), nearly half of their income (43%) was derived from private teaching, with a further quarter (23%) from primary and secondary school teaching. The balance was earned from music therapy, conservatoriums of music, and other teaching settings.

Table 27:

Distribution of music teachers' income by income source

Source of income	Respondents (n=108)
Private students	43%
Primary or secondary school	23%
Therapy students	11%
Conservatorium of music	7%
Tertiary institution	7%
Other	9%

Source: Results of the industry-wide survey.

Of those music teachers who responded to the survey, over one quarter (28%) reported teaching more than 31 students per week, with a combined 57% teaching more than 16 students per week. About one quarter (26%) reported teaching five students or less per week.

Table 28:

Average number of individual students taught by music teachers each week

Number of Students	Respondents (n=109)
1–5 students	26%
6–10 students	12%
11–15 students	6%
16–20 students	12%
21–30 students	17%
31+ students	28%

Source: Results of the industry-wide survey.

In March 2025, the House of Representatives Standing Committee on Communications and the Arts released its *Inquiry Report*, into the challenges and opportunities for the live music sector.[121]

In response to the inquiry, the committee has recommended that the Australian Government collaborate with state and territory governments to enhance music education in primary schools, potentially through pilot projects targeting socio-economically disadvantaged communities and assessing their impact on student outcomes. It also recommended that the Australian Curriculum, Assessment and Reporting Authority partner with these governments to better integrate music into school curricula, aiming to boost participation in music studies across primary and secondary school levels.[122] It is noted that the National Cultural Policy *Revive* includes a strong commitment to arts and creative education, and, through the establishment of Music Australia, has committed to delivering song writing and recording initiatives in schools.[123]

121 The Parliament of Australia (2025), *Am I ever going to see you live again? Yes way! You bet! Oh yeah!*, House of Representatives Standing Committee on Communication and the Arts.

122 The Parliament of Australia (2025), *Am I ever going to see you live again? Yes way! You bet! Oh yeah!*, House of Representatives Standing Committee on Communication and the Arts.

123 Creative Australia. (2023) *National Cultural Policy Revive: a place for every story, a story for every place.*

3.9 Industry Support, Development, and Representation

Policy, strategy, industry representation, and other activities to support and enable industry development, investment, networking, and sector advocacy

$290m
Direct Gross Value Added (2024)

$153m
Value of music-related grants across state/territory and Federal government agencies (2024)

>1,700
Employees across industry support, development, and representation (2024)

A wide range of organisations work to support the ongoing growth and development of the Australian music industry. While each has different focuses and remits, these organisations work to promote the industry, identify and address challenges, provide resources, education and training, undertake research, make representations and advocate, and support industry networks and engagement.

3.9.1 Music Related Government Agency Operations and Funding

All levels of government in Australia make investments and provide resourcing to support the music industry. Depending on the level and purview of the agency or department, this can encompass:

- Provision of individual and organisational funding under established government programs;
- Policy advice, and support with legislation and regulation;
- Research, data collection, and analysis;
- Investment in infrastructure;
- Economic support; and
- Export and international market assistance.

These resources are intended to help promote Australian music, support emerging and established artists, and foster a vibrant and diverse music and wider arts ecosystem. The development and administration of these initiatives are typically aligned with broader arts and cultural policy and strategic priorities. Agencies, departments, and staff work together with industry, peak bodies, and associations and each other to support the music industry, from local communities to international markets including infrastructure and resources, education and training, international promotion and pathways, development, and advocacy.

Between 2015–16 and 2019–20 there were steady, modest increases in government funding and support for music. This support almost doubled for some government agencies in 2020–21 in response to the impacts of COVID-19. [124] The Commonwealth Government has maintained this higher level of funding over recent years.

124 Historic funding figures were access through the Australian Government's Department of Infrastructure, Transport, Regional Development, Communications and the Arts, Office for the Arts website, and include the *Cultural funding by Government – 2021-2022 – Overview and the Cultural and Creative Statistics Working Group Cultural Funding by Government -2021-22* report, retrieved from https://www.arts.gov.au/cultural-data-online/government-cultural-funding-and-participation.

3.9.2 Performing Rights Organisations

Performing rights organisations play a vital role in the music industry by ensuring that songwriters, composers, and music publishers are compensated for the public performance of their works, in addition to their broader role in advocacy and representing the views of their members, and supporting industry development.

APRA AMCOS represents over 124,000 songwriters, composers, and music publishers across Australia and New Zealand, and pays royalties to music creators when their music is played or copied locally and overseas. APRA AMCOS also license to perform, copy, or record music by organisations and businesses, and pay these royalties to members and overseas affiliated societies. With reciprocal arrangements in place, overseas societies also collect and pay royalties on the music of their members used in territories outside of Australia and New Zealand. APRA AMCOS actively engage with and advocate on issues affecting members and represent their members' views in a range of public and industry forums.[125]

PPCA grants licences for the broadcast, communication or public playing of recorded music or music videos, and distribute these licence fees to record labels and Australian recording artists. PPCA currently provides licences to more than 55,000 clubs, hotels, bars, restaurants, fitness centres, shops, halls and dance studios across Australia, as well as radio and television stations. The licence fees collected by PPCA are distributed to the owner or licencee of the recording, the Australian recording artist who performed the music and to the PPCA Performers Trust Foundation. The trust is a fund that provides grants encouraging music and performing arts.[126]

A joint music licensing initiative between APRA AMCOS and PPCA, OneMusic, was established in 2019 to allow businesses and organisations to meet their copyright obligations for the use of musical works, sound recordings and music videos in public settings.

OneMusic does not supply music, rather, its purpose is to promote music licensing alongside other licensing and business requirements for any business operating in Australia.

Together, these organisations administer a significant component – though not all – royalties on behalf of Australian artists, as well as advocating for the interests of their members. They also coordinate with international counterparts to collect royalties payable to Australian artists for overseas engagements and to distribute royalties for international artists earned through performances undertaken in Australia.

3.9.3 Music Peak Industry Bodies, Associations, and Not-For-Profit Organisations

Representing the collective interests of the music industry and/or its members, through engagement and the industry-wide survey 58[127] music peak industry bodies and associations were identified. Peak industry bodies and associations provide a range of resources, support and networking, and advocacy. They are a trusted source of information for members, and seek to understand the interests, needs and rights of their membership.

In addition, dozens of non-profit and charity organisations responded to the industry-wide survey. These included a vast range of smaller organisations representing the interests of their members. Often in niche music genres or specialisations (eg education, disability representation), these organisations actively engage with their members, and the broader public through events, broadcasting, performances, information sharing and education programming, reaching new audiences and providing opportunities, resources and support for a range of musicians, music professionals and related industries.

Peak bodies, associations and non-profit organisations in the music sector have a broad range of purposes, membership models, and areas of focus, reflecting their diverse roles within the industry.

125 Australian Performing Rights Association (APRA) (n. d.) What we do. Retrieved from https://www.apra.com.au/what-we-do, accessed 14 January 2025.
126 Phonographic Performance Company of Australia limited (PPCA) (n.d.), What we do. Retrieved from https://www.ppca.com.au/about-us/what-we-do, accessed 14 January 2024.
127 This includes APRA AMCOS and PPCA as they also provide peak industry services, resources, advocacy, and other member services (as well as administering royalties and licences).

Our analysis captures data from 48 organisations that were able to provide information, and this information is captured in our analysis. As a number of organisations did not provide data, the current figures do not fully represent the total economic contribution of all non-profits operating in this space, however, over time, we aim to gather and incorporate additional information it into future analyses to offer a more comprehensive picture.

3.9.4 Music Awards

A range of music awards (and prizes) are staged each year, including national, state and territory, and genre-based awards, each with several award categories. Major awards include (but are not limited to):

- Australian Independent Record Labels Association (AIR) Awards
- Association of Artist Managers Awards;
- ARIA Awards;
- APRA Music Awards;
- Art Music Awards;
- Country Music Association of Australia (CMAA) Golden Guitar Awards;
- Australian Women in Music Awards;
- Australian Folk Music Awards;
- Environmental Music Prize;
- Australian Music Prize;
- Major Minor Music Australia Awards;
- MusicACT Music Awards;
- Music Producer and Engineers' Awards;
- SMAC Awards (fbi radio);
- J Awards, presented by triple j;
- Gold Coast Music Awards;
- Screen Music Awards;
- SA Music Awards;
- National Indigenous Music Awards;
- National Live Music Awards (last presented in 2023);
- Queensland Music Awards;
- WA Music Awards; and
- The Age Music Victoria Awards.

Awards play a significant role in celebrating and acknowledging the achievements of artists and industry and provide a valuable platform for promotion and exposure.

As well as acknowledgement and credibility, they can be a catalyst for career advancement through contributing to artists and industry stakeholders in breaking through or further increasing their profile and reputation. Whilst only Australian awards have been factored into this analysis, international music awards (for example the Grammy Awards and the BRIT Awards) provide a global platform and recognition for local Australian artists. International award nominations, attendance and the award itself can provide artists with a valuable platform to engage with industry and audiences alike.

There is no systematic data collected in relation to music awards. Results from the industry-wide survey for music awards are not reported in detail separately due to the response rate and representation of the sample.

3.9.5 Music Conferences

Music industry conferences provide an important platform for networking, showcasing, learning, and collaboration to help drive industry growth and development. There are several types of conferences hosted each year in Australia, including:

- National music industry conferences (eg, Bigsound, AIR Indie Con);
- Regional music conferences (eg, WAMCon, Regional and Remote Music Summit);
- Genre-based music conferences (eg, Electronic Music Conference, Folk Alliance Australia Conference); and
- Wider creative industries conferences, within which music is a key focus (eg, SXSW Sydney).

Conferences benefit a range of stakeholders by helping to build industry capacity, showcasing new talent, identifying emerging trends and challenges, sharing knowledge, and facilitating new opportunities. They can also have flow on economic impacts related to local economies, including tourism, hospitality and other related services and industries.

There is no systematic data collected in relation to music conferences. Results from the industry-wide survey for music conferences are not reported in detail separately due to the response rate and representation of the sample.

3.9.6 Music Consultancy and Professional Music Industry Support Services

Music consultancy is a broad term that, for the purposes of this report, captures roles that may not sit neatly with other subsector or occupation definitions. Consultants generally provide highly specialised advice or expertise, for example, a consultant could be engaged to undertake specific research or analysis by a government agency or peak body, while a label or artist could engage a consultant for specific creative inputs for example a staging design for a live performance.

The traditional role of music consultants has evolved over time in response to industry needs and trends, and new responsibilities have emerged in response to changes in the industry, for example digital strategists.

Given the complexity of the industry a range of professional support services (separate to consultancy services) are accessed by artists and industry businesses to enable them to operate effectively. In most instances, the primary purpose and/or focus of these providers is in a field unrelated to music, for example accountancy and law, however they apply their expertise, and in some cases specialise in, the music industry.

There are no definitive data sets available on the number of music consultants and professional music industry support services operating in Australia.

4. Industry Spotlights

This section contains spotlight profiles with deeper analysis on cross-sections of Australia's music industry. These include:

- Analysis of how artists earn money and the income distribution of Australian artists;
- The impact of First Nations artists;
- Electronic dance music (EDM) – a key contemporary music genre and growing music export;
- Australian music exports, which are important both in terms of supporting export revenues for the Australian industry and providing career and development pathways for Australian artists; and
- The changing landscape of music media in Australia.

The spotlight profiles couple available data and research with survey results and stakeholder engagement insights.

Spotlight 1: Artist Income

There was an estimated 10,800 active artists, musicians, songwriters, and composers in Australia who earned an estimated combined income of $860 million from working in the music industry in 2023–24.[128,129,130]

Key statistics:

$860m
Estimated value of Australian artist income (2024)

$14,700
Estimated median Australian artist income (2024)

48%
Estimated share of Australian artist income from live music performance (2024)

~82%
Proportion of Australian artist income earned by the top 25% of income earners (2024)

A broad range of data, research, and qualitative information has been considered through the analysis to better understand the nature of artists' work and income. The following sections provide further insights into several of these dimensions. While not exhaustive, the analysis provides a detailed foundation from which to continue to expand and evolve in future editions of this report.

128 The estimated number of artists/musicians is based on *Artists as Workers: An Economic Study of Professional Artists in Australia*, 2024 report prepared by David Throsby and Katya Petetskaya for Creative Australia.

129 Workforce estimates vary significantly across datasets and studies due to complexity in measurement. The above estimate is preferred due to the way in which the study used a detailed cross-sectional survey of artists to estimate the level of under-representation of artists in official taxation and census statistics published by the ATO and ABS respectively.

130 Total income is based on the estimated number of artists/musicians, average income results from the industry-wide survey, and insights from confidential data and benchmarks provided for the purposes of this report.

Sources of income

Artists typically undertake several activities to earn income in the Australian music industry. On average, analysis shows artists rely heavily on live music performance (48%) and royalties (23%), which together form the majority of average total income. Teaching, session fees, and merchandise contribute a further 15%, on average. The remainder comes from government funding, sponsorships and branding, and other forms of income such as commissions, advances, and synchronisation placement fees.

Table 29:

Estimated breakdown of average artist income, by income source ($m, 2023–24)

Source of music-related income	Proportion of music industry rated income
Live music performance	48%
Royalties	23%
Teaching fees	7%
Session fees	5%
Merchandise sales	3%
Government funding/grants	3%
Sponsorships, branding, and other promotions	1%
Other (eg, synchronisation placement fees, commissions, advances)	11%

Note: Totals may not add due to rounding.

