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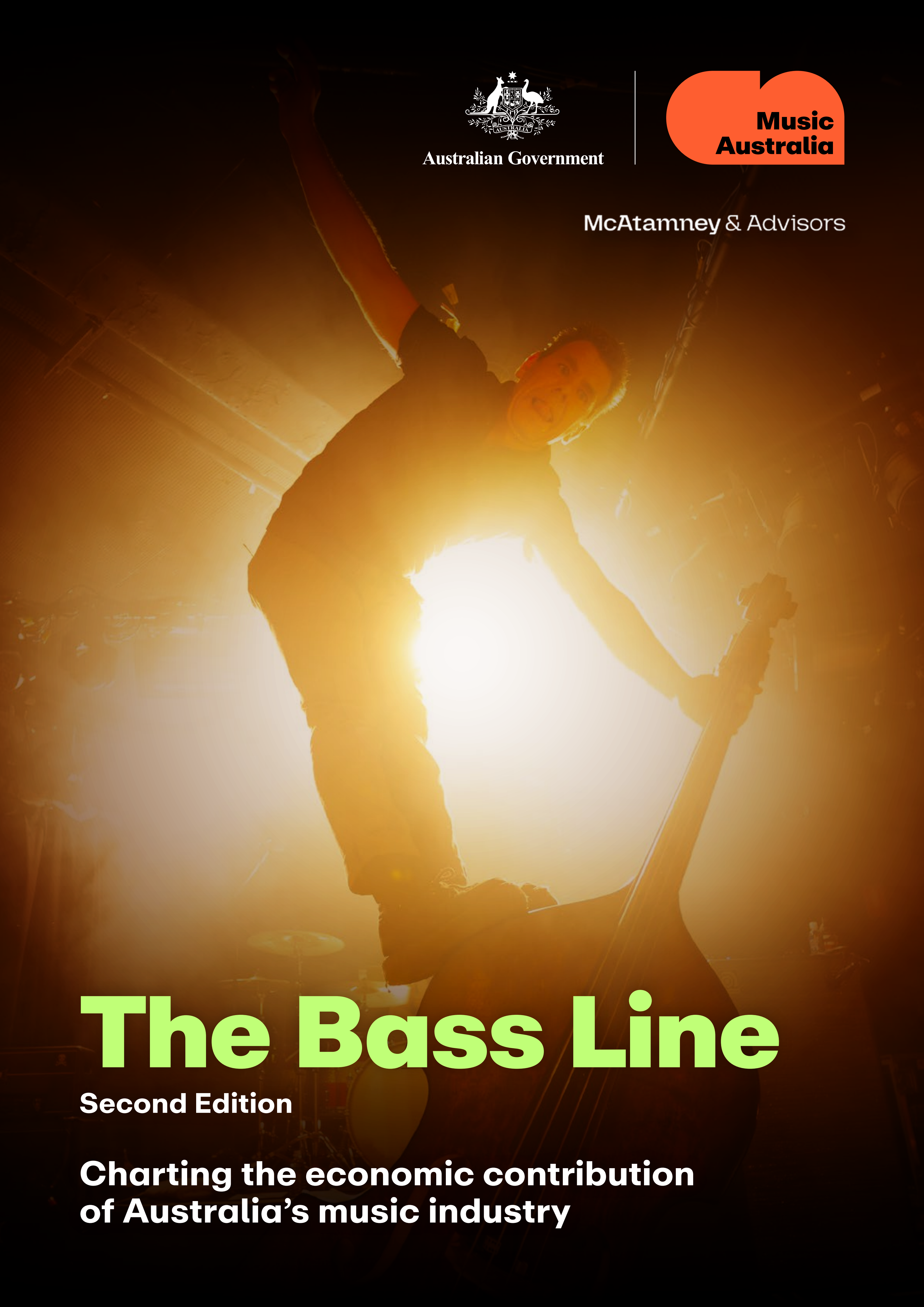

The Bass Line

Second Edition

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.

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.

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

Cover image credit:
Photograph of Scott Owen playing the Double Bass licensed for the cover of The Bass Line – Edition 2.

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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.

Building on the landmark first edition of *The Bass Line*, this second iteration updates our core figures for 2024-25 and expands the series in important ways: adding music education to the analysis for the first time, providing state and territory breakdowns, and exploring current challenges and success stories through spotlights on artist income, insurance, the artificial intelligence landscape, the evolving Australian country music scene, and local government.

Music education is fully quantified for the first time in this edition, meaning the overall figures are not directly comparable to those published in Edition 1. Music education alone contributed $1.79 billion in revenues, with gross value added (GVA) as a share of revenue at 84%, the highest of any sub-sector. Its inclusion reflects the industry measured more completely.

With music education included, the Australian music industry generated revenues of $10.76 billion and contributed $4.28 billion in direct GVA to the Australian economy in 2024-25. Music export revenues were over $1 billion.

What's clear is that growth is hard to achieve, but retaining value is harder. Despite estimated industry revenue growth of 5.2%, industry GVA grew by only 1.5%. Of concern, artist incomes only grew by 0.9% year-on-year and declined in real terms.

With two years of data, patterns are beginning to emerge that no single snapshot can show. We can see how value moves through the industry, where it stays and where it leaves, and what that means for the artists and businesses at the centre of it. We can see which costs are rising, where unpaid time is being absorbed, where income is diversifying and where it remains concentrated. We can better understand the correlations between different industry drivers, where the economics are sticky, and track where conditions are improving.

One relationship we all instinctively know that the data is making increasingly clear: the consumption of Australian music by Australian audiences is directly connected to artist revenue growth. This kind of picture, built year on year, is the evidence based signals needed for long-term local content considerations.

We would like to thank the many organisations, individuals, educators and institutions who shared their data and knowledge with us. *The Bass Line* is a collective industry effort, and we could not do it without you.

Millie Millgate

Director
Music Australia

In this Edition

About *The Bass Line*

This is the second edition of *The Bass Line.*

The Bass Line is the only analysis of its kind, synthesising hundreds of thousands of data points to provide a consistent and industry-wide time series analysis of the economic contribution and industry dynamics across Australia's music industry.

The Bass Line provides artists, industry, policymakers, and the community with robust evidence and contemporary analysis to inform policy, investment, and decision-making to support a thriving and sustainable Australian music industry.

The goal of *The Bass Line* is to provide the most robust and comprehensive evidence in each edition and identify priorities and gaps to inform subsequent efforts. In doing so, the intent is to drive continual improvement and increasing confidence in the evidence base over time.

New in this edition

This second edition of *The Bass* Line builds on the first edition, released in June 2025, with:

- **Analysis for the 2024-25 financial year,** including direct economic contribution, exports, and Australian artist income;
- Inclusion of **analysis of the economic contribution of Music Education,** which was a key data gap identified in the first edition;
- Inclusion of **State and Territory breakdowns** of the analysis results;
- Inclusion of **new spotlights to provide deep dive analysis** into:
    - Insurance arrangements in the music industry;
    - The changing nature of Australian Country Music;
    - Current and emerging artificial intelligence (AI) applications, attitudes, threats, and opportunities across the music industry;
    - Long term impacts of music education and professional pathways; and
    - Local government's role in Australia's music industry.
- **Refined assumptions** across the industry value chain based on additional data collection, testing, and consideration of emerging trends;
- Identification of priorities for analysis and data collection in the third edition of *The Bass Line,* to be published in 2027.

Limitations

Each edition of *The Bass Line* provides a point-in-time analysis based on the best available data and assumptions. The report describes the limitations of the analysis and underlying datasets in detail. Like for the first edition, the limitations identified in existing data and information inform future research priorities to ensure *The Bass Line* continues to provide a contemporary and robust evidence base.

Key findings

Table 1: Economic contribution of Australia's music industry

	Total Revenue (nominal)	Export Revenue (nominal)	Direct GVA (nominal)	GVA as % of revenue (%)
2025	**$10.76b** **+ 5.2%**	**$1.08b** **+ 1.9%**	**$4.28b** **+ 1.5%**	**40%**
2024 (revised to include music education)*	**$10.23b**	**$1.06b**	**$4.21b**	**41%**
2024 (original)	$8.78b	$975m	$2.82b	32%

* Music education was the most significant revision to the 2024 figures. In addition, other minor revisions based on new or more granular data and information have been made but are immaterial in impact.

Belle Chen, *'Ravel in the Forest'*, Live at Earth Theatre Hackney, EFG London Jazz Festival, 2024. Credit: Charlie Swinbourne.

Insights

The Australian music industry generated revenues of $10.76 billion and contributed $4.28 billion in direct gross value added, or GVA, to the Australian economy in 2024-25. Music exports contributed an estimated $1.08 billion (or about 10%) to the total Australian music industry revenue.

The results demonstrate that growth is hard to achieve, but retaining value is harder. Despite an estimated 5.2% growth in industry revenue, industry GVA only grew by 1.5%, resulting in a decline in GVA as a percentage of revenue by 1.4 percentage points to 40%. Live music performance was the main driver of this impact.

Music Education is an economic powerhouse, with $1.79b in revenues and contributing more to GVA than live performance (in addition to lifetime impact, pathways, social impact etc.). GVA as a % of overall revenue (at 84%), is the highest of all industry subsectors.

Artists did not capture a material share of the industry's growth, with estimated income of about $877 million roughly flat year-on-year (+0.9%) and not keeping pace with inflation.

Live performance revenue grew 7.3% over the period, however, growth was driven predominantly by international touring acts which, combined with cost pressures across the sector, contributed to the decline in GVA as a share of industry revenue. Classical music revenues and audiences grew over the period (14.5% and 7.6%), while opera recorded a decline in revenues (22%) and audiences (16.5%), compounding a range of operational and financial challenges facing companies in the genres.

There is room for greater export growth and resilience. Accounting for the inclusion of Music Education, exports exceeded $1 billion but grew at just 1.9%, below revenue growth of 5.2%. A decline in retail exports (-11%) was partially offset by growth in composition, songwriting, music publishing and recording. This underscores the need to identify opportunities to strengthen and diversify the export base, including in higher-margin areas such as synchronisation and catalogue licensing that offer more scalable pathways to global markets.

Artificial intelligence (AI) is rapidly reshaping the music industry. AI-generated content is entering the market in high volumes, with displacement of artist-commissioned work most visible in synchronisation and production music. Regulatory settings are struggling to keep up with both consumer expectations and a rapidly shifting international policy environment.

Insurance cost pressures are acutely felt across live music venues, festivals and events, yet nearly 80% of industry survey respondents had taken no action to address insurance costs. Consultation identified several opportunities for individuals, businesses and industry bodies to take action to reduce costs and ensure adequacy of cover.

Consultation, survey findings, and deep dive analysis across the sector highlighted **cost of living and inflation as the universal financial pressure felt by industry.** Access to government funding remains a significant friction point for nearly a third of industry survey respondents, with support systems described as accessible in theory, but difficult and resource-intensive in practice, to navigate.

Business confidence is the sharpest dividing line in how the industry experiences structural challenges. Respondents with low business confidence cited industry power imbalances and exhaustion, while those with higher confidence reported greater capacity to absorb pressures, suggesting **the industry's problems are consistent but the capacity to withstand them is not.**

Key year-on-year changes in economic contribution

-$36m
Live music GVA

- Live music revenues rose 7.3% during the period, primarily due to an increase in major international touring artists (eg. Taylor Swift, Coldplay, P!nk, Pearl Jam and The Weeknd) and despite a significant decline in opera revenues.
- However, GVA as a % of revenue declined from 30% to 27% due to the different economics of major international acts and cost pressures across the sector.

+$48m
Music retail GVA

- Music retail GVA grew from $515m to $563m, with GVA as a percentage of revenue lifting from 19% to 20%.
- This reflects continued domestic demand for music retail, though the sector's low GVA margin relative to other sub-sectors reflects its high cost-to-revenue structure.

+$2m
Synchronisation GVA

- Whilst modest in absolute terms, direct GVA in synchronisation increased from $16m to $18m, lifting the GVA-to-revenue ratio from 25% to 26%.
- Whilst this is a relatively modest base, it reflects a a high level of growth. As revenues tend to be higher margin this also offers additional export potential.

+$29m
Composition, songwriting and music publishing exports

- Export revenue rose from $95m to $124m, the largest proportional export growth of any sub-sector.
- Australian composer, songwriter and publisher income from the international use of their catalogues continues to increase, reflecting the growing global demand for Australian creative IP.

+$25m
Music recording, production, label services and distribution exports

- Export revenue grew from $485m to $510m, reinforcing recording and distribution as the industry's largest export sub-sector by some margin.
- Growth reflects continued international demand for Australian-produced recorded music and associated label and distribution services.

-$36m
Music retail exports

- This was driven by music product exports from $310m to $274m – the highest export decline across the industry.

Industry subsector contributions

Table 2: Summary – economic analysis of the Australian music industry by subsector in 2024 and 2025 ($m, nominal)

	Total revenue			Export revenue			Direct GVA			GVA as % of revenue		
Subsector	2024 (original)	2024 (revised)	2025	2024 (original)	2024 (revised)	2025	2024 (original)	2024 (revised)	2025	2024 (original)	2024 (revised)	2025
Live music performance	$4,830	$4,830	**$5,187**	$105	$105	**$115**	$1,440	$1,440	**$1,404**	30%	30%	**27%**
Music recording, production, label services and distribution	$790	$790	**$821**	$485	$485	**$510**	$350	$360	**$358**	44%	45%	**44%**
Composition, songwriting, and music publishing	$470	$475	**$488**	$95	$95	**$124**	$155	$165	**$164**	33%	34%	**34%**
Artist management	$195	$195	**$198**	$10	$10	**$10**	$92	$93	**$94**	47%	48%	**48%**
Synchronisation	$64	$65	**$69**	$13	$13	**$13**	$16	$16	**$18**	25%	25%	**26%**
Music retail	$2,730	$2,685	**$2,803**	$310	$310	**$274**	$515	$515	**$563**	19%	19%	**20%**
Music education	>$60	$1,725	**$1,788**	n.a.	$85	**$90**	>$60	$1,445	**$1,495**	n.a.	84%	**84%**
Industry and sector development	n.a.	n.a.	**n.a.**	n.a.	n.a.	**n.a.**	$290	$335	**$345**	n.a.	n.a.	**n.a.**
Total*	$8,775	**$10,225**	**$10,760**	$975	**$1,060**	**$1,080**	$2,815	**$4,210**	**$4,275**	32%	**41%**	**40%**
Year-on-year change			**+5.2%**			**+1.9%**			**+1.5%**			**-1.44pp**

* 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.

State and Territory contributions

Table 3: State and Territory contributions – 2025

	Total	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Revenue	**$10.76b**	1%	36%	<1%	16%	5%	2%	33%	7%
Exports	**$1.08b**	<1%	39%	<1%	14%	5%	2%	32%	7%
GVA	**$4.28b**	1%	36%	<1%	16%	5%	2%	30%	8%

Source: Economic analysis calculations.

CYRIL performing at Tomorrowland 2025, Belgium. Credit: Max Foley.

Acronyms

Term	Definition
AAM	Association of Artist Managers
ABC	Australian Broadcasting Corporation
ABRSM	Associated Board of the Royal Schools of Music
ABS	Australian Bureau of Statistics
ACER	Australian Council for Educational Research
AEG	AEG Presents
ACT	Australian Capital Territory
ACCC	Australian Competition and Consumer Commission
ACMA	Australian Communications and Media Authority
AFA	Australian Festivals Association
AI	Artificial intelligence
AIR	Australian Independent Record Labels Association
ALGA	Australian Local Government Association
ALMBC	Australian Live Music Business Council
AMA	Australian Music Association
AMC	Australian Music Centre
AMCOS	Australasian Mechanical Copyright Owners Society
AMEB	Australian Music Examinations Board
AMIN	Australian Music Industry Network
AMPAL	Australian Music Publishers Association Limited

Term	Definition
AMRA	Australian Music Retailers Association
ANZCA	Australia and New Zealand College of Arts
APRA	Australasian Performing Rights Association
APRA (prudential)	Australian Prudential Regulatory Authority
ARIA	Australian Recording Industry Association
ATAR	Australian Tertiary Admission Rank
ATO	Australian Taxation Office
BCARR	Bureau of Communications, Arts and Regional Research
BPI	British Phonographic Industry
CAGR	Compound Annual Growth Rate
CAIRG	Copyright and AI Reference Group
CBAA	Community Broadcasting Association of Australia
CCTV	Closed-Circuit Television
CISAC	International Confederation of Societies of Authors and Composers
DDEX	Digital Data Exchange
DSP	Digital Service Provider
EDF	Export Development Fund
EDM	Electronic dance music
FY	Financial Year
GPAI	General-Purpose Artificial Intelligence

Term	Definition
GVA	Gross value added
ICA	Insurance Council of Australia
IFPI	International Federation of the Phonographic Industry
IP	Intellectual Property
ITE	Initial Teacher Education
LCM	London College of Music
LPA	Live Performance Australia
LMO	Live Music Office
MEAA	Media Entertainment & Arts Alliance
ML	Machine Learning
MPEG	Music Producer and Engineers' Guild
NAAE	National Advocates for Arts Education
NAMM	National Association of Music Merchants
NATSIMO	National Aboriginal and Torres Strait Islander Music Office
NCPD	APRA National Claims and Policies Database
NSW	New South Wales
NT	Northern Territory
OFTA	Office for the Arts

Term	Definition
OSCA	Occupational Classifications in Australia
PPCA	Phonographic Performance Company of Australia Ltd
QLD	Queensland
RMIT	Royal Melbourne Institute of Technology
SA	South Australia
SEP	Special Entertainment Precinct
STEM	Science, Technology, Engineering and Mathematics
TAFE	Technical and Further Education
TAS	Tasmania
TDM	Text and Data Mining
TEG	Ticketek Entertainment Group
UK	United Kingdom
UMG	Universal Music Group
VET	Vocational Education and Training
VMDO	Victorian Music Development Office
VIC	Victoria
WA	Western Australia
WMG	Warner Music Group

1. Introduction

Music is central to the daily lives of Australians, shaping our shared culture, strengthening communities, and contributing significantly to national wellbeing and prosperity.[1] As the music ecosystem continues to evolve with shifts in creation, participation, technology, and industry structures,[2] so too does the need for clear and consistent evidence to understand and reflect its dynamics and contribution.

62%
Of Australians state that music is really important to them (2025)[3]

71%
Music-engaged Australians feel a sense of pride when they listen to Australian music (2025)[4]

$1.5b
Is the economic contribution of the music education subsector (2025)

$877m
Estimated Australian artist income (2025)

The Bass Line series reflects the growing recognition across government, industry and the broader community that robust, comparable data is essential for understanding the dynamics of the music industry and supporting effective policy, planning and investment.[5]

This second edition of *The Bass Line* expands on the first, offering a comprehensive picture of the sector's economic contribution and current industry dynamics. It also represents a continued commitment by Music Australia and Creative Australia to strengthening the evidence base and building *The Bass Line* into a robust, repeatable measurement series to inform effective policy, planning, and investment.

1. Creative Australia (2025) *Listening In: Live Music Attendance*.
2. Part of a blog post about an industry panel convened by Blackbox Lab, part of the Digital Data Design Institute at Harvard in 2024, *Shaping the future of music in the creator economy*, published in Medium, 15 November 2024. The post is available at https://medium.com/blackbox-lab/shaping-the-future-of-music-in-the-creator-economy-296e769d328f.
3. This figure is included in Music Australia's 2025 report, Listening In: Insights on live music attendance, citing the Consumer & Media View (CMV) survey undertaken by Nielsen in 2024.
4. Creative Australia (2025) *Listening In: Insights on music discovery and engagement*.
5. Music Australia and McAtamney & Advisors (2025), *The Bass Line: Charting the economic contribution of Australia's music industry*.

ŽIVA performing at Arthaus.
Credit: Bee Elton.

1.1 Purpose and Scope

The purpose of this report is to provide a comprehensive and nationally-consistent analysis of the direct economic contribution of Australia's music industry. Its scope is to:

- update estimates of the direct economic contribution of Australia's music industry, based on the methodology established in the first edition, for the period from July 2024 to June 2025 (ie. the financial year (FY) 2024-25);
- extend and refine the analysis and insights based on additional information and data gathered; and
- identify and present additional insights and analysis into key subsectors to deepen the analysis and understanding.

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, as it is defined.	In scope
Export income	The component of total income from the music industry's operations that is earned outside Australia.	In scope
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.	In scope
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 (e.g., additional spending on flights, 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.	Not in scope

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. These first and second editions of *The Bass Line* focus on direct economic contribution in order to maximise the robustness and consistency of the analysis.

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** contains 'spotlights' into specific areas of Australia's music industry, including artist income, insurance arrangements, country music, music education, the artificial intelligence landscape, and the role of local government in Australia's music industry;
- **Section 5** outlines research priorities for the next edition of *The Bass Line*; and
- **Appendix A** provides supplementary information on the approach.

Alexander Flood performs at his 'ARTIFACTUAL RHYTHM' album launch at The Lab, Adelaide. Credit: streetvisioner.

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 music industry, to earn income. The industry includes a variety 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 value is created and disseminated.

The first edition of *The Bass Line* developed a comprehensive first-principles methodology to estimate direct economic contribution. This included establishing a comprehensive definition of the Australian music industry suitable for economic analysis, collecting and analysing data (including primary data collection), and undertaking analysis across industry subsectors based on the specific characteristics and data availability for those subsectors.

→ Read the detailed technical approach in The Bass Line, Edition 1

The original methodology was designed to be durable, and to ensure comparability and consistency over time, while capturing changing industry dynamics and improved data.

The methodology is consistently applied in this second edition, and is enhanced in the following ways:

Enhancement	Overview
Inclusion of additional datasets and benchmarks	This second edition is strengthened through the inclusion of additional quantitative datasets, expanded research, access to additional confidential benchmarks, and broader stakeholder insight. These enhancements reflect a coordinated effort across data contributors and industry stakeholders to improve the coverage and specificity of the analysis.
New participants in the industry-wide survey	A refined industry survey was undertaken in 2025, building on the survey undertaken for the first edition. There were 948 respondents to the survey, with nearly three quarters (73%) completing the survey for the first time in 2025. The survey maintained the structure and coverage from the first edition while incorporating the following updates: • Alignment of the industry value chain definitions and categories to reflect the refinements made as part of the second edition, particularly in relation to Music Education; • Incorporation of new modules to support the deep dive analysis, including for insurance and music education; and • Refining core survey questions and logic for occupations and where individuals and businesses work across the value chain in order to clarify and streamline attribution. → Read more about the Industry Survey coverage and response in Appendix B

Enhancement	Overview
Inclusion of State and Territory breakdowns	This edition introduces state and territory breakdowns, enabled by expanded data coverage and increased stakeholder inputs across subsectors. These breakdowns expand the granularity of the report and will enable greater emphasis on trends and regional variations over time.
Analysis of the economic contribution of Music Education	A deep dive analysis of the current state and direct economic contribution of Australia's music education sector for the period from July 2024 to June 2025 was undertaken. This edition includes an overview of the outcomes of this work, a Music Education spotlight considering the long term impacts of music education and professional pathways, and *The Australian Music Education Ecosystem* report. The report is based on extensive research, sector engagement, and primary data collection to provide an overview of the music education sub-sector and its economic contribution. → Read more about the music industry value chain in Appendix A
Refined assumptions across the value chain	This edition incorporates refinements to assumptions applied across the music industry value chain, reflecting improved data availability and greater ability to triangulate information to test assumptions. Where additional data and inputs have permitted, assumptions have been updated to better align with observed industry dynamics and operational realities. Notwithstanding these enhancements, a conservative approach has been maintained in estimating economic contribution to ensure the robustness and credibility of the analysis.

Similar to the first edition, stakeholder engagement has been critical in continuing to gather and test data and insights, seek feedback, increase survey participation, and increase the visibility and reach of *The Bass Line*.

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.

3.1 Results summary

The direct economic contribution of Australia's music industry in 2024-25 is estimated at $4.28 billion. This was approximately 40% of total estimated music industry revenues of $10.76 billion. The results of the economic analysis for each of the industry subsectors is as follows.

Anna Lunoe performs at Dom Dolla's Allianz Stadium show, Sydney December 2025.
Credit: Tiff Williams.

Table 4: Economic analysis of the Australian music industry by subsector in 2024 and 2025 ($m, nominal)

Subsector	Total revenue			Export revenue			Direct GVA			GVA as % of revenue		
	2024 (original)	2024 (revised)	2025	2024 (original)	2024 (revised)	2025	2024 (original)	2024 (revised)	2025	2024 (original)	2024 (revised)	2025
Live music performance	$4,830	$4,830	**$5,187**	$105	$105	**$115**	$1,440	$1,440	**$1,404**	30%	30%	**27%**
Music recording, production, label services and distribution	$790	$790	**$821**	$485	$485	**$510**	$350	$360	**$358**	44%	45%	**44%**
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Music retail	$2,730	$2,685	**$2,803**	$310	$310	**$274**	$515	$515	**$563**	19%	19%	**20%**
Music education	>$60	$1,725	**$1,788**	n.a.	$85	**$90**	>$60	$1,445	**$1,495**	n.a.	84%	**84%**
Industry and sector development	n.a.	n.a.	**n.a.**	n.a.	n.a.	**n.a.**	$290	$335	**$345**	n.a.	n.a.	**n.a.**
Total*	$8,775	**$10,225**	**$10,760**	$975	**$1,060**	**$1,080**	$2,815	**$4,210**	**$4,275**	32%	**41%**	**40%**
Year-on-year change			**+5.2%**			**+1.9%**			**+1.5%**			**-1.44pp**

* 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.
n.a. Not applicable.
Note: Results for 2024 have been revised to include Music Education sub-sector results and minor improvements in data granularity. The minor improvements in data granularity do not significantly impact the 2024 results.
Source: Economic analysis calculations.

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

Table 5: Summary – Economic contribution of live music performance in 2024 and 2025, and state and territory distribution ($m, nominal)

	Revenue ($m, nominal)	Export income ($m, nominal)	Direct gross value added ($m, nominal)	GVA as % of revenue
2024 (original)	$4,830	$105	$1,440	30%
2024 (revised)	$4,830	$105	$1,440	30%
2025	**$5,187**	**$115**	**$1,404**	**27%**
ACT	$55	$1	$16	30%
NSW	$1,641	$38	$402	25%
NT	$20	$1	$8	41%
QLD	$878	$21	$254	29%
SA	$258	$6	$81	31%
TAS	$87	$2	$28	33%
VIC	$1,884	$38	$508	27%
WA	$364	$9	$106	29%

Note: Results for 2024 have been revised to include Music Education sub-sector results and minor improvements in data granularity. The minor improvements in data granularity do not significantly impact the 2024 results.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

Live music remains vital to Australia's creative economy and social and cultural participation.

→ Read more about Live Music Performance in The Bass Line, Edition 1

Key statistics:

15.8m
Estimated number of attendees at live music events (excluding pubs, clubs, and nightclubs) (2024)

$2.56b
Estimated ticket sales for live music events in Australia (2024)

$1.35b
Estimated attributable food and beverage and merchandise revenue at live music events (2024)

$34m
Australian writer and publisher income from live music (2025)

SPEED performs at
Outbreak Festival 2025.
Credit: Jack Rudder.