Source: Calculations based on the industry-wide survey results, confidential data and benchmarks, publicly available research, and industry consultation.

Cross-sectional nature of work

The cross-sectional nature of artists' work is complex, with artists working in various capacities and roles in the music industry, and, in some cases, other industries too.

Examples of different artists' work portfolios

- Artist 1 works exclusively in the music industry, touring extensively in Australia and internationally and earning royalties from back catalogues of records.
- Artist 2 works exclusively in the music industry in several capacities. They operate as a sole trader, providing music education and tutoring services to students. They also own and operate a label and produce music, working with a portfolio of Australian and international artists.
- Artist 3 works as a permanent part-time employee in a music industry peak body for three days per week, and for the balance of time works as a self-published singer-songwriter. Additionally, they play two to three gigs in pubs, clubs, and other hospitality venues every month.
- Artist 4 works part time in the music industry, typically for one to two days per week as a singer-songwriter with the goal of writing, recording, and publishing their own album and becoming a touring artist. They do not earn a significant income from this work, as it requires a significant investment of time and resources to build their catalogue and profile. They derive most of their regular income from working part time for the remainder of their week in another industry sector.
- Artist 5 works usually as a film and television composer during the day, and plays as a regular principal musician in opera and musical theatre pits for major performing arts companies in the evenings.

While not necessarily representative of all artists, the responses to the industry-wide survey provide an illustration of this cross-section in practice. On average, artists answering the survey (n=509) worked approximately 1.8 days per week as a solo or group artist, 0.9 days per week songwriting and composing, and about half a day per week teaching.

Typical number of days per week worked in different roles by artists (n=509)

Solo artist	Composer/ songwriter	Group artist	Music teacher	Music producer
1.2 days/wk	0.9 days/wk	0.6 days/wk	0.6 days/wk	0.5 days/wk

Source: Results of the industry-wide survey.

Developing a more complete understanding of the cross-sectional nature of artists' work and income will be a key focus in future editions of this report.

Distribution of artists' incomes

The distribution of artists' incomes in Australia is heavily skewed, with a very high proportion of artists earning low incomes from their work in the music industry. Analysis suggests a median annual income of just under $15,000, with the top 25% of artists (by income) earning an estimated 82% of total artist income.

Table 30:

Estimated Australian artist income quartiles (2023–24)

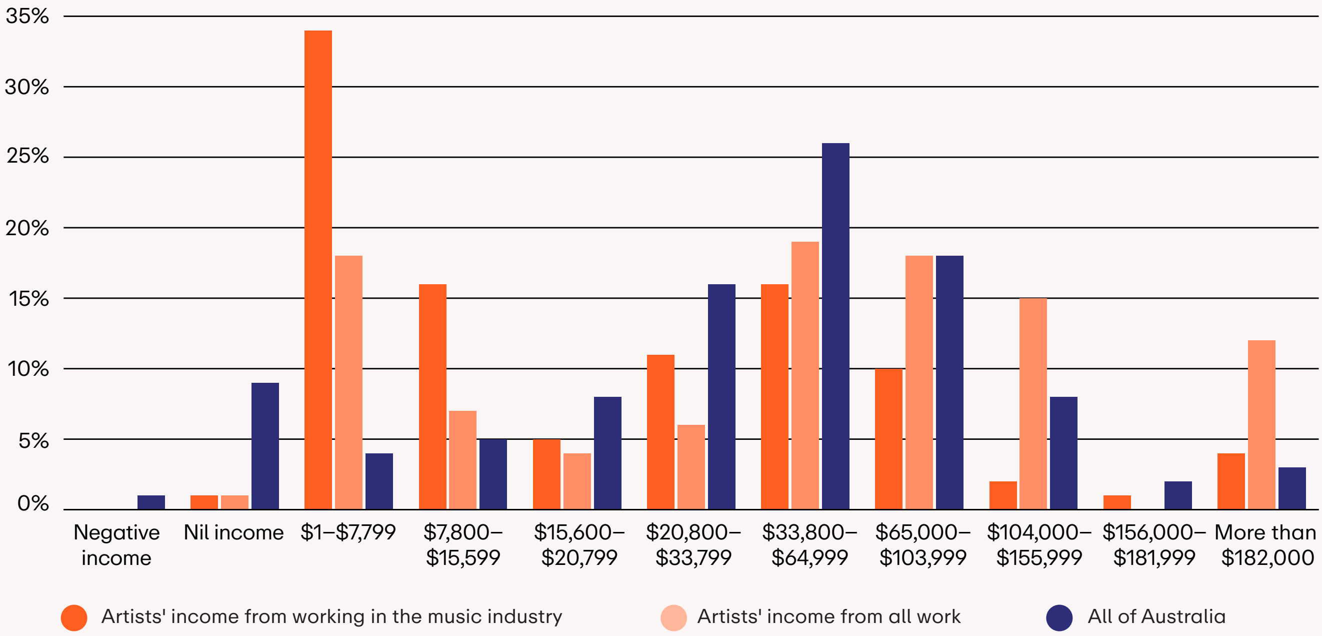
Quartile	Estimated income from working in the music industry (2023–24)	Estimated share of total Australian artist income
First quartile (25th percentile)	$4,900	1%
Median (50th percentile)	$14,700	5%
Third quartile (75th percentile)	$44,100	18%

Source: Calculations based on the industry-wide survey results, confidential data and benchmarks, publicly available research, and industry consultation.

Analysis suggests that about 1% of artists made a loss or earned no income in 2023–24. The next 50% earned less than $15,599, with an estimated median income of $14,700. This is a significant over-representation relative to the broader Australian workforce, of which approximately 18% earned less than $15,599. With the above said, many artists undertake work outside the music industry, either as a primary or supplementary component of total income.

Figure 1:

Estimated distribution of artists' income relative to the Australian workforce



Source: Calculations based on ABS (2021), *2021 Census Sex and Total Income Personal Income (weekly) by State*, available at https://www.abs.gov.au/statistics/microdata-tablebuilder/tablebuilder, accessed 20 November 2024, the industry-wide survey results, and confidential data and benchmarks.

When all income is accounted for, average total income levels are higher than the broader Australian population. This suggests many artists carry on significant employment outside the music industry. Detail was not captured in the analysis on the specific nature of this work, though anecdotal evidence from consultation suggests it includes a mix of full-time, part-time, and casual work, as well as operating businesses outside the music industry.

Spotlight 2: First Nations Artists

First Nations artists and music play a critical role in Australia's history, culture and contemporary music industry. As custodians of the world's oldest living musical practice, First Nations musicians have a strongly positive impact on the sector as well as contributing to wellbeing and quality of life among First Nations communities.[131] First Nations music artists are also achieving substantial international recognition.

Data on First Nations Artists

However, less than half of Australians believe First Nations arts are well represented in Australia.[132] There is currently no single source of representative data on First Nations artists and music industry workers, and the industry-wide survey for this report did not attract a sufficient sample of First Nations artists for specific analysis.

Future Directions

We've identified the need to improve our dataset and increase our insight into this dynamic area. In the coming months Creative Australia will collaborate with First Nations stakeholders to develop appropriate materials through a standalone project. The results will inform future editions of *The Bass Line*.

Representation of First Nations Artists

A recent analysis of the ARIA top 100 charts between 2000 and 2023 highlighted the decline of all Australian artists in the best-selling single and album annual charts. However, the analysis found that First Nations artists stood in contrast to this trend.[133] In the context of Australian-only artists, the First Nations Australian artists' share of the market has remained steady over the 24-year period, at around 4%.[134]

Whilst First Nations artist representation in the Australian charts has remained steady over the last 20-plus years, during this time there were only nine First Nations charting artists, with Jessica Mauboy accounting for 42.5% of all First Nations chart entries.[135] Indeed, a 2020 survey found that in addition to industry-wide challenges, representation of First Nations people in the industry remained a key challenge for First Nations music artists.[136]

Strengths and Challenges of being a First Nations musician

Strengths	Challenges
• Inspiring other First Nations artists. • Opportunities to educate, challenge and/or build understanding with non-First Nations people. • Creating pathways for the next generations of First Nations musicians.	• Lack of financial return from creative practice. • Lack of time to do creative work due to other pressures and responsibilities. • Difficulty with grant applications. • Lack of work opportunities. • Lack of First Nations people in decision-making roles.

131 A New Approach, (2019), *Insight Research Series Report Two, Transformative: Impacts of culture and creativity, Produced by A New Approach (ANA) think tank with lead delivery partner the Australian Academy of the Humanities*.
132 Creative Australia (2023), *Creating Value, Results of the National Arts Participation Survey*, September 2023.
133 Kelly, T (2024), *Down, and Under Pressure: The Decline of Local and Non-Anglo Best-Selling Recording Artists in Australia 2000–2023*, International Journal of Music Business Research • 13(1) • 2024.
134 Kelly, T (2024), *Down, and Under Pressure: The Decline of Local and Non-Anglo Best-Selling Recording Artists in Australia 2000–2023*, International Journal of Music Business Research • 13(1) • 2024.
135 Kelly, T (2024), *Down, and Under Pressure: The Decline of Local and Non-Anglo Best-Selling Recording Artists in Australia 2000–2023*, International Journal of Music Business Research • 13(1) • 2024.
136 Australia Council for the Arts (2020), *Survey of First Nations Music Artists Results*.

Recent Successes of First Nations Artists

Some First Nations artists have achieved local and international success and recognition, not always starting on home soil.

The Kid LAROI, a Kamilaroi man, for example, launched his career in the United States, having signed a development deal with Sony Music.[137] In 2021, *Stay*, his collaboration with Justin Bieber, reached number one in 22 countries, his second on the ARIA singles charts.[138] In reaching number one in the United States in 2021, he became the first male Australian-born solo artist to do so since Rick Springfield's *Jessies Girl* in 1981.[139] The album from which the song is featured, *F**K LOVE 3: OVER YOU*, is the first Billboard 200 chart number one album by a First Nations artist, and he is the equal youngest artist ever (after Billie Eilish) to achieve this.[140] The Kid LAROI's was subsequently selected for Apple Music's FIRST playlist, which showcases First Nations artists across Australia.

Australian-based music producer and artist 18yoman has gained significant recognition in the music industry locally and internationally. 18yoman, aka Vincent Goodyer, is a Bunuba man and an ARIA Award winning, Grammy and Australian Academy of Cinema and Television Arts Awards (AACTA) nominated producer, composer, multi-instrumentalist and artist, based in Sydney.[141] 18yoman's success includes co-producing Lil Nas X's album Montero (2021), which received a Grammy Award nomination for Album of the Year, in addition to producing work on Kid Cudi's album Man on the Moon III. As a songwriter, he co-wrote Am I dreaming, featuring Miley Cyrus, alongside Ward, Take a Daytrip and Omer Fedi, and has had success as a solo artist, including Fireflies.[142]

The 2024 ARIA Awards reflected the breadth and quality of First Nations artists, with 22 nominations. Winners included established and emerging artists including Troy Cassar-Daley (Best Country Album), Emily Wurramara (Best Adult Contemporary Album), Nathaniel Miller (Music Teacher Award), 3% (Best Hip Hop/Rap Release, Best Cover Art), DOBBY (Best World Music Album) and JK-47 (Best Use of an Australian Recording in an Advertisement).[143] In addition, Best Soundtrack was awarded to *Faraway Downs*, the *Baz Luhrmann project*, which featured a number of First Nations artists including Jessica Mauboy, Miiesha, Budjerah and King Stingray, while Electric Fields make up a significant part of the soundtrack with six individual tracks.[144]

Indigenous Cultural and Intellectual Property (ICIP)

One of the key issues raised in consultation with First Nations artists on their work relates to the issue of Indigenous Cultural and Intellectual Property (ICIP).

ICIP is recognised as a tool to address a range of challenges faced by First Nations artists and communities.[145] ICIP refers to the rights of Indigenous Australians to control their traditional knowledge and cultural expression, sometimes referred to as cultural heritage, which includes music, writing, language, performance and documented cultural heritage, such as sound recordings.[146]

137 Rolling Stone (2023), The Kid LAROI Becomes the First Indigenous Australian Artist to Top Billboard's Singles Chart, https://au.rollingstone.com/music/music-lists/the-50-most-iconic-australian-music-moments-of-all-time-45432/the-kid-laroi-becomes-the-first-indigenous-australian-artist-to-top-billboards-singles-chart-45496/, accessed 5 November 2024

138 Brandle, L (2021), The Kid Laroi and Justin Bieber's 'Stay' Bows at Nº 1 In Australia, https://www.billboard.com/pro/the-kid-laroi-justin-bieber-stay-no-1-australia/ , accessed 5 November 2024.

139 Brandle, L (2021), *The Kid Laroi breaks Australian drought with Billboard Hot 100 Nº 1*, https://themusicnetwork.com/the-kid-laroi-australian-billboard-hot-100-no-1-stay/, accessed 5 November 2024.

140 SBS (2021), Records tumble as The Kid LAROI hits Billboard Nº 1, https://www.sbs.com.au/nitv/article/records-tumble-as-the-kid-laroi-hits-billboard-no-1/9gm4d6u2e, accessed 5 November 2024.

141 This description is provided on 18yoman website, https://www.18yoman.com/about, accessed 8 January 2025.

142 The summary of 18yoman's work was retrieved from https://en.wikipedia.org/wiki/18yoman with direct sources not available.

143 Condon, Dan (2024), *Troye Sivan cleaned up at the ARIA Awards, but the biggest winners were lesser-known*, https://www.abc.net.au/news/2024-11-20/aria-awards-2024-nooky-kid-laroi-troye-sivan-royel-otis/104626892, accessed 8 January 2025.

144 Charles, B. Callaghan, L. (2024), *Here are the First Nations winners of the 2024 ARIA Awards*, https://www.sbs.com.au/nitv/article/here-are-the-first-nations-winners-of-the-arias/1cbkrpn10 .accessed 8 January 2024

145 Office for the Arts, (n.d), *Stand-alone legislation – Protecting Indigenous cultural and intellectual property rights*, Australian Government, https://www.arts.gov.au/what-we-do/indigenous-arts-and-languages/stand-alone-legislation-protecting-indigenous-cultural-and-intellectual-property-rights, accessed 24 October 2024.

146 Arts Law Centre of Australia,(n.d), *Indigenous Cultural and intellectual Property (ICIP) information Sheet*, https://www.artslaw.com.au/information-sheet/indigenous-cultural-intellectual-property-icip-aitb/, accessed 28 October 2024

While existing laws give some protection, Australian law does not currently protect or recognise ICIP specifically. Following the 2023 launch of the *New National Cultural Policy: Revive*, the Australian Government committed to developing stand-alone ICIP legislation.[147] In the context of music specifically, two key challenges exist. The concept of 'ownership' and the time-limited nature of rights in sound recordings, music and lyrics.

Australia's current legal system favours individual ownership, or individuals specified within a group. In many First Nations communities, communal rights or communal ownership is favoured.

In addition, under current Australian law, copyright in music and lyrics generally lasts for 70 years from the death of the author, while sound recordings generally last 70 years from the time the recording was made (or made public).[148] ICIP rights do not have an end date in acknowledgement of the perpetual rights of Indigenous knowledge and cultural heritage. While there are a range of voluntary protocols, codes of conduct and practices, these do not mandate appropriate respect, self-determination, consent and consultation, interpretation, cultural integrity, secrecy and privacy, attribution, benefit sharing, maintenance of culture, and recognition and protection of First Nations knowledge and cultural heritage. Developing and introducing stand-alone ICIP legislation, including the removal of copyright time limits and allowing for both individual and communal rights and ownership, could offer substantial economic and social benefits.[149]

ICIP may also provide a mechanism to address future threats, in particular generative artificial intelligence (AI). In a recent survey of First Nations APRA AMCOS members by the National Aboriginal and Torres Strait Islander Music Office (NATSIMO), 89% of respondents believe that AI has the potential to cause cultural appropriation or misuse of Aboriginal and Torres Strait Island cultural property. In addition, 67% agree that using AI in music creation makes it more difficult to protect cultural rights.[150] Respondents believe that AI can significantly impact the ability of Aboriginal and Torres Strait Islander people to manage and protect cultural content, and 83% of respondents identified the importance of the guardians or owners of ICIP to manage copyright violations made by AI. Conversely respondents also recognised AI as having the potential to improve knowledge about cultural content and legal information.[151]

As First Nations knowledge and creative products gain increasing prominence in creative industries, the introduction of ICIP alongside appropriate education, training and awareness on how to exercise ICIP and negotiate favourable terms in contracts and agreements will be essential for First Nations artists and communities to manage cultural and intellectual property[152] and support increased opportunities to leverage knowledge and creative products.

147 Office for the Arts, (n.d), *Stand-alone legislation – Protecting Indigenous cultural and intellectual property rights*, Australian Government, https://www.arts.gov.au/what-we-do/indigenous-arts-and-languages/stand-alone-indigenous-cultural-and-intellectual-property-legislation/indigenous-knowledge-partnership-guide-new-stand-alone-legislation, accessed 24 October 2024.

148 Arts Law Centre of Australia, (n/d), accessed 29 October 2024 *Music and Indigenous Cultural & Intellectual Property Information Sheet*, https://www.artslaw.com.au/information-sheet/music-and-indigenous-cultural-intellectual-property-aitb?action=genpdf&id=11637, accessed 29 October 2024.

149 Janke, T. (1999) *Our Culture, Our Future, Michael Frankel and Company, Sydney*, www.terrijanke.com. au/our-culture-our-future accessed 24 October 2024.

150 APRA AMCOS (2024), *AI and music, Market development of AI in the music sector and impact on music creators in Australia and New Zealand August 2024*, A report commissioned by AMPRA AMCOS, conducted by Goldmedia.

151 AMCOS (2024), *AI and music, Market development of AI in the music sector and impact on music creators in Australia and New Zealand August 2024*, A report commissioned by AMPRA AMCOS, conducted by Goldmedia.

152 Janke, T and Burgess, A (2022), *Growing Economic Opportunity from Traditional Knowledge, Written by Terri Janke and Annabelle Burgess*, https://www.terrijanke.com.au/post/growing-economic-opportunity-from-traditional-knowledge accessed 24 October 2024.

Jessica Mauboy performs during the Fire Fight Australia bushfire relief concert at ANZ Stadium in Sydney, Sunday 16 February 2020.
Credit: AAP Image/Joel Carrett

Spotlight 3: The Rise of Electronic Dance Music

With a rich and diverse history in Australia, from early experimentation in the 1950s to the current scene, electronic music has evolved significantly, with strong consumer demand and Australian artists experiencing unprecedented local and international success.

The evolution of electronic music styles in Australia has been a dynamic and diverse process. The 1990s saw the rise of rave and club culture, with the establishment of iconic clubs and the emergence of Australian electronic music artists like The Avalanches.[153] The 2000s saw a resurgence of interest in electro and indie dance music, with acts like Cut Copy, The Presets, and Empire of the Sun achieving mainstream success, while the 2010s saw the rise of Electronic Dance Music (EDM) and festival culture, with the growth of large-scale festivals like Stereosonic, Future Music Festival and Parklife.[154]

In recent years, the global electronic music industry has been experiencing a resurgence, with positive revenue growth[155] and consumer demand reflected in both recorded and live performance, and local and international electronic artists headlining festivals, events, and clubs across Australia.[156] In 2024 almost one in four music festivals (presented or planned) was an electronic music festival (23% of all music festivals).[157]

According to Spotify monthly listener data, Australia was the world's third-largest consumer of Australian and international electronic music, behind Germany and the US in 2023 and 2024,[158] with 10 times more electronic music listeners on the platform than Australia's total population.[159] Australian electronic music fans are considered 'super fans', who purposefully seek to discover new electronic music, including through social and streaming platforms, radio, TV, film and games. They are also highly engaged liking, sharing, playlisting and repeat listening more frequently than any other genre.[160]

In 2023, Soundcloud reported nearly 33% of streams on the platform are in Australia, which is 50% higher than the global average of 22%,[161] while around one fifth of Spotify's streams come from Australia, behind Germany, Brazil and Mexico.[162]

At a global level, the value of the global electronic music industry has experienced steady growth since falling in 2020, in 2024 reaching US$12.6 billion in value, up 6% from 2023.[163] A gross increase of 566 million new electronic music fans were added to the Spotify, Instagram, TikTok, YouTube, and Facebook platforms in 2024,[164] while the #ElectronicMusic hashtag attracted 13.4 billion global views on TikTok in 2024, up 45% on 2023,[165] while #DnB, #Techno and #Trance increased by 50 percent, 63% and 73% respectively.[166]

153 Carbines, S. (2021), "'Everything just collapsed into everything': Australia's golden age of electronic music", *Mix Mag*, 18 January 2021, https://mixmag.net/feature/australia-golden-age-electronic-music-sydney-melbourne-modular-gang-bang accessed 25 October 2024.

154 Carbines, S. (2021), "'Everything just collapsed into everything': Australia's golden age of electronic music", *Mix Mag*, 18 January 2021, https://mixmag.net/feature/australia-golden-age-electronic-music-sydney-melbourne-modular-gang-bang accessed 25 October 2024.

155 Mulligan, M. and MIDiA Research (2025) *IMS Business Report 2025: An Annual Study of the Electronic Music Industry.* IMS Ibiza

156 Tregoning, J. (2024). "Rüfüs Du Sol, Dom Dolla, Flume, Fisher: inside Australian electronica's global boom", *The Guardian*, https://www.theguardian.com/music/2024/oct/16/rufus-du-sol-dom-dolla-flume-fisher-inside-australian-electronicas-global-boom. The Guardian accessed 23 October 2024

157 Creative Australia (2024), *Soundcheck: Insights into Australia's music festival sector.*

158 Mulligan, M. and MIDiA Research (2025) *IMS Business Report 2025: An Annual Study of the Electronic Music Industry.* IMS Ibiza.

159 Mulligan, M. and MIDiA Research (2025) *IMS Business Report 2025: An Annual Study of the Electronic Music Industry.* IMS Ibiza.

160 Carbines, S. (2021), "'Everything just collapsed into everything': Australia's golden age of electronic music", *Mix Mag*, 18 January 2021, https://mixmag.net/feature/australia-golden-age-electronic-music-sydney-melbourne-modular-gang-bang accessed 25 October 2024.

161 Cameron, J.(2024), "Electronic Music is the Most Popular Music Genre in Australia", *EDM Identity*, https://edmidentity.com/2024/10/17/sounds-australia-electronic-music-report/ accessed 23 October 2024.

162 Cameron, J.(2024), "Electronic Music is the Most Popular Music Genre in Australia", *EDM Identity*, https://edmidentity.com/2024/10/17/sounds-australia-electronic-music-report/ accessed 23 October 2024.

163 Mulligan, M. and MIDiA Research (2025) *IMS Business Report 2025: An Annual Study of the Electronic Music Industry.* IMS Ibiza.

164 Mulligan, M. and MIDiA Research (2025) *IMS Business Report 2025: An Annual Study of the Electronic Music Industry.* IMS Ibiza.

165 Mulligan, M. and MIDiA Research (2025) *IMS Business Report 2025: An Annual Study of the Electronic Music Industry.* IMS Ibiza.

166 Paine, A (2024), *TikTok expands #ElectronicMusic hub globally* https://www.musicweek.com/digital/read/tiktok-expands-electronicmusic-hub-globally/090694 accessed 23 October 2024.

STÜM playing at the Dance Dome at Beyond The Valley.
Credit: Duncographic.

SoundCloud figures also note that the production of electronic music is increasing, with electronic music accounting for 35% of total Australian uploads, up from 28% in 2023.[167]

In 2024 a survey conducted in the US revealed increasing demand for modification tools for consumers to augment or create their own music.[168] In addition, 10% of surveyed consumers have used generative AI tools to make music or lyrics.[169]

Whilst no new local electronic music released reached the ARIA 2023 top 100 charts, significant local and international success has been achieved by several artists including Rüfüs Du Sol, Dom Dolla, VASSY, Fisher, Cyril, Sonny Fodera, and Confidence Man, who attracted several local and international industry awards, undertook high profile collaborations and headlined international festivals and events.[170,171,172]

167 Colquhoun, J. (2024), “Stats reveal that Australians listen to dance music more than any other country: A series of industry services have the data to prove it”, *Mix Mag*, https://mixmag.net.au/read/stats-reveal-that-australians-listen-to-dance-music-more-than-any-other-country-news accessed 24 October 2024.

168 Mulligan, M. and MIDiA Research (2025) *IMS Business Report 2025: An Annual Study of the Electronic Music Industry.* IMS Ibiza.

169 Mulligan, M. and MIDiA Research (2025) *IMS Business Report 2025: An Annual Study of the Electronic Music Industry.* IMS Ibiza.

170 Eliezer, C. (2024) “Australia ranks 3rd largest market in the world for electronic dance music”, *The Music*, https://themusic.com.au/industry/australia-ranks-3rd-largest-market-in-the-world-for-electronic-dance-music/bE7SfmFgY2I/26-04-24 accessed 23 October 2024.

171 APRA AMCOS (2024), *2023–2024 Year in Review.* https://www.apraamcos.com.au/about/governance-policy/annual-reports/year-in-review-24/year-in-review-24-international accessed 23 October 2024.

172 Green, Stephen, (2024), “Vale Guitars: EDM Australia’s favourite genre”, *The Music*, https://themusic.com.au/industry/vale-guitars-edm-australias-favourite-genre/ajbQfH9-YWA/24-04-25,accessed 29 April 2025.

Spotlight

Spotlight 4: Australian Music Exports

Australian music exports including the revenues derived from the international sale or licensing of music-related goods and services

$975m
Estimated value of Australian music industry exports (2024)

$95m
Estimated value of Australian writer and publisher payments earned overseas (2024)

$175m
Estimated value of artists' rights earned overseas (2024)

56%
Estimated streaming share of Australian artists' rights earned overseas (2024)

Music is an important export industry for Australia, contributing an estimated $975 million to industry revenue in 2023–24. Exports income was earned across a diverse range of activities, including live performance, sponsorship, merchandising and synchronisation, recordings and royalties, licensing, digital and physical music sales, and the export of music products such as pro-audio, equipment and musical instruments.

As an industry, growing and leveraging export channels and markets is important for industry dynamism, growth, and long-term sustainability. Indeed, exports are also important for artists looking to increase sales and exposure,[173] and there are many success stories for Australian artists in creating, marketing, and performing music internationally. Music exports also help contribute to wider benefits such as driving tourism, national branding and pride, and soft diplomacy.[174]

173 The Port Authority Music Export Academy (n.d) *The World's Top 7 Music Export Countries*. https://www.musicexportacademy.com/blog/the-worlds-top-7-music-export-country accessed 22 October 2024.