The Live Performance Australia (LPA) 2024 *Ticket Attendance and Revenue Report* noted that contemporary music and festivals (contemporary music) accounted for 14.1 million attendees (51.2% of total live performance attendance) in 2024. Attendance continues to be driven heavily by international touring artists. In 2024, this included Taylor Swift, Cold Play, Pink, Pearl Jam and the Weeknd.[6] Classical music attendance grew by 7.6%, attracting 1.4 million attendees, while opera recorded a decline in attendance by 16.5%, attracting <0.3 million attendees.[7] Based on the LPA data, the attendance and revenue breakdown by state and territory was as follows.

Table 6: State and territory share of attendance and ticket revenue (contemporary music, festivals (contemporary music), opera, and classical music)

		ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Attendance	**2025**	**2%**	**35%**	**<1%**	**17%**	**5%**	**<1%**	**32%**	**9%**
	2024	1%	33%	<1%	18%	5%	1%	31%	10%
Ticket revenues	**2025**	**1%**	**38%**	**<1%**	**16%**	**4%**	**<1%**	**34%**	**7%**
	2024	1%	34%	<1%	18%	5%	1%	31%	9%

Source: Live Performance Australia, (2024), *Live Performance Industry in Australia, 2023 Ticket Attendance and Revenue Report* and *Live Performance Australia, (2025), Live Performance Industry in Australia, 2024 Ticket Attendance and Revenue Report.*

6. Live Performance Australia, (2025), *Live Performance Industry in Australia, 2024 Ticket Attendance and Revenue Report.*
7. Live Performance Australia, (2025), *Live Performance Industry in Australia, 2024 Ticket Attendance and Revenue Report.*

In 2025, Creative Australia released, *Listening In: Live music attendance*,[8] the first in a series of three research reports aiming to build a contemporary evidence base on how Australians engage with music across listening, discovery and live attendance. The findings suggest a sector that is deeply valued but increasingly constrained by affordability, access, and structural change. While demand for live music remains strong, particularly among young Australians, participation is becoming more concentrated around major events and selective experiences.

- **Live music is culturally and socially significant**
  Music plays an important role in the lives of most Australians. Younger, music-engaged audiences identify live music as having positive impacts on mental health, wellbeing, relationships, and feelings of community and belonging.
- **Cost is the dominant barrier to attendance**
  Ticket prices are the most frequently cited barrier to attending live music. However, audiences are equally constrained by associated costs such as transport, accommodation, and food and drinks at venues.
- **There is strong support for Australian music, but international acts are prioritised**
  Australians value local music and recognise it may be easier to see local than international acts. Despite this, audiences often prioritise international artists perceived as rare or "once-in-a-lifetime" opportunities.
- **Attendance is growing at major venues and festivals, but declining in pubs and clubs**
  Live music attendance is increasing at major venues and festivals, while declining in pubs and clubs, traditionally key spaces for emerging and local artists.
- **Young Australians are still spending on live music, though selectively**
  Despite cost-of-living pressures and feeling less financially secure, young Australians are spending more on entertainment and leisure than in 2019. Music-engaged participants are saving and prioritising spending on gigs that matter to them.
- **Awareness and geographic access shape participation**
  Beyond cost, attendance is influenced by lack of interest, limited awareness of events, and perceptions that some areas, particularly outside major cities, are underserved.
- **Alcohol prices are changing audience behaviour**
  High alcohol prices at live music events are prompting some audiences to drink less, drink beforehand, or seek alternative ways to enhance their experience.

→ Read the Creative Australia Listening In Research Series

8. Creative Australia (2025) *Listening In: Live Music Attendance*.

While attendance continued to be strong across most categories, challenges identified in the first edition of *The Bass Line* persist and, in several areas, have intensified or evolved. Meanwhile, initial policy responses and new research have further clarified the nature of the risks facing the sector.

Attendance patterns have continued to shift, with activity increasingly concentrated in major venues and festivals, alongside ongoing declines in attendance at pubs and clubs.[9] This trend reinforces concerns about the sustainability of grassroots performance settings and the long-term development of artists and audiences. That said, half of music-engaged respondents to a recent Creative Australia survey note that they would like to attend more live local Australian music, but don't know where to find out about it.[10]

These structural changes are occurring alongside changing consumer behaviours, including later ticket purchasing, reduced frequency of attendance and lower ancillary spending, increasing revenue volatility and financial risk for venues, promoters and artists. In some cases, these pressures have contributed to business failure and insolvency within the live events sector.[11, 12]

Barriers related to location, transport and venue accessibility remain significant, particularly outside major metropolitan centres. Research continues to point to uneven access to live music across regions, reflecting long-standing geographic disparities in live music provision.[13] The industry survey conducted as part of our stakeholder engagement and data collection efforts for this report, found that for 48% of venue operator (n=163) expenses grew substantially faster than income. Since 2024, targeted policy measures such as the Australian Government's *Revive Live* program have been introduced to support venue and festival sustainability and improve accessibility and participation.[14]

While these initiatives represent an important intervention, they operate within broader structural constraints that continue to affect local live music ecosystems.

Cost-of-living pressures remain the primary demand-side constraint on live music attendance. Ticket pricing and practices, has recently attracted increased scrutiny in regard to dynamic pricing, fees and transparency, which all impact ticket prices and in turn, their affordability. These issues have attracted heightened public and policy attention, situating live music within wider discussions of consumer protection, competition and market power.[15] The industry survey found that live music businesses continue to be impacted by reduced advance ticket sales and shifting consumer behaviour, which is borne out in booking behaviour and ticketing cash flow data.

Workforce capacity remains a critical constraint on sector sustainability, with persistent skills shortages across technical, production and specialist roles within live music.[16] These shortages are compounded by ongoing issues of insecure employment, burnout and limited career pathways.[17]

Collectively, while demand for live music remains strong, the business landscape continues to be fragile and uneven. The industry survey found that for promoters, artist managers, and labels, the live music supply chain, including venue hire, crew costs, backline, and insurance, are the key drivers of cost. 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, which together contribute to live performances.

9. Creative Australia (2025) *Listening In: Live Music Attendance.*
10. Creative Australia (2025) *A summary and synthesis of insights into music consumption.*
11. News.com.au (2026) *Solbar Sunshine Coast closes permanently after 25 years,* https://www.news.com.au/entertainment/iconic-sunshine-coast-music-venue-solbar-to-close-its-doors-permanently/news-story/99986df7348f25f9af12310698a4ed7e, accessed 25 February 2026).
12. Roberts, R., & Whiting, S. (2025). *"I'd Have to Be Crazy if I Did it Strictly on a Financial Basis": Australian Regional Music Venues, Burnout, and Precarious Music Ecologies.* Popular Music and Society, 48(2), 194–211. https://doi.org/10.1080/03007766.2025.2455302.
13. Creative Australia (2025) *Listening In: Live Music Attendance*.
14. Australian Government (2025) *Revive Live*. https://www.arts.gov.au/funding-and-support/revive-live, accessed 4 February 2026.
15. The Guardian (2025), *Labor moves on dynamic pricing after concert ticket backlash*. https://www.theguardian.com/music/2025/apr/18/labor-taking-action-on-dynamic-pricing-after-ticket-prices-to-lady-gagas-sydney-and-melbourne-concerts-spark-outrage, accessed 4 February 2026.
16. Creative Australia (2025) *Creative Workforce Scoping Study.*
17. Eltham, B. (2024) *Issues facing crew workers in Australia: Industry conditions and results of CrewCare's survey.* CrewCare, Melbourne.

3.2.1 Artists

Key statistics:

$410m Australian artist income from live music (2025)	**47%** Estimated proportion of artist income earned from live music (2025)	**30%** Artist share of live music direct GVA (2025)

Australian artists continue to rely heavily on live performance, which accounted for an estimated $410 million – or 49% – of artists' music-related income in 2024-2025, relatively stable in comparison to 2023 - 2024. An additional $32 million of artist income was generated through merchandise sales at live music events (also stable in comparison to 2023-2024)

→ Read more about merchandise sales in 2024-25 in Music Retail

Musicians Australia, a division of the Media, Entertainment & Arts Alliance (MEAA), established a minimum performance fee of $250 per musician as the benchmark floor for publicly funded live performances, based on the three-hour call rate set out in the Live Performance Award.[18] This minimum fee has since received endorsement from the governments of South Australia, Western Australia, Queensland, Victoria, and the Australian Capital Territory, each adopting the benchmark, initially as a condition of COVID-19 recovery funding, as a requirement attached to publicly funded performance grants.[19] The NSW Government subsequently moved to formally implement the $250 minimum fee as a standing contractual condition for all commercial events receiving NSW Government funding. Implementation commenced mid-February 2026 with initial trials across one government department with the intention of broader expansion thereafter.[20]

A recent survey of over 300 professional musicians conducted by Musicians Australia found that 44% of respondents earned less than $250 per gig.[21] While the survey further identified that 59% of gigs did not include superannuation payments, there are indications of incremental improvement in some areas, with 68% of respondents reporting being paid for every performance, which represents an increase from 53% recorded in 2020.[22]

→ Read more about Artist Income in Section 4, Industry Spotlights

Contemporary music performances continued to make up approximately three quarters of all live performances.

18. Musicians Australia/MEAA (n.d.). *The Musicians Australia Minimum Fee*. Musicians Australia, viewed 10 April 2026.
19. Musicians Australia/MEAA (2024). *Insecure Work and Poor Pay Forces Musicians to Hang Up Their Instruments*. Media, Entertainment & Arts Alliance.
20. NSW Government (2026). *Submission Nº 80: Inquiry into the State of Live Music in New South Wales*. NSW Parliament, p. 3.
21. Musicians Australia/MEAA (2025). *Musicians Australia Survey Report 2024/25*. Media, Entertainment & Arts Alliance.
22. Musicians Australia/MEAA (2025). *Musicians Australia Survey Report 2024/25*. Media, Entertainment & Arts Alliance.

Table 7: Percentage of live performing artists performing different types of live music

Type of performance	Results (n=226) 2024	Results (n=47) 2025
Contemporary music performances	75%	74%
Music performances in settings not specifically dedicated to music (e.g., musical theatre, cabaret, weddings, events, and other settings)	49%	38%
Music festivals	32%	32%
Classical music performances	23%	8.5%
Opera performances	6%	0%

Note: Totals do not sum to 100 per cent because artists perform in multiple different performance types.
Note: In 2025 respondents were asked to select their top three primary roles in the music industry only (in 2024 they could select all roles).
Source: Results of the industry-wide surveys conducted in 2024 and 2025.

Artists responding to the survey reported performing an average of 59 times in 2024-2025. The most frequent performance venues continued to be hotels and pubs, and registered clubs, which together made up 23.3% of all live music performances and concert halls and theatres (8.4% performances).

Australian String Quartet, Florescence.
Credit: Kane Moroney.

Table 8: Average number of performances per year, by venue type, for live music artists

<table>
<tr><th>Performance venue</th><th>Results (n=214) 2024</th><th>Results (n=72) 2025</th></tr>
<tr><td>Hotels and pubs</td><td rowspan="2">27.2</td><td>17.9</td></tr>
<tr><td>Registered clubs</td><td>5.4</td></tr>
<tr><td>Concert halls and theatres</td><td rowspan="2">13.9</td><td>8.4</td></tr>
<tr><td>Regional performing arts centres</td><td>3.2</td></tr>
<tr><td>Outdoor public spaces</td><td>8.0</td><td>5.1</td></tr>
<tr><td>Community centres and halls for hire</td><td>4.2</td><td rowspan="2">5.9</td></tr>
<tr><td>Town halls</td><td>2.5</td></tr>
<tr><td>Nightclubs (Electronic Dance Music)</td><td>3.9</td><td>2.4</td></tr>
<tr><td>Arenas</td><td>0.4</td><td>1.1</td></tr>
<tr><td>Stadiums</td><td>0.2</td><td>0.2</td></tr>
<tr><td>Private settings (eg. weddings, corporate events)</td><td rowspan="2">8.0</td><td>7</td></tr>
<tr><td>Other</td><td>2.4</td></tr>
<tr><td>Total number of performances</td><td>68.2</td><td>58.9</td></tr>
<tr><td>Average annual live performance income (for artists answering the survey)</td><td>$15,350</td><td>$15,859</td></tr>
</table>

Note: Excludes outlier responses of over 300 performances per year.
Note: Venue categories were updated in the 2025 survey to provide more detailed breakdowns.
Note: In 2025 respondents were asked to select their top three primary roles in the music industry only (in 2024 they could select all roles).
Source: Results of the industry-wide survey 2024 and 2025.

Industry survey respondents working as individuals in contemporary live music (as one of up to three primary roles in the music industry) were asked to rate their confidence in the outlook for their work on a scale of 1 (not confident) to 5 (extremely confident).[23] Of the 126 respondents, the largest single group selected a neutral rating of 3 (32%), while 45% rated their confidence at 1 or 2, indicating a predominantly cautious or low-confidence outlook. Only 23% rated their confidence positively at 4 or 5, with fewer than 4% selecting the highest confidence rating.

In 2024-25 APRA AMCOS writer and publisher members, earned a record $98.8 million in international performance royalties, up 14.8% from the previous financial year. In this same year, 679 different Australian acts (an increase of 112% compared to the previous year) submitted 1,120 Overseas Live Performance Returns (an increase of 55%) to APRA AMCOS, which reflects 6,868 shows (an increase of 19%), performed by Australian artists globally.[24]

→ Read more about Artist Income in Section 4, Industry Spotlights

23. This question was not included in the 2024 industry survey and therefore no year-on-year comparison is possible.
24. Data provided by APRA AMCOS for the purpose of this report.

3.2.2 Live music venues

Key statistics:

$1.87b

Estimated venue income from venue hire, F&B, and merchandise commissions at live music events (2024)

30%

Venues share of live music direct GVA

Live music in Australia is presented across a highly diverse venue landscape, ranging from purpose-built large and small music venues to multipurpose and non-music venues that host performances occasionally as part of broader events. This ecosystem also includes non-traditional and temporary sites, such as outdoor festivals, which rely on short-term infrastructure to enable live music performance.

→ Read more about venues and major private live venue owners and operators in The Bass Line, Edition 1

Australia's live music venue ecosystem has remained under sustained structural pressure, even as governments attempt to recalibrate regulatory settings. In NSW, the rollout of the *Vibrancy Reforms* and expanded use of Special Entertainment Precincts (SEPs) signal a shift toward "agent of change" principles and reduced noise-compliance risk for venues, particularly in inner-city and late-night economies.[25] The Parliament of Victoria released research in 2025 highlighting the fragility of venue business models amid rising insurance, compliance and property costs, while noting that regulatory reform alone is insufficient without direct financial intervention.[26]

In addition, the New South Wales Legislative Council's Standing Committee on Social Issues launched an inquiry into the state of live music in New South Wales in October 2025, receiving submissions from across the industry through February 2026.[27] The inquiry examines progress against the NSW Contemporary Music Strategy 2025-2034, the impact of the Vibrancy Reforms, and structural challenges facing venues and artists in both metropolitan and regional NSW.

Submissions from the industry highlight persistent concerns about the net loss of live music venues since 2014, the ongoing affordability of rehearsal and recording space, and the compounding effect of algorithmic discovery systems on demand for local live music. The NSW Government's submission to the inquiry cited the inaugural NSW Music Prize (November 2025), the introduction of Michael's Rule across the Venues NSW network, and the Live Performance Venue Program, which awarded $3.4 million in grants to 56 venues in 2024-25, as evidence of the reform trajectory underway.[28] The NSW Government also recently noted a significant increase in pubs and clubs accessing their live music incentives (from 133 in 2023, to 564 as of March 2026).[29] The incentive requires eligible live music venues to host at least 10 live music gigs per month while receiving a discount on licensing fees and extended trading hours.

In 2025, the Australian Treasury consulted on proposed reforms to the Australian Consumer Law, seeking to address unfair ticketing practices, including dynamic pricing and hidden fees added throughout the purchasing process.

25. NSW Government (2025) *Sound regulation for licensed venues: Vibrancy reforms*. https://www.nsw.gov.au/business-and-economy/liquor-and-gaming/liquor-licensing/sound-regulation-for-licensed-venues/key-changes-under-vibrancy-reforms, accessed 4 February 2026.
26. Parliament of Victoria (2025) *Challenges and opportunities for Victoria's live music venues*. https://www.parliament.vic.gov.au/49a6b6/globalassets/sections-shared/about/publications/research-papers/2025_2_challenges-and-opportunities-for-victorias-live-music-venues_rp.pdf, accessed 4 February 2026.
27. NSW Parliament, Legislative Council Standing Committee on Social Issues 2025, Inquiry into the State of Live Music in New South Wales: Terms of Reference, NSW Parliament, Sydney, established 8 October 2025, https://www.parliament.nsw.gov.au/committees/inquiries/Pages/inquiry-details.aspx?pk=3147, accessed 7 April 2026.
28. NSW Government 2026, Submission to the NSW Legislative Council Standing Committee on Social Issues: *Inquiry into the State of Live Music in New South Wales*, Submission Nº 80, NSW Parliament, Sydney, 3 March 2026, https://www.parliament.nsw.gov.au/lcdocs/submissions/94666/0080%20NSW%20Government.pdf, accessed 7 April 2026.
29. NSW Government 2026, Live music revival: venue numbers quadruple, media release, NSW Government, Sydney, https://www.nsw.gov.au/departments-and-agencies/dciths/ministerial-media-releases/live-music-revival-venue-numbers-quadruple, accessed 23 April 2026.

DJ PGZ at Australia House at Amsterdam Dance Event 2025.
Credit: Luke Layson

In November 2025, Consumer Ministers agreed to improve protections for consumers against unfair trading practices through amendments to the Australian Consumer Law, with Treasury subsequently working on draft legislation for further stakeholder consultation.[30]

Internationally, in April 2026, a federal jury in New York found Live Nation and its subsidiary Ticketmaster liable for illegally monopolising the live events industry, concluding that its vertically integrated control of artist promotion, venue ownership and ticketing had stifled competition and overcharged consumers.[31] The determination could result in a forced structural break-up of the two companies[32] and has prompted renewed calls for Australia's ACCC to revisit long-standing concerns around market concentration and pricing transparency in the local live events sector.[33]

Venue viability continues to be negatively impacted by fixed-cost escalation, most notably public liability insurance. Throughout 2025, industry bodies warned that insurance premiums remain prohibitive for small-to-mid scale live music venues, with closures and programming reductions cited as direct outcomes.[34] The closure of Melbourne's Gasometer Hotel as a live music venue became a symbolic illustration of a broader trend, reinforcing concerns that hospitality conversions are increasingly favoured over music-led formats that are experiencing increasingly lower margins.[35, 36]

Stakeholder engagement undertaken for this report, including with music venues and insurance brokers, identified some areas of tangible progress in the venue insurance market. Through a more nuanced understanding of venue operations, risk management practices, and the specific controls in place across live venues, an improved understanding is supporting more informed underwriting decisions and, in several cases, enabling the negotiation of reduced premiums and excesses.

→ Read more about music industry insurance in Section 4, Industry Spotlights

30. Australian Treasury 2024, Unfair Trading Practices – Supplementary Consultation, Australian Government, Canberra, treasury.gov.au/consultation/c2024-602157, accessed 17 May 2026.
31. Ghost Cult Magazine 2026, 'Live Nation guilty — what it means for concert fans', 27 April, https://ghostcultmag.com/live-nation-ticketmaster-monopoly-verdict-2026/, accessed 29 April 2026.
32. Music Business Worldwide 2026, 'Live Nation and Ticketmaster lose antitrust trial: what happened, what it means, and what comes next', 15 April, https://www.musicbusinessworldwide.com/live-nation-antitrust-verdict-what-happened-what-it-means-and-what-comes-next/, accessed 29 April 2026.
33. Australasian Leisure Management 2026, 'US court verdict on overcharging by Live Nation and Ticketmaster sparks renewed scrutiny of Australia's ticketing market', April, https://www.ausleisure.com.au/news/us-court-verdict-on-overcharging-by-live-nation-and-ticketmaster-sparks-renewed-scrutiny-of-australias-ticketing-market, viewed 30 April 2026.
34. Insurance Council of Australia (2025) Reform of state laws needed to reduce business insurance costs (white paper supported by the Australian Live Music Business Council). Available at: https://almbc.org.au/insurance-council-of-australia-report/, accessed 4 February 2026.
35. The Music Network (2025) 'Gasometer Hotel to close after building owners reject offers', The Music Network, 17 March, https://themusicnetwork.com/gasometer-hotel-closing-permanently-march/, accessed 29 March 2026.
36. Realcommercial (2025) Gasometer Hotel to close as Melbourne live music venue. https://www.realcommercial.com.au/news/gasometer-hotel-to-close-as-melbourne-live-music-venue-gastropub-replacement-expected, accessed 4 February 2026.

Vv Pete performs at Mode Festival 2024, Sydney.
Credit: Jade D'Amico.

Public funding, including at a federal and state level, has provided targeted operational support for venues presenting original Australian music including programs supporting sound management, venue sustainability and regional touring infrastructure. Local governments play a critical role in live music at a grass roots level. Functioning as an enabler of place-based music activity, councils facilitate access to civic venues, parks and streetscapes; administer event approvals; provide grants and fee waivers; and deliver their own cultural programming. In metropolitan municipalities, this may be framed within creative industries or night-time economy strategies. In regional areas, where alternative infrastructure providers are limited, council-managed facilities and event programming can represent the backbone of local live music ecosystems. Whilst there is no consolidated list of funding programs and jurisdictions, venue closures and regional venue operators continue to highlight the importance of industry support and funding.[37]

→ Read more about Local Government in Section 4, Industry Spotlights

Venue closures, ownership and consolidation trends across pubs, clubs and major venue portfolios also continue to shape the live music landscape.[38, 39] Large hospitality groups, backed by private capital, have expanded their footprints through acquisitions and restructures, particularly in NSW and VIC. While consolidation may improve compliance capacity and capital investment, it may marginalise live music programming[40] and grassroots live music infrastructure.[41]

37. Roberts, R. and Whiting, S. (2025) "I'd have to be crazy if I did it strictly on a financial basis": Australian regional music venues, burnout, and precarious music ecologies, Popular Music and Society, 48(2), pp. 194–211. Available at: https://doi.org/10.1080/03007766.2025.2455302.
38. ABC News (2025) *Sunshine Coast live music venue The Station to shut down.* https://www.abc.net.au/news/2025-12-31/sunshine-coast-live-music-venue-the-station-to-shut-down/106189286, accessed 4 February 2026.
39. Realcommercial (2025) *Gasometer Hotel to close as Melbourne live music venue.* https://www.realcommercial.com.au/news/gasometer-hotel-to-close-as-melbourne-live-music-venue-gastropub-replacement-expected, accessed 4 February 2026.
40. Parliament of Victoria (2025) *'No dancing whilst drinking': Challenges and opportunities for Victoria's live music venues,* Research Paper, Melbourne: Parliament of Victoria, https://www.parliament.vic.gov.au/49a6b6/globalassets/sections-shared/about/publications/research-papers/2025_2_challenges-and-opportunities-for-victorias-live-music-venues_rp.pdf, accessed 29 March 2026.
41. Concrete Playground (2026) *This just in: Australian Venue Company has acquired four Solotel venues, including Barangaroo House and The Golden Sheaf.* Available at: https://concreteplayground.com/sydney/food-drink/this-just-in-australian-venue-company-has-acquired-four-solotel-venues-including-barangaroo-house-and-the-golden-sheaf, accessed 8 February 2026

3.2.3 Promoters

Key statistics:

35	**14.1m**	**$2.14b**	**26%**
Companies licensed as National Event Promoters from 1 January 2026 with OneMusic Australia (from 32 in 2024)	Estimated number of attendees at contemporary music events and festivals (2024)	Contemporary music concert ticket revenue (2024)	Promoter share of live music direct GVA

Australia continues to play a significant role in the global live music promoter market. According to Pollstar's 2025 Year-End promoter rankings (covering the reporting period 11 November 2024 to 11 December 2025), the top five Australian promoters collectively grossed US $605.47 million and sold 1.9 million tickets during the reporting period.[42]

Among the highest-ranked Australian promoters globally TEG Live, ranked #8 with 2.96 million tickets sold and US $264.33 million gross revenue, and Frontier Touring, ranked #18 with US $169.37 million gross revenue.[43] Other Australian promoters appearing in the global Top 100 included Destroy All Lines (#44), Untitled Group (#47) and MG Live (#63).[44]

The following companies are Australian-based promoters with substantial domestic operations:

- Frontier Touring, established in 1979, has operated major concert tours across Australia and New Zealand for more than four decades. It is a joint venture between Mushroom Group and AEG Presents.[45]
- Destroy All Lines is an independent Australian-owned promoter involved in national tours and festivals, including founding and operating the *Good Things Festival*.[46]
- MG Live is wholly owned by and operates as part of the Australian-owned Mushroom Group, delivering headline tours and branded live events.[47]
- TEG Live operates within the Ticketek Entertainment Group (TEG), promoting concerts and large-scale live entertainment tours across Australia and internationally.[48]
- Untitled Group is an Australian independent promoter and festival operator that has achieved repeated inclusion in global promoter rankings.[49]

Australian promoters also contribute beyond the domestic market. These global rankings, combined with their domestic success, reflect the international recognition achieved by Australian promoters.

42. Eliezer, C. (2026) 'Aussie Live Music Sector Continues To Plug Into The Global Juggernaut', *The Music*, 9 January. https://themusic.com.au/industry/aussie-live-music-sector-continues-to-plug-into-the-global-juggernaut/cYDPZWRnZmk/09-01-26, accessed 27 February 2026.
43. Eliezer, C. (2026) *'Aussie Live Music Sector Continues To Plug Into The Global Juggernaut', The Music*, 9 January 2026, https://themusic.com.au/industry/aussie-live-music-sector-continues-to-plug-into-the-global-juggernaut/cYDPZWRnZmk/09-01-26, accessed 27 February 2026.
44. Eliezer, C. (2026) *'Aussie Live Music Sector Continues To Plug Into The Global Juggernaut', The Music*, 9 January 2026, https://themusic.com.au/industry/aussie-live-music-sector-continues-to-plug-into-the-global-juggernaut/cYDPZWRnZmk/09-01-26, accessed 27 February 2026.
45. Frontier Touring (2024) *About Frontier Touring*, https://www.frontiertouring.com, 27 February 2026
46. Destroy All Lines (2025) *'About Destroy All Lines' and Good Things Festival profile*. https://www.destroyalllines.com/, accessed 27 February 2026.
47. Mushroom Group (2025) 'MG Live', https://mushroomgroup.com, accessed 27 February 2026.
48. TEG Group (2025) 'TEG Live', https://www.teg.com.au, accessed 27 February 2026.
49. Untitled Group (n.d), About, https://www.untitledgroup.com.au/about, accessed 27 February 2026.