174 The University of Newcastle. (2019). *Born Global: Australian music exports. ARC Linkage Project - The economic and cultural value of Australian music exports*, July 2029. Research partners Monash University, APRA AMCOS and Australia Council for the Arts.

Exporting success

Calculating the value of Australian music exports is complex, and there are no comprehensive statistics or agreed national and international standards or metrics. In addition, the complex nature of industry revenue flows and the cross-sectional nature of work increase the complexity of counting and attribution.[175]

Based on all the data and information considered in this report, music exports contributed an estimated $975 million to Australian music industry revenue in 2023–24. Whilst export income was earned across a diverse range of activities, recorded music, music retail (predominantly music products) and live performance were the key export revenue drivers in 2023–24.

Table 31:

Export revenues by music subsectors

Subsector	Contribution to exports (%)
Music recording, production, label services and distribution	48%
Music retail	30%
Live music performance	10%
Composition, songwriting, and music publishing	9%
Synchronisation	1%
Artist management	1%

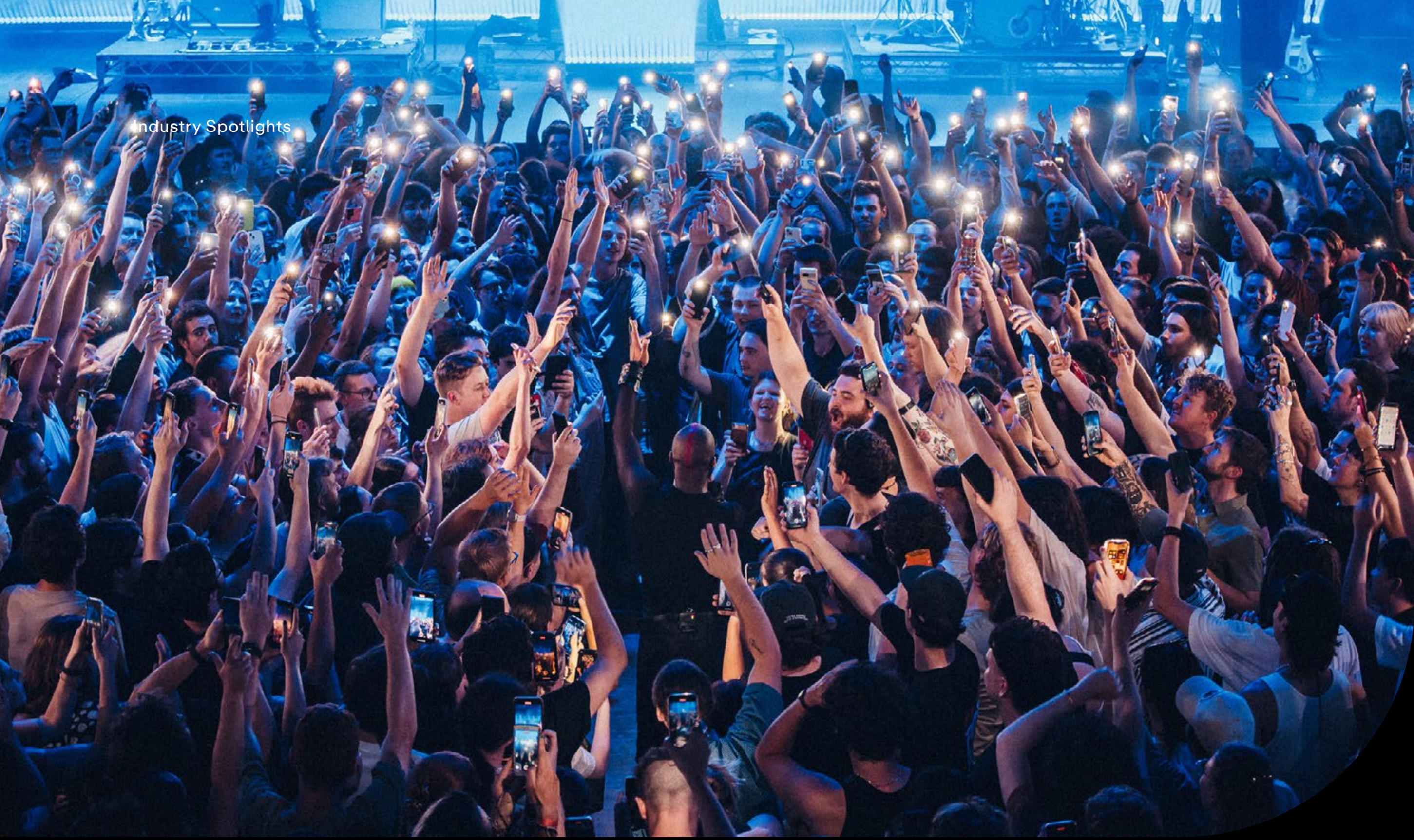
Note: Totals may not add due to rounding.
Source: Economic analysis results.

Export revenues for recorded music exceeded $485 million in 2023, with most of this income generated through streaming, and smaller portions through physical sales and royalties. According to Spotify, in 2023 more than 80% of royalties generated by Australian artists on Spotify were from outside the country.[176] Notwithstanding the industry's concerns about falling support for local artists by domestic audiences and their declining representation in local charts, emerging international markets for Australian recorded music include Brazil, Mexico and Germany,[177] all predominantly non-English speaking markets.

175 The University of Newcastle. (2019). *Born Global: Australian music exports.* ARC Linkage Project - The economic and cultural value of Australian music exports, July 2029. Research partners Monash University, APRA AMCOS and Australia Council for the Arts.

176 Eliezer, C (2024), "Report: Australian Artists Only Rank 9.2 Per Cent With Music Streaming Fans", *The Music*, https://themusic.com.au/industry/report-australian-artists-only-rank-9-2-per-cent-with-music-streaming-fans/sLAOoqWkp6Y/08-10-24, accessed 17 January 2025.

177 Spotify (2024), *Loud and Clear, Spotify Celebrates a Thriving Australian Music Industry with Pop Sensation Tones and I*, https://newsroom.spotify.com/2024-07-11/spotify-celebrates-a-thriving-australian-music-industry-with-pop-sensation-tones-and-i/, accessed 14 May 2025 .



Genesis Owusu Struggler Australian Tour, Melbourne.
Credit: Jordan Munns.

In 2023–24, more than $311 million in music product export revenues was generated. A significant surge in export revenues was felt during the pandemic, where revenues more than tripled, from $61 million in 2020 to $217 million in 2021.[178] Steadier growth in most categories has been experienced since. Globally, the pandemic surge is believed to now be stabilising, in addition to inflationary pressures impacting consumer behaviours.[179] The Australian products export market is dominated by microphones and stands, and wireless microphones, which account for an estimated 85% of exports.[180]

Australian artists continue to have a strong presence in international markets, with over $100 million in export revenues estimated from live music performance. This income was received across artists, promoters, crew and technical services, booking agents, artist managers, and Australian writer and publisher royalties from live music performance.

APRA AMCOS reports that approximately 40,000 writer members and 5,600 publisher members, earned a record $74.7 million in international performance royalties in the 2023–24 financial year, up 22.5% from the previous financial year and almost doubling since the pandemic. Additional international publishing royalties earned through other arrangements were approximately $19.4 million. In this same year, at an increase of 30% year-over-year, 321 different Australian acts submitted 721 Overseas Live Performance Returns covering over 5,700 shows performed by Australian artists globally.[181]

In 2023 Goldman Sachs estimated the total global music market will reach a value of US$151.4 billion by 2030,[182] with the potential for the Australian music industry to gain a greater share of these revenues,[183] as highlighted in *National Cultural Policy: Revive.*

178 Australian Music Association (2024), *Australian Music Association Market Report*.

179 NAMM, (n.d), *2024 NAMM Global Report*.

180 Australian Music Association (2024), *Australian Music Association Market Report*.

181 Figures shared by APRA AMCOS. See also APRA AMCOS 2024, 2023–24 Year in Review.

182 Goldman Sachs (2024) *Music in the Air: Focus on monetisation, Emerging Markets and AI; updating global music industry forecasts*, 1 May 2024, https://www.goldmansachs.com/pdfs/insights/pages/music-in-the-air--focus-on-monetisation,-emerging-markets-and-ai--updating-global-music-industry-forecasts-f/music-redaction.pdf. Accessed 22 October 2024.

183 Creative Australia. (2023) *National Cultural Policy Revive: a place for every story, a story for every place.*

Pathways and challenges to exporting success

There are many pathways toward successful exporting, with some artists developing a domestic profile first, and others launching directly into international contexts through digital platforms.[184] Whilst digital distribution and streaming services have made it much easier for artists to directly engage with global audiences, a period of major structural change to the industry is forecast by some, due to the persistent under-monetisation of music content, outdated streaming royalty payout structures and the deployment of generative AI.[185] The emphasis on cultivating networks and building trust through physical presence in international markets[186] therefore continues to remain an important factor in export success.[187,188] A combination of government and industry support the export success of Australian artists. For example, in 2023–24, Sounds Australia[189] delivered activities in 33 cities across 20 countries and held 14 showcase events with 146 unique performance opportunities for 117 artists. Industry engagement included nearly 2,800 meetings, 23 B2B networking events attended, 21 speaking opportunities and 12 panel presentations as well as three trade stands.[190] Since its inception in 2009, more than 2,000 artists have been showcased internationally with Sounds Australia.[191]

Despite the international success of local artists established export pathways, and steady growth in export revenues, Australian artists face a range of challenges in achieving export success.

The health of the domestic market is one factor, ensuring there are live music venues,[192] training and access to resources, industry services and support are all considered vital, while other challenges can be more complex.

While Australian artists can directly and instantly access global audiences through digital platforms, geographic distance remains a physical and financial challenge for Australian artists. Australian music exports rely on personal and industry networks, and physical presence, requiring significant time and travel to establish and maintain.[193]

More recently, a phenomenon known as ‘glocalisation’ was identified in European markets. Glocalisation is a process that involves adapting products or services for the global market by tailoring them to local cultures. An example of this is a Polish artist recording a traditionally North American music genre like hip hop, in Polish for the (predominantly Polish-speaking) local market. The study found that local artists, recording and performing ‘global’ genres in their native languages in countries where English is not the predominant language, are seeing increasing and accelerating chart success.[194] The report also highlighted the potential negative consequence for predominantly English-speaking artists. Whilst these artists have traditionally held a competitive advantage in international markets, the report concluded that glocalisation could make it more difficult for English-language music to achieve international success.[195]

184 Sounds Australia (n.d), *Fast-tracking Australian music success globally, 2023 Annual Report*.
185 Goldman Sachs (2024) *Music in the Air: Focus on monetisation, Emerging Markets and AI; updating global music industry forecasts*, 1 May 2024, https://www.goldmansachs.com/pdfs/insights/pages/music-in-the-air--focus-on-monetisation,-emerging-markets-and-ai--updating-global-music-industry-forecasts-f/music-redaction.pdf. Accessed 22 October 2024
186 The University of Newcastle. (2019). *Born Global: Australian music exports. ARC Linkage Project - The economic and cultural value of Australian music exports*, July 2019. Research partners Monash University, APRA AMCOS, and Australia Council for the Arts.
187 Sounds Australia (n.d), *Fast-tracking Australian music success globally, 2023 Annual Report*.
188 Organisation for Recorded Culture and Arts (2024), *Setting the Stage: How Music Works*.
189 Sounds Australia provides a centralised, whole-of-industry service to support music exporting. Sounds Australia is government funded and operates independently, auspiced by APRA AMCOS.
190 APRA AMCOS. (2024). *Year in review 24: International*. APRA AMCOS. Available at: https://www.apraamcos.com.au/about/governance-policy/annual-reports/year-in-review-24/year-in-review-24-international, accessed 17 January 2025.
191 Figures provided by Sounds Australia in October 2024.
192 Inquiry into the Australian Live Music Industry (2024), Sounds Australia, Submission 56.
193 Inquiry into the Australian Live Music Industry (2024), Sounds Australia, Submission 56.
194 Page, W and Dalla Riva, C (2023), *‘Glocalisation’ of Music Streaming within and across Europe* London School of Economics and Political Science Europe in Question, Discussion Paper Series at LSE, EIQ Paper No. 1 182 / 2023.
195 Page, W and Dalla Riva, C (2023), *‘Glocalisation’ of Music Streaming within and across Europe* London School of Economics and Political Science Europe in Question, Discussion Paper Series at LSE, EIQ Paper No. 1 182 / 2023.

Spotlight 5: The Changing Music Media Landscape

Music media has played a key role in the music industry for decades, providing a platform for critiquing and sharing the stories of artists, music, and industry, and for fans to discover new music.

The music media landscape is constantly evolving, in recent years, media globalisation and fragmentation has accelerated due to changes in technology, music creation and consumption.[196] Dedicated music magazines have struggled with relevance, broadcast TV has ceded ground to streaming, and newspaper arts sections have contracted. Social media and blogs, while empowering new voices, have diluted the curated trust once embodied by these outlets, while simultaneously playing a much more significant role in the industry, with artists having direct contact with their fan bases.

Whilst this has provided a range of new opportunities, traditional music news and media channels have declined.[197] For journalism, this means a pivot from 'gatekeeper' to 'gateway', with a significant focus on storytelling, curation and community-building. Still vital, but no longer singularly dominant in informing music culture. The preservation of music journalism as a point of genuine engagement is seen by artists as critical for audiences to engage with music, artists and their practice more deeply.

Historically, magazines like *Rolling Stone* and *Pitchfork Magazine* set the standard for long form music journalism, delivering in-depth features, reviews, and interviews that shaped music tastes and often the trajectories of artists. The Australian edition of *Rolling Stone* debuted in 1972 but ceased publication in 2018, while it relaunched in 2020 under *The Brag Media*, its influence had diminished as print readership declined globally with digital media's rise. *Smash Hits*, a pop-centric magazine thriving in the UK and Australia during the 1980s and 1990s, folded in 2006 as online platforms eclipsed print.[198]

Australian titles like *Juke* (1975–1993), *Rock Australia Magazine* (1975–1989), and *Go-Set* (1966–1974) once flourished, but by the 2000s, many either shuttered or moved online, reflecting a broader decline in print dominance,[199] and the resulting decline in journalism jobs.[200]

In addition, free weekly music magazines (street press) were a significant force in music media in the 1980s and 1990s. Often funded by the record labels, promoters and brands who advertised in them, they contained comprehensive, location-specific gig guides and included titles such as *Drum Media* and *the Brag* in Sydney; *Beat* and *Inpress* in Melbourne; *Time Off*, *Rave* and *Scene* in Brisbane; *Xpress* in Perth; and *Rip It Up* in Adelaide.[201] Stress press experienced a similar decline to the print magazines as audiences moved to online guides and advertising revenues followed.

The splintering of once prominent music publications into more intentionally niche publications like *Rhythms* (digital), *Limelight* (print and digital), *The Music* (print and digital) and digital publications *The Music Network* (digital), *Mixmag Australia* (digital) and *The Brag* (digital) have adapted and successfully evolved their audiences and coverage.

Similarly, print newspapers once boasted robust arts sections with dedicated music critics providing reviews and commentary. In Australia, mastheads including *The Sydney Morning Herald* and *The Age*, and *The Australian* offered extensive arts and culture coverage including critiques, reviews and profiles, which has declined significantly in recent years. Reflective of a wider, global trend, many music critics jobs were eliminated in the early 2000s, with much concern from the industry itself who note the vital nature of analysis, commentary and reportage to the health of the artform.[202]

196 Shepherd, E (2022), "'Fragmentation is not slowing down,' says ABC's Emma Turner on how Australians consume media", *Mumbrella*, https://mumbrella.com.au/fragmentation-is-not-slowing-down-says-abcs-emma-turner-on-how-australians-consume-media-747746, accessed 14 January 2025.

197 Nichols, D (2023), "The rise and 'whimper-not-a-bang' fall of Australia's trailblazing rock press", *The Conversation*, https://theconversation.com/the-rise-and-whimper-not-a-bang-fall-of-australias-trailblazing-rock-press-213896, accessed 14 January 2025.

198 Martin, J (2019), "Is there a future for Australian music journalism?", *Crikey,* https://www.crikey.com.au/2019/01/16/australian-music-journalism/, access 26 March 2025.

199 Martin, J (2019), "Is there a future for Australian music journalism?", *Crikey,* https://www.crikey.com.au/2019/01/16/australian-music-journalism/, access 26 March 2025.

200 Gordon, J (2019), "Can music journalism transcend its access problem?", *Columbia Journalism Review*, https://www.cjr.org/analysis/music-journalism-access.php, accessed 26 March 2025.

201 Fell, S. J (2023), "The golden age of music street press: how Australia's free weeklies grew entire scenes", *The Guardian*, https://www.theguardian.com/media/2023/sep/13/the-golden-age-of-music-street-press-how-australias-free-weeklies-grew-entire-scenes, accessed 26 March 2025.

202 Wakin. D.J (2007), "Newspapers Trimming Classical Critics", *New York Times*, https://www.nytimes.com/2007/06/09/arts/music/09crit.html, access 26 March 2025.

Our industry survey results included 18 responses from people identifying as working in music media as employees, and 39 responses from sole trader music journalists. Of these respondents, 10% are working as music journalists full time, and 84% worked an average of one to two days per week in that capacity. The high number of music journalists working only one to two days per week reflects the observed industry-wide journalism trends.

Broadcast music television, once a key medium for music discovery, has also largely lost its former prominence. *MTV*, launched in 1981, transformed music media, pairing film clips with artist interviews and promotions. In Australia, *Countdown*, aired on the ABC from 1974 to 1987 and became a cultural phenomenon, spotlighting new releases and live performances that propelled acts like INXS and Kylie Minogue to fame. *Rage* (ABC) and *Video Hits* (Network Ten), both debuting in 1987,[203] followed Countdown as vital platforms for music engagement and discovery, while *Channel [V]* (Foxtel) launched in 1995,[204] and ABCTV's *Recovery* in 1996,[205] but their influence waned over time. *MTV* globally pivoted to reality TV by the late 1990s, as music videos moved online. *Video Hits* was cancelled in 2011, *Recovery* in 2000,[206] and *Channel [V]* ceased in 2016, outpaced by YouTube and streaming services like Spotify, while *Rage* endures nearly 40 years later on weekend overnights as the, longest running and only remaining dedicated music-video show in Australia.[207,208]

While social media outpaces traditional print and broadcast media in shaping opinions and supporting music discovery, podcasts have emerged as a significant player, offering a unique platform for promotion, discovery and deeper insights into artists and their music.

The role of social media influencers also represents another progression in music media's evolution, with their role being distinct yet complementary within the broader ecosystem of music media. As a powerful form of music promotion[209] and discovery,[210] social media influencers scale the traditional model of curated print and broadcast media to a global level, using algorithms rather than page space or airtime. Advantages including accessibility and increased discoverability need to be considered alongside disadvantages such as oversaturation[211], content pressures on artists[212] and algorithmic bias, and a more distinct shift toward user-driven culture introduces new complexities for both artists and audiences alike.

While social media platforms allow influencers and artists to sidestep traditional media outlets, share new releases and updates directly with fans, the role of public relations agencies and publicists has grown in significance.[213] Research conducted in 2022 highlighted the role of public relations agencies and publicists in music media, with 63 percent of music and arts journalists sourcing their stories from PR agencies and publicists, and 85% from press releases.[214] While the early social media focus on celebrity journalism has since waned,[215] there is no shortage of artist and publicist driven digital information, and music critique has shifted from comprehensive and curated analysis to fan-based reviews and recommendations.

Further focus will be required in future releases of this report to better understand the contemporary music media landscape and increase the available data for such analysis.

203 Brandle, L (2011), "'Australia's 'Video Hits' TV Show Cancelled After 24-Years On-Air'", *Billboard*, https://www.billboard.com/music/music-news/australias-video-hits-tv-show-canceled-after-24-years-on-air-1177199/, accessed 26 March 2025.
204 Davis, B (2016), "The Rise And Fall Of Channel V: A Timeline", *The Music*, https://themusic.com.au/news/the-rise-and-fall-of-foxtels-music-channels-a-timeline/LjghICMiJSQ/24-02-16,accessed 26 March 2025.
205 Dunne, N (2017), "The ABC's Recovery electrified live music TV, but could it be made today?", *The Guardian*, https://www.theguardian.com/tv-and-radio/2017/aug/22/the-abcs-recovery-electrified-live-music-tv-but-could-it-be-made-today, accessed 14 May 2025.
206 Dunne, N (2017), "The ABC's Recovery electrified live music TV, but could it be made today?", *The Guardian*, https://www.theguardian.com/tv-and-radio/2017/aug/22/the-abcs-recovery-electrified-live-music-tv-but-could-it-be-made-today, accessed 14 May 2025.
207 Adams, C (2017), "The secrets of Rage – now the longest-running music show on TV", News.com.au, https://www.news.com.au/entertainment/the-secrets-of-rage-now-the-longestrunning-music-show-on-tv/news-story/64f1edc1ece9cfe31b0ee1871e014a6c, accessed 26 March 2025.
208 Brandle, L (2011), "'Australia's 'Video Hits' TV Show Cancelled After 24-Years On-Air'", *Billboard*, https://www.billboard.com/music/music-news/australias-video-hits-tv-show-canceled-after-24-years-on-air-1177199/, accessed 26 March 2025.
209 Whipser, I (2025), *Exploring the Impact of Social Media in the Music Industry*, WorldWiseDIGEST, retrieved from https://worldwidedigest.com/exploring-the-impact-of-social-media-in-the-music-industry/.
210 Illustrate Magazine (2024). *How Social Media Influencers are Shaping the Music Industry: The Rise of TikTok, Instagram, and YouTube Stars*. Retrieved from illustratemagazine.com, accessed 10 April 2025.
211 Illustrate Magazine (2024). *How Social Media Influencers are Shaping the Music Industry: The Rise of TikTok, Instagram, and YouTube Stars*. Retrieved from illustratemagazine.com, accessed 10 April 2025.
212 MediaTech Institute, 2023. *Music Moves: Social Media's Influence on the Modern Music Industry.* Retrieved from https://mediatech.edu/music-moves-social-media-influence/, accessed 10 April 2025.
213 Gordon, J (2019), "Can music journalism transcend its access problem?", *Columbia Journalism Review*, https://www.cjr.org/analysis/music-journalism-access.php, accessed 26 March 2025.
214 Medianet. (2022). *2022 Australian Media Landscape survey report.*
215 Gordon, J (2019), "Can music journalism transcend its access problem?", *Columbia Journalism Review*, https://www.cjr.org/analysis/music-journalism-access.php, accessed 26 March 2025.

5. Future Directions

Building on the foundation established in this first edition of *The Bass Line*, the future directions outlined in this section have been identified to improve and refine data collection and analysis in future editions. This is aimed at continuing to strengthen the robustness and granularity of the analysis and establish time series measurement across the industry to better inform industry dialogue, decision making, and investment.

5.1 First Nations Impact Study

The economic and cultural contributions of First Nations musicians remain under-explored due to limited data. Building on the work of NATSIMO, Multicultural Arts Victoria[216] and the findings of our industry survey, establishing a better understanding of this contribution and impact, together with the challenges faced by First Nations artists, will be important in providing greater evidence and representation to enable community and industry dialogue, enablement, and investment.

5.2 Deep Dive Research

Significant efforts were undertaken in this first edition of *The Bass Line* to capture a detailed cross-sectional picture of activity across the Australian music industry. However, several areas remain where significant data gaps exist. Addressing these gaps will likely require stand-alone targeted research, data collection, and consultation that can subsequently be applied to improve the industry-wide analysis.

Area	Overview
Music Education	Limited data exists on the economic contribution of music education in Australia. Research spanning the primary, secondary, and tertiary sectors, alongside youth and private education providers would provide a greater understanding of the revenues and employment, and, over time, changes and trends in economic and employment activity in this part of the sector.
Role and Impact of Artificial Intelligence (AI) on the Music Industry	The rapid integration of AI across the music value chain, spanning creation, distribution, and consumption, lacks comprehensive economic analysis. Building on the 2024 APRA AMCOS research, *AI and Music Market Development of AI in the Music Sector and Impact on Music Creators in Australia and New Zealand*, further research is needed to understand how AI-driven transformations affect employment, artist income, rights and attribution, and overall economic outcomes. The importance of this understanding is expected to grow quickly as the pace of technology and change increases and existing models face increased disruption.
Contemporary Live Music in Pubs and Clubs	Available ticket and revenue data does not include pubs and clubs at a national level, however, these settings are an important part of the Australian live music industry. Improved measurement and understanding of contemporary live music in pubs, clubs, nightclubs, and other hospitality venues is required to strengthen the analysis and better understand income patterns for artists.

216 In October 2024, Multicultural Arts Victoria recently released a research paper, *Beyond Tokenism: Strategic Conversations with Culturally Diverse Artists and Creatives*, commissioned by Creative Victoria as an input into the their Creative State strategy. In addition, NATSIMO, as the peak body for Aboriginal and Torres Strait Islander music creators, undertake a range of engagement and research initiatives.

5.3 Enhanced Stakeholder Engagement and Collaboration

Stakeholder engagement and collaboration has been critical to deliver this first edition of *The Bass Line*, and ongoing collaboration with key stakeholders is essential to align efforts, share resources, and enhance the quality and extent of available and included data. As has been discussed in the report, there has been extensive and comprehensive engagement across the industry to build a collaborative and inclusive approach to this analysis. Further contributions from all stakeholders are welcomed to support and contribute further to future editions. In this context, there are several priorities identified to build on the foundation established in this first edition.

Area	Overview
Refinements to Survey Coverage and Process	Several opportunities for improvement have been identified in the design of the industry-wide survey to streamline responses, increase the breadth and coverage of respondents, and the quality of responses.
Expanding Data Collection Activities	While extensive data was received, there are opportunities to access a wider array of data that will improve the quality and granularity of analysis. These include, but are not limited to: • Data on music activity in pubs, clubs, hotels, and hospitality venues, for example through collaborating with organisations such as Clubs Australia and the Australian Hotels Association; • Data on local government activity and investment, supported through expanded data collection with local councils and other local organisations; • Increasing the representation and coverage of artists completing the survey and providing data, to better capture and reflect the cross-section of activity and income.
Opportunities for other Stakeholders	Industry bodies and organisations will be encouraged to leverage the findings of this report to enhance their own data collection and analysis efforts, promoting a more integrated approach to understanding the music sector.
Ongoing Collaboration with the ABS and BCARR	Noting the introduction of OSCA and existing statistical publications with coverage of the music industry and/or wider creative industries, continued collaboration with the ABS, BCARR, and other stakeholders will be important in continuing to advocate for improvements to the industry and occupational classification framework to ensure more complete and contemporaneous representation of music industry activity.