3.2.4 Booking agents

Key statistics:

$50m
Estimated booking agent income (2025)

$5m
Estimated booking agent income from overseas (2025)

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 and other stakeholders.

→ Read more about Booking Agents in The Bass Line, Edition 1

The 2025 industry survey findings reaffirmed that the booking agent sector is dominated by sole traders where being a booking agent is one of several roles. In 2024, 11% of respondents who identified being a booking agent said it was their primary occupation, and in 2025 this figure rose slightly, to 15%. This is consistent with the broader music industry pattern of performing multiple roles.

In 2024, the majority of sole trader booking agents (82%) worked in the role for no more than two days per week, reflecting its part-time and supplementary nature. In 2025, respondents were asked to nominate the top three roles they undertook in the music industry (in 2024 they could select all), and while the primary-role cohort was smaller, they continued to report working two or more days per week as a booking agent in the music industry.

Table 9: Days worked per week as a booking agent (sole traders)

Days per week	2024	2025
Up to 1 day	54%	20%
1–2 days	28%	10%
2–3 days	13%	40%
3–4 days	4%	10%
Full time (5+ days)	3%	20%

Note: In 2025 respondents were asked to select their top three primary roles in the music industry only (in 2024 they could select all roles)
Source: Results of the industry-wide survey in 2024 and 2025.

As a percentage of their revenue, booking agents' GVA is 56%, meaning that more than half of every dollar earned by booking agents directly contributes to the broader economy.

3.2.5 Crew and technical services

Key statistics:

$115m

Estimated crew and technical services income (2025)

6%

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

→ Read more about Crew and Technical Services in The Bass Line, Edition 1

Across both years, the overwhelming majority of crew and technical services sole traders worked in the role for no more than one day per week, with approximately 69% in 2024 and 71% of the 2025 primary-role cohort reporting this pattern. For crew and technical services, GVA as a proportion of their revenue is 73%, reflecting the labour-intensive nature of the sector, where the vast majority of revenue directly contributes to economic value added.

Table 10: Days worked per week by crew and technical services (sole traders)

Days per week	2024 (n=61)	2025 primary role (n=24)
Up to 1 day	69%	71%
1–2 days	16%	8%
2–3 days	10%	17%
3–4 days	—	4%
Full time (5+ days)	5%	—

Note: In 2025 respondents were asked to select their top three primary roles in the music industry only (in 2024 they could select all roles).
Source: Results of the industry-wide survey.

A 2024 survey of approximately 300 crew workers conducted by industry not-for-profit organisation CrewCare found that 47% relied on income from outside the industry to make ends meet and 29% were actively considering leaving the sector, citing low wages and poor work-life balance as the primary reasons.[50] These findings were consistent with the *Creative Workforce Scoping Study* published by Creative Australia and Service and Creative Skills Australia in March 2025, which identified production and technical roles as experiencing acute workforce shortages across all creative sectors, attributing these to precarious work conditions, low wages, and a disconnect between formal education and industry needs.[51] Evidence presented to a recent NSW Parliamentary Inquiry indicates that these conditions persist, with submissions identifying post-pandemic skills shortages continuing to affect audio, lighting, set construction and production roles, and describing long-term pathways into the sector as broken.[52]

50. Eltham, B. (2024). *Issues Facing Crew Workers in Australia*. CrewCare, sponsored by Winarch Live, October 2024.
51. Creative Australia and Service and Creative Skills Australia (2025). *Creative Workforce Scoping Study — Full Report*. March 2025
52. National Institute of Dramatic Art (2026). *Submission Nº 42: Inquiry into Arts and Music Education and Training in New South Wales*. NSW Parliament.

3.3 Music recording, production, label services, and distribution

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

Table 11: Summary – Economic contribution of music recording, production, label services, and distribution in 2024 and 2025, and state and territory distribution ($m, nominal)

	Revenue ($m, nominal)	Exportincome ($m, nominal)	Direct gross value added ($m, nominal)	GVA as % of revenue
2024 (original)	$790	$485	$350	44%
2024 (revised)	$790	$485	$360	45%
2025	**$821**	**$510**	**$358**	**44%**
ACT	$14	$9	$5	36%
NSW	$255	$159	$121	47%
NT	$8	$5	$3	43%
QLD	$169	$105	$62	37%
SA	$57	$35	$22	38%
TAS	$17	$11	$6	37%
VIC	$210	$131	$106	50%
WA	$90	$56	$32	35%

Note: Results for 2024 have been revised to include Music Education sub-sector results and minor improvements in data granularity. The minor improvements in data granularity do not significantly impact the 2024 results.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

In 2024, the global recorded music market was valued at an estimated US$29.6 billion, marking the tenth consecutive year of growth (+4.8% year-on-year).[53] Streaming revenues remain the dominant format, accounting for 69% of all revenue.[54]

In Australia, revenues exceeded $700 million in 2024, growing 6.1% in the period.[55] Despite this, Australia dropped out of the top 10 markets (replaced by Mexico).[56] The digital market represents 91% of the total market, with subscription services increasing their market share to 71%.[57] Of physical sales, vinyl continues to grow and represents more than 70% of physical sales.[58]

It is often observed that more music is being released today (in a single day), than was released in the calendar year of 1989. While it is impossible to verify, with an estimated 2.7 million new tracks uploaded to streaming services every month,[59] this unprecedented supply continues to intensify competition for listener attention globally. At a local level, consumption of Australian artists is at an alarming low, with only 8% of the top 10,000 most streamed artists in 2024 being Australian.[60] Despite this, Australian artists continue to perform well internationally, with 80% of Spotify royalties for Australian artists coming from overseas in 2025.[61]

53. International Federation of the Phonographic Industry (2025), *IFPI Global Market Report 2025, Premium Edition*.
54. International Federation of the Phonographic Industry (2025), *IFPI Global Market Report 2025, Premium Edition*.
55. Australian Recording Industry Association (ARIA) 2025, *'Recorded music continues to grow in Australia'*, https://www.aria.com.au/industry/news/recorded-music-continues-to-grow-in-australia, accessed 5 February 2026.
56. International Federation of the Phonographic Industry (2025), IFPI Global Market Report 2025, Premium Edition.
57. Australian Recording Industry Association (ARIA) 2025, *'Recorded music continues to grow in Australia'*, https://www.aria.com.au/industry/news/recorded-music-continues-to-grow-in-australia, accessed 5 February 2026.
58. Australian Recording Industry Association (ARIA) 2025, *'Recorded music continues to grow in Australia'*, https://www.aria.com.au/industry/news/recorded-music-continues-to-grow-in-australia, accessed 5 February 2026.
59. Luminate (2025) *2024 Year-End Music Report*, Luminate, https://luminatedata.com/reports/yearend-music-industry-report-2024/, accessed 29 March 2026.
60. Luminate (2025) *2024 Year-End Music Report*, cited in Creative Australia (2025) *Listening In: A summary and synthesis of insights on music consumption*, Music Australia, Creative Australia, June, https://creative.gov.au/sites/creative-australia/files/documents/2025-06/ACA_302776_Listening%20In%20Report_Music%20Consumption_FA%20Web.pdf, accessed 29 March 2026.
61. Spotify (2026), *Investing in Australian Music Artists*, Spotify Newsroom, 3 March, https://newsroom.spotify.com/2026-03-03/investing-in-australian-music-artists/, accessed 29 March 2026.

→ Read the Creative Australia Listening In Research Series into Australia's engagement with music

As the global recorded music industry continues to expand, alongside major labels, independent record labels play a central role in both the commercial and cultural dimensions of recorded music. These independent labels are agile, and able to develop artists and operate at scale without major-label infrastructure.[62] Recent evidence shows that growth is increasingly driven by independent artists and labels, rather than major record companies. This reflects structural changes in distribution, artist business models and access to global audiences.

The *IFPI Global Music Report 2025* notes that independent labels and artists continue to increase their market share supported by direct digital distribution and greater retention of rights.[63] Ownership-adjusted data from MIDiA Research indicates that independent artists and labels accounted for 46.7% of global recorded music revenues, placing the independent sector close to parity with the majors.[64] Industry analysis further shows that independent music was the fastest-growing segment of the recorded music market in 2024, outpacing major-label growth.[65]

Across both years of our industry survey, the majority of artist respondents, 54% in 2024 and 53% in 2025, reported operating without any label or distribution support, in indication that independent operation is the dominant model among working musicians in Australia. Despite major labels accounting for the significant majority of recorded music investment and revenue nationally, major label representation among survey respondents was minimal, at approximately 2% in both years.

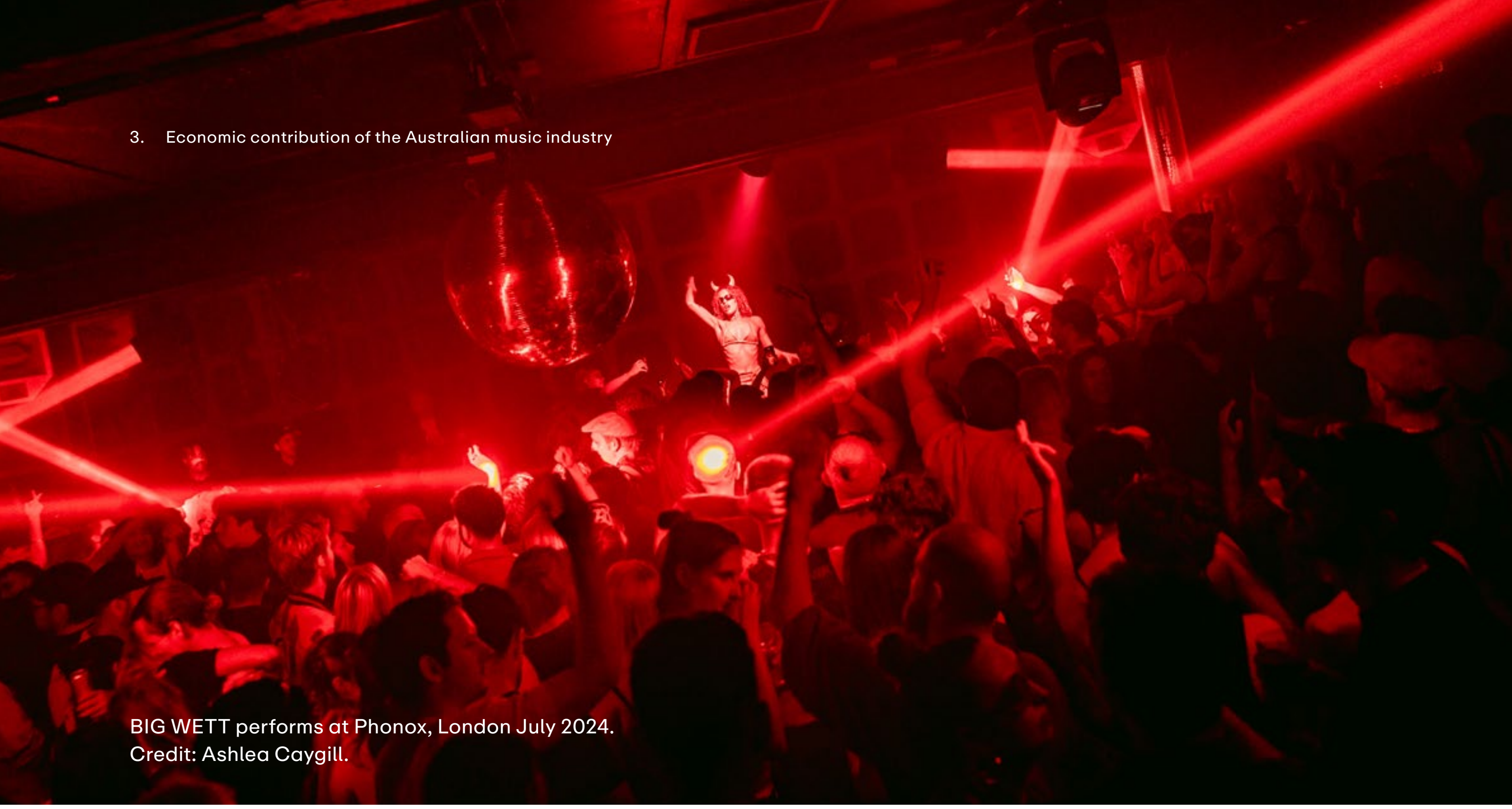
Table 12: Overview of artists' label and/or distribution services arrangements

Arrangement	2024 (n=61)	2025 primary role (n=24)
No label or distribution support	54%	53%
Not with a label, but access selected distribution services	25%	17%
Independent label	9%	10%
Own label	9%	15%
Major label	2%	2%
Prefer not to say	1%	3%
Total	**100%**	**100%**

Note: In 2025 respondents were asked to select their top three primary roles in the music industry only (in 2024 they could select all roles).
Source: Results of the industry-wide survey.

Streaming platform data reinforces this shift. Spotify reports that it paid US$5 billion in royalties to independent artists and labels in 2024, representing close to half of all royalties paid by the platform and a US$500 million increase year-on-year.[66] This demonstrates the growing commercial competitiveness of independent music.

62. IFPI 2025, *Global Music Report 2025: State of the Industry,* International Federation of the Phonographic Industry, London, https://www.ifpi.org/resources/global-music-report-2025/, accessed 24 November 202
63. IFPI 2025, *Global Music Report 2025: State of the Industry,* International Federation of the Phonographic Industry, London, https://www.ifpi.org/resources/global-music-report-2025/, accessed 24 November 2025.
64. Christman, E. 2024, *Indie labels own nearly half the recorded music market,* Billboard, 8 November 2025, https://www.billboard.com/pro/indie-labels-own-half-recorded-music-market-midia-report/, accessed 24 November 2025.
65. Octiive 2024, *The independent music market: A 2024 growth story, Octiive,* 17 December 2024, https://www.octiive.com/blog/the-independent-music-market-a-2024-growth-story, accessed 24 November 2025.
66. Spotify 2025, *How the music industry's cultural and financial impact define its success in 2025*, Spotify Newsroom, 12 March 2025, https://newsroom.spotify.com/2025-03-12/beyond-profits-how-the-music-industrys-cultural-and-financial-impact-define-its-success-in-2025/, accessed 24 November 2025.



BIG WETT performs at Phonox, London July 2024.
Credit: Ashlea Caygill.

In Australia, this influence is clearly reflected in industry recognition. Independent artists account for 72.6% of nominees at the 2025 ARIA Awards, the highest proportion in the awards' history.[67]

For major labels and distribution companies, AI is increasingly embedded within core business workflows, particularly across marketing, audience development and commercial strategy. Industry reporting indicates that labels are integrating AI-driven analytics into release planning, campaign optimisation and fan segmentation, enabling more precise targeting, dynamic budget allocation and real-time performance monitoring across streaming and social platforms.[68, 69]

Copyright and licensing frameworks are increasingly central to these arrangements and represent one of the most contested areas of AI policy in the Australian music industry. APRA AMCOS's *AI and Music* report (2024) estimated that by 2028 nearly a quarter of music creators' revenues will be at risk due to generative AI.[70]

Some distribution and label service providers are similarly deploying machine-learning systems to automate metadata management, streamline reporting, enhance playlist pitching strategies and improve digital advertising efficiency, reducing administrative overheads while strengthening conversion and audience growth outcomes.[71] At an industry level, AI is positioned as part of a broader digital transformation agenda, with labels incorporating advanced data infrastructure into long-term operational models to enhance competitiveness, scalability and market responsiveness.[72] Concurrently, strategic partnerships and licensing agreements between labels and AI firms indicate a shift from experimentation to structural integration, embedding AI not only in day-to-day marketing workflows but within longer-term business, rights management and revenue frameworks.[73, 74, 75]

→ Read more about AI in Section 4, Industry Spotlights

67. The Music 2025, Hosts for the 2025 *ARIA Awards revealed, The Music*, 30 October 2025. Available at: https://themusic.com.au/industry/hosts-for-the-2025-aria-awards-revealed/95JF6-rt7O8/30-10-25, accessed 24 November 2025.
68. Music Business Worldwide (2026) *AI tag*, https://www.musicbusinessworldwide.com/tag/ai/, accessed 24 February 2026.
69. Rolling Stone Culture Council (2025) *The impacts and disruption of AI on music industry stakeholders*, https://council.rollingstone.com/blog/the-impacts-and-disruption-of-ai-on-music-industry-stakeholders/, accessed 24 February 2026.
70. APRA AMCOS (2024) *AI and Music: Market development of AI in the music sector and impact on music creators in Australia and New Zealand*. Conducted by Goldmedia GmbH. Sydney.
71. Distromono (2025) *AI in Music Distribution and Promotion*, https://distromono.com/golden-advice/ai-music-distribution-promotion/, accessed 24 February 2026.
72. International Federation of the Phonographic Industry (2025), *IFPI Global Market Report 2025, Premium Edition.*
73. Corcoran, N. (2025) *Major Labels Sign Licensing Deals With AI Music Company Klay.* Pitchfork, https://pitchfork.com/news/warner-music-group-signs-licensing-deal-with-ai-music-company-klay, accessed 24 February 2026.
74. Music Business Worldwide (2025) *How independent labels and their artists can win the AI race*, https://www.musicbusinessworldwide.com/how-independent-labels-and-their-artists-can-win-the-ai-race/, accessed 24 February 2026.
75. Merlin (20 January 2026) 'Merlin and Udio Partner to Advance AI for Independent Music', Merlin, https://merlinnetwork.org/merlin-and-udio-partner-to-advance-ai-for-independent-music/, accessed 12 May 2026.

3.4 Composition, songwriting, and music publishing

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

Table 13: Economic contribution of composition, songwriting and music publishing in 2024 and 2025, and state and territory distribution ($m, nominal)

	Revenue ($m, nominal)	Export income ($m, nominal)	Direct gross value added ($m, nominal)	GVA as % of revenue
2024 (original)	$470	$105	$155	33%
2024 (revised)	$475	$95	$165	34%
2025	**$488**	**$124**	**$164**	**34%**
ACT	$2	$0	$2	100%
NSW	$237	$65	$65	27%
NT	$9	$2	$2	25%
QLD	$68	$15	$29	42%
SA	$15	$3	$8	56%
TAS	$10	$2	$3	34%
VIC	$136	$35	$44	32%
WA	$11	$1	$11	100%

Note: Results for 2024 have been revised to include Music Education sub-sector results and minor improvements in data granularity. The minor improvements in data granularity do not significantly impact the 2024 results.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

In 2025, Australia's songwriting, composing and music publishing sector showed strong overall revenue performance, reflecting the continued economic value of music rights in a digital and globalised economy. Rights collecting organisations reported record or near-record collections during the period, driven by growth in international income, online platforms, screen content, and subscription video services.[76]

Music copyright and catalogue rights remain high-value intellectual property assets, able to deliver recurring income and scaling through global reach. Yet beneath the strong growth figures, Australian repertoire accounts for a declining share of consumption on major global platforms in Australia. This means local creators must increasingly break into international markets to capture a greater share of this growth.

76. APRA AMCOS (2024), *AI and Music: The Australian Creator Perspective*. Sydney: APRA AMCOS, https://www.apraamcos.com.au/about-us/news-and-events/ai-in-music-report, accessed 20 January 2026.

Key statistics: composition and songwriting

$100m

Royalties and income paid to Australian composers and songwriters (mechanical and performing rights) (2025)

34%

Estimated proportion of composer and songwriter income paid through collecting societies and publishers (2025)

Commissioned and licensed music for film, television, streaming content, digital games, advertising, live performance and public venues continues to provide income for Australian composers, songwriters and publishers.[77] These uses rely on licensing and repeat performance rather than viral popularity, making them more predictable and commercially durable.[78] From an economic perspective, this highlights the value of music as an enabling input across multiple creative and service industries, particularly screen and games production, rather than as a standalone consumer product.[79]

The industry survey identified a significant shift in composition income sources between 2024 and 2025. An eightfold increase in synchronisation placement fees between 2024 and 2025 suggests a growing role for sync licensing as an income stream for Australian composers. This is consistent with broader industry trends toward screen and digital content consumption.

→ Read more about synchronisation in The Bass Line, Edition 1

Industry survey data also showed that commissions and upfront fees remained the largest single income source in both years, while royalties declined modestly.

Table 14: Composition and songwriting income sources

Arrangement	2024 (avg)	2025 primary role (avg)
Commissions / upfront fees	53%	41%
Royalties	36%	19%
Synchronisation placement fees	7%	36%
Arrangement fees	1%	3%
Other	10%	1%

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

Respondents to the industry survey identified that direct payment was the most dominant channel for receiving income in both years. In 2025 publisher-channelled income increased from an average of 5% in 2024 to 35% in 2025, which could reflect the growth in synchronisation fees, as sync deals are commonly brokered through publishers. While income being channelled through collecting societies and directly to the composer both declined, which may reflect the composition of the 2025 respondent group rather than a structural shift.

77. APRA AMCOS (2025), *Year in Review FY24/25*. Sydney: APRA AMCOS, https://www.apraamcos.com.au/year-in-review, accessed 20 January 2026.
78. APRA AMCOS (n.d.) *Royalties overview*. Sydney: APRA AMCOS, https://www.apraamcos.com.au/music-creators/membership-explained/royalties-overview, accessed 20 January 2026.
79. Creative Australia (2023) *Australian Music and Games 2023 Benchmark*.

Table 15: Methods of receipt of composition income by composers and songwriters

Payment channel	2024 avg	2025 avg
Directly to composer	66%	53%
Through a collecting society	27%	12%
Through a publisher	5%	35%
Other	2%	<1%

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

Results of the 2025 industry survey also identified an almost doubling of average export revenue among sole trader composers which suggests growing international demand (again, this could be related to the growth in sync for the respondent cohort).

Key statistics: music publishing

$385m
Estimated Australian publisher revenue (2025)

$114m
Estimated Australian publisher export revenue (2025)

16%
Estimated Australian publisher GVA (2025)

In 2025 estimated publisher revenue grew to $385 million, up from $370 million in 2024, and export revenues grew from $86 million in 2024 to $114 million in 2025. This growth is consistent with current and projected growth globally, with revenues projected to grow at a mid-single-digit rate through to 2030. Multiple market forecasts estimating a compound annual growth rate of between 5.4% and 5.9%, and total market value reaching somewhere between US$10.22 billion and US$14.04 billion by the end of the decade.[80]

In 2024-25 APRA AMCOS writer and publisher members, earned a record $98.8 million in international performance royalties, up 14.8% from the previous financial year.[81] The economic importance of music catalogues (collections of existing songs and compositions, usually older than 6 months)[82] as long-term revenue-generating assets continues to increase. International consumption data shows that older works now account for the majority of music use, driving increased investment and acquisition activity in music rights globally.[83, 84]

80. Multiple independent market forecasts project global music publishing revenues to grow at a mid-single-digit CAGR of between 5.4% and 5.87% through to 2030, with total market value estimates ranging from US$10.22 billion to US$14.04 billion depending on the scope of market definition applied. See: Omdia (2025) *Omdia: Music Publishing Revenue Growth to Outshine Recorded-Music Over the Next Five Years,* press release, 20 October, Omdia/Informa Tech; and Mordor Intelligence, cited in Research and Markets (2025) *Music Publishing Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025–2030)*, Research and Markets.
81. APRA AMCOS 2025, *Year in Review* 2024–25, APRA AMCOS, Sydney, https://www.apraamcos.com.au/about-us/news-and-events/year-in-review-25, accessed 30 April 2026.
82. Using Luminate data and definitions, Catalogue and Deep Catalogue usually refers to songs or release groups that are more than 18 months old (referred to as Catalogue 18-60 months), and 60+ months (referred to as Deep Catalogue).
83. Luminate (2025) *Year-End Music Report / 2025*. Luminate Intelligence.
84. Kelly, T 2026, 'Down, and under pressure: The decline of the new music economy in Australia 2000–2024', *International Journal of Music Business Research,* https://reference-global.com/article/10.2478/ijmbr-2026-0002\, accessed 21 April 2026.

For Australian composers, songwriters and publishers, this has increased the focus on treating songs as long-term intellectual property assets that need careful management. That includes making sure rights are properly administered around the world and that licensing deals are structured to maximise income over time.

The increasing value of catalogue music also raises important financial questions, such as when to sell catalogue rights, how to value catalogue rights, and how to value long-term rights ownership. As more overseas investors buy into Australian music rights, there is growing attention on the long-term control and value of Australian intellectual property.

Research released during in 2024 showed widespread concern among Australian creators that unlicensed use of music to train AI systems could undermine future earnings and weaken existing intellectual property protections.[85] These concerns became economically relevant through policy debate, as proposals to expand AI data-mining access to copyrighted works were actively considered before facing strong resistance from the creative sector.[86] While no major legislative change occurred during the year, uncertainty around how creative assets will be protected and monetised in technology-driven markets continues to grow.

In 2024 APRA AMCOS research highlighted Australian creators' concerns about unlicensed use of music in artificial intelligence training.[87] In 2025 policy debate around AI and copyright intensified with the Productivity Commission's release of an interim report examining whether copyright settings should be adjusted to facilitate AI-related data use, with potentially significant implications for music and other copyright-dependent sectors.[88] Music and screen industry bodies opposed any expansion of unlicensed text-and-data mining, arguing it would undermine the value of creative assets.[89,90] Subsequent reporting indicated the proposal was abandoned following sustained opposition, underscoring ongoing uncertainty about how creative works will be protected and monetised in technology-driven markets.[91] Australia was among the first common-law jurisdictions to formally put a text and data mining exception to public consultation through an independent government inquiry, attracting over 400 submissions and drawing significant international attention from creative industries globally.

→ Read more about AI in Section 4, Industry Spotlights

85. APRA AMCOS (2024) *AI and Music: Report on the Impacts of Artificial Intelligence on Australian and New Zealand Music Creators*, commissioned by APRA AMCOS and Goldmedia GmbH, August, https://www.apraamcos.com.au/about/supporting-the-industry/research-papers/aiandmusic, accessed 27 February 2026.
86. ABC News (2025) *Labor Rules Out AI Training Copyright Exceptions After Backlash*, 26 October, https://www.abc.net.au/news/2025-10-27/labor-rules-out-ai-training-copyright-exceptions/105935740, accessed 27 February 2026.
87. APRA AMCOS (2024), *AI and Music: The Australian Creator Perspective.* Sydney: APRA AMCOS, https://www.apraamcos.com.au/about-us/news-and-events/ai-in-music-report, accessed 20 January 2026.
88. Productivity Commission (2025) *Harnessing Data and Digital Technology: Interim Report.* Canberra, Australian Government.
89. Creative Australia 2025, *Harnessing data and digital technology: Creative Australia submission,* submission to the Productivity Commission, 6 June, 06062025_Creative Australia submission_Productivity Commission review.pdf, accessed 21 April 2026.
90. Screenrights (2025) Submission in response to the *Productivity Commission Interim Report on Harnessing Data and Digital Technology,* https://www.screenrights.org/wp-content/uploads/2025/10/Screenrights-Submission-in-response-to-Productivity-Commission-Interim-Report-on-Harnessing-data-and-digital-technology.pdf, accessed 20 January 2026.
91. Guardian Australia (2025), *Proposal to allow use of Australian copyrighted material to train AI abandoned after backlash, The Guardian,* 19 December, https://www.theguardian.com/australia-news/2025/dec/19/proposal-australian-copyrighted-material-train-ai-abandoned-after-backlash, accessed 20 January 2026.