5.4 Methodological Improvements

As outlined in Section 1 and 2 of the report, future improvements to the methodology will be considered in the context of available data, changing industry dynamics, and emerging literature and best practice. Importantly, continuity of time series will be established and maintained for future editions to ensure comparability of results over time. Where significant new information is identified through improved data collection in later editions, appropriate revisions to the prior estimates will be considered and reported, as is standard practice in statistical and analytical publications.

Appendix A: Detailed Approach

This appendix discusses the approach to completing the economic analysis. It addresses the contextual backdrop and challenges, data sources and research methods, approach, and limitations.

A.1 Step 1: Defining the Australian Music Industry

The first step was to establish a comprehensive definition of the Australian music industry suitable for the purposes of undertaking an economic analysis. This included industry subsectors, the activities undertaken by those subsectors, and the key occupations of workers in those subsectors. The purpose of this exercise was not to exhaustively define the sector. Rather, it was to ensure appropriate structure and coverage of the industry's overall end-to-end value chain suitable for the purposes of guiding data collection and mapping as part of an economic analysis. It was also important to ensure that the definition reflected the practical ways in which the industry works and is interconnected, including the many and varied roles of artists and musicians working in different areas of the industry.

A.1.1 Review of existing industry classification structures

Available research and data were considered to understand existing industry and occupational classifications to inform the definition to be established for this report.

Australian industry classifications

The starting point was consideration of the classification taxonomies used in existing national industry data collections undertaken by the Australian Bureau of Statistics (ABS) and the Australian Tax Office (ATO), and analysis undertaken by the Bureau of Communications Arts and Regional Research (BCARR). The below outlines the key context and considerations arising from this review.

Existing industry and occupational classifications

The ABS, ATO, and BCARR collect and publish data that offer some insight into economic activity, income, and employment in the music industry. These include, but are not limited to, BCARR's *Cultural and Creative Satellite Accounts*, the ABS *Census of Population and Housing*, and the ATO *Individuals Taxation Statistics*. These datasets utilise the Australian and New Zealand Standard Industrial Classification (ANZSIC) and OSCA (formerly ANZSCO)[217] taxonomies. BCARR has also developed an occupation-based framework using ATO data, which it utilises in its live music analysis.

While useful and used for several existing industry data collections, OSCA, ANZSIC, and BCARR's occupation-based framework has several gaps and limitations and they do not capture the full scope of activity in the Australian music industry. Further, the *Census of Population and Housing* underestimates music industry employment due to the limitations in the ANZSCO classifications and that it is based on the main job on Census night and does not capture where people may undertake multiple roles concurrently and/or may only have periodic employment in the industry. This fluidity in the industry complicates employment classifications and economic measurements, as people do not fit neatly into traditional job categories.

Creative Australia made submissions to the review of the ANZSCO classifications and continues to collaborate with BCARR on their methodology refresh[218] for the *Cultural and Creative Activity Satellite Accounts*.[219] Creative Australia will continue to collaborate with the ABS to support methodologies and classification descriptions to represent the contemporary structure and activities of the music industry and accommodate future developments more accurately.

In the above context, it was considered that the definition and classifications used in this report needed to be referenced to, but not be unnecessarily constrained by, existing statistical classifications.

217 Following a review, the Australian Bureau of Statistics released the Occupational Standard Classification for Australia (OSCA) to replace ANZSCO, retrieved from https://www.anzscosearch.com/osca-replaces-anzsco-in-australias-occupational-classification-system/#:~:text=OSCA%20Replaces%20ANZSCO%20in%20Australia's%20Occupational%20Classification%20System,-January%2017%2C%202025&text=On%206th%20December%202024%2C%20the,Australia%20(OSCA)%20version%201.0.

218 Bureau of Communications, Arts and Regional Research, (2023), *Cultural and Creative Activity Satellite Accounts Methodology Refresh, Consultation*, Australian Government.

219 Bureau of Communications, Arts and Regional Research, (2024), *Cultural and Creative Activity in Australia, 2008–09 to 2022–23 (Methodology Refresh) Statistical Working Paper*, Australian Government.

International industry classifications

Several international studies have been undertaken on the economic impact of different countries' music industries and subsectors thereof, including, but not limited to, the U.K., U.S., Canada, and New Zealand. Due to their contemporaneous nature, U.K. Music's *This is Music 2023* and the Recording Industry Association of America's *The U.S. Music Industries: Jobs and Benefits 2024* were specifically considered.

Study	Country	Scope	Economic contribution	Measurement year	Notes
U.K. Music, (n.d), *Methodology Document, This is Music 2024*, by Oxford Economics prepared for UK Music	U.K.	Music industry	Direct	2023	• Utilises the U.K. Office for National Statistics' *Standard Industrial Classification and Standard Occupation Classification* codes. • The report notes that while the codes are useful, they lack the breadth required to truly reflect the music industry subsectors included in the analysis. • The authors adopted a bespoke approach to defining the industry, built around the concept of 'core' and 'non-core' industry subsectors. • This analysis includes 'core' activities, however it does not include education, media and festivals as part of this 'core', noting that their economic value is captured through other parts of government, for example tourism reporting.
Recording Industry Association of America, (2024), *The U.S. Music Industries – Jobs and Benefits: The 2024 Report*	U.S.	Recorded music industry	Direct and indirect	2020	• Utilises the *North American Industry Classification System* codes. • While the authors note these classifications are more contemporary, the report scope is limited to a primary focus on the recorded music industry and does not reflect the full breadth of industry activities.

Study	Country	Scope	Economic contribution	Measurement year	Notes
PwC (2015), *Economic contribution of the New Zealand music industry 2014 – A report for the New Zealand music industry*	New Zealand	Music industry	Direct and indirect	2014	• Uses a range of industry and occupational classifications, drawing on various datasets from Statistics New Zealand and various industry and other public datasets. • Utilises a broad definition of the music industry and includes music creation, production, performance, and distribution, music sales, live music, and royalties. • The report utilises input-output multipliers, which can be subject to additional limitations compared with equilibrium modelling techniques that can better reflect complex upstream and downstream economic dependencies. Further, export earnings are excluded. • The report provides findings for 2014, which are no longer contemporaneous.
PwC and Music Canada (2012), *Economic Impact Analysis of the Sound Recording Industry in Canada*	Canada	Sound recording industry	Direct and indirect	2012	• Utilises the North American Industry Classification System (NAICS) and the North American Product Classification System (NAPCS), however, recognises these may not fully reflect all activity. • The report provides limited consideration of export earnings for Canadian artists. • Considers activities related to the creation, production, marketing, and distribution of sound recordings. This includes recording studios, producers, artists, record labels, distribution networks, and related support functions. • The report provides findings for 2012, which are no longer contemporaneous.

The above considerations provided useful context to inform the approach. However, structural differences in the music industries across these jurisdictions and differences in definitions, measures, methodologies, and assumptions further reinforced the need for a bespoke approach fit-for-purpose to the Australian context.

A.1.2 Industry engagement

Extensive industry engagement was undertaken to support the development of this report. As part of this engagement, stakeholders were asked for feedback and input to the definition and classifications to be used to guide the analysis. Details of the scope and coverage of industry engagement is outlined in the following sections.

A.1.3 Industry definition used in this report

Through the above efforts, the following definition was established for the industry subsectors, and key activities and occupations across the Australian music industry.

Subsector	Key subsector activities	Key subsector occupations
Live Music Performance Activities and events where musicians perform music for payment (including professional, professional-amateur, community, and private settings).	• Contemporary Music Performances • Music Festivals • Classical Music Performances • Opera Performances • Music Performances in Other Settings (eg, musical theatre, cabaret, weddings, events etc)[220]	• Artist/Musician – Solo and/or Group* • Booking Agent • Crew and Technical Services • Music Director* • Promoter • Music Venue Operations (all staff)
Composition, Songwriting and Music Publishing Income paid through royalties (mechanical and performing rights) and other arrangements to Australian composers and songwriters (2024).	• Music Composition • Royalty Earnings (for rights and license holders) • Music Publishing	• Composer/Songwriter (music only, lyrics only, music and lyrics and arrangements)* • Orchestrator/Music Arranger • Music Publishing Operations (all staff)
Artist Management Activities associated with the professional development and management of an artist's career.	• Artist Management	• Artist Management Operations (all staff)
Music Recording, Production, Label Services, and Distribution The development, manufacturing, distribution and promotion of Australian music recordings.	• Branding and Sponsorship • Distribution • Independent Record Labels • Label Services • Major Record Labels • Music Marketing and Promotions • Music Recording • Recording/Rehearsal Studio Operations • Music Videos	• Artist and Repertoire (A&R) • Marketing and Promotions • Crew and Technical Services* • Artist/Musician – Solo and/or Group* • Music Director* • Music Programmer • Music Producer* • Sound Recording and Studio Engineer • Record Label, Distribution and Label Services Operations (all staff)

220 Only the income from artists/musicians is in scope for music performances in other settings. For example, in the case of music theatre, only the pay of musicians is counted, rather than the economic activity from the full production. As another example, in the case of an ensemble engaged to play at a wedding, only their pay is considered, rather than the economic impact of the wedding/event.

Subsector	Key subsector activities	Key subsector occupations
Synchronisation The use of music in visual media, including TV shows, music videos, videos of performances, animations, video games, and advertisements.	• Synchronisation Services • Royalty and Other Fee Earnings (for rights and license holders)	• Synchronisation Agent • Music Supervisor • Author/Composer*
Music Retail The sales and/or hire of music and associated merchandise, music equipment, and instruments (including making and repairs).	• Music Retail (physical and online) • Music Instrument Making, Sales and/or Repairs • Recording Equipment • Merchandise • Music Streaming Services and Platforms • Downloads and Other Digital	• Music Retail Operations (all staff)* • Musical Instrument and/or Equipment Maker and/or Repairer*
Music Education Specialist music education and programs provided by artists/musicians and/or qualified music educators.	• Music Education – Primary • Music Education – Secondary, Tertiary and Private	• Music Education Operations (all staff) • Music Educators*
Music Media Media that includes platforms and outlets that cover, promote, and distribute music-related content.	• Music Media (all forms) • Radio Promotions	• Music Journalist/Media Reporter • Music Programmer • Music Publicist
Industry Support, Development and Representation Policy, strategy, industry representation, and other activities to support and enable industry development, investment, networking, and sector advocacy.	• Music-Related Government Agency Operations and Funding (all levels) • Performing Rights Organisations • Music Peak Industry Body/ Associations • Music Awards • Music Conferences • Music Consultancy • Professional Music Industry Support Services	• Administrative Staff • CEO/Managing Director/ Senior Executive or equivalent • Manager or equivalent • Operational Staff • Music Consultant

* Occupation aligns with existing statistical taxonomies.

The above definition was tested with and received input and clarification from stakeholders throughout the analysis.

A.2 Step 2: Synthesise Available Data and Research

A key goal of this report was to ensure the supporting evidence base was comprehensive to maximise the robustness of the analysis and identify key gaps to focus future effort on strengthening data.

Four detailed streams of work were undertaken to identify and synthesise available evidence to inform this first national study, as follows:

Subsector	Key subsector activities
Document and Literature Review	A comprehensive stocktake of publicly available data and information sources and consideration of the relevance, strengths, and limitations of these sources.
Collection of Existing Data	Engagement with data custodians and stakeholders including Commonwealth, state and territory agencies, and collection agencies.
Stakeholder Engagement	Industry consultations with national peak bodies and associations as well as key stakeholders from commercial parts of the industry
Industry-Wide Survey	Gain insight and a further independent source of data to complement existing industry data and related publications

These are outlined in detail in the following sub sections.

A.2.1 Document and literature review

A comprehensive review of publicly available local and international data and research was undertaken to inform the development of the methodology and key assumptions. This included informing the value chain definition, identifying relevant data and other insights from the literature to help build a contemporary picture of the different areas of the value chain in the report and analysis.

List of public research:

- A New Approach. (2019). *Insight Research Series Report Two, Transformative: Impacts of culture and creativity*. Produced by A New Approach (ANA) think tank with lead delivery partner the Australian Academy of the Humanities.
- Adams, C. (2017). *The secrets of Rage – now the longest-running music show on TV*. News.com.au.
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- Alberts I The Tony Foundation. (n.d.). *Music Education: Right from the Start, An Understanding of Quality School Music Education.*
- Andriani, R. (2022). *Music education for Australian students depends on which state they live in*. ABC Classic.
- APRA AMCOS. (2024). *AI and music, Market development of AI in the music sector and impact on music creators in Australia and New Zealand August 2024*. A report commissioned by APRA AMCOS, conducted by Goldmedia.
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- Association of Artist Managers. (2022). *National Cultural Policy Submission*.
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- Cameron, J. (2024). *Electronic Music is the Most Popular Music Genre in Australia.* EDM Identity.
- Carbines, S. (2021). *"Everything just collapsed into everything": Australia's golden age of electronic music.* Mix Mag.
- Charles, B., & Callaghan, L. (2024). *Here are the First Nations winners of the 2024 ARIA Awards*. SBS NITV.
- Colquhoun, J. (2024). *Stats reveal that Australians listen to dance music more than any other country: A series of industry services have the data to prove it*. Mixmag Australia.
- Community Music Victoria (2023), *The Sound of Silence: School Leavers and the Vanishing Music Experiences in Australia.*
- Condon, D. (2024). *Troye Sivan cleaned up at the ARIA Awards, but the biggest winners were lesser-known*. ABC News.
- Creative Australia. (2009). *Music and arts education in NSW Creative Australia submission to the Joint Select Committee onArts and Music Education and Training inNew South Wales*, 25 July 2024.
- Creative Australia. (2023). *Creating Value: Results of the National Arts Participation Survey. Music Fact Sheet, September 2023*.
- Creative Australia. (2023). *National Cultural Policy Revive: a place for every story, a story for every place*.
- Creative Australia. (2023). *Soundcheck: Insights into Australia's music festival sector.*
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A.2.2 Data collection

Data was collected from a range of government agencies, peak bodies, and industry collecting organisations. While disparate in nature and based on varying definitions, metrics, and timeframes, these datasets formed an important input to the analysis.