3.5 Artist management

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

Table 16: Economic contribution of artist management in 2024 and 2025, and state and territory distribution ($m, nominal)

	Revenue ($m, nominal)	Export income ($m, nominal)	Direct gross value added ($m, nominal)	GVA as % of revenue
2024 (original)	$195	$10	$92	47%
2024 (revised)	$195	$10	$93	48%
2025	**$198**	**$10**	**$94**	**48%**
ACT	$3	<$1	<$1	10%
NSW	$57	$3	$34	61%
NT	$1	<$1	$1	45%
QLD	$38	$2	$11	29%
SA	$12	$1	$2	16%
TAS	$4	<$1	<$1	7%
VIC	$66	$3	$39	59%
WA	$17	$1	$7	39%

Note: Results for 2024 have been revised to include Music Education sub-sector results and minor improvements in data granularity. The minor improvements in data granularity do not significantly impact the 2024 results.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

Artist managers have always served as the central point of coordination for a musician's career. Overseeing strategy, negotiating contracts, assembling professional teams and managing the day-to-day relationships between an artist and their label, booking agent, publicist and business manager, in the traditional major label era, this role was demanding but relatively well-defined. Labels handled recording, distribution, marketing and promotion. Publishers administered composition rights and collected royalties. The manager's role was to oversee these relationships and protect the artist's interests within a system that, while imperfect, had clearly assigned responsibilities.

The shift toward independent releasing and self-publishing has fundamentally changed this equation. As artists enter into less traditional label and publishing deals, having been empowered by digital distribution platforms and a growing ecosystem of independent service providers, the functions that labels and publishers once performed have not disappeared.

They have been redistributed. In the absence of a label team handling marketing, radio promotion, playlist pitching, data analysis and international rights administration, or without a publisher managing royalty collection, synchronisation licensing and co-writer documentation, these responsibilities increasingly default to the manager.

The result is that the role of Artist Managers has expanded in scope without a corresponding change in how managers are resourced or compensated. The standard commission model was designed for a different industry structure, and the gap between what independent artists need from their managers and what the current business models can sustain creates significant structural pressure.

The industry survey identified the long development horizon for artist managers as a defining structural feature of the subsector, with respondents in 2024 and 2025 reporting that it takes on average 8–9 years from signing an artist to receiving steady income.

Despite this, managers invest an average of approximately 30 hours per week in unpaid developmental work per artist which is a substantial and largely uncompensated commitment. The average number of artists managed remained stable at approximately 4, while the number generating consistent income was just under 2 in 2024 and over 2025, meaning that at any given time, fewer than half of managed artists generate reliable returns for their managers.

Table 17: Artist management and development investment

	2024 (n=47)	2025 primary role (n=26)
Average number of artists managed	4.2	3.8
Average number generating consistent income	1.9	2.1
Average years of investment before steady income	8.6 yrs	9.0 yrs
Average unpaid hours invested per week	30.3 hrs	30.5 hrs

Note: In 2025 respondents were asked to select their top three primary roles in the music industry only (in 2024 they could select all roles). The 2025 sample likely represents around 10% of artist managers operating in Australia and should therefore be read as directional only.
Source: Results of the industry-wide survey 2024 and 2025.

Respondents to the industry survey identified that 8-9 years was the most commonly reported artist development horizon, a wide range of development timeframes were noted, reflecting the highly variable nature of artist development timelines and the considerable financial exposure managers may need to carry before returns are realised.

Sole trader artist manager survey respondents estimated the total financial value of their investment in an individual artist's development, including both uncharged time and cash or in-kind contributions, to be an average of $370K+ across 12 activity categories (from signing an artist to receiving steady payments). Uncharged management time, live performance coordination and logistics, marketing and promotion, and administrative tasks including legal and contract work were the activities where the most uncharged, cash or in-kind contributions were made.

The majority of sole trader artist managers worked no more than two days per week in the role in the 2024 and 2025 survey, representing 49% of respondents in 2024 and 55% in 2025, reinforcing the part-time and supplementary nature of management activity within broader music industry working portfolios.

Table 18: Days worked per week by artist managers

Days per week	2024 (n=119)	2025 primary role (n=70)
Up to 1 day	31%	26%
1–2 days	18%	29%
2–3 days	16%	17%
3–4 days	10%	11%
Full time (5+ days)	24%	16%

Note: Percentages may not sum to 100 due to rounding
Note: In 2025 respondents were asked to select their top three primary roles in the music industry only (in 2024 they could select all roles). The 2025 sample likely represents around 10% of artist managers operating in Australia and should therefore be read as directional only.
Source: Results of the industry-wide survey in 2024 and 2025.

The industry survey also considered how this time is distributed across various tasks. The focus on live performance tasks may reflect the primary income stream of many Australian artists, noting that nearly 50% of their income is derived from live music.

Table 19: Time distribution across various artist manager tasks

Task	2025 primary role (n=29)
Marketing & promotion	10.0 hrs
Administration / general business support	4.0 hrs
Administrative tasks (legal/contracts)	6.0 hrs
Business & partnership development	4.0 hrs
Live performance coordination & logistics	12.0 hrs
Distribution related activities	2.0 hrs
Booking live performances	10.0 hrs
Music recording coordination	4.0 hrs
Merchandise	4.0 hrs
Collection society / rights management	2.0 hrs
Branding & sponsorship	2.0 hrs
Publishing related activities	2.0 hrs

Note: Figures represent average hours. Respondents could nominate any activities and their hours, meaning the total hours reflected across all activities does not account for the average hours each manager works each week. The 2025 sample likely represents around 10% of artist managers operating in Australia and should therefore be read as directional only.
Source: Results of the industry-wide survey in 2025 from respondents noted Artist Management as one of up to three primary roles they undertake in the music industry.

Based on the sample of artist manager sole traders who completed the 2025 industry survey, the average total sole trader income remained broadly stable across the two years at approximately $36,000. There was a decline in both export revenues and average expenses, and while average salaries and wages nearly doubled the average number of people employed fell, suggesting fewer but better-paid staff.

For artist management businesses, average total income declined from $871,200 to $762,700, including export income share falling from 32% to 19%. Salary and wages expenses increased from $221,400 to $284,300, while total expenses reduced modestly. The lower profitability between years, while consistent with cost pressures being experienced by the broader industry, shows the volatility of the subsector.

Juno Mamba.
Credit: Ben Willis.

3.6 Synchronisation

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

Table 20: Summary – Economic contribution of synchronisation in 2024 and 2025, and state and territory distribution ($m, nominal)

	Revenue ($m, nominal)	Export income ($m, nominal)	Direct gross value added ($m, nominal)	GVA as % of revenue
2024 (original)	$64	$13	$16	25%
2024 (revised)	$65	$13	$16	25%
2025	**$69**	**$13**	**$18**	**26%**
ACT	<$1	<$1	<$1	n.r.
NSW	$28	$6	$8	28%
NT	<$1	<$1	<$1	n.r
QLD	$13	$2	$3	24%
SA	$3	<$1	$1	24%
TAS	$1	<$1	<$1	22%
VIC	$19	$4	$5	26%
WA	$5	$1	$1	25%

n.r. Note reportable due to data granularity.
Note: Results for 2024 have been revised to include Music Education sub-sector results and minor improvements in data granularity. The minor improvements in data granularity do not significantly impact the 2024 results.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

In 2025, music synchronisation remained a relatively small but strategically important part of the global music economy, especially for export-oriented markets such as Australia. In 2024, a global report found that income from sync licensing collected by collective management organisations grew for the fourth year in succession, increasing by 18.4% to reach a record EUR61.3m in revenue.[92]

Synchronisation is estimated to account for less than 1% of total global collective royalty collections, far behind digital, broadcast, and live income,[93] even though sync often delivers disproportionately higher upfront fees and international exposure for Australian songwriters and composers.[94] The industry survey identified a significant shift in composition income sources between 2024 and 2025, with substantial growth in synchronisation placement fees, which increased from an average of $606 in 2024 to $4,955 in 2025, an eightfold increase.

→ Read more about Synchronisation in The Bass Line, Edition 1

92. International Confederation of Societies of Authors and Composers (CISAC) (2025) *Global Collections Report 2025*, https://www.cisac.org/cisac-global-collections-report-2025, accessed 6 February 2026.
93. IFPI (2025) *Global Music Report 2025: State of the Industry* (reporting 2024 data), https://www.ifpi.org/wp-content/uploads/2024/03/GMR2025_SOTI.pdf, accessed 6 February 2026.
94. International Confederation of Societies of Authors and Composers (CISAC) (2025) *Global Collections Report 2025*, https://www.cisac.org/cisac-global-collections-report-2025, accessed 6 February 2026.

Stella Donnelly performs at SIDEFEST, Rosemount Hotel in Perth, November 2025. Credit: Lizzie Wilkie.

Sync demand is increasingly tied to the proliferation of content across digital platforms, including streaming, free ad supported streaming television, short-form video, and interactive media. Inherently difficult to track, global platform licensing deals are evolving to consider how and where music is monetised digitally.[95]

Domestically, the passage of the Communications Legislation Amendment (Australian Content Requirement for Subscription Video On Demand (Streaming) Services) Bill 2025 represents a structural uplift in commissioned Australian screen content that creates new sync licensing opportunities for Australian composers and publishers.[96] By requiring major streaming services to invest a defined share of their Australian revenue in locally produced screen content, including drama, documentary, arts and educational programming, the legislation is expected to grow the volume of Australian productions requiring original music scores and licensed soundtracks.

The legislation is also expected to create unprecedented opportunities for local composers.[97]

In addition, rights-holders are investing in technological innovation, including AI-enabled rights tracking, metadata systems, and detection infrastructure to manage licensing and identify unlicensed or AI-generated content.[98] Rather than banning generative AI, the industry is building detection and provenance tools to embed rights management earlier in the music lifecycle, allowing licensing and attribution before public release, a shift that aims to strengthen sync monetisation and copyright protection.[99]

→ Read more about AI in Section 4, Industry Spotlights

95. An example of this includes Universal Music Group and Meta extended their agreement to include licensed music use on Facebook, Instagram, Messenger, Horizon, Threads and WhatsApp. Explained in in this media release – Universal Music Group and Meta (2024) *Expanded Global Licensing Agreement,* https://www.universalmusic.com/meta-and-universal-music-group-announce-expanded-global-agreement/.
96. Australian Parliament 2025, Communications Legislation Amendment (Australian Content Requirement for Subscription Video On Demand (Streaming) Services) Bill 2025, Parliament of Australia, Canberra, passed 27 November 2025, https://www.aph.gov.au/Parliamentary_Business/Bills_Legislation/bd/bd2526/26bd32, accessed 7 April 2026.
97. APRA AMCOS 2025, 'Australian Parliament Passes Landmark Streaming Content Legislation', media release, 28 November, https://www.apraamcos.com.au/about-us/news-and-events/svod-local-content-2, accessed 7 April 2026.
98. The Verge (2025) *Music industry tech to track AI songs and licensing,* https://www.theverge.com/ai-artificial-intelligence/686767/music-industry-ai-song-detection-tracking-licensing, accessed 6 February 2026.
99. The Verge (2025) *Music industry tech to track AI songs and licensing,* https://www.theverge.com/ai-artificial-intelligence/686767/music-industry-ai-song-detection-tracking-licensing, accessed 6 February 2026.

3.7 Music retail

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

Table 21: Economic contribution of music retail in 2024 and 2025, and state and territory distribution ($m, nominal)

	Revenue ($m, nominal)	Export income ($m, nominal)	Direct gross value added ($m, nominal)	GVA as % of revenue
2024 (original)	$2,730	$310	$515	19%
2024 (revised)	$2,685	$310	$515	19%
2025	**$2,803**	**$274**	**$563**	**20%**
ACT	$20	$0	$1	5%
NSW	$1,249	$151	$294	24%
NT	$12	<$1	$1	8%
QLD	$310	$11	$33	11%
SA	$95	$2	$8	9%
TAS	$24	$0	$1	5%
VIC	$932	$104	$208	22%
WA	$162	$6	$17	10%

Note: Results for 2024 have been revised to include Music Education sub-sector results and minor improvements in data granularity. The minor improvements in data granularity do not significantly impact the 2024 results.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

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.

→ Read more about Music Retail in The Bass Line, Edition 1

ELISION Ensemble performs at Melbourne Recital Hall, July 2024. Credit: Lauren Murphy.

3.7.1 Physical and digital music recordings

Key statistics:

$755m
Estimated value of Australian music subscription audio streaming revenues (2024)

$115m
Estimated Australian artist rights income from global streaming (2024)

1.3%
Estimated global market share of Australian music (2024)

Australians' appetite for recorded music continued to grow (by 6.1%) during the period, its sixth consecutive year of growth, with both physical and digital sales driving this growth. Streaming services and social media continue to be the primary sources of music discovery among music-engaged Australians, that is, people who have an active and regular relationship with music, including attending live events, listening frequently, and actively discovering new artists.[100] Nearly three quarters (72%) of Australians used an online music streaming service in 2025,[101] and streaming revenues accounted for 91.5% of total recorded music revenues in Australia, totalling $656 million in 2024,[102] up from $616 million in 2023.[103] While Australians report a desire to listen to more Australian music, a recent report noted that only 8% of the top 10,000 artists streamed in Australia in 2024 were Australian.[104]

While physical sales continue to decline in share relative to digital sales, sales for vinyl records continued to grow, increasing by 5.6%, and representing 72.8% of total physical sales (by dollar value) and 45.7% of physical sales (by volume).[105] This is consistent with global trends, which have seen vinyl sales grow consecutively over the last five years, with Australia ranking 10th globally in the top 10 vinyl markets.[106]

100. Creative Australia (2025) *Listening: Insights into music discovery and engagement.*
101. Australian Communications and Media Authority (ACMA) (2026) *Trends and developments in viewing and listening 2024–25.* Canberra.
102. Australian Recording Industry Association (n.d). *2024 ARIA Yearly Statistics,* https://content.aria.com.au/documents/2024-aria-sales-figures.pdf, accessed 9 February 2026.
103. In Australian Recording Industry Association (n.d). *2024 ARIA Yearly Statistics,* https://content.aria.com.au/documents/2024-aria-sales-figures.pdf, accessed 9 February 2026.
104. Page, W. and Harrington, M. 2025, *Reversing the Decline of Australian Music,* The Australia Institute, Canberra, November, https://australiainstitute.org.au/post/drowned-out-in-the-stream-australian-music-is-in-trouble-and-needs-investment-new-report/, accessed 7 April 2026.
105. Australian Recording Industry Association (ARIA), 2025. *Recorded music continues to grow in Australia,* 19 March, https://www.aria.com.au/industry/news/recorded-music-continues-to-grow-in-australia, accessed 9 February 2026.
106. International Federation of the Phonographic Industry (2024), *IFPI Global Market Report 2025, Premium Edition.*

Table 22: Share of total combined digital and physical music revenues by digital and physical revenue streams in 2023 and 2024 ($m, nominal)

	Value & share of music sales				
Revenue stream	2023 Value ($m)	2023 Share	2024 Value ($m)	2024 Share	YoY change (value)
Digital					
Subscription audio streaming	$467.6	69%	$509.4	71%	+8.9%
Ad-supported audio streaming	$68.3	10%	$69.6	10%	+1.9%
Video streaming	$62.8	9%	$61.7	9%	–1.7%
Permanent downloads	$16.4	2%	$14.3	2%	–12.8%
Mobile personalisation & other digital	$1.0	<1%	$0.9	<1%	–6.6%
Physical					
Vinyl	$42.1	6%	$44.5	6%	+5.6%
Compact Disc (CD)	$17.1	3%	$16.2	2%	–5.6%
Music Video/DVD	$0.5	<1%	$0.4	<1%	–19.5%
Grand Total	**$676.1**	**100%**	**$717.1**	**100%**	**+6.1%**

Source: Australian Recording Industry Association (ARIA), Yearly Statistics January–December 2023, ARIA, Sydney, March 2024; Australian Recording Industry Association (ARIA), Yearly Statistics January–December 2024, ARIA, Sydney, February 2025.

Victoria's independent vinyl market

Melbourne has the world's highest per capita density of independent record stores at 5.9 per 100,000 residents, compared to London (4.9), Paris (4.7), Berlin (2.9) and Tokyo (2.3). Victoria's 119 independent stores represent approximately 50% of Australia's independent record store infrastructure. National wholesale vinyl sales reached $44.5 million in 2024, a 5.6% increase, with Victoria estimated to account for $25–32 million in retail sales. Victoria's store count grew 18% between 2023 and 2025, with half of all stores combining vinyl retail with cafés, bars, live events or record labels, positioning them as cultural and community destinations rather than traditional retail outlets. No surveyed store, however, reported a strong financial position, with two-thirds describing their situation as "doing OK."[107]

107. Holben, E. 2025, *For the Record: Part 1 — Victoria's Vinyl Renaissance*, report, Audience Strategies, commissioned by Victorian Music Development Office, Melbourne, December.

3.7.2 Music products

Key statistics:

~4,321 Estimated employment associated with music products retailers (2025)	**$465m** Value of music product imports (2025)	**$275m** Value of music product exports (2025)

In addition to physical and digital sales of recorded music, the sale of music products continued to grow in the period.

→ Read more about Music Products in The Bass Line, Edition 1

Australian music product imports totalled $464 million in 2025, up from $442 million in 2024, with pro audio accounting for $178 million and musical instruments and accessories comprising $286 million. Exports totalled $274 million, with pro audio representing approximately 95% of export value at $261 million.[108]

New South Wales and Victoria continued to dominate as the primary ports of import entry, accounting for approximately 55% and 38% of import value respectively.

The top three export product categories in 2025 were microphones and stands ($169 million), wireless microphones ($53 million), and multiple loudspeakers ($20 million), which together account for around 88% of total music product exports.[109]

The Australian Music Association (AMA) conducted a member survey in 2025 and its Business Confidence Index had increased to 99.5, up from 88.4 in 2024,[110] signaling a meaningful improvement in industry sentiment and consistent with the global stabilisation narrative characterised by NAMM.[111]

108. Industry information provided by the Australian Music Association.
109. Industry information provided by the Australian Music Association.
110. Industry information provided by the Australian Music Association.
111. NAMM, (n.d), 2025 NAMM Global Report.

Georgia Mooney, performs at Joan Sutherland Performing Arts Centre on the Kate Miller-Heidke 'Catching Diamonds Tour 2024'. Credit: Drew Harrison Norley.

3.7.3 Merchandise

Key statistics:

$240m	~75%	$65m	4%
Estimated music merchandise sales in Australia (2025)	Estimated share of merchandise sales occuring at live music events	Estimated value of Australian artist gross merchandise sales (2025)	Share of Australian artist income from merchandise (after venue/retailer cut and costs) (2025)

Merchandise is increasingly operating at the intersection of live performance, retail and direct-to-fan commerce. Recent developments highlight a set of structural issues changing how merchandise value is created and captured. Increasingly, tour merchandise is positioned as a higher cost limited-edition fashion or premium lifestyle product rather than low-cost memorabilia, with higher price points reflecting higher production costs, branding strategies and scarcity.[112] Live-event sales data indicates that average per-fan merchandise spend continues to grow, in the US this is up 7% to US$64 per fan.[113]

Merchandise commissions and fees remain a point of tension, particularly in live settings where margins are already constrained by manufacturing, logistics and staffing costs. Some international venues have responded by removing merchandise charges entirely, signalling growing recognition of merchandise as a core income stream for artists.[114] Comparable policy shifts have not yet occurred at scale in Australia, but the issue remains material for touring sustainability.

While merchandise has long been sold through a mix of channels, including live events and retail outlets, artist-owned online stores are increasingly the primary point of sale for a wide range of merchandise, including tour items, album-related products and exclusive releases. These stores are increasingly controlled directly by artists or their teams, with limited or no involvement from traditional music retailers. Recent industry developments show closer links between music distribution systems and direct-to-consumer commerce platforms, allowing music and merchandise to be sold together through a single online store.[115] While this can simplify sales and give artists greater control, it also increases reliance on a small number of third-party platforms.

Australian examples reflect these global dynamics. Major festivals have begun releasing official merchandise designs and prices in advance, signalling a more formalised approach to merchandise as a retail category.[116] High-profile tours have also drawn attention to elevated pricing, while tour-specific online stores and retail pop up stores (in sites additional to the performance venues)[117,118] using city-exclusive and limited-edition items are increasingly common, extending merchandise sales beyond the venue.[119, 120]

112. Yahoo Entertainment (2025) *'The merch boom: When a hoodie costs as much as your concert ticket'*, https://www.yahoo.com/entertainment/music/articles/merch-boom-hoodie-costs-much-061330351.html, accessed 9 February 2026.
113. This is as average figure for the US market, which devises an average between venues with large and small capacities. atVenu (2025) *The 2025 Fan Spending Report: What Concertgoers Are Buying Most*, https://www.atvenu.com/post/the-fan-spending-report-what-concertgoers-are-buying-most, accessed 9 February 2026.
114. Braehead Arena (2025) *'Braehead Arena puts artists first with ground-breaking move to drop all merch charges'*, https://braeheadarena.co.uk/braehead-arena-puts-artists-first-with-ground-breaking-move/, accessed 9 February 2026.
115. Music Business Worldwide (2025) Tencer, D. 'FUGA makes first step into D2C commerce for artists and labels, in partnership with Shopify-backed Single', 6 June, https://www.musicbusinessworldwide.com/fuga-makes-first-step-into-d2c-commerce-for-artists-and-labels-in-partnership-with-shopify-backed-single/, accessed 9 February 2026.
116. The Music (2026) 'Laneway Festival unveils 2026 merch designs and prices', 5 February, https://themusic.com.au/news/laneway-festival-unveils-2026-merch-designs-prices/ELWuAgUEBwY/05-02-26, accessed 9 February 2026.
117. McNamara, L. (2026) Ed Sheeran brings exclusive merch and vinyls to Australian pop-up stores. Rolling Stone Australia, 9 February, https://au.rollingstone.com/music/music-news/ed-sheeran-exclusive-pop-ups-australian-tour-dates-90802/, accessed 28 April 2026.
118. Lynch, J. (2025) Dua Lipa brings 'Radical Optimism' to Sydney with exclusive pop-up store. Tone Deaf, 19 March, https://tonedeaf.thebrag.com/dua-lipa-sydney-exclusive-pop-up-store/, accessed 28 April 2026.
119. News.com.au (2025) '"Insane": Outrage over Billie Eilish merch prices on Australian tour'. https://www.news.com.au/entertainment/music/tours/billie-eilish-fans-stunned-as-vost-of-limitededition-tour-items-revealed/news-story/40df0b62dd1f922098b1908d3fa898c9, accessed 9 February 2026.
120. As an example of an exclusive tour-specific online store, Oasis' Live '25 Australian tour merchandise store was available at https://aulive25store.oasisinet.com/collections/live-2025.

3.8 Music education

Music education research and curriculum design, teacher training, instructional delivery, youth pathways, assessment and certification, retail and technology supply, and industry support.

Table 23: Summary – Economic contribution of music education in 2024 and 2025, and state and territory distribution ($m, nominal)

	Revenue ($m, nominal)	Export income ($m, nominal)	Direct gross value added ($m, nominal)	GVA as % of revenue
2024 (Original)	>$60	n.e.	>$60	n.e.
2024 (Revised)	$1,725	$85	$1,445	84%
2025	**$1,788**	**$90**	**$1,495**	**84%**
ACT	$39	$1	$35	91%
NSW	$659	$24	$557	85%
NT	$10	<$1	$8	84%
QLD	$296	$8	$250	85%
SA	$115	$6	$96	84%
TAS	$39	$3	$31	80%
VIC	$463	$46	$369	80%
WA	$169	$3	$148	88%

n.e. Not able to be estimated with available data.
Note: Results for 2024 have been revised to include Music Education sub-sector results and minor improvements in data granularity. The minor improvements in data granularity do not significantly impact the 2024 results.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

The music education sub-sector comprises an interconnected ecosystem spanning research and curriculum design, teacher training, instructional delivery, youth development pathways, assessment and certification, retail and technology supply, and industry support. It brings together educators, industry professionals, administrators and businesses to design, deliver, credential and sustain music learning, while supporting talent development and broader sector growth.

→ Read more about More than notes on a page Australian Music Education Ecosystem report

Musica Viva's Water Rhythms, Lockridge Primary School. Credit: Edify Media.

Table 24: Economic analysis of music education by sub sector in 2024-25 ($m, nominal)

Subsector	Total revenue 2025 ($m, nominal)	Export revenue 2025 ($m, nominal)	Direct GVA 2025 ($m, nominal)	GVA as % of revenue
Research, pedagogy, teacher training and professional development	$53	$13	$20	37%
Instruction and delivery (to students)	$1,529	$77	$1,397	91%
Youth pathways and showcase (non-school based)	$21	$0	$11	54%
Music examinations	$17	n.e.	$6	38%
Continuing learning	$169	n.e.	$53	20%
Industry support, investment and development	n.a.	n.a.	$8	n.a.
Total*	**$1,788**	**$90**	**$1,495**	**84%**

* The total music education sector-wide economic contribution is not equal to the sum of the sub sector contributions, as the total removes duplication of economic activity that is attributable across multiple sub sectors.
n.e. Not able to be estimated with available data.
n.a. Not applicable.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

Australia's music education sector is diverse, evolving and, in many communities, highly valued. Strong programs foster creativity, cognitive development, cultural participation and social cohesion, while also contributing to Australia's creative economy by developing performers, composers, educators and technical specialists. Music education also supports Australia's creative economy by producing highly skilled performers, composers, educators, and technical specialists who contribute to both domestic and global cultural industries.[121,122]

→ Read more about participation and pathways in music education in Section 4, Industry Spotlights

Defining and measuring the Australian music education ecosystem is complex. The sector sits at the intersection of education and the broader music industry, with many practitioners identifying primarily as educators and many professionals working across teaching, performance and production. Funding streams, policy frameworks and statistical classifications typically separate education and cultural activity, resulting in fragmented definitions and limited visibility of the sector as a whole. The diversity of providers, learning settings and pathways, alongside students' participation in multiple forms of music learning simultaneously, further complicates measurement.

Community engagement is a defining strength of the sector, supporting intergenerational learning and cultural exchange, and digital technologies are expanding access through flexible and personalised learning models. The inclusion of diverse musical traditions, including First Nations cultural practices, is further enriching the sector and strengthening cultural understanding.[123] However, access to quality, sequential learning, taught by trained and confident teachers remain uneven.

121. Queensland Department of Education, 2023. *Instrumental Music Program*. https://education.qld.gov.au, accessed 14 August 2025.
122. Office for the Arts (2023), *National Cultural Policy—Revive: A place for every story, a story for every place*. Canberra.
123. Joseph, D. and Merrick, B. (2023), *Walking carefully towards bridging the gap: Exploring Australian music educator voices about teaching Indigenous music*, Australian Journal of Teacher Education, 48(7), pp. 89–108.

Students in APRA AMCOS' SongMakers Program, Albert Park.
Credit: RCSTILLS.

A significant proportion of Australian students, particularly in rural, remote and disadvantaged communities, lack access to school classroom based music education,[124] with limited availability of specialist teachers and insufficient training for generalist classroom educators.[125]

Workforce pressures, insecure employment, rising delivery costs and uneven adoption of digital tools constrain sustainability and quality. Pathways across school, vocational education and training (VET), higher education and industry are fragmented, and the principal national review of music education is now two decades old.

Broader research on post-school transitions highlights inconsistent and non-linear pathways,[126] especially for disadvantaged learners, reinforcing the need for clearer articulation across sectors.

Despite these challenges, there are opportunities for reform and renewal. Strategic investment in equitable access, teacher development and infrastructure could lift national consistency. Emerging technologies, interdisciplinary applications and growing recognition of music education's social and economic value create momentum for policy reform.

124. Kallio, A.A. et al. (2025) *Music Education Research and Policy Summit: Feedback Report from the Access to Music for Inclusion and Equity (AMIE) network.* Creative Arts Research Institute, Griffith University. Cites Available at: https://hdl.handle.net/10072/436321, accessed: 14 August 2025. This report cites Brasche and Thorn (2018) as the source for the figure referenced, Brasche, I. and Thorn, B. (2018), *Addressing dimensions of "The Great Moral Wrong": How inequity in music education is polarizing the academic potential of Australian students,* Arts Education Policy Review.

125. Collins, A. and Hocking, R. (2023) *Fading notes: The state of music education for the next generation of primary teachers*: A report commissioned by Music Education: Right from the Start, to investigate the provision of music education in primary teaching degrees in Australia, Alberts | The Tony Foundation.

126. This study is non-music or arts specific specific, it Abbott-Chapman, J. (2011), *Making the most of the mosaic: facilitating post-school transitions to higher education of disadvantaged students*, The Australian Educational Researcher, 38(1), pp. 57 – 71, accessed https://link.springer.com/article/10.1007/s13384-010-0001-9, accessed 15 August 2025

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

Table 25: Summary – Economic contribution of industry support, development and representation in 2024 and 2025, and state and territory distribution ($m, nominal)

	Direct gross value added ($m / %)
2024 (original)	$290
2024 (revised)	$335
2025	**$345**
ACT	1%
NSW	47%
NT	1%
QLD	16%
SA	4%
TAS	2%
VIC	22%
WA	7%

Note: Results for 2024 have been revised to include Music Education and improved granularity of data.
Note: The State and Territory breakdown is approximate based on available data. Not all industry and sector development activity is able to be attributed to a State and Territory level due to the nature of certain organisations' activities and data limitations.
Note: Results in this section include the impact of APRA AMCOS employee, director and contractor costs. APRA AMCOS member distributions are not counted in the GVA for this sub sector.
Note: Totals may not add due to rounding.
Source: Economic analysis calculations.

Organisations and their roles

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

The economic contribution of the following organisations is captured in this section:

- Music related government agency operations and funding
- Performing rights organisations
- Music peak industry bodies, associations, and not-for-profit organisations
- Music awards
- Music conferences
- Music consultancy and professional music industry support services.

→ Read more about music industry support, development and representation in The Bass Line, Edition 1

Policy developments

Through 2025 Australia's music policy settings were relatively stable, with a strong focus on establishing a national evidence base, continued export and industry development investment, and varied state-level approaches to contemporary music strategy and live performance support were delivered.

At the federal level, Music Australia significantly expanded the sector's data infrastructure through the release of three reports:

- *The Bass Line* (Edition 1) established a consistent methodology for measuring the economic contribution of Australia's music industry.
- *Listening In research series* provided updated insight into audience behaviour, music discovery and engagement with Australian repertoire and live music attendance.
- *Sound Fair?* examined commissioning trends in art music, identifying structural patterns in investment and opportunity.

These reports mark a shift toward more systematic measurement of economic activity, audience engagement and commissioning practice. This body of work strengthens the policy rationale underpinning programs such as the Export Development Fund (EDF) and the 2026 record label co-investment initiative, providing clearer reference points for sector performance and impact.

The launch of Ausify (#AusifyYourAlgo) in November 2025 signals a notable policy emphasis on audience behaviour. Rather than focusing solely on supply-side interventions (grants, touring, production), Ausify frames listener behaviour, including searching, streaming and following Australian artists, as a structural factor in discoverability and market outcomes. The campaign encouraged Australian listeners to deliberately search for local artists and become more conscious and regular consumers of Australian music.

The award winning campaign[127] generated measurable engagement and reach across digital and media channels, recording 10.85 million video views between 30 October and 1 December 2025. The campaign involved more than 1,500 artists and delivered 30.3 million media impressions, and 252 pieces of media coverage. The campaign website attracted 76,460 unique users, resulting in 171,908 plays of Australian songs via the Ausify player and social media activity averaged around 500,000 impressions per day throughout the month. The campaign also coincided with an 86.2% increase in the number of Australian songs included in the Triple j Hottest 100 countdown. These measures by the federal government reflect a broader ecosystem approach: production and export support on one side, audience activation and discoverability on the other.

Across jurisdictions, approaches vary in structure and scale:

- NSW formalised a long-term policy position through the *NSW Contemporary Music Strategy 2025–2034*, supported by the Sound NSW Advisory Board Act 2025, embedding governance alongside strategy.
- NSW also initiated the Legislative Council's inquiry into the state of live music, established October 2025 and receiving submissions through February 2026, representing the most recent parliamentary health check of a major state music ecosystem, with a report expected in 2026.
- WA committed $2.75 million over four years (2025–26 to 2028–29) to its *Contemporary Music Fund*, signalling multi-year funding stability.
- SA integrated music within its broader cultural policy, *A Place to Create*, while maintaining dedicated Music Development Office programs including project grants and the Live Music Events Fund.
- QLD prioritised live activation and infrastructure through the *Growing Gigs Fund, Live Music Venue Business Grants*, and touring support.
- VIC, ACT, NT, and Tasmania continued established grant-based frameworks (e.g., *Music Works* in Victoria; *Arts Activities* in ACT; *Arts Grants* NT; Arts Tasmania arts programs).iod.

127. B&T (2026) *Entertainment Campaign Winners – Cairns Crocodiles Awards 2026*. B&T Magazine. https://www.bandt.com.au/entertainment-campaign-winners-cairns-crocodiles-awards-2026/, accessed:18 May 2026.

This variation reflects differing policy focus areas, with some focussed on long-term positioning, while several states directed funding toward venue sustainability, event activation and touring access.

In addition, of the 537 councils across Australia,[128] more than 100 actively support local music, including through music strategies and action plans, music events and festivals, funding and industry development programs and resources, planning and regulator activities such as special entertainment precincts to foster live music venues and activities.

→ Read more about Local Government in Section 4, Industry Spotlights

Key areas of industry focus

In 2025, Australia's peak music bodies focused on regulatory reform, digital market settings, copyright and AI and industry sustainability. Activity was concentrated in four areas.

Broadcast and discoverability settings for Australian music.

A central theme in 2025 was ARIA's sustained advocacy around Australian music quotas and broadcast regulation, particularly through the Commercial Radio & Audio Code review process. ARIA publicly argued that existing quota settings are no longer effective in connecting Australian music with audiences, particularly during peak listening periods and called for reform to ensure local repertoire is programmed at times of meaningful audience reach.

Despite sustained industry advocacy, the Australian Communications and Media Authority's registration of the *Commercial Radio Code of Practice 2026*, effective 1 July 2026, did not materially strengthen local music content obligations or extend quota requirements to digital radio services, a key priority the industry had sought.[129]

In parallel, ARIA announced significant changes to the ARIA Charts methodology (effective September 2025). These changes were framed as modernising the charts to better reflect contemporary listening behaviour and reduce structural barriers affecting new and Australian releases. The charts update represents an industry rule-setting intervention with implications for visibility, benchmarking and commercial momentum.

In 2025 ARIA introduced two new ARIA Awards categories: Best Music Festival Award, recognising festivals with an Australian headline act or at least 50% Australian artist lineups, and a new Global Impact Award, with Dom Dolla announced as its inaugural recipient.[130]

Sector advocacy

APRA AMCOS, ARIA and PPCA maintained a strong advocacy presence focused on copyright integrity, AI governance and fair remuneration for creators. Building on its prior AI and music research program, APRA AMCOS issued further public updates reinforcing principles of consent, credit and compensation in relation to generative AI systems. ARIA and PPCA undertook a range of activities, includig public statements, submissions, and hosting events to support AI advocacy efforts throughout 2025. AMPAL's AI advocacy focussed on licensing over copyright exceptions, while AAM's position focused on licensing, consent and compensation.

→ Read more about AI in Section 4, Industry Spotlights

128. Australian Local Government Association (ALGA) 2025, *Facts and Figures,* Australian Local Government Association, https://alga.com.au/about/local-government/facts-and-figures/, accessed 6 March 2026.
129. Ormston, D. cited in Mollica, C. 2026, *'Australia's Music Industry Slams New Commercial Radio Code'*, *Billboard*, 12 February, https://www.billboard.com/pro/australia-music-industry-slams-new-commercial-radio-code/, accessed 7 April 2026.
130. Australian Recording Industry Association (ARIA) (25 September 2025) *'Fresh Wave of Global Stars Lead the 2025 ARIA Awards Nominations',* ARIA, https://www.aria.com.au/awards/news/fresh-wave-of-global-stars-lead-the-2025-aria-awards-nominations, accessed 12 May 2026.

PPCA's 2025 reporting and advocacy activity continued to focus on recording artist and recording rights, including regulatory engagement through the Copyright Tribunal and broadcast licensing settings, where it advocated for higher, market-aligned radio broadcast royalty rates. The 2026 Tribunal determination settled on an increase from 0.4% to 0.55% of industry revenue (approximately +38% for rights holders), with the rate constriained by the statutory cap.[131]

Through the Vote Music 2025, 19 music industry peak bodies advocated for elevated sector priorities including local music visibility, regulatory reform and long-term sustainability as part of an election campaign. The campaign framed music as both a cultural and economic asset requiring policy alignment and presented five priorities to secure the future of music.

The Australian Music Industry Network (AMIN) continued to operate as the national coalition of the eight state and territory contemporary music peak bodies. Its role remained focused on coordination and advocacy alignment, including participation in sector-wide initiatives, while continuing to support ongoing industry development resources. In 2025 youth music organisation The Push released their long-term strategic direction focused on strengthening pathways for young people into the contemporary music industry, with a particular emphasis on access, skills development, and industry participation. The 10-year vision centres on building a more sustainable and inclusive music ecosystem by expanding all-ages live music opportunities, increasing regional engagement, and supporting early-career artists and industry workers through training, mentoring, and employment pathways. The strategy reflects a shift toward addressing structural barriers to entry, such as venue access, skills gaps, and geographic disadvantage, while positioning youth participation as a critical pipeline for the future of the Australian music industry.[132]

Support for "Michael's Rule" which calls for international touring artists to include Australian support acts and was revived in 2024 through collective advocacy efforts by artist managers[133] and the broader music sector.[134] The initiative progressed in 2025, with the NSW Government introducing incentives tied to venue hire to encourage adoption of the rule across touring activity in the state.[135]

Exports

Sounds Australia's 2024 activity reflected a shift toward expanded international engagement, with increased focus on Asia-Pacific markets alongside continued activity in established territories. The organisation identified Asia as a growing but complex region requiring tailored market strategies, and increased its presence through attendance at regional events and targeted engagement. This was complemented by a stronger emphasis on inbound activity, including hosting international industry delegates in Australia, to facilitate relationship-building and reduce cost barriers associated with outbound touring.[136]

In parallel, Sounds Australia expanded its trade and market development activity, undertaking 13 reconnaissance missions and delivering three trade missions across Mexico, India (inbound), and Los Angeles. These initiatives were designed to build market intelligence, establish new networks, and identify emerging opportunities for Australian artists and industry. This approach reflects a broader shift toward diversifying export pathways beyond traditional markets, combining outbound showcasing with inbound exchange and targeted market exploration to support longer-term international development.[137]

131. PPCA (2026) PPCA recognises the Copyright Tribunal of *Australia's ruling on new radio broadcast licence rate,* https://www.ppca.com.au/news/ppca-recognises-the-copyright-tribunal-of-australias-ruling-on-new-radio-broadcast-licence-rate, accessed 28 April 2026. The statutory cap refers to a legislated limit of 1% of commercial radio revenue that can be paid in total copyright royalties for sound recordings, which the PPCA argues is constraining higher market-based rates.
132. The Push (n.d.) *Strategy and impact,* https://thepush.com.au, accessed 29 April 2026.
133. Association of Artist Managers (AAM) (2024) *Michael's Rule,* https://www.aam.org.au/michaelsrule, accessed 29 April 2026.
134. The Music Network (2024) *Australia's music community commits to "Michael's Rule",* https://themusicnetwork.com/australias-music-community-commits-michaels-rule/, accessed 29 April 2026.
135. NSW Government (2025) *Michael's Rule,* https://www.nsw.gov.au/departments-and-agencies/sound-nsw/funding-and-support/michaels-rule, accessed 29 April 2026.
136. Sounds Australia (2024) *Sounds Australia Annual Report 2024.*
137. Sounds Australia (2024) *Sounds Australia Annual Report 2024.*

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;
- Insurance arrangements in the Australian Music Industry;
- The making of Australian Country Music;
- Participation and pathways in music education;
- Emerging issues for artificial intelligence (AI) in Australia's music industry; and
- The role of local government in Australia's music industry

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

Battlesnake.
Credit: Rhys Bennett.

4.1 Spotlight 1: Artist income

Artists, musicians, songwriters, and composers in Australia earned an estimated combined income of $877 million from working in the music industry in 2024-25.[138, 139, 140]

Key statistics – artist income (2023-24 and 2024-25)

Estimated value of Australian artist income 2025	Estimated median Australian artist income 2025	Estimated share of Australian artist income from live music performance 2025	Proportion of Australian artist income earned by the top 25% of income earners 2025
$877m	**$14,800**	**47%**	**~82%**
2024 (revised) **$869m**	2024 (revised) **$14,700**	2024 (revised) **47%**	2024 (revised) **~82%**

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

138. 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.
139. 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.
140. Total income is based on the estimated number of artists / musicians, calculations based on the industry-wide survey results, confidential data and benchmarks, publicly available research, and industry consultation.

Anieszka.
Credit: Adrianne Armida.

Y.O.G.A.
Credit: Lizzie Wilkie

Artists undertake several activities to earn income in the Australian music industry. Across both 2024 and 2025, live music performance and royalties continued to account for approximately 70% of all artist income in each year. Teaching, session fees, and merchandise contributed a further 12%, on average. Artists' income mix remained broadly stable between the two years, with no statistically significant shifts identified in the relative contribution of any income stream across different income levels.

Table 26: Estimated breakdown of average artist income, by income source ($m, nominal)

Performance venue	2024 ($m, revised)	2024 (% of total income)	2025 ($m)	2025 (% of total income)
Live music performance	$409	47%	**$410**	47%
Royalties	$196	23%	**$204**	23%
Other music income	$103	12%	**$102**	12%
Teaching fees	$60	7%	**$59**	7%
Session fees	$39	4%	**$38**	4%
Merchandise sales	$32	4%	**$32**	4%
Government funding/grants	$26	3%	**$27**	3%
Sponsorships, branding and promotions	$6	1%	**$6**	1%
Total	**$869**	**100%**	**$877**	**100%**

Source: Calculations based on statistical analysis of industry survey, confidential industry data, industry expert judgement, and other benchmarks. Totals may not add due to rounding.

The distribution of artists' incomes in Australia remains heavily skewed, with a very high proportion of artists earning low incomes from their work in the music industry. Analysis of across the two years shows a slightly higher income across each percentile, with the median annual income of $15,000, with the top 25% of artists (by income) earning an estimated 82% of total artist income.

There is a clear correlation between income levels and the contribution of live performance versus royalty income for artists. Analysis across 2023-24 and 2024-25 shows artists earning lower incomes tended to be more reliant on live performance income. Conversely, artists in higher income brackets tended to earn a higher percentage of their incomes from royalties. This pattern was consistent across both years, and together with the above data, highlights the stickiness of artist income earning patterns and the importance of long term royalty payments in contributing to artist income growth.

Table 27: Estimated Australian artist income quartiles ($m, nominal)

Quartile	Estimated income from working in the music industry 2024 (revised)	Estimated share of total Australian artist income 2024	Estimated income from working in the music industry 2025	Estimated share of total Australian artist income 2025
First Quartile (25th percentile)	$4,900	1%	**$4,900**	**1%**
Median (50th percentile)	$14,700	5%	**$14,800**	**5%**
Third quartile (75% percentile)	$44,100	18%	**$44,500**	**18%**

Source: Calculations based on statistical analysis of industry survey, confidential industry data, industry expert judgement, and other benchmarks.

Blusher, THE AUSSIE BBQ Reeperbahn Festival 2025.
Credit: Marcelle Bradbeer.

4.2 Spotlight 2: Insurance arrangements in Australia's music industry

Key statistics:

1,151
Insurance policies reported across all survey respondents (n=365)

51%
% identifying insurance as a top-3 fastest-growing cost (n=71)

78%
% taking no action in response to rising premiums (n=888 individual policies)

$43,960
Average annual premium saving for live music venues (n=25) through testing the market for alternatives and moving to more detailed underwriting practices

Fan Girl, Retreat Hotel Brunswick, 2025.
Credit: Rick Clifford

Insurance is a fundamental component of financial and risk management across the Australian economy, including in the music industry. Operators at every level, from individual artists and smaller venues to major festivals and touring productions, hold insurance to manage the risks associated with their activities.

Insurance costs have increased significantly across the economy since around 2019-20. These increases reflect a combination of global factors, including higher reinsurance costs driven by rising natural catastrophe losses, and domestic factors, particularly the frequency and severity of extreme weather events in Australia. The music industry has not been immune to these pressures, with insurance identified by survey respondents as one of the most significant and fastest-growing cost items in the sector.

These pressures have been the subject of government attention. The House of Representatives Standing Committee on Communications and the Arts inquiry into the Australian live music industry (2024-25) identified insurance as a key challenge and made three recommendations directly addressing it for the sector.[141]

Insurance affordability and availability for small businesses and not-for-profit organisations are currently the subjects of a Parliamentary Joint Committee on Corporations and Financial Services inquiry, due to report in October 2026.[142] The Insurance Council of Australia (ICA) has separately published a white paper arguing, as part of its policy position, for civil liability reform as a means of reducing public liability premium costs.[143]

Insurance arrangements in the music industry are described in this spotlight across four areas: types of cover held, cost and cost drivers, where pressure has been most acute, and the current policy discussion. The spotlight draws on the industry-wide survey, stakeholder consultations, and publicly available data.

Insurance market context

The Australian general insurance market has been in what is commonly described as a 'hard market' since approximately 2019-20. A hard market is characterised by rising premiums, higher excesses (the amount a policyholder must contribute before insurance pays), reduced coverage breadth and stricter underwriting conditions (the criteria insurers apply when deciding whether and on what terms to offer cover).[144]

Several factors have contributed to this situation. Global insured losses from natural disasters have exceeded US$100 billion for five consecutive years, reaching an estimated US$137 billion in 2024 according to Swiss Re.[145] Australian primary insurers have faced reinsurance cost increases of up to 30% in recent renewal cycles, according to the ICA.[146] Domestically, the ICA estimates that extreme weather events have generated average annual insurance claims in excess of $4.5 billion in recent years.[147]

141. House of Representatives Standing Committee on Communications and the Arts (2025) *Am I ever gonna see you live again?*, Parliament of Australia, Canberra, tabled 6 March 2025, https://www.aph.gov.au/Parliamentary_Business/Committees/House/Former_Committees/Communications/Livemusicindustry/Report, accessed 8 April 2026. Insurance recommendations: Recommendations 10, 4 and 5.
142. Parliamentary Joint Committee on Corporations and Financial Services (2025) *Inquiry into the provision, regulation, and pricing of modern insurance products for small businesses and not-for-profit and community organisations operating in Australia,* Parliament of Australia, Canberra, referred 30 October 2025, report due 27 October 2026, assessed 8 April 2026. https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Corporations_and_Financial_Services/SmallBusinessInsurance.
143. Insurance Council of Australia (2025) *A sustainable public liability insurance market in Australia: the case for civil liability reform, ICA,* Sydney, https://insurancecouncil.com.au/wp-content/uploads/2025/10/Civil-Liability-Report-October-2024.pdf, accessed 8 April 2026.
144. Insurance Council of Australia (2025) *ICA industry snapshot 2025 fact pack, ICA,* Sydney, https://insurancecouncil.com.au/wp-content/uploads/2025/03/INCA015-Fact-Pack-2025_v2.8-1.pdf, accessed 8 April 2026.
145. Swiss Re Institute (2025) sigma 1/2025: *Natural catastrophes in 2024,* Swiss Re, Zurich, https://www.swissre.com/institute/research/sigma-research.html, viewed 8 April 2026.
146. Insurance Council of Australia (2025) *ICA industry snapshot 2025 fact pack,* ICA, Sydney, https://insurancecouncil.com.au/wp-content/uploads/2025/03/INCA015-Fact-Pack-2025_v2.8-1.pdf, accessed 8 April 2026.
147. Insurance Council of Australia (2025) *ICA industry snapshot 2025 fact pack,* ICA, Sydney, https://insurancecouncil.com.au/wp-content/uploads/2025/03/INCA015-Fact-Pack-2025_v2.8-1.pdf, accessed 8 April 2026.. The $4.5 billion annual average figure also appears in ICA's submission to the Small Business Insurance Inquiry (February 2026).

Gross written premium (the total premiums received by insurers before deducting reinsurance costs) in the public liability class grew from approximately $1.9 billion per annum in 2017 to approximately $2.9 billion per annum in 2020, according to the Australian Prudential Regulatory Authority (APRA prudential) National Claims and Policies Database (NCPD) Analysis Report published in May 2023.[148] The average premium per risk in this class increased by approximately 40% between 2015 and 2021, a rate of around six per cent per annum.[149] The ICA, drawing on a different measure and baseline, estimates that public liability premiums have increased by up to 60% since 2019.[150] These figures reflect different methodologies and time periods and should not be directly compared.

APRA (prudential) data indicate that the increase in public liability costs nationally has been driven primarily by rising cost per finalised bodily injury claim rather than by an increase in claim numbers. The average finalised bodily injury claim in the public liability class increased at approximately 5.5% per annum since 2013, driven largely by large individual claims above $500,000.[151] Separately, industry stakeholders reported to the 2024 parliamentary inquiry that some liability claims against music venues are settled at values reflecting legal costs associated with contesting claims rather than determinations of fault, a practice described as common across public liability insurance more broadly.[152] These are distinct observations: the APRA (prudential) data describe a national claims cost trend; the stakeholder evidence describes a settlement dynamic specific to smaller venues.

The insurance cost pressures facing the music industry appear consistent with these broader trends, with additional sector-specific factors in some segments as discussed later in the spotlight.

148. The NCPD is a national database, maintained by APRA (prudential) since 2003, of every public and product liability and professional indemnity insurance policy and claim underwritten in Australia.
149. Australian Prudential Regulation Authority (2023) *Review of claims trends and affordability of public liability and professional indemnity insurance in Australia: NCPD analysis report,* APRA, Sydney, May 2023, https://www.apra.gov.au/national-claims-and-policies-database-analysis-report, accessed 8 April 2026. The $1.9bn to $2.9bn GWP figures are from Figure 2.1 and surrounding text of that report; the 40% per-risk premium increase is from the section on average premium per risk.
150. Australian Prudential Regulation Authority (2023) *Review of claims trends and affordability of public liability and professional indemnity insurance in Australia: NCPD analysis report,* APRA, Sydney, May 2023, https://www.apra.gov.au/national-claims-and-policies-database-analysis-report, accessed 8 April 2026. This figure is an ICA estimate using a different measure and baseline to the APRA NCPD data cited in footnote 151; the two figures are not directly comparable.
151. Australian Prudential Regulation Authority (2023) *Review of claims trends and affordability of public liability and professional indemnity insurance in Australia: NCPD analysis report,* APRA, Sydney, May 2023, https://www.apra.gov.au/national-claims-and-policies-database-analysis-report, accessed 8 April 2026. The 5.5% per annum bodily injury claim cost increase and the large-claim driver are from the claims analysis section of the NCPD report.
152. Stakeholder consultations for this report; consistent with evidence to the 2024 House of Representatives Standing Committee on Communications and the Arts (2025) *Am I ever gonna see you live again?,* Parliament of Australia, Canberra, tabled 6 March 2025, https://www.aph.gov.au/Parliamentary_Business/Committees/House/Former_Committees/Communications/Livemusicindustry/Report, accessed 8 April 2026.

Selve perform their album ‘Breaking Into Heaven’ live with the Australian Session Orchestra, Bleach* Festival. Credit: Eimhin.

Types of insurance held

Music industry operators hold a range of insurance products reflecting the diverse nature of activities across the sector.

Table 28: Insurance types, purpose and holders within the music industry

Insurance type	Coverage purpose	Common holders
Public liability	Third-party injury or property damage arising from operations	Venues, festivals, touring companies, artists
Property and contents	Physical assets, equipment, fit-out	Venues, studios, retailers
Event cancellation	Financial loss if an event cannot proceed	Festivals, promoters, venues
Workers' compensation	Statutory cover for employees	All employers
Professional indemnity	Errors and omissions in professional services	Labels, managers, agents
Vehicle and transit	Touring vehicles and equipment in transit	Artists, touring companies
Equipment and instruments	Loss or damage to musical equipment	Artists, venues, studios

Across 365 survey respondents, 1,151 individual insurance policy responses were recorded with premium data, representing a combined aggregate annual premium of approximately $2.1 million.

The industry survey found that 54% of for-profit businesses (20 of 37) and 47% of individuals (16 of 34) cited insurance as one of their top-three cost drivers. This puts insurance alongside salaries, wages and contractor fees and travel, accommodation and logistics as the most commonly-cited drivers of cost growth across the industry out of the survey respondents.

Secret World at Vic on the Park, 2025.
Credit: Mitch Strangman.

Table 29: Key operational cost pressures reported by industry survey respondents

Cost category	% identifying as top driver	Number of respondents (combined individuals and businesses)
Salaries, wages and contractor fees	56%	n=40
Travel, accommodation and logistics	56%	n=40
Insurance	51%	n=36
Marketing and promotions	39%	n=28
Equipment	24%	n=17
Interest and financing costs	23%	n=16
Other	17%	n=12

Source: Industry-wide survey results.