Key data contributors included:

- APRA AMCOS;
- Australasian Music Publishers' Association Limited;
- Australian Music Association;
- Australian Recording Industry Association;
- Arts ACT (ACT Government);
- Arts NT (Northern Territory Government);
- Arts Queensland (Queensland Government);
- ArtsWA (Government of Western Australia);
- Bureau of Communications, Arts and Regional Research;
- Creative Australia (Australian Government);
- Creative Victoria (Victorian Government);
- Department of Foreign Affairs and Trade (Australian Government);
- Music Australia (Australian Government);
- Music Development Office (South Australian Government);
- Office for the Arts (Australian Government);
- Phonographic Performance Company of Australia Limited;
- Sound NSW (New South Wales Government); and
- Sounds Australia.

In addition to the above, several stakeholders provided confidential data and benchmarks.

A.2.3 Industry stakeholder engagement

Several initial briefings about the project were held with music industry representatives. Following this, direct engagement with industry stakeholders was conducted, including engagement with national peak and representative bodies as well as key stakeholders from commercial parts of the industry. Engagement resulted in a better understanding of the music industry value chain and activities, and the scope and scale of available unpublished data and or data collection initiatives that were underway.

Two briefings were held at the commencement of the project to provide industry stakeholders with an overview of the project, anticipated engagement and key activities. Attendees included:

- A New Approach
- African Music and Cultural Festival
- Association of Artist Managers
- Association of Australian Musicians
- Australasian Mechanical Copyright Owners Society
- Australasian Performing Rights Association
- Australian Festival Association
- Australian Guild of Screen Composers
- Australian Independent Music Association
- Australian Live Music Business Council
- Australian Music Association
- Australian Music Centre
- Australian Music Publishers Association
- Australian Music Radio Airplay Project
- Australian Recording Industry Association
- Community Broadcasting Association of Australia
- Country Music Association of Australia
- Crew Care
- Electronic Music Conference
- Folk Alliance Australia Inc
- Future Classic
- Helen Perris Music Studio
- John Wardle Consulting
- Live Music Australia
- Live Music Office
- Live Performance Australia

- Media Entertainment and Arts Alliance
- Monash University
- Morwenna Collett Consultants
- Multicultural Arts Victoria
- Music ACT
- Music Australia Council Members
- Music NSW
- Music NT
- Music Producer and Engineers Guild
- Music SA
- Music Tasmania
- National Aboriginal and Torres Strait Islander Music Office
- One Music Australia
- Phonographic Performance Company of Australia
- QMusic
- Sounds Australia
- Support Act
- The Push
- The Seed Fund/Mama Kin
- Unity Management Group
- Victorian Music Development Office
- WA Music

Stakeholder meetings

Meetings were held with stakeholder's representing a range of organisations across the music industry.

Stakeholders included:

- A New Approach
- Association of Australian Musicians
- Audoo
- Australasian Performing Rights Association l Australasian Mechanical Copyright Owners Society
- Australian Artist Managers
- Australian Festival Association
- Australian Guild of Screen Composers
- Australian Independent Record Labels Association
- Australian Music Association
- Australian Music Centre
- Australian Music Industry Network
- Australian Music Publishing Association Ltd
- Australian Record Industry Association
- Community Broadcasting Association of Australia
- Creative Victoria
- Crew Care
- Dark Wave
- Electronic Music Conference
- Eleven Music
- Folk Alliance Australia
- Gyrostream
- Live Music Office
- Live Performance Australia
- Massey University, University of New Zealand
- Media Entertainment Arts Alliance
- Monash University
- Morwenna Collett Consultants
- Multicultural Arts Victoria
- Music ACT
- Music NSW
- Music Producer and Engineers Guild of Australia;
- Music SA
- Music Tasmania
- Music Victoria
- National Aboriginal and Torres Strait Islander Music Office
- Phonographic Performance Company of Australia Limited
- QMusic
- Royal Melbourne Institute of Technology
- Sound NSW
- Sounds Australia
- South Australian Government
- Victorian Music Development Office
- Western Australia Music
- White Sky

A.2.4 Industry-wide survey

An industry-wide survey was undertaken to better understand some of the most important gaps in data identified through background work, initial data collection, and early stakeholder engagement. The purpose was not to attempt to measure every component of the industry. Rather, it was to:

- Understand the cross-sectional nature of work and income of individuals and businesses working in different parts of the music industry (and in other industries);
- Through the above, help to remove double counting that arises through crossovers in existing datasets and research; and
- Provide greater context to the results through understanding specific details about the different ways various parts of the industry operate and relate to each other.

Through the above, Music Australia's intent was to develop a repeatable survey that could be refined and extended over time to support longitudinal and cross-sectional data collection and analysis.

These objectives informed the development of the survey design and analysis.

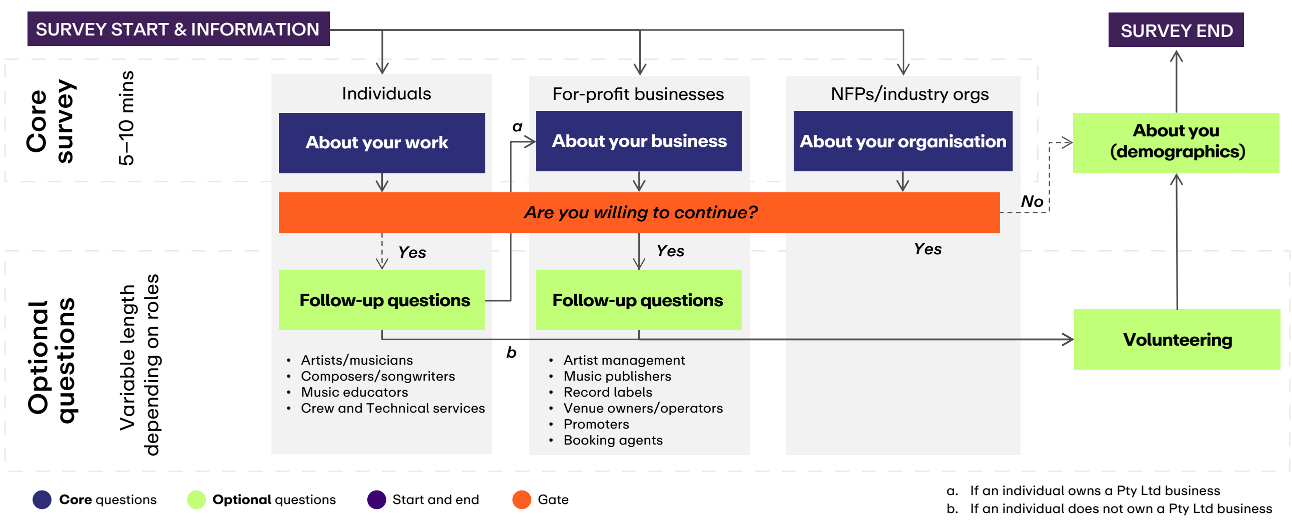
Survey design

The following design principles were agreed to guide the survey development:

- The survey design should be clear, simple, and accessible to minimise barriers to completion.
- Survey questions should be non-leading and neutral in tone to minimise potential response biases.
- Survey length and format should be targeted to minimise time burden on respondents while maximising the quality and depth of information gathered.
- The format of responses should be fixed wherever appropriate (eg, numeric; radio buttons; sliding scales) to maximise comparability and minimise free text requirements.
- The survey design and categorisation of survey responses should be aligned with the agreed industry definition established for the analysis.
- The design should be repeatable and able to be refined in the future.
- The design should capture domestic and international income and identify where individuals have multiple income streams/ positions in the sector.

A collaborative process was undertaken to design the survey in line with the above principles. Insights from stakeholder meetings were also used as an input to the survey development, and the final design and questions were thoroughly tested.

The final structure of the survey was as follows:



Survey briefings

Briefings were held prior to the release of the industry-wide survey to provide key information, assist in dissemination efforts, and address clarification questions.

Briefing attendees included:

- Australian Chamber Orchestra
- Australian Live Music Business Council
- Australian Festivals Association
- Australian Live Music Business Council
- Australian Music Examinations Board
- Australian Music Publishing Association Ltd
- Australasian Mechanical Copyright Owners Society
- Australasian Performing Rights Association
- AV1
- Bar Open
- Bluesfest
- BMG
- Canberra Theatre Centre
- Cedar Mill Group
- City of Newcastle
- Cooking Vinyl
- Crown Theatres Perth
- Darwin Entertainment Centre
- Dark Mofo
- Destroy All Lines
- Dew Process
- Etcetc Music
- Frontier Touring
- Fuzzy
- Gaga Music
- Gyrostream
- Hal Leonard
- Kicks Entertainment
- Kobalt Music
- Laneway Festival
- Live Nation / Ticketmaster
- Live Music Office
- LNA Venues
- Lunatic Entertainment
- Melodie
- Melbourne Recital Hall
- Meredith Music Festival
- Moshtix
- Mardi Gras Arts
- Music NT
- Odean Theatre
- Port Fairy Folk Festival
- QMF
- Remote Control
- Rising
- Sony Music
- Spinning Top
- Strawberry Fields
- Sydney Coliseum
- Sydney Festival
- Sydney Symphony Orchestra
- Tamworth Music Festival
- TEG
- TEG Live
- The Prestige
- The Tivoli
- Ticketmaster
- Together Agency
- TMRW Music
- United Group
- Wise Music
- WOMAdelaide
- Yours and Owls

Survey period

The survey was released on Tuesday 17 September 2024 and closed on Tuesday 8 October 2024.

Response rate

1,064 completed responses were received to the industry-wide survey across individuals, businesses, and not-for-profit/government/industry organisations. The tables below outline the coverage of the responses received.

Table 32:

Number of completed survey responses by respondent type

I am responding to this survey on behalf of:	Number of respondents
Myself, as an individual working in the music industry	942
A for-profit business working in the music industry	78
A not-for-profit organisation, industry peak body or association working in the music industry	44
Total	**1,064**

Source: Results of the industry-wide survey.

Table 33:

Number of completed survey responses by geographic location of residence (individuals only)

Derived state/territory of residence based on postcode	Number of respondents
New South Wales	353
Victoria	251
Queensland	138
Western Australia	58
South Australia	53
Tasmania	33
Australian Capital Territory	27
International	22
Northern Territory	7
Total	**942**

Source: Results of the industry-wide survey.

Table 34:

Number of completed survey responses by age group

What is your current age?	Number of respondents
Under 18	2
18–24	36
25–29	73
30–34	107
35–44	247
45–54	242
55–64	198
65+	136
Did not respond	23
Total	**1,064**

Source: Results of the industry-wide survey.

Table 35:

Number of completed survey responses by gender identity

What is your gender identity?	Number of respondents
Man or male	565
Woman or female	436
Non-binary	21
Prefer not to answer	14
I use a different term (please specify)	7
Transgender	2
Did not respond	19
Total	**1,064**

Source: Results of the industry-wide survey.

Table 36:

Number of completed survey responses by Aboriginal and Torres Strait Islander people

Are you of Aboriginal or Torres Strait Islander origin?	Number of respondents
Aboriginal	15
Aboriginal and Torres Strait Islander	6
Torres Strait Islander	–
Neither	980
Prefer not to answer	36
Did not respond	27
Total	**1,064**

Source: Results of the industry-wide survey.

Table 37:

Number of completed survey responses by people with a disability

Do you identify as a person with a disability?	Number of respondents
Yes	108
No	884
Prefer not to answer	46
Did not respond	26
Total	**1,064**

Source: Results of the industry-wide survey.

Table 38:

Number of completed survey responses by people from culturally and linguistically diverse (CALD) backgrounds

Do you identify as a person from a culturally and linguistically diverse (CALD) background?	Number of respondents
Yes	152
No	846
Prefer not to answer	39
Did not respond	27
Total	**1,064**

Source: Results of the industry-wide survey.

A.3 Step 3: Applying Available Data to Estimate Economic Contribution

The full range of data and information collected was considered in undertaking the economic analysis. Given the extent of information, and the gaps and challenges noted, data was combined from multiple sources to develop estimates and supporting assumptions. In doing so, the goal was to maximise the robustness of the analysis based on the best available data for each of the industry subsectors considered.

Trade-offs were required as part of the above process due to gaps and other inconsistencies in available information. In each circumstance, best attempts were made to triangulate and cross-reference information from different sources, and seek expert stakeholder judgement, to determine suitable approaches and assumptions. Where possible, multiple estimates were prepared using different independent data sources to test the uncertainty of the estimates and supporting assumptions. Final judgements were based on the quality, relevance, and consistency of the respective datasets considered.

All estimates account for the level of estimated foreign ownership of different parts of the Australian music industry value chain. Foreign ownership is important to the profit component of economic contribution (GVA) because these profits are not ultimately kept in Australia. Estimates of foreign ownership levels were informed by available data, benchmarking, and publicly available research.