Across 1,122 policy-level claims responses, 94.7% recorded no claims in 2024-25 (1,063 of 1,122). Ofthe 59 total claims made, comprehensive car insurance accounted for the largest share at 27 claims (46% of all claims), followed by travel (9 claims, 15%), equipment (8 claims, 14%), and workers compensation (6 claims, 10%). Claims against music-specific products were minimal: public liability recorded only 4 claims from 270 policies (1%), professional indemnity 1 from 112 (1%), and event cancellation recorded noclaims at all.

Low claim frequency in the industry survey is consistent with the national pattern in the public liability class, where APRA (prudential) NCPD data indicate that premium increases have been driven by rising cost per claim rather than rising claim numbers.[153]

Coverage adequacy

Insurance premiums were cited in the industry survey as a significant expense pressure by approximately 12% of individual respondents (n=39) and 30% of business respondents (n=16), with some individuals reporting they had quietly cancelled coverage they could no longer afford.

82% of respondents to the industry survey (n=277) reported their current insurance coverage was about the right level for their requirements. A further 10% (n=34) reported being over-insured (too high for requirements), while 7% (n=25) reported being under-insured (with their insurance coverage being too low for their requirements).

Stakeholder consultations suggest that the extent of under-insurance in the sector may exceed self-reported survey figures. Some operators are reported to hold policies that understate actual trading conditions in order to reduce premiums. Where a claim occurs, this approach creates risk of coverage being declined on the basis of material non-disclosure, as insurers routinely cross-reference disclosed information against licensing records and social media.

153. Australian Prudential Regulation Authority (2023) *Review of claims trends and affordability of public liability and professional indemnity insurance in Australia: NCPD analysis report*, APRA, Sydney, May 2023, https://www.apra.gov.au/national-claims-and-policies-database-analysis-report, accessed 8 April 2026. The 5.5% per annum bodily injury claim cost increase and the large-claim driver are from the claims analysis section of the NCPD report.

Rainbow Chan at Asia TOPA.
Credit: Nam Nguyen.

Key music industry insurance pressures

Public liability insurance for live music venues

Public liability insurance is a mandatory operating requirement for venues open to the public. It covers third-party injury or property damage claims arising from venue operations and is reported by stakeholders and venue operators as one of the most significant cost items for smaller operators.

The ICA, in oral evidence to the 2024 parliamentary inquiry, identified several characteristics that it said place live music venues in a higher-risk category for underwriting purposes: the service of alcohol, late trading hours, the use of staging and rigging equipment, and what it described as a transient and mobile workforce.[154] Industry bodies and venue operators have raised concerns at the same inquiry that standard underwriting frameworks, developed primarily for nightclubs or general hospitality businesses, may not adequately differentiate the operational profile of a live music venue. Standardised category-level frameworks support underwriting practice, including consistent risk pooling and data comparability across large portfolios, however specific concerns have been raised by a range of stakeholders as to whether those frameworks capture the differences between a live music venue and a higher-risk hospitality category.

Media reporting and stakeholder accounts indicate that in the twelve months to August 2023, some venues saw public liability premium increases of up to ten-fold on prior-year premiums.[155] Cumulative increases of 200 – 400% over three to four years were reported in submissions and testimony to the 2024 parliamentary inquiry for some operators with no claims history.[156] The example below illustrates the scale of impacts for a specific small venue.

Premium escalation at a small Melbourne venue

Pride of Our Footscray, a 200-capacity Melbourne live music venue with no claims history, was reported by Beat Magazine (February 2026) as having seen its public liability premium increase from approximately $6,000 in 2020 to approximately $142,890 in 2024, an increase of approximately 2,300%. Of 19 insurers their insurance broker approached, 18 declined to provide a quote. Of the venues total revenues, insurance was reported to represent approximately 13%, highlighted as the 'survival margin' for the small business sector is reported to be between 5-10% of total revenues.[157]

154. Insurance Council of Australia, evidence to the House of Representatives Standing Committee on Communications and the Arts, public hearing, 11 Octobe 2024, Parliament of Australia, Canberra. Reported in: House of Representatives Standing Committee on Communications and the Arts (2025) *Am I ever gonna see you live again?*, Parliament of Australia, Canberra, tabled 6 March 2025, https://www.aph.gov.au/Parliamentary_Business/Committees/House/Former_Committees/Communications/Livemusicindustry/Report, accessed 8 April 2026; and Eliezer, C (2024) *'Insurance industry explains why live music's so high risk',* The Music, 16 October, https://themusic.com.au/industry/insurance-industry-explains-why-live-music-s-so-high-risk/5yNV-_r9_P8/16-10-24, accessed 8 April 2026.
155. Pickup, J (2023) *'On the brink: why has music venue insurance gone through the roof?',* ArtsHub Australia, 8 August, https://www.artshub.com.au/news/news/on-the-brink-why-has-music-venue-insurance-gone-through-the-roof-2655150/, accessed 8 April 2026.
156. House of Representatives Standing Committee on Communications and the Arts, public hearing, 11 October 2024, Parliament of Australia, Canberra. Reported in: House of Representatives Standing Committee on Communications and the Arts (2025) *Am I ever gonna see you live again?*, Parliament of Australia, Canberra, tabled 6 March 2025, https://www.aph.gov.au/Parliamentary_Business/Committees/House/Former_Committees/Communications/Livemusicindustry/Report., accessed 8 April 2026. The 200-400% cumulative increase figure reflects evidence given at the inquiry; specific submissions include evidence from the ALMBC (Howard Adams, Committee Hansard, 11 October 2024, p.17: venues operating for 23 years with no claims going from $10,000 to $120,000) and venue operators.
157. Beat Magazine (2026), *'A Melbourne venue's $157,000 insurance bill could reshape how Australia protects live music',* Beat Magazine, 27 February 2026, beat.com.au/a-melbourne-venues-157000-insurance-bill-could-reshape-how-australia-protects-live-music, accessed 8 April 2026.

A concern raised in stakeholder consultations and parliamentary evidence is that underwriting assessments for live music venues are frequently conducted at a category level, without direct engagement with individual venues and without reference to operational information venues already maintain for licensing purposes, including CCTV coverage, fire safety certification, security arrangements and trading records.[158] Evidence from specialist broking practice suggests that where this information is presented directly to underwriters, pricing outcomes have in some cases differed (though the evidence base for this is limited in scale, as discussed below).

Evidence to the 2024 parliamentary inquiry indicated that domestic underwriting capacity for live music public liability cover is limited. The ICA told the inquiry that, due to the specialised nature of these risks, very few insurers offer public liability insurance for large live music events and venues, with cover typically available only through international underwriters, primarily Lloyd's of London.[159]

Two distinct issues arise in the sector. Availability refers to whether cover can be obtained at all: some operators, particularly smaller venues and community festivals, have reported being unable to secure quotes from any domestic insurer. Affordability refers to the cost of cover relative to operating revenue: even where cover is available, premiums may represent a material share of total revenue. Both problems are present in the sector, but they have different drivers and potentially different policy responses. Availability constraints are primarily a function of limited underwriting capacity and market concentration; affordability concerns are shaped by the broader premium cycle as well as by how individual operators' risk profiles are assessed.

The Australian Live Music Business Council (ALMBC) launched an Insurance Gateway for venues in late 2022, offering a platform to compile risk information and connect with brokers.[160] In 2024, the ALMBC's focus shifted toward risk mitigation tools, parliamentary advocacy and systemic reform. Creative Australia and Music Australia commissioned a study in 2025 examining the feasibility of a discretionary mutual insurance model for the festival sector, conducted by FEAT. and Bloom Insurance.[161] The study was inconclusive due to limited claims data and low engagement from commercial festival operators but identified it as an area for further development.

158. House of Representatives Standing Committee on Communications and the Arts, public hearing, 11 October 2024, Parliament of Australia, Canberra. Reported in: House of Representatives Standing Committee on Communications and the Arts (2025) *Am I ever gonna see you live again?*, Parliament of Australia, Canberra, tabled 6 March 2025, https://www.aph.gov.au/Parliamentary_Business/Committees/House/Former_Committees/Communications/Livemusicindustry/Report., accessed 8 April 2026.

159. House of Representatives Standing Committee on Communications and the Arts (2025) *Am I ever gonna see you live again?*, Parliament of Australia, Canberra, tabled 6 March 2025, https://www.aph.gov.au/Parliamentary_Business/Committees/House/Former_Committees/Communications/Livemusicindustry/Report., accessed 8 April 2026, citing Alexandra Hordern, ICA, Committee Hansard, 11 October 2024, p.1. Direct quote from the inquiry report: *'Due to the specialised nature of these risks, very few insurers offer public liability insurance for large live music events and venues, and cover is typically only available internationally through the Lloyd's insurance market in London.'* The 'approximately 24 insurers' figure for motor vehicle cover is from oral testimony reported in InsuranceNews.com.au (2024) *'No simple solutions on live music coverage, inquiry told'*, 11 October, https://www.insurancenews.com.au/daily/no-simple-solutions-on-live-music-coverage-inquiry-told, accessed 8 April 2026.

160. Australian Live Music Business Council (2022) *'Australian Live Music Business Council announces solution for insurance crisis',* The Music, 6 September, https://themusic.com.au/news/australian-live-music-business-council-announces-solution-for-public-liability-insurance-crisis/9yvj6-rt7O8/06-09-22, accessed 8 April 2026.

161. Creative Australia (2025) Music festival insurance study: *A summary by Creative Australia,* https://creative.gov.au/research/music-festival-insurance-study-summary-creative-australia, accessed 8 April 2026. Published 28 October 2025; conducted by FEAT. in collaboration with Bloom Insurance.

CASE STUDY:

Cost reductions in venue public liability insurance premiums

Confidential industry data provided from one specialist broker shows potential for significant reductions in public liability premiums for live music venues with detailed, venue-specific underwriting, rather than relying on category-level underwriting assessments. The data covers a self-selected group of 88 venues that sought that broker's services, and the before-and-after premium comparison is available for 25 of those 88 venues (28% of the dataset). The dataset has not been independently audited and the venues in it may differ systematically from venues that did not engage a specialist broker.

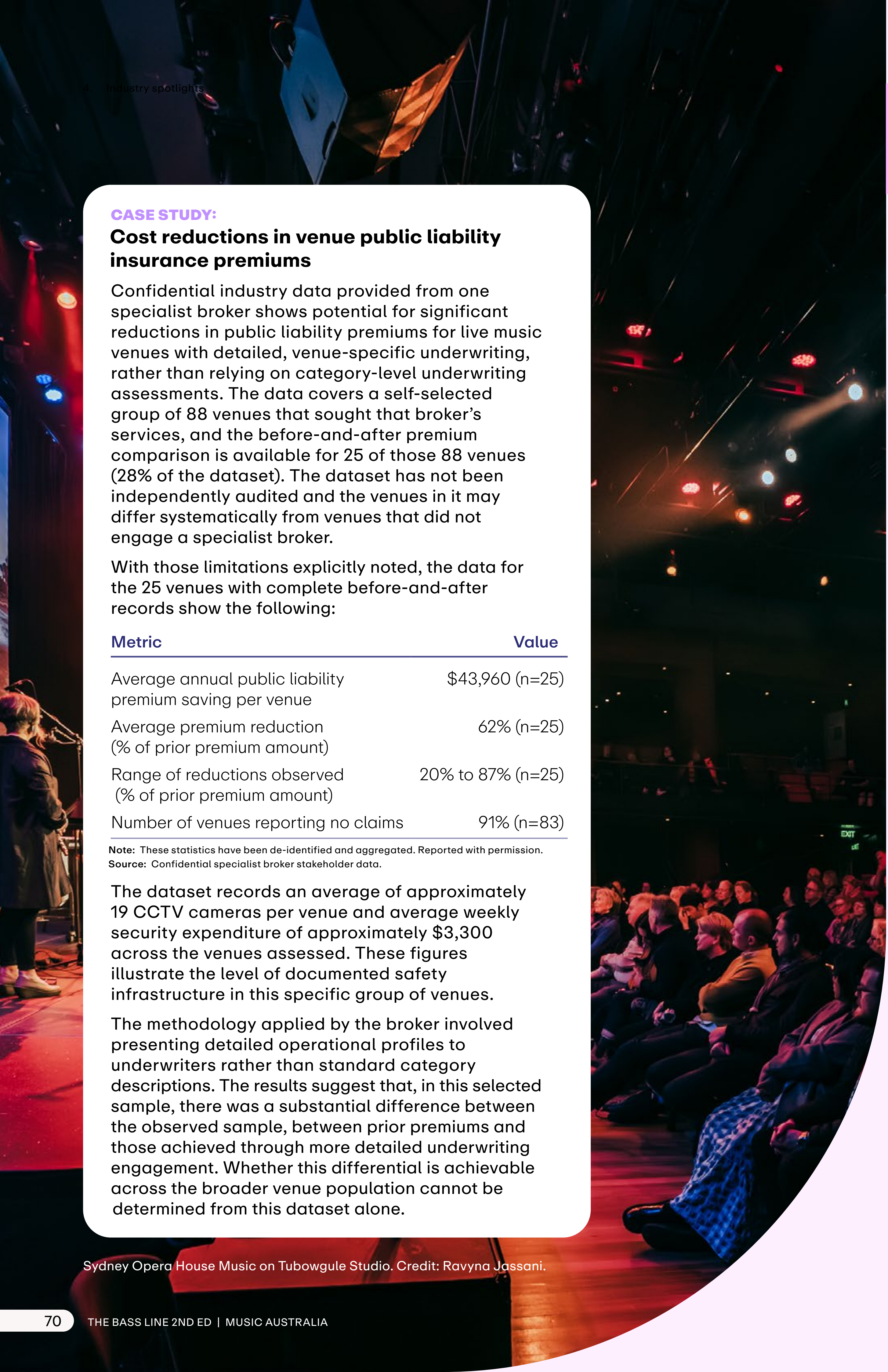
With those limitations explicitly noted, the data for the 25 venues with complete before-and-after records show the following:

Metric	Value
Average annual public liability premium saving per venue	$43,960 (n=25)
Average premium reduction (% of prior premium amount)	62% (n=25)
Range of reductions observed (% of prior premium amount)	20% to 87% (n=25)
Number of venues reporting no claims	91% (n=83)

Note: These statistics have been de-identified and aggregated. Reported with permission.
Source: Confidential specialist broker stakeholder data.

The dataset records an average of approximately 19 CCTV cameras per venue and average weekly security expenditure of approximately $3,300 across the venues assessed. These figures illustrate the level of documented safety infrastructure in this specific group of venues.

The methodology applied by the broker involved presenting detailed operational profiles to underwriters rather than standard category descriptions. The results suggest that, in this selected sample, there was a substantial difference between the observed sample, between prior premiums and those achieved through more detailed underwriting engagement. Whether this differential is achievable across the broader venue population cannot be determined from this dataset alone.



Sydney Opera House Music on Tubowgule Studio. Credit: Ravyna Jassani.

Southern River Band.
Credit: Jared Hinz.

Insurance for festivals and events

Festivals and large-scale events face insurance requirements across multiple product lines. A recent study examining insurance arrangements across the Australian music festival sector[162] confirmed that Australian festival insurance is concentrated through international underwriters, reflecting limited domestic capacity for large-scale event risk.

For festival operators, event cancellation cover is a primary insurance concern. Cancellation cover protects against financial loss if an event cannot proceed due to circumstances outside the organiser's control. The cost and availability of this cover deteriorated significantly from 2020, with premiums rising sharply and policy exclusions expanding. Stakeholder consultations for this report indicated that cancellation premiums have in some cases been equivalent to 15 - 20% of total event budget.[163] Creative Australia's *Soundcheck* Report (2024) found that insurance was cited as having a severe or major impact by 31% of festival respondents.[164]

Separately, the Creative Australia *Music Festival Insurance Study (2025)* reported that some festival operators have seen premium increases of more than 1,300% since 2019.[165]

Based on Creative Australia's research across the festival sector, cost pressures vary by festival type. Small commercial festivals (under approximately 20,000 patrons) recorded the highest relative premium growth, following the exit of several smaller insurers from the live events market after 2020. Touring festivals have faced additional complexity from multi-state operations. Larger not-for-profit festivals with established governance and risk management records have generally accessed more stable insurance arrangements.[166] Operators running global insurance programs across large event portfolios benefit from scale not available to smaller independent promoters.

162. Creative Australia (2025) *Music festival insurance study: A summary by Creative Australia,* https://creative.gov.au/research/music-festival-insurance-study-summary-creative-australia, accessed 8 April 2026. Published 28 October 2025; conducted by FEAT. in collaboration with Bloom Insurance.
163. Stakeholder consultations for this report. This figure is consistent with the general direction of festival cost data in Creative Australia (2024) *Soundcheck: insights into Australia's music festival sector,* Creative Australia, Sydney, https://creative.gov.au/research/soundcheck-australian-music-festivals, accessed 8 April 2026.
164. Creative Australia (2024) Soundcheck: insights into Australia's music festival sector.
165. Creative Australia (2025) *Music festival insurance study: a summary by Creative Australia,* Creative Australia, Sydney, https://creative.gov.au/research/music-festival-insurance-study-summary-creative-australia, accessed 8 April 2026. Published 28 October 2025; conducted by FEAT. in collaboration with Bloom Insurance.
166. Creative Australia 2024, *Soundcheck Two: Analysis of Australian music festival models and operations.*

Opportunities for industry action

The industry survey identified action responses across the 1,132 policies identified by respondents. Across these policies, 888 (78.4%) – the majority – indicated they had taken no recent action in response to rising premiums. Among those who did take action (n=244 responses), the most common responses were speaking with an insurer to review or adjust policy pricing (8%), seeking alternate quotes (6%), and increasing coverage (5%).

Table 30: Actions taken by respondents on insurance policies

Cost category	% of total	Responses
No action	78%	n=888
Spoke with insurer to review/adjust pricing	8%	n=91
Sought alternate quotes	6%	n=73
Increased level of coverage	5%	n=56
Changed provider — equivalent policy	2%	n=28
Reduced level of coverage	2%	n=18
Adjusted excess up	1%	n=15
Cancelled policy	1%	n=14
Other	1%	n=14

Source: Industry-wide survey results.

Respondents to the industry survey were most likely to take some form of action on event cancellation, volunteer personal accident, and commercial property policies, where no-action rates were lower at 56%, 61%, and 64% respectively.

Stakeholder consultations indicate that the gap between the scale of insurance cost pressures and active responses by industry participants reflects the complexity of insurance markets, a perception among some operators that market conditions are beyond individual influence, and a degree of normalisation of higher costs as a fixed expense.

The data and consultation insights suggest there may be greater scope for both individuals, business and industry as a whole to build awareness and take action to help reduce industry cost pressures while ensuring suitability and adequacy of coverage, particularly in higher-risk settings.

4.3 Spotlight 3: The making of Australian Country Music

Australian country music has deep historical roots that distinguish it from its American counterpart, evolving from 19th-century bush ballads which were often oral folk traditions influenced by English, Irish, and Scottish songs recounting convict life, outback hardships, droving, droughts, and pioneering stories. Poets such as Henry Lawson and Banjo Paterson provided foundational lyrical themes of rural resilience, mateship, and the Australian landscape.[167]

The modern genre took shape in the 1930s–1940s with pioneers like New Zealander Tex Morton and Australian Buddy Williams,[168] who blended American hillbilly and country influences with distinctly local narratives about bush life, swagmen, and the outback. The progressive incorporation of local themes contributed to the development of a distinct storytelling tradition within the genre.[169]

167. The Story of Australian Country Music (n.d.), *History of Country Music,* https://historyofcountrymusic.com.au/soacm.html, accessed 16 February 2026.
168. Museums & Galleries of NSW (n.d.) *The fathers of Australian country music*, https://storyplace.org.au/story/the-fathers-of-australian-country-music/, accessed: 16 February 2026.
169. National Film and Sound Archive of Australia (n.d.) *Give a Little Credit to Your Dad – Buddy Williams (curator's notes),* https://www.nfsa.gov.au/collection/item/give-little-credit-your-dad-buddy-williams, accessed 16 February 2026; Waterhouse, R. (2012) *Tex Morton*. Australian Dictionary of Biography, https://adb.anu.edu.au/biography/morton-tex-15027, accessed 16 February 2026.

Brittany Elise at Gympie Music Muster Australia.
Credit: Jay Seeney.

The genre gained national prominence in the post-war era, with figures like Slim Dusty becoming a cultural icon. Often called Australia's "King of Country Music," Slim Dusty chronicled rural life through bush ballads and songs about drovers, pubs, and the road. In the 1950s, he and his wife Joy McKean launched the Slim Dusty Travelling Show, transitioning from showground circuits to independent tours. From the 1960s onward, and particularly through the 1970s and 1980s, he established annual round-Australia tours covering up to 48,000 kilometres over ten months, performing hundreds of concerts in regional halls, towns, and remote areas.

These extensive live circuits helped sustain the genre's grassroots connection during periods when rock and pop dominated urban markets. Slim Dusty's prolific output (over 100 albums), awards (including the first Australian gold record for "A Pub with No Beer" in 1957), and honours (MBE in 1970, AO in 1998) solidified country music's place in national identity.[170, 171, 172]

A distinctive and culturally significant dimension to Australian country music is the strong adoption and adaptation of the genre by Aboriginal and Torres Strait Islander communities. Since the mid-20th century a vibrant sub-genre, often termed Aboriginal country music, has seen Indigenous artists adopting the genre to express stories of connection to Country, family, resilience, dispossession, identity, and social issues, echoing how blues served African American communities and bridging traditional songlines with contemporary narratives. Pioneers include Jimmy Little, the first Aboriginal pop/country star, whose gentle style brought Indigenous voices to mainstream audiences.

Later artists such as Archie Roach, Ruby Hunter, Kev Carmody, and Troy Cassar-Daley blended country elements with folk and rock to address reconciliation, stolen generations experiences, and pride. This sub-genre remains especially resonant in remote and regional communities, with ongoing representation through platforms like the National Indigenous Music Awards and appearances at festivals including Tamworth.[173]

Women have been prominent trailblazers, from early contributors like Joy McKean, through to Gina Jeffreys and Kasey Chambers. Gina Jeffreys emerged in the 1990s as a leading voice in country music, while Kasey Chambers broke barriers in the early 2000s by winning ARIA awards across genres, achieving mainstream crossover and Australian country artists. This female presence has continued, with contemporary acts continuing to contribute to a diverse and inclusive country scene.[174]

Fanny Lumsden has emerged as one of the most awarded artists of her generation, winning multiple ARIA Awards for Best Country Album and numerous Golden Guitar Awards, alongside growing international recognition.[175] Max Jackson represents a newer wave of artists, achieving early success through the Star Maker Award and multiple Golden Guitar wins, including Female Artist of the Year, while building a strong digital and touring presence.[176] Established artists such as Catherine Britt and The McClymonts demonstrate sustained success, with Britt earning multiple Golden Guitar Awards, ARIA nominations, and international recognition, and The McClymonts securing multiple ARIA and Golden Guitar Awards alongside consistent chart success and touring.[177, 178]

170. Encyclopaedia Britannica (n.d), *Slim Dusty (2025)*, https://www.britannica.com/biography/Slim-Dusty, accessed 16 February 2026.
171. Official Slim Dusty Website (n.d), *Slim Dusty Music – Bio,* https://www.slimdustymusic.com.au/bio/, accessed 16 February 2026.
172. Live Performance Australia (n.d), *Slim Dusty AO MBE 1927–2003,* https://liveperformance.com.au/hof-profile/slim-dusty-ao-mbe-1927-2003/, accessed 16 February 2026.
173. The story of Aboriginal country music. National Film and Sound Archive, https://www.nfsa.gov.au/collection/curated/asset/82983-buried-country, accessed 16 February 2026.
174. Women find freedom in Australian country music (2015) Sydney Morning Herald, https://www.smh.com.au/entertainment/music/women-find-freedom-in-australian-country-music-20150122-12l74m.html, accessed 16 February 2026.
175. Lumsden, F. (n.d.) *Awards and biography*, https://en.wikipedia.org/wiki/Fanny_Lumsden, accessed 28 April 2026.
176. Jackson, M. (n.d.) *Awards and biography*, https://en.wikipedia.org/wiki/Max_Jackson, accessed 28 April 2026.
177. Britt, C. (n.d.) *Biography,* https://catherinebritt.com/biography, accessed 28 April 2026.
178. The McClymonts (n.d.) *Awards and career overview,* https://en.wikipedia.org/wiki/The_McClymonts, accessed 28 April 2026.

Kirsty Lee Akers performs at Groundwater Country Music Festival, Gold Coast 2023. Credit: Bianca Holderness.

Streaming as a driver of expansion

More recently, country music in Australia is demonstrating sustained audience growth, supported by accelerating streaming consumption, generational diversification and a resilient live performance culture. Recent national genre reporting identifies country as one of the fastest-growing music categories in the Australian market, with listenership increasing by 28% between 2023 and 2024.[179] In 2023, country represented 4.9% of overall national listening share, with further expansion recorded into 2024.[180] This growth rate exceeds that of several other major genres over the same period, indicating structural rather than cyclical change in audience behaviour.

Streaming platforms are central to this expansion. Reporting drawing on Spotify data indicates that Australian country streams have increased by 115% since 2023.[181] Australia has also been identified as one of the largest country music markets globally, ranked third after the United States and Canada. New Country Music Association data presented at the association's first International Summit in March 2026 reported that the US leads the market with 129 billion streams and an 8.5% market share of on-demand streams, Canada matched the same 8.5% market share with 13 billion streams, and Australia achieved a 5.8% market share producing 6.6 billion streams.[182] This reflects both strong catalogue consumption and sustained engagement with Australian country music in Australia. While country has historically been associated with regional audiences, streaming patterns suggest a pronounced metropolitan concentration, with 92% of country streams attributed to urban areas.[183]

Discovery pathways and demographic shifts

Discovery pathways are increasingly algorithmic and playlist-driven. Industry commentary from the recent inaugural County Music Associations' International Summit reinforced this dynamic, with industry representatives noting that listeners frequently discover country through mixed playlists that carry no country label.[184] This cross-genre playlist exposure is increasingly regarded as a primary mechanism for audience acquisition beyond traditional country listeners. The prominence of curated flagship playlists, mood-based programming and cross-genre placement has expanded country's reach beyond traditional audiences, particularly where production styles intersect with mainstream pop and contemporary adult formats. Social and short-form video platforms have also contributed to discovery, reinforcing catalogue longevity and supporting breakout tracks across age cohorts.[185]

Demographic change is a defining feature of current growth. *Connect by Live Nation's Step Into Country* found that 68%of surveyed Gen Z listeners are consuming more country music than previously, and that 78% of Australian music fans now consider the genre mainstream.[186] These indicators suggest generational renewal alongside attitudinal shifts regarding country's cultural positioning. Younger listeners are increasingly engaging through streaming and social platforms. The *Step Into Country* report also found that 92% of country music streams in Australia originate from metropolitan areas, indicating that urban-based consumption accounts for the overwhelming majority of listening activity.[187]

179. Varvaris, M. (2025) *Data reveals country is Australia's fastest-growing genre*. Countrytown, https://countrytown.com/news/data-reveals-country-is-australia-s-fastest-growing-genre/EQWvBQQHBgk/03-03-25, accessed 16 February 2026.
180. Varvaris, M. (2025) *Data reveals country is Australia's fastest-growing genre*. Countrytown, https://countrytown.com/news/data-reveals-country-is-australia-s-fastest-growing-genre/EQWvBQQHBgk/03-03-25, accessed 16 February 2026.
181. Eliezer, C. (2025) *Australia's $1B country music sector offers great strides for live*. Pollstar, https://news.pollstar.com/2025/09/04/australias-1b-country-music-sector-offers-great-strides-for-live-australia-new-zealand-special-2025/, accessed 16 February 2026.
182. Luminate and Official Charts Company (2026) *Country music global streaming data*, presented at the Country Music Association International Summit, London, 11 March 2026. Cited in Henderson, L. (2026) *'Country music isn't American, it's global'*, IQ Magazine, 12 March.
183. Kennedy, J. (2025) *Australia's country music explosion, driven by Gen Z*. Rolling Stone Australia, https://au.rollingstone.com/music/music-news/australias-country-music-explosion-83117/, accessed 16 February 2026
184. Henderson, L. (2026), *Country music isn't American, it's global*, IQ Magazine, 12 March, https://www.iqmagazine.com/2026/03/country-music-isnt-american-its-global/, accessed 7 April 2026.
185. Newton, D. (2025) *Valuing Australian Country Music 2025*. Country Music Association of Australia, https://country.com.au/images/CENSUS-2025/2025_CENSUS_-_FULL_REPORT.pdf, accessed 16 February 2026.
186. Connect by Live Nation (2025) *Step Into Country*. Future Sound Research Series. Sydney: Live Nation Australia & New Zealand, https://www.connectbylivenation.com.au/insights/step-into-country, accessed 7 April 2026.
187. Connect by Live Nation (2025) *Step Into Country*. Future Sound Research Series. Sydney: Live Nation Australia & New Zealand, https://www.connectbylivenation.com.au/insights/step-into-country, accessed 7 April 2026.

Minor Gold.
Credit: Rick Clifford.

Despite expanded demand, Australian repertoire operates within a recorded music environment characterised by strong international dominance. A review of the ARIA Country Albums Charts across 2024 and 2025 demonstrates significant representation by US and other international artists in leading chart positions.[188]
This reflects broader findings from national research into Australian music discoverability, which identify structural challenges for domestic repertoire within globally weighted streaming systems.[189] In qualitative feedback from the *2025 Valuing Australian Country Music Census*, artists and industry respondents highlighted competition with US releases, limited playlist access and algorithmic visibility constraints as ongoing concerns.[190]

Live performance infrastructure and sustainability

Live performance remains central to country music's cultural and professional infrastructure. *The Tamworth Country Music Festival* continues to function as the anchor event of the national country calendar and is widely described as the largest and longest-running country music festival in the Southern Hemisphere.[191] Attendance estimates commonly exceed 300,000 across the festival period.[192] The event incorporates the *Golden Guitar Awards* and provides a high-visibility platform for established and emerging artists, reinforcing career development pathways alongside audience engagement.

188. Australian Recording Industry Association (ARIA) (2024) *ARIA Top 50 Country Albums – End of Year 2024*, https://www.aria.com.au/charts/2024/country-albums-chart, accessed 7 April 2026; Australian Recording Industry Association (ARIA) (2025) *ARIA Top 100 Country Albums – End of Year 2025*, https://www.aria.com.au/charts/2025/country-albums-chart, accessed 7 April 2026). Note: the 2025 end-of-year chart reflects an anomaly in calculation methodology. In September 2025, ARIA introduced new chart rules intended to promote new music consumption and remove barriers for Australian repertoire, meaning the 2025 chart covers two different calculation periods. ARIA has noted a marked increase in Australian acts appearing on charts since the rule change, though the full effects will not be reflected until the 2026 end-of-year chart.
189. Creative Australia (2024) *Listening In Research Series*, https://creative.gov.au/research/listening-research-series/, accessed 16 February 2026.
190. Newton, D. (2025) *Valuing Australian Country Music 2025*. Country Music Association of Australia, https://country.com.au/images/CENSUS-2025/2025_CENSUS_-_FULL_REPORT.pdf, accessed 16 February 2026.
191. Tamworth Country Music Festival (2026) *Festival Overview*, https://www.tcmf.com.au/get-started, accessed 16 February 2026.
192. Destination NSW (2025) *First Wave of Artists Revealed for the Toyota 54th Tamworth Country Music Festival*, https://media.destinationnsw.com.au/media-releases/first-wave-artists-revealed-toyota-54th-tamworth-country-music-festival, accessed 16 February 2026.

The broader national festival circuit also supports the genre's growth and visibility, including *CMC Rocks* Queensland, Australia's largest international country music festival which attracts major global and domestic acts and audiences of over 20,000.[193] The inaugural *Countrytown Music Awards*, produced by *The Music*, were also launched in 2024 as a new industry event recognising excellence in Australian country music, held on the Gold Coast immediately prior to *CMC Rocks*.[194] Positioned alongside a major international festival, the awards provide an additional platform for industry recognition and visibility, complementing established accolades such as the *Golden Guitar Awards*.

Newer events such as *Groundwater Country Music Festival* on the Gold Coast and *Riding Hearts Festival* in Melbourne further extend this ecosystem, offering free, accessible programming (in the case of Groundwater) and curated line-ups that blend mainstream and emerging artists.[195, 196] These festivals contribute to a distributed live performance network that underpins audience development, touring circuits, and industry exposure for Australian country music.

Beyond festivals, country music maintains one of Australia's most active regional touring circuits, spanning community venues, theatres and outdoor festivals, a legacy built on the extensive regional circuits pioneered by artists like Slim Dusty in earlier decades. However, this infrastructure operates within a live sector facing sustained financial and operational pressure.[197, 198]

Country artists describe live performance as a principal income source, supplemented by merchandise and direct-to-fan activity, but note that streaming revenue is insufficient in isolation.[199] Export ambition, particularly toward the United States, is also consistently identified as a strategic priority, reflecting both market scale and genre alignment.[200] A growing number of Australian artists are relocating to Nashville, drawn by greater touring frequency, larger audiences, and proximity to European markets. For many, the city also offers access to a professional songwriting economy, including Music Row's publishing infrastructure, that is difficult to replicate in Australia. [201]

Overall, current indicators position country music as a growth genre within the Australian music landscape, building on a rich heritage of bush storytelling, Indigenous innovation, pioneering live circuits, and strong female contributions. New platforms, such as *The Ladies Love Country* podcast, launched in 2025, provides an additional platform for country music in Australia, featuring artist interviews, festival coverage and music discovery for Australian fans.[202] In addition, streaming acceleration, youth engagement and metropolitan listening concentration demonstrate widening audience reach. At the same time, the dominance of international repertoire within recorded formats and structural pressures within the live sector present ongoing challenges for the genre.

193. CMC Rocks (n.d.) *About CMC Rocks QLD*, https://www.cmcrocks.com, accessed 28 April 2026.
194. *The Music* (2024) *Countrytown Music Awards launched ahead of CMC Rocks*, https://themusic.com.au/industry/countrytown-music-awards-announced, accessed 28 April 2026.
195. Groundwater Country Music Festival (n.d.) *About,* https://groundwatercmf.com, accessed 28 April 2026.
196. Riding Hearts Festival (n.d.) *Festival information,* https://www.ridingheartsfestival.com, accessed 28 April 2026.
197. University of South Australia (2025) *Regional live music venues burnt out by industry struggles,* https://www.unisa.edu.au/media-centre/Releases/2025/soundcheck-for-survival-regional-live-music-venues--burnt-out-by-industry-struggles/, accessed 16 February 2026.
198. Live Performance Australia (2024) *Live Performance Industry in 2024 Report.* Available at: https://reports.liveperformance.com.au/ticket-survey-2024/pdf/2024/Live%20Performance%20Industry%20in%202024%20States%20AUSTRALIA%20Final.pdf, accessed 16 February 2026.
199. Newton, D. (2025) *Valuing Australian Country Music 2025.* Country Music Association of Australia, https://country.com.au/images/CENSUS-2025/2025_CENSUS_-_FULL_REPORT.pdf, accessed 16 February 2026.
200. Newton, D. (2025) *Valuing Australian Country Music 2025.* Country Music Association of Australia, https://country.com.au/images/CENSUS-2025/2025_CENSUS_-_FULL_REPORT.pdf, accessed 16 February 2026.
201. Crawford, R 2026, *'Why Australian musicians are flocking to Nashville',* Rolling Stone, 26 April, https://www.rollingstone.com/music/music-features/australia-country-music-singers-coming-to-nashville-1235551961/, accessed 30 April 2026.
202. Ladies Love Country 2025, Ladies Love Country Podcast, ladieslovecountry.com, viewed May 17 2026.

4.4 Spotlight 4: Participation and pathways in music education

Key statistics:

56%

of arts-educated Australians attend music events as adults, compared to just 36% of those who received no arts education.[203]

29%

of arts-educated Australians attend music events at least monthly, compared to 24% of those without an arts education background.[204]

21%

of arts-educated Australians actively participate in music as adults, more than double the rate of those without arts education (8%).[205]

54%

of all music organisations in Australia provide music instruction and delivery (to students).[206]

203. Creative Australia (forthcoming), *Results of the National Arts Participation Survey.*
204. Creative Australia (forthcoming), *Results of the National Arts Participation Survey.*
205. Creative Australia (forthcoming), *Results of the National Arts Participation Survey.*
206. National music education mapping conducted as part of the research for this report, based on publicly available information and the value chain classifications used as part of this analysis.

Musica Viva Australia's Music Education Residency Program at Furlong Park School, VIC. Credit: James Henry.

Music education is both a sector in its own right and a critical input to the broader music industry. It produces the performers, composers, educators, producers and technical specialists who sustain the industry's output, and it forms the audiences who attend live events, purchase recorded music and engage with Australian artists over their lifetimes. The *Australian Music Education Ecosystem* report[207] provides a detailed economic analysis of the music education sector's direct contribution including its revenues, employment and gross value added. This spotlight examines music education through an economic lends and considers what current participation tells us about the future talent and audience base, the skills it supplies beyond the music industry itself, and what the current trends signal about the pipeline ahead.

The evidence points to a sector in tension. Music education participation for school aged student is broad and whileat the household level it growing, the growth is generally through participation outside of class. Secondary school and tertiary enrolments are declining, pathways from education to professional practice remain fragmented, and access to quality music education is uneven across geography and socioeconomic circumstance.

These trends carry direct economic implications for talent supply, for future audience development, and for the broader creative workforce.

Participation is high at school age and strongly predicts adult music consumption

Three quarters of Australians (75%) were taught an art form during their school-age years, according to the forthcoming *2025 National Arts Participation Survey.*[208] Music is the most common art form learned, both at school (48%) and outside of school (23%). Among parents with children currently under 18, 86% report at least one child learning an art form, with music again the most common art form learned at school (47%) and outside it (23%).[209]

The economic significance of this participation extends well beyond cultural value. Adults who received arts education as children are significantly more likely to be active music consumers. The forthcoming *2025 National Arts Participation Survey* data shows that Australians taught an art form during school-age years are more likely to listen to recorded music (96% compared to 86% of those who were not), attend live music events more frequently, and engage with arts content online (63% compared to 33%).[210]

Parents whose children are currently learning an art form outside of school are also significantly more likely to attend live arts events themselves (93% compared to 73%), to save specifically for events (60% compared to 39%), and to prioritise purchasing tickets despite financial pressure (46% compared to 25%).[211] Music education is not only producing the next generation of musicians, it is producing the next generation of audiences. There is a direct economic line from education participation today to concert attendance, streaming subscriptions and live event spending in the years ahead.

207. Creative Australia, 2026, *The Australian Music Education Ecosystem:* More than notes on a page.
208. Creative Australia (forthcoming), *Results of the National Arts Participation Survey.*
209. Creative Australia (forthcoming), *Results of the National Arts Participation Survey.*
210. Creative Australia (forthcoming), *Results of the National Arts Participation Survey.*
211. Creative Australia (forthcoming), *Results of the National Arts Participation Survey.*

The secondary and tertiary pipeline is narrowing

Set against the primary school picture, secondary school and tertiary enrolment data tells a different story. Nationally, Australian Tertiary Admission Ranking (ATAR) arts enrolments fell 21% between 2015 and 2023, with declines of 45% in Queensland and 44% in Western Australia.[212] Year 12 arts enrolments fell from 22.2% to 15.8% for male students and from 37.6% to 26.9% for female students between 2012 and 2022.[213]

These declines do not reflect falling student interest in music, rather, they reflect a structural ATAR disincentive. Music is scaled down relative to STEM subjects in most jurisdictions. This means that a student achieving 100% in Year 12 music may have that result reduced in the final ATAR calculation, while lower raw scores in mathematics or physics are scaled upward.[214]

Research consistently identifies ATAR scaling as a primary driver of secondary school music attrition, with students actively counselled by school coordinators to drop music in order to protect their rankings.[215]

At the tertiary level, the 2021 Job-Ready Graduates (JRG) package significantly increased student contributions for arts and humanities degrees, reducing enrolments in music and creative arts programs and contributing to course closures. A Senate inquiry into legislation to reverse those increases, the *Higher Education Support Amendment (Reverse Job-Ready Graduates Fee Hikes and End $50k Arts Degrees) Bill 2025*, was underway at the time of publication and due to report in June 2026.[216]

Together, these pressures create a structural gap between high school-age student participation captured in the forthcoming *2025 National Arts Participation Survey* data and the far smaller number of students carrying that engagement through to senior school and tertiary study, precisely at the stage where professional skills development begins.

Participation data does not capture quality

Participation figures alone do not reflect the quality of music education delivered. Primary research conducted in South Australia (2024) and New South Wales (2025) by the Australian Council for Educational Research (ACER) confirms significant delivery gaps.[217] In South Australia, a survey of 115 government primary schools found that over a third of teachers do not teach music regularly, and 65% of teachers received fewer than nine hours of music education preparation in their initial teacher education (ITE).[218] In New South Wales, a survey of 1,603 government primary schools found that more than 70% of teachers use pre-recorded video rather than delivering music live, and 82% reported their ITE did not equip them to teach music to Year 6 level.[219]

→ Read more about music education teacher training in the More than notes on a page Australian Music Education Ecosystem report

The quality of early music education, not only its existence, determines whether students develop the engagement and capability to continue into secondary and post-school pathways.

212. ACARA data as reported in: Limelight Arts (2026), *'Arts education in freefall'*, 13 February 2026, limelight-arts.com.au, accessed 8 April 2026; Capture Magazine (2026), *Creative arts enrolments fall as policies begin to bite*, February 2026, capturemag.com.au, accessed 8 April 2026.
213. ACARA data as reported in: Limelight Arts (2026), *'Arts education in freefall'*, 13 February 2026, limelight-arts.com.au, accessed 8 April 2026; Capture Magazine (2026), *Creative arts enrolments fall as policies begin to bite*, February 2026, capturemag.com.au, accessed 8 April 2026.
214. National Advocates for Arts Education (NAAE) (2024), ATAR scaling data, as cited in Tolmie, D et al (2024), *An Australian Study of Transferable Music Skills*, Queensland Conservatorium Griffith University, research-repository.griffith.edu.au.
215. Tolmie, D, Hicks, J, Segrave, S and Loughlin, K (2024), *An Australian Study of Transferable Music Skills: The Impact of Music Education on the Workforce*, Queensland Conservatorium Griffith University, Brisbane, research-repository.griffith.edu.au, accessed 8 April 2026; School News Australia (2019), *The majority of music students drop out before the end of high school – is the ATAR to blame?*, December 2019, school-news.com.au, accessed 8 April 2026.
216. Senate Education and Employment Legislation Committee (2025–2026), Inquiry into the Higher Education Support Amendment (Reverse Job-Ready Graduates Fee Hikes and End $50k Arts Degrees) Bill 2025, Parliament of Australia, Canberra. Due to report 25 June 2026.
217. Australian Council for Educational Research (ACER) (2024–2025) *Music: Right from the Start – National and state findings*, https://www.acer.org/au/research/projects/music-right-from-the-start, accessed 8 April 2026.
218. Australian Council for Educational Research (ACER) (2024) *Music: Right from the Start – South Australia report*, https://www.acer.org/au/research/projects/music-right-from-the-start, accessed 8 April 2026.
219. Australian Council for Educational Research (ACER) (2025) *Music: Right from the Start – New South Wales report*, https://www.acer.org/au/research/projects/music-right-from-the-start, accessed 8 April 2026.

A Professional Development class being given at Ainslie Arts Centre, ACT, 2025.
Credit Jamila Toderas.

Pathways from education to professional practice remain fragmented

Australia has significant infrastructure that connects music education to professional entry. The Australian Youth Orchestras Network (AYON) coordinates classical pathways nationally with their state and territory member organisations supporting nearly 3,000 young musicians through weekly programs (including 60 ensembles), and more than 1,800 young musicians through school holiday workshops, camps, tours and mentorship programmes in 2025.[220] Contemporary music pathways are supported by organisations such as The Push (VIC) and a range of for-profit providers offering training, song-writing programs and industry mentoring.[221]

While MusicNT's R*emote Music Rangers Program* places community-based Indigenous workers across NT communities to support local musicians, assist with funding applications, provide production training, and record music oral histories.[222]

Large-scale school showcases including NSW Schools Spectacular, Victorian State Schools Spectacular, Queensland's Fanfare festival and South Australia's Primary Schools Music Festival, provide professional-standard exposure and act as feeders into national youth and contemporary programs.[223]

Music examinations provide a further structural bridge. The Australian Music Examinations Board (AMEB) assesses more than 100,000 candidates annually, and qualifications from the six major examining bodies (AMEB, Trinity College London, ABRSM, LCM, ANZCA and St Cecilia) contribute to university entry and, in some cases, credit toward tertiary music degrees.[224]

Despite this infrastructure, the pathway from school to professional practice in Australia is fragmented. Transitions between school, community, VET, TAFE and tertiary contexts are poorly articulated, and geographic inequity compounds the problem. Recent music education sector mapping found that 63% of identified music education organisations are located in VIC or NSW.[225] The NT and Tasmania are thinly represented across most categories of provision, and regional and remote students consistently have the fewest structured pathway opportunities.

The Creative Australia and Service and Creative Skills Australia *Creative Workforce Scoping Study* (2025) identified skills shortages and on-the-job learning as persistent challenges across the creative workforce, noting that formal education pathways do not always align with industry needs.[226] Research by RMIT University and the Victorian Music Development Office (VMDO) on music industry workforce skills found that music workers often acquire skills on-the-job, that professionals may not recognise the gaps they have, and that the industry would benefit from a more systematic approach to training that integrates transferable skills with practical expertise.[227]

220. Information provided by the AYON members related to actual and projected 2025 figures.
221. Creative Australia (2026), *The Australian Music Education Ecosystem:* More than notes on a page.
222. MusicNT n.d., Remote Music Rangers Program, MusicNT, musicnt.com.au/program/remote-music-rangers-program/, accessed 17 May 2026.
223. Creative Australia (2026), *The Australian Music Education Ecosystem:* More than notes on a page.
224. Creative Australia (2026), *The Australian Music Education Ecosystem:* More than notes on a page.
225. Creative Australia (2026), *The Australian Music Education Ecosystem:* More than notes on a page.
226. Creative Australia and SaCSA (2025), *Creative Workforce Scoping Study Report: Addressing the Challenges with Critical Skills and Sustainable Careers.*
227. VMDO and RMIT University (2025), *Research on Victorian music industry workforce skills,* reported in Australian Stage Online (2025), *'New research suggests developing skills for music workers'*, australianstage.com.au, 28 April 2025.

Music education supplies transferable skills across the economy

Music education's contribution to the economy extends beyond the creative industries. Performers, composers, educators and technical specialists are its most visible outputs, but music study also develops human capital that flows into technology, law, finance, health, education and the public sector.

A Griffith University study on transferable music skills, the largest of its kind in Australia, found that sustained music education develops capabilities that map directly onto the skills most in demand in a changing labour market: creativity, adaptability, collaboration, cognitive discipline and the ability to perform under pressure.[228] The World Economic Forum's *Future of Jobs Report 2025* identifies creativity and analytical thinking as the two most valued workforce skills for the decade ahead, and positions resilience and a growth mindset as increasingly important hiring differentiators.[229]

Music develops these capacities through practice. Sustained instrumental study builds self-regulation and discipline, while ensemble performance requires active listening, responsiveness and collaboration. Performance assessment builds composure and recovery under pressure, while composition requires creative problem-solving and iterative refinement. Declining investment in music education, including the ATAR scaling penalty and the reduction of specialist primary school music teachers, risks reducing the supply of these capabilities to the broader workforce at a time when demand for them is highest.[230]

Today's participation shapes tomorrow's market

The relationship between childhood music education and adult music consumption is one of the most robust findings in the *2025 National Arts Participation Survey* research, and one of the most directly relevant to the music industry's economic future. Adults who received arts education as children are substantially more active music consumers across every measure.

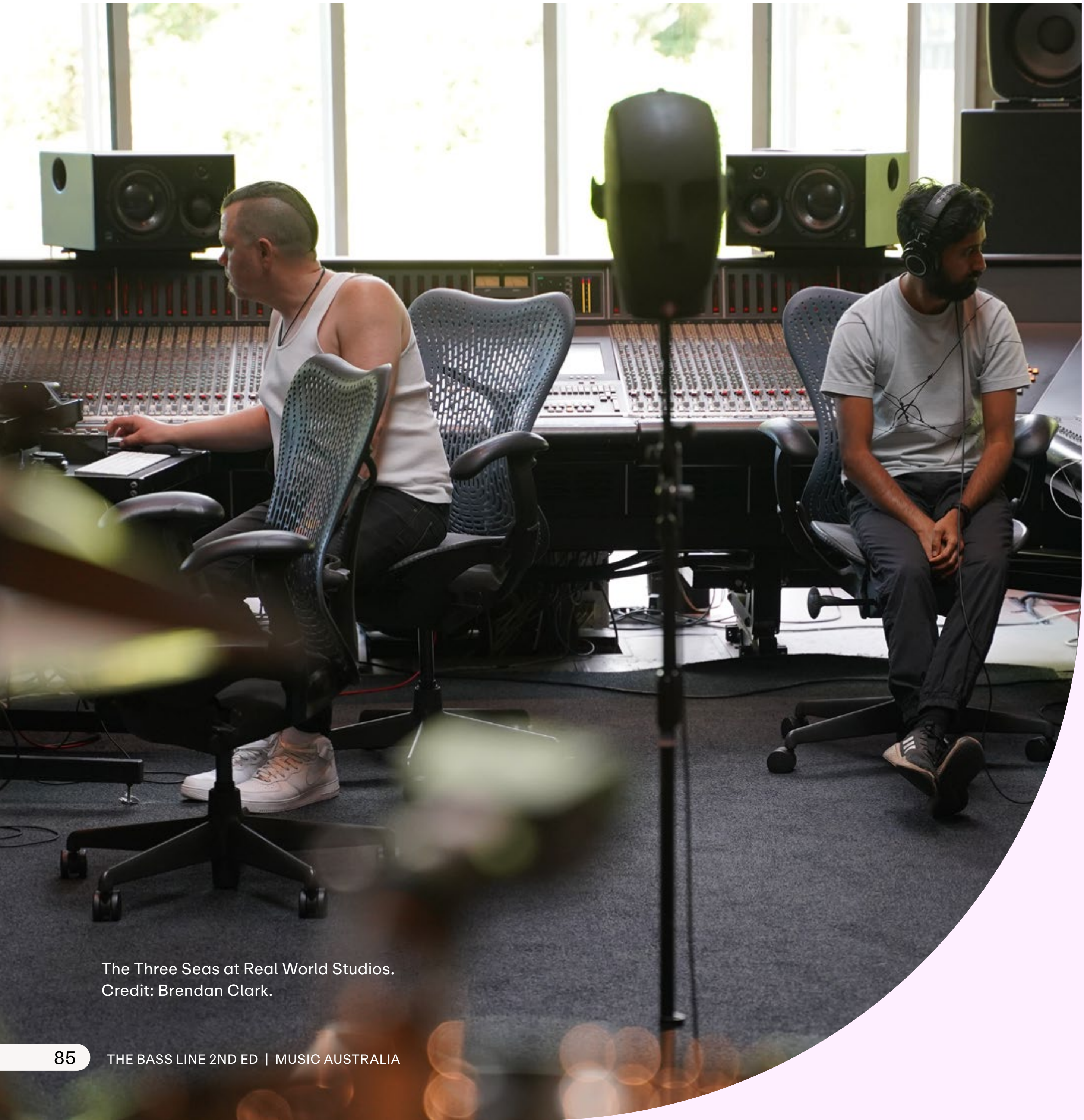
The intergenerational pattern reinforces this finding. More than two-thirds of parents who were themselves taught an art form outside of school are now enrolling their children in extracurricular arts activities (68%).[231] This indicates that music education participation generates a reinforcing cycle of engagement, and that households where music is valued are among the music industry's most active and committed consumer segments.

A sustained decline in secondary school music enrolments and disincentives at the secondary and tertiary level therefore represents a future audience risk as much as a talent pipeline risk. If fewer students carry meaningful music engagement through senior and tertiary settings, the pool of highly music-engaged adults will contract over time.

228. Tolmie, D et al (2024), *An Australian Study of Transferable Music Skills: The Impact of Music Education on the Workforce,* Queensland Conservatorium Griffith University, research-repository.griffith.edu.au.
229. World Economic Forum (2025), Future of Jobs Report 2025, WEF, Geneva, weforum.org.
230. Tolmie, D et al (2024), *An Australian Study of Transferable Music Skills: The Impact of Music Education on the Workforce,* Queensland Conservatorium Griffith University, research-repository.griffith.edu.au.
231. Creative Australia (forthcoming), *Results of the National Arts Participation Survey.*

4.5 Spotlight 5: Emerging issues for artificial intelligence (AI) in Australia's music industry

Artificial intelligence (AI) is reshaping the conditions under which music is created, distributed, monetised and protected. For Australia's music industry this creates both material risks and genuine opportunities. This spotlight summarises the current state of AI in music: observable trends and use cases and less certain future directions, based on currently available secondary research and stakeholder engagement. It maps current and emerging applications and use cases across the music industry value chain, and synthesises creator, businesses, and policymaker perspectives on AI in the music industry in 2026.



The Three Seas at Real World Studios.
Credit: Brendan Clark.

Defining AI

AI is a broad term encompassing a wide and growing range of technologies. This spotlight focusses on two technologies central to AI's application in the music industry: machine learning and generative AI.

Machine learning (ML) involves systems that identify patterns in large datasets to make predictions, classifications, or recommendations. In the music industry, ML has been embedded in operational workflows for well over a decade, including streaming platform recommendation engines, royalty fraud detection systems and sync licensing matching tools. The technology is largely invisible to consumers, and the economic and operational benefits are, in many cases, priced into standard industry practice.

Generative AI produces new content by learning patterns from existing training material. Generative AI applied to creative works is where creator concerns, rights disputes, and policy discussion are concentrated, and where development has been most rapid.

There are three broad categories of use cases for both ML and generative AI as they relate to the music industry:

- To create (in whole or part, or to support the development of) music
- To improve the efficiency and quality of business and operational processes
- Integrated within existing software applications and products.

Highlighting these distinctions is important as public debate and policy attention on AI in the music industry has coalesced in the first domain, where generative AI raises direct and unresolved questions about authorship, consent and compensation. AI applications in business operations and consumer-facing products are in many cases well integrated and uncontroversial. Distinguishing between these domains enables more accurate assessment of where AI applications are embedded and settled, and where impacts may remain contested or uncertain.

Current and emerging applications of AI across the music industry

The way AI is utilised varies across the music industry. This section takes stock of current and emerging applications, focused on specific applications observed in Australia where available. Some globally observed applications may not yet be evidenced in the Australian context. This spotlight does not attempt to estimate the scale of adoption in Australia; rather it attempts to provide a broadly comprehensive account of relevant applications of AI to Australian music and the music industry now and into the future.

Live music performance

Dynamic ticket pricing is the most commercially visible consumer-facing AI application in live music. **ML-based demand modelling** adjusts prices in response to purchase velocity, timing, and audience segmentation data. For promoters and venues dynamic pricing tools support revenue optimisation from ticket sales, however consumer response has been sharply divided. Green Day's 2025 Australian tour attracted sustained media coverage after tickets repriced significantly above face value within hours of going on sale, prompting public debate about the role of AI-driven dynamic pricing in live music.[232] No equivalent regulatory response has been announced in Australia, in contrast to early-stage policy attention in the United Kingdom and European Union.

Generative AI for stage visuals and lighting, and **AI-assisted translation and captioning** for live streams, are emerging applications with growing adoption, particularly for international touring acts.

232. Michael West Media (2025) *'Dynamic ticket pricing: the new normal for live music?'*, Michael West Media, https://michaelwest.com.au, accessed 8 April 2026; Al Jazeera (2025) *'Green Day Australia tour: fans hit by dynamic pricing surge'*, Al Jazeera, https://www.aljazeera.com, accessed 8 April 2026.

Music recording, production, label services, and distribution

The use of **generative AI** and **ML-based tools for mixing, mastering, vocal tuning, and audio restoration** are increasingly visible in music production workflows. AI-generated session parts, arrangements, and marketing content are increasingly deployed by labels and artists – a global survey of over 1,200 users of LANDR's platform found that 87% use AI in some aspect of their workflow, though as a sample drawn from an existing AI tool platform's own user base, this figure is likely to overstate adoption rates among musicians generally.[233] A separate survey of music producers by Tracklib (November 2025) found that only 6% regularly use fully generative tools such as prompt-based song creation, with 82% opposing full AI song generation.

Among producers who do use AI, the dominant use case is assistive rather than generative: stem separation, EQ, and mastering tools are the most widely adopted applications.

The commercial scale of AI music generation platforms had reached significant levels by early 2026. Suno, the leading generative AI music platform, self-reported approximately two million paid subscribers and US$300 million in annual recurring revenue as of February 2026, generating an estimated seven million AI-composed tracks per day, an output equivalent to Spotify's full catalogue approximately every two weeks.[234] Udio, founded by former Google DeepMind researchers, operates at comparable generation volumes. These are global, self-disclosed commercial metrics; they are not independently audited and there is no available data disaggregating adoption, subscriber numbers of usage volumes by territory, including Australia. They are cited here as the available indicator of the commercial scale at which AI music generation is operating.

Stem separation and audio processing tools have achieved substantial adoption at the consumer and prosumer level. As an example, Moises, one of several stem separation platforms, reports more than 70 million registered users globally.[235] In distribution and streaming, **ML-based fraud detection**, which counters attempts to inflate streaming numbers via bots, is now standard practice. Apple Music identified and demonetised approximately two billion fraudulent streams in 2025, protecting an estimated US$17 million in royalties.[236]

AI-assisted A&R analytics and catalogue valuation are adopted across major labels and specialist data providers, using listening and social data to inform signing decisions, release timing, and asset pricing.

Composition, songwriting, and music publishing

AI co-writing tools, melody and lyric generators are increasingly used across composition and songwriting. An estimated 60 million people globally used music creation applications in 2024, and 10% of consumers reported using AI to generate music or lyrics.[237] The *IFPI's Global Music Report* notes that record companies are actively engaging with AI developers to build licensing models around these tools while warning that unauthorised ingestion of copyrighted works for model training remains a serious threat.[238] The sourcing of AI training data from published catalogues without creator consent or compensation is a central legal dispute in music AI globally, and a key driver of recent Australian policy debate. This includes the Productivity Commission's Harnessing Data and Digital Technology inquiry (2025) and the Australian Government's subsequent decision to rule out a text and data mining exception for AI training.[239]

233. LANDR (November 2025) *'How Musicians Use AI: LANDR Study Uncovers How 87% of Artists Really Use AI'*, LANDR, https://www.landr.com/ai, accessed 8 April 2026.
234. TechCrunch (27 February 2026) *'AI music generator Suno hits 2M paid subscribers and $300M in annual recurring revenue'*, TechCrunch, https://techcrunch.com, accessed 8 April 2026; Music Business Worldwide (February 2026) *'Suno: We've hit 2M paid subscribers and $300M annual revenue'*, Music Business Worldwide, https://www.musicbusinessworldwide.com, accessed 8 April 2026.
235. Moises company disclosures; noted in Water & Music partnership announcement (2026).
236. The Hollywood Reporter (2 February 2026), interview with Apple VP of Music Oliver Schusser, The Hollywood Reporter, https://www.hollywoodreporter.com, accessed 8 April 2026. The $17M royalty figure is based on a calculator from law firm Manatt Phelps and Phillips, as cited in the same article.
237. IMS Business Report IMS Ibiza (2025), *IMS Business Report 2025,* IMS Ibiza.
238. IFPI Global Music Report IFPI (2025), *'IFPI: Amidst highly competitive market, global recorded music revenues grew 4.8% in 2024'*, IFPI, https://www.ifpi.org, accessed 8 April 2026.
239. Productivity Commission Productivity Commission (2025), Harnessing Data and Digital Technology, Inquiry Report Nº 111, Australian Government, Canberra. Available at: pc.gov.au, accessed 8 April 2026.

Audio fingerprinting and content identification systems are well established across streaming and user-generated content platforms. AI music generators Suno and Udio have both recently integrated Audible Magic's identification technology to screen uploads for copyrighted material,[240] and the detection of AI-generated tracks and deepfake voice clones is a growing operational priority. Sony Music alone requested the removal of more than 135,000 AI-generated deepfake songs from streaming services in 2025.[241] These developments are largely driven by major-label and platform-level activity; the extent to which smaller and independent Australian publishers have adopted equivalent tools in their own workflows is less clear.

A related concern is the **distribution of fully AI-generated music on streaming platforms**, particularly on functional and mood-based playlists (i.e. study music, ambient, workout). Deezer reported in September 2025 that it was receiving more than 30,000 fully AI-generated tracks per day, accounting for over 28% of daily uploads, and that up to 70% of the streams on those tracks were fraudulent.[242] By January 2026, this had grown to 60,000 tracks per day (39% of daily deliveries), with approximately 85% of streams on AI-generated tracks identified as fraudulent across 2025. From January 2026, Deezer's AI detection technology has been commercially licensed to third parties, with French collecting society Sacem among the first external users. Spotify removed more than 75 million spam tracks in the twelve months to September 2025, noting that such content can dilute the royalty pool and reduce visibility for professional artists.[243]

With AI-generated music projected to account for around 20% of traditional streaming platform revenues by 2028,[244] the growing volume of AI-generated music for commercial distribution is a documented concern for the displacement of human creator revenues.

Synchronisation

Music search platforms using **ML-based audio tagging** and similarity matching allow supervisors to search licensed catalogues by mood, genre, instrumentation, and descriptive language, reducing manual search time. Some automated licensing tools, including The Rights Sync Licensing Clearance Platform (a US-based tool launched in 2024 by The Rights/therights.com and subsequently acquired by Soundstripe, Nashville) have been launched; though there are limited publicly available details on the extent to which ML or generative AI is embedded within their workflows.245

The commercial pressure from AI varies across sync placement tiers. AI-generated tracks are more likely to displace commissioned works where cost and speed outweigh the need for creative depth. Examples include lower-budget background placements including in-store music, social media content, and corporate video. A December 2024 report by the International Confederation of Societies of Authors and Composers (CISAC) projected that by 2028 , AI-generated music could account for around 60% of music library revenues.246 For higher-value placements, such as feature film scores, video game main themes, and television title music, human authorship appears commercially and legally preferred, in part because AI-generated works face unresolved questions of copyright eligibility and licensing.

240. Udio and Audible Magic Music Business Worldwide (2025), *'Udio and Audible Magic team up to tackle rights management in AI-generated music'*, Music Business Worldwide, https://www.musicbusinessworldwide.com, accessed 8 April 2026.
241. Sony Music deepfakes Music Business Worldwide (2026), *'Sony Music has targeted 135,000+ deepfakes of its artists' music for removal from streaming platforms'*, Music Business Worldwide, https://www.musicbusinessworldwide.com, accessed 8 April 2026.
242. Deezer AI-generated music Deezer (2025), *'Deezer: 28% of all music delivered to streaming is now fully AI-generated'*, Deezer, https://www.deezer.com, accessed 8 April 2026.
243. Spotify AI protections Spotify (2025), *'Spotify strengthens AI protections for artists, songwriters, and producers'*, Spotify, https://newsroom.spotify.com, accessed 8 April 2026.
244. CISAC & PMP Strategy CISAC and PMP Strategy (2024), *Study on the Economic Impact of Generative AI in the Music and Audiovisual Industries*, CISAC, Paris. Available at: cisac.org, accessed 8 April 2026.
245. Music Connection Music Connection (2024), *'The Rights launches music clearance platform for sync licensing traffic'*, Music Connection, https://www.musicconnection.com, accessed 8 April 2026.
246. CISAC & PMP Strategy CISAC and PMP Strategy (2024), *Study on the Economic Impact of Generative AI in the Music and Audiovisual Industries*, CISAC, Paris. Available at: cisac.org, accessed 8 April 2026.

Music retail (incl. discovery and consumer-based platforms)

ML-based recommendation systems on streaming platforms are the primary mechanism through which most listeners discover music, and there is growing evidence that these systems structurally disadvantage local artists in English-speaking markets outside the United States. A 2025 report by former Spotify chief economist Will Page, published by the Australia Institute, found that the number of Australian artists in the top 10,000 streamed in Australia fell by 17% between 2021 and 2024, while the stream share of those artists dropped from 12% to 8% (a 30% decline) even as overall Australian recorded music revenue grew.[247] APRA AMCOS reported that the share of locally written or composed music streamed in Australia and New Zealand fell by 31% over five years, to just 9.5% in 2024-25.[248] Research published by Creative Australia in June 2025 found that only 8% of the top 10,000 artists streamed in Australia are Australian, with 56% from the United States.[249]

Research commissioned by the Victorian Music Development Office and published in The Conversation in 2025, analysing 2.27 million tracks across seven English-speaking markets, found that AI-generated playlists on Spotify are significantly less likely than editorial playlists to surface regionally specific music. The study found that 77% of US tracks in the dataset were by established artists, compared to 22% of Australian tracks, meaning the remaining 78% of Australian tracks are structurally less likely to be surfaced by recommendation algorithms that favour established listening patterns.[250] The effect is a compounding disadvantage: algorithms reproduce US listening norms as global defaults, creating a feedback loop that limits discoverability for emerging acts in smaller English-speaking markets.

Music Australia launched the "Ausify Your Algo" campaign during AusMusic Month in November 2025, encouraging Australian listeners to deliberately search for local artists. While streaming algorithms cannot be directly retrained to recognise Australian content by nationality, with platforms using language as a proxy for culture rather than nationality,[251] deliberately searching for and streaming Australian artists generates the behavioural signals that cause recommendation systems to surface more similar content to that individual user. The campaign reflects the industry's recognition that algorithmic bias in discovery is not a peripheral issue but a direct threat to the economic viability of local music ecosystems. Spotify's Prompted Playlist feature, which allows users to generate algorithm-curated playlists using natural-language text prompts, launched in Australia in February 2026.[252] A Commonwealth parliamentary inquiry into live music has recommended that streaming services increase the proportion of Australian content surfaced by algorithms, with the possibility of mandatory requirements if voluntary measures prove insufficient.

> In the artist management, music education, and industry support segments, AI applications are predominantly operational rather than creative. Use cases include data analytics, workflow automation, and administrative tools rather than content generation. Adoption is generally emerging, not yet well documented in Australia, and broadly comparable to AI uptake in equivalent sectors outside music.[253]

247. The Australia Institute The Australia Institute (2025), *Drowned Out in the Stream: Australian Music is in Trouble and Needs Investment,* The Australia Institute, Canberra. Available at: australiainstitute.org.au, accessed 8 April 2026.
248. Music Business Worldwide — APRA AMCOS streams Music Business Worldwide (2025), *'Australia and New Zealand have seen a 31% collapse in streams of local music, APRA AMCOS says',* Music Business Worldwide, https://www.musicbusinessworldwide.com, accessed 8 April 2026.
249. Creative Australia (2025) *Listening In: Insights on Music Discovery and Engagement*, Referencing data from *Luminate 2024, Insights Matter: Music Insights for the Global and Asia Pacific Markets,* September 2024.
250. Malik, M and Morrow, G (2025), *'Is Spotify's AI "killing" Australian music? What we found from analysing more than 2 million tracks',* The Conversation, https://theconversation.com, accessed 8 April 2026.
251. Australia Institute 2025, *Reversing the Decline of Australian Music,* The Australia Institute, Canberra, https://australiainstitute.org.au/report/reversing-the-decline-of-australian-music/\, accessed 21 April 2026.
252. Spotify (23 February 2026) 'Introducing Prompted Playlists', Spotify Newsroom, https://newsroom.spotify.com, accessed 8 April 2026. Prompted Playlist launched in Australia, Ireland, Sweden, and UK on February 23, 2026.
253. The Australia Institute (2025), *Drowned Out in the Stream: Australian Music is in Trouble and Needs Investment,* The Australia Institute, Canberra. Available at: australiainstitute.org.au, accessed 8 April 2026.

Hilary Geddes performing at the 2025 Melbourne International Jazz Festival. Credit: Will Hamilton-Coates.

Artist management

Data analytics platforms such as Chartmetric, Viberate, and Luminate are widely used by management and label teams to track streaming performance, playlist placement, social engagement, and audience demographics, though these are principally data aggregation and visualisation tools rather than AI applications in a meaningful sense. Social media scheduling and content automation tools, **some incorporating generative AI or ML-based features**, are broadly used. More specialised applications, including predictive modelling for release timing and AI-assisted contract analysis, are available as products but there is limited evidence of systematic adoption, particularly among smaller management operations.

Music education

ML-based transcription, notation, and personalised feedback tools are entering music education, with providers including major conservatoria and online platforms integrating these into instrument learning and theory curricula. Generative AI composition tools raise a separate set of questions, particularly around assessment integrity and whether student work can be meaningfully distinguished from AI-assisted output. This debate is consistent with AI adoption pressures across education sectors broadly and is not unique to music.

Industry support, development, and representation

Peak bodies and industry development organisations are engaging with AI tools in their business operations, though documented adoption specific to the music industry is inconsistent. Applications under exploration include metadata reconciliation and rights attribution, member analytics, and administrative automation. AI literacy and capability building is emerging as an organisational function, as peak bodies position members for informed engagement with AI tools and policy processes.

Creator, community and industry attitudes

Responses to the industry survey found mixed perspectives across individuals and businesses in relation to AI, with the two predominant contrasting themes being its threats to incomes and artistry and its potential as a productivity tool. Responses were optional, meaning results cannot be extrapolated with confidence. However, for those who did respond, individuals tended to identify threats and income impacts, including for session fees, composition for advertising and gaming, and background music. In contrast, businesses reported both positive and negative attitudes, though positive attitudes tended to be with businesses of greater scale.

In addition, broader community attitudes, captured through the most recent *2025 National Arts Participation Survey* identified an acknowledgement of the creative benefits of AI, alongside near-universal concern about authenticity, transparency and the threat to artists' livelihoods.

The following section maps attitudes in further detail to illustrate where perspectives on the use of AI across the Australian music industry and community converge and diverge.

Individual creators

The most comprehensive Australian evidence base on creator attitudes towards AI applications in the music industry comes from APRA AMCOS's August 2024 survey of more than 4,200 members.[254] The results present a picture of a creative community that is engaged, largely worried, and increasingly practical in what it is asking for.

82% of creator respondents indicated that AI tools pose a threat to their ability to earn a living from their creative work.[255] 65% assessed the risks as outweighing the opportunities. Yet the same survey found that 54% agreed AI could assist their creative practice in some form, and 38% were already using AI tools.[256] These findings suggest creators can see practical uses for AI in their own workflows while expressing substantial concern about broader systemic effects on livelihoods and rights.

The policy positions from Australian creators are specific and consistent. 97% supported mandatory disclosure obligations for AI-generated content, 95% supported consent requirements before their work is used as AI training data, and 89% of Indigenous creator respondents raised concerns about the cultural appropriation of Indigenous music through AI training processes.[257] These figures have direct bearing on the policy outcomes described in the following section.

Evidence from the industry survey is consistent with this picture. 47% of individual respondents (n=228) and 39% of business and organisation respondents (n=69) identified "technological disruptions (AI/automation)" as a top-three threat to their economic position over the next two years, the second-highest ranked threat in both categories.[258] Unprompted qualitative comments on AI were sparse, suggesting that while the threat is registered, most respondents have not yet experienced specific economic impacts and are not yet in a position to articulate precise mechanisms of harm.

254. APRA AMCOS (2024) *AI and Music: The Australian Creator Perspective*. Sydney: APRA AMCOS, apraamcos.com.au/about-us/news-and-events/ai-in-music-report, accessed 8 April 2026.
255. IFPI (2025), *Global Music Report 2025*, IFPI, London. Available at: ifpi.org/ifpi-global-music-report-2025/, accessed 8 April 2026.
256. APRA AMCOS (2024) *AI and Music: The Australian Creator Perspective*. Sydney: APRA AMCOS, apraamcos.com.au/about-us/news-and-events/ai-in-music-report, accessed 8 April 2026.
257. APRA AMCOS (2024) *AI and Music: The Australian Creator Perspective*. Sydney: APRA AMCOS, apraamcos.com.au/about-us/news-and-events/ai-in-music-report, accessed 8 April 2026.
258. McAtamney & Advisors (2025), *The Bass Line: Australia's Music Industry Economic Survey*, unpublished primary data, McAtamney & Advisors, Sydney.

Business and industry participants

Industry body and commercial operator positions on AI reflect a sector that has moved from general concern toward active navigation and adoption. International consumer research published by the BPI in 2025, drawing on 1,750 UK consumers, found approximately 80% considered human creativity essential in the creation of music, 82% wanted AI-generated music to be labelled as such, and 79% believed AI developers should obtain consent before using recorded music in training datasets.[259] Consumer expectations for transparency and consent are running ahead of regulatory requirements in most markets.

A consumer survey commissioned by Deezer and conducted by Ipsos Digital in October 2025, drawing on 9,000 respondents across eight countries, found that 97% of participants were unable to distinguish fully AI-generated tracks from human-made music in a blind listening test. The same survey found that 80% of respondents wanted AI-generated music to be clearly labelled, and 70% believed AI-generated music poses a threat to musician livelihoods.[260]

Peak bodies and rights management organisations have taken strong public positions. ARIA and PPCA submitted to the Productivity Commission that AI training on copyright-protected content without consent is infringement, and that licensing rather than legislative exemption is the appropriate mechanism for addressing the relationship between rights holders and AI developers.[261] APRA AMCOS's August 2025 update confirmed its position that generative AI companies operating commercially must secure licences from rights holders.[262]

At the commercial level, Universal Music Group's expanded licensing agreement with Meta in 2025 is an example of how major catalogues might be licensed for AI training at scale.[263] Merlin, the digital licensing partner for independent labels and distributors, entered two opt-in AI licensing agreements in 2025–26. The first with ElevenLabs for its Eleven Music model in September 2025 (described as the first deal of its kind) and subsequently with Udio in January 2026, establishing a framework for licensing independent members' repertoire to train AI models while ensuring fair compensation and protections for artists' rights.[264, 265]

Settlement agreements reached in late 2025 between the major labels and AI music generation platforms confirmed both that the legal risks of unlicensed training are real and that licensing is commercially viable where parties are incentivised to reach agreement. Universal Music Group settled with Udio (October 2025) and Warner Music Group settled separately with both Suno and Udio (November 2025), in each case agreeing to establish licensed AI music platforms in 2026. Sony Music Group remains in active litigation against both platforms.[266]

Creative Australia's forthcoming National Arts Participation Survey will include new data on Australians' attitudes towards the use of AI for creative production. This report will be published in June 2026.

259. BPI (2025), *All About the Music 2025: Consumer Research Report*, BPI, London. Available at: bpi.co.uk/all-about-the-music-2025, accessed 8 April 2026.
260. Deezer (12 November 2025) 'Deezer and Ipsos study: AI fools 97% of listeners', Deezer Newsroom, https://newsroom.deezer.com, accessed 8 April 2026. Research partner: Ipsos Digital. n=9,000 across US, Japan, UK, Germany, France, Brazil, Netherlands, Canada.
261. ARIA and PPCA (2025) *Submission to the Productivity Commission: Harnessing Data and Digital Technology.* Sydney: ARIA/PPCA, Available at: aria.com.au/submissions/productivity-commission-2025, accessed 8 April 2026.
262. APRA AMCOS (2025), 'AI and music update — August 2025', APRA AMCOS, Sydney. Available at: apraamcos.com.au/about-us/news-and-events/ai-music-update-august-2025, accessed 8 April 2026.
263. Universal Music Group (2025), 'Meta and Universal Music Group announce expanded global agreement', Universal Music Group, https://www.universalmusic.com, accessed 8 April 2026; Complete Music Update (2025), 'UMG and Meta strike expanded licensing deal', *Complete Music Update*, https://www.completemusicupdate.com, accessed 8 April 2026.
264. Merlin (20 January 2026) *'Merlin and Udio Partner to Advance AI for Independent Music'*, Merlin, https://merlinnetwork.org/merlin-and-udio-partner-to-advance-ai-for-independent-music/, accessed 12 May 2026.
265. Billboard (20 January 2026) *'Udio and Merlin Announce New AI Music Licensing Agreement'*, Billboard, https://www.billboard.com/pro/udio-merlin-ai-music-licensing-deal/, accessed 12 May 2026.
266. UMG/Udio settlement: Rolling Stone (October 2025); Music Business Worldwide (October 29, 2025). WMG/Suno and WMG/Udio settlements: Rolling Stone (November 2025); Billboard (November 25-26, 2025); TechCrunch (November 2025). Sony active litigation: Billboard (2025-2026 coverage).

Adrian Dzvuke at Music Matters Live 2025, Singapore with Sounds Australia. Credit: Hasyir Ibrahim.

The policy environment

The Australian Government's policy response to AI and copyright in 2025 built on a process that had been developing since 2023. The Senate Select Committee on Adopting Artificial Intelligence delivered its final report in November 2024, with recommendations including the establishment of a credentialing system for AI-generated content, targeted regulatory reform to prevent misuse of AI in the creative industries, and requirements for transparency from AI platforms about the content used in training their systems.[267]

On 1 April 2026, the Australian Government tabled its response to the Senate Select Committee on Adopting Artificial Intelligence (AI) in the House of Representatives, in which the Government moved away from the Senate Select Committee's recommendation of dedicated AI legislation in favour of a regulatory approach that builds on existing legal frameworks, a position foreshadowed by the release of the *National AI Plan* in December 2025.[268, 269]

The Committee's findings informed the government's subsequent approach to the Productivity Commission recommendations.

267. Senate Select Committee on Adopting Artificial Intelligence (2024) Final Report, Parliament of Australia, Canberra, tabled 26 November 2024, https://www.aph.gov.au/Parliamentary_Business/Committees/Senate/Adopting_Artificial_Intelligence_AI/AdoptingAI/Report, accessed 8 April 2026.

268. Department of Industry, Science and Resources (Australia) 2025, National AI Plan, Commonwealth of Australia, December 2025, https://www.industry.gov.au/national-ai-plan, accessed 13 May 2026.

269. Department of Industry, Science and Resources (Australia) 2026, Australian Government Response: Senate Select Committee on Adopting Artificial Intelligence (AI) Report, Commonwealth of Australia, tabled in the House of Representatives 1 April 2026, https://www.industry.gov.au/publications/australian-government-response-senate-select-committee-adopting-artificial-intelligence-ai-report, accessed 13 May 2026.

The Productivity Commission's inquiry into harnessing data and digital technology became the central domestic policy contest for Australia's creative sectors in 2025. The Commission's interim report, released in August 2025, proposed a text and data mining (TDM) exception to copyright. This would have permitted AI developers to use copyright-protected material for training without consent or compensation in certain circumstances.[270] The proposal drew immediate and sustained opposition from across the creative industries, including from APRA AMCOS, ARIA, PPCA, AMPAL, AAM, AMC and Screenrights, which argued that TDM exceptions had not been adequately assessed for their impact on rights holders and that licensing, not legislative override, was the appropriate path.[271, 272, 273]

The Commission's final report, released in December 2025, rejected the proposed TDM exception, instead recommending a three-year monitoring period to assess whether market-led licensing arrangements were developing at sufficient scale.[274] The Australian Government confirmed it would not proceed with the TDM exception, with Attorney-General Michelle Rowland confirming there would be no TDM exemption from existing copyright obligations. Industry bodies welcomed the outcome.[275]

The Copyright and AI Reference Group (CAIRG), which had been operating since December 2023, was directed to consult on three priority areas: the development of licensing arrangements for use of copyright material in AI training; the application of copyright law to AI-generated outputs; and the establishment of a less costly enforcement pathway, including a potential small claims forum.[276]

No copyright claims related to AI and music have been filed in Australian courts as of the time of writing, in contrast to the substantial US litigation described below; the policy contest in Australia has to date been conducted primarily through regulatory and parliamentary processes.[277]

In April 2026, the Australian Government signed a Memorandum of Understanding with Anthropic, the first formal arrangement under the National AI Plan, covering cooperation on AI safety, economic impact data, and workforce tracking.[278]

270. Productivity Commission (2025) *Interim Report — Harnessing Data and Digital Technology.* Canberra: Australian Government. Available at: pc.gov.au/node/4799.

271. Screenrights (2025), *Submission in Response to the Productivity Commission Interim Report on Harnessing Data and Digital Technology*, Screenrights, Sydney. Available at: screenrights.org/wp-content/uploads/2025/10/Screenrights-Submission-PC-Interim-Report.pdf, accessed 8 April 2026.

272. ARIA and PPCA (2025) *Submission to the Productivity Commission: Harnessing Data and Digital Technology.* Sydney