The sub sections below detail the approach and supporting assumptions, and, where relevant, the considerations made in applying the available data. This process collectively informed the limitations, which are outlined at the end of this section.

A.3.1 Live Music Performance

There is no single consolidated source of revenue and income data for live performance. The analysis of live music performance was therefore approached by performance type, with the results aggregated to estimate the total subsector contribution. The analysis for each performance type was based on a combination of available data sources and supporting assumptions.

Revenue was derived from various industry reports and publications as follows:

Performance type	**Sources to inform revenue estimation**
Contemporary music performances (stadiums and arenas, concert halls and theatres, town halls and community centres)	LPA (2024), *Live Performance Industry in Australia, 2023 Ticket Attendance and Revenue Report*.[221]
Contemporary music performances (pubs, clubs and bars, nightclub)	Based on consideration of the baseline for clubs, pubs, nightclub, and hospitality venue gigs from FY2018–19 published in BIS Oxford Economics (2022), *The Economic Impact of Tax Offsets on the Live Music Industry* and publicly available benchmarks, data, and qualitative information on trends since the pandemic.
Festivals	Based on consideration of both LPA (2024), *Live Performance Industry in Australia, 2023 Ticket Attendance and Revenue Report* and more detailed public and confidential data on festivals taking place in 2024 as reported in Creative Australia (2024), *Soundcheck 2: Analysis of Australian music festival models and operations*.
Classical music performances, opera performances	LPA (2024), *Live Performance Industry in Australia, 2023 Ticket Attendance and Revenue Report*.
Music performances in settings not specifically dedicated to music (eg, musical theatre, cabaret, weddings, events etc)	Based on the industry-wide survey results of average number of performances per year and artist earnings per performance.

Results were compared with other publicly available estimates, where available, for completeness.

221 Statistics published by LPA do not include attendance and revenues from live music performances undertaken in pubs and clubs.

Revenue was apportioned to key value chain activities based on available data and expert judgement.

Performance type	Sources to inform value chain apportionment from top line revenue
Contemporary music performances (stadiums and arenas, concert halls and theatres, town halls and community centres)	Expert judgement was applied based on consideration of several data sources: • Publicly available reports and benchmarks; • Industry expectations of typical commercial arrangements associated with key providers (eg, booking agents, promoters); and Confidential industry data. Figures were segmented by venue size to reflect that how the economics of live music can vary with event scale.
Contemporary music performances (pubs, clubs and bars, nightclub)	Based on consideration of BIS Oxford Economics (2022), *The Economic Impact of Tax Offsets on the Live Music Industry* and publicly available data and benchmarks.
Festivals	Creative Australia (2024), *Soundcheck 2: Analysis of Australian music festival models and operations*.
Classical music performances, opera performances	Publicly available annual report data from a representative sample of classical music and opera performing companies
Music performances in settings not specifically dedicated to music (eg, musical theatre, cabaret, weddings, events etc)	Not apportioned further as these performances are assumed to be predominately undertaken by artists operating as sole traders who self-manage key costs, as demonstrated in the industry-wide survey results.

Expenditure and profit benchmarks for each performance type were developed based on publicly available benchmarks, publicly available reports and analyses, confidential data provided for the purposes of this report, and the results of the industry-wide survey (where appropriate). Like other steps, expert judgement was also applied in the context of available information and industry knowledge.

Live performance royalty income for Australian writers and publishers was based on APRA AMCOS data on payments, net of its administration costs, to Australian writers and publishers in 2024 for the following categories:

- Live performances;
- Major live performances; and
- Nightclubs.

International payments to APRA and AMCOS for Australian writers and publishers were included. Payments from APRA and AMCOS to internationally based writers and publishers were excluded.

This income is also included in the *Music Composition and Origination* subsector analysis.

Several publications considering the economic contribution of different subsets of the live music industry were noted through the process of undertaking this analysis. The results of these analyses are based on different scopes (eg, direct vs. indirect economic contribution), approaches, datasets, and assumptions than this analysis. Further, the specific approaches and assumptions are not always transparent in these reports. For these reasons, the results determined through this study are not able to be directly compared with the results of these other studies.

A.3.2 Composition, Songwriting, and Music Publishing

The estimation approaches and supporting assumptions for each of the two activity streams within this subsector are as follows:

Royalties (for rights and license holders)

Rights holders receive royalties from APRA and AMCOS in relation to the performance, communication, and reproduction of compositions in recorded music. Royalties are typically collected and distributed in Australia by APRA AMCOS.

APRA AMCOS provided comprehensive data in relation to royalty payments to Australian writers and publishers in 2024.

Income was based on APRA AMCOS data on payments, net of its administration costs, to Australian writers and publishers in 2024, as appropriate, for the following categories:

- Audio streaming – not on-demand;
- Audio streaming – on-demand;
- Audio-visual streaming – on-demand;
- Cinema;
- Nightclubs;
- Download – audiovisual content;
- Download – audio content;
- Download – ringtones;
- Public performance of live performances;
- Major live performances;
- Music by digital or recorded means;
- Radio;
- Television; and
- User generated content (audio and audio-visual).

International payments to APRA and AMCOS for Australian writers and publishers were included. Payments from APRA and AMCOS to internationally based writers and publishers were excluded.

Where APRA AMCOS does not represent all its members for certain digital licences, an estimation was made of the full market size. Data was also supplemented with AMPAL reported publishing income additional to data provided by APRA AMCOS.

Songwriter amounts were included in income and GVA without adjustment, which assumes there is negligible marginal effort from writers to earn this income. Publisher GVA from total income was calculated based on benchmarks on publisher expenditure based on publicly available information and the industry-wide survey results.

Upfront composition fees

Rights and license holders receive royalties in relation to the production,

Depending on the commercial arrangement, composers can receive various types of fee structures separate to, and distinct from, royalty payments for ongoing use of their work.

The industry-wide survey asked composers and songwriters about the amount of composition income earned, and how this income was paid. This information was used to estimate average composition income by type of payment. This information was extrapolated to an industry-wide estimate of composition income based on the A*rtists as Workers: An economic study of professional artists in Australia*, Creative Australia (2024) report.

Amounts were included in income and GVA without adjustment, which assumes there is negligible marginal effort from writers and publishers to earn this income.

Royalty income and synchronisation placement fees received by Australian composers are separately covered in *Royalties (for rights and license holders)* and *Synchronisation sub-sector*, respectively.

A.3.3 Artist Management

To-date, there has been significant paucity of data available on artist management. As a result, one of the key focus areas within the industry-wide survey was to better understand the landscape of artist management activity. Survey responses were combined with available membership information and membership reports from the Association of Artist Managers (AAM) to develop estimates of total revenue, expenses, salaries and wages, and profit. For the purposes of the analysis and noting there is no current population figure for artist managers, the population estimate used for the purposes of results extrapolation was the current AAM membership.

A.3.4 Music Recording, Production, Marketing, and Distribution

Global data on recorded music revenues by country was obtained from the International Federation of the Phonographic Industry (IFPI) *Global Music Report*. These data are revenue measures of consumption within each country, and therefore represent consumption of music by both local and international artists. Australian artists' share for each country was estimated based on confidential market share data provided by Luminate Data, other publicly available benchmarks, and expert judgement. Revenues were further apportioned to estimate artist royalties, labour costs, and profitability based on publicly available record label financial reports, research and benchmarks, and expert judgement.

A.3.5 Synchronisation

Data on synchronisation related incomes was primarily sourced from data within the IFPI *Global Music Report* (for recording industry revenues) and confidential data provided by AMPAL (for publishing revenues). Data from APRA AMCOS on writer synchronisation royalties was separately added.

While the industry-wide survey provided some context around synchronisation income, this was not relied upon for the purposes of the analysis given the coverage of the APRA AMCOS and AMPAL information.

A.3.6 Music Retail

Analysis for music retail was undertaken for each key segment of the retail subsector and aggregated to the subsector totals reported.

Analysis for physical music sales was based on trade data published in the IFPI *Global Music Report 2024*. Supporting assumptions were made on wholesale-to-retail margins, retail labour costs, and retail profitability based on publicly available reports and benchmarks.

Detailed data on music products imports and exports, and associated music products retail employment, was provided by the Australian Music Association based on its *Market Report*. Similarly, supporting assumptions around margin and retailer expense structures were developed based on publicly available reports and benchmarks.

The Australian Music Association also provided data in relation to the estimated number of music instrument makers and/or repairers. This was the only data of its kind identified through the information review and stakeholder consultation. This data was used to estimate total income for music instrument makers and repairers based on median income, with a further assumption made that this part of the sector is predominately sole trader activity.

Digital retail sales values were derived from the IFPI *Global Music Report*. These figures were included within revenue figures, but no significant value added (ie profit) was counted on this revenue because of the foreign ownership of major streaming services. Artist payments and royalties related to the streaming of Australian music is separately counted in earlier sections of the analysis.

A.3.7 Music Education

There are significant gaps in data to quantify the scope and impact of music education in Australia. While significant research and engagement has been undertaken in the past, and the different components of the music education subsector are easily identified by stakeholders, little hard data exists.

The responses to the industry-wide survey included many artists who teach music as part, or all, of their work portfolio. However, there was little representation across other key parts of the music education subsector, including (but not limited to) conservatoriums and private tuition providers. Available data from the industry-wide survey, publicly available sources, and confidential benchmarks was sufficient to derive an estimate of teaching income earned by Australian artists. This analysis is quantified and included within the relevant chapter of the report.

Increased focus and effort will be required to collect additional data and measure all the relevant areas of the music education subsector. This will be important in building the coverage of the measurement approach in line with the value chain definition. It is also critical given the fundamental importance of music education to the industry at large, and in a wider social and economic context.

A.3.8 Industry Support, Development, and Representation

There is no single consolidated source of information related to industry support, development, and representation activities. For this subsector, data and information were collected from a range of publicly available sources and data requests with individual organisations to build a picture of the current activities.

Respective government agencies provided data returns in relation to attributable music policy and grants staffing and expenditure at a state/territory and Federal level.

The main body of the report provides further context as to where the most significant data gaps exist.

A.4 Limitations

In undertaking the analysis, it is important to acknowledge the limitations inherent in the underlying data and information, and the associated impact on the interpretation and use of the results. The following sub sections outline the various limitations of the approach and key considerations:

Point in time measurement

The analysis considers data and figures captured for the 2023–24 Australian financial year, which does not account for broader industry trends or the potential drivers of revenues, income, employment or exports. As a snap shot, dynamic and external factors cannot be considered, nor can the analysis be used to make forecasts. This first analysis is intended to serve as a baseline for future analysis that would, over time, identify changes and trends and or could be drawn on to consider a broader scope of analysis.

Lack of baseline industry economic analysis and disparate data sources

As previously acknowledged, there is no one single data source and as the first national industry analysis of its kind, there is no consolidated industry baseline to use as a foundation or reference point for comparison.

In addition, similar data points are collected by multiple stakeholders for different purposes and subsectors within the industry creating potential duplication and subjectivity. Without standardised and consistent data collection across the industry or the centralisation of aggregation of data and information across established industry bodies and government agencies, there is significant complexity in establishing the overall size and scale of the industry. Existing benchmarks have been identified and used in the analysis as a point of reference and comparison. In addition, the analysis takes a ‘ground up’ approach by building a comprehensive picture of industry value chain activities considering each subsector with the best available data in each, complemented by the industry wide survey.

Data quality, overlap and double counting

The reliability and accuracy of data varies among sources. Data has been prioritised in a number of ways including quality, consistency and relevance to the analysis and industry value chain definitions. We also acknowledge, and are aware of, the potential for double counting across multiple data sets. To minimise double counting the industry value chain and its related activities seek to draw clear boundaries around activities and therefore the scope of data inclusions and sources provided by key stakeholders. In addition, the industry-wide survey and unpublished data provided by key stakeholders provides reference points for sense checking and comparison.

In integrating multiple data sources, we recognise that there are key differences in definitions across these sources, for example categorisation, measurement units, or geographic scope, that can complicate analysis and interpretation. To mitigate these impacts, data validation to understand the data’s accuracy, completeness, relevance and reliability, and the use of standardised definitions have been applied where possible.

Limitations of the industry-wide survey

A number of limitations related to the industry-wide survey have been identified. Whilst significant consideration was given to the design, focus, timing and promotion of the survey, a number of limitations have been identified:

- **Potential for response error or bias:** Not all respondents may provide honest or accurate responses, while other respondents may not respond correctly, misinterpret questions or provide inaccurate estimates based on previous information, assumptions or misunderstanding of the question(s).
- **A non-representative sample:** Given the breadth and diversity of the industry, it is possible that certain aspects of the industry are potentially underrepresented due to a number of factors including survey fatigue, lack of awareness, time or interest, accessibility and or confidentiality concerns. A lack of definitive data on population size for different cohorts makes this difficult to assess.
- **Potential survey design issues:** The survey was designed with logic and clarity top of mind, with clear, industry-based language utilised throughout the design, as well as a logical sequence of mandatory and optional information. Information about the structure, use and outcomes of the survey were embedded to ensure understanding. The survey assumes a minimum level of knowledge by all respondents, which may not have been the case. Ambiguous, leading and or negative questions and wording were avoided.
- **Prioritisation of quantitative data:** While several opportunities were provided for respondents to provide qualitative insights, these were limited to contextual information, therefore some complexities and nuances may not have been able to be provided and therefore considered in the interpretation of survey data.

Every effort was taken to address and/or minimise the impacts of these limitations on the analysis.

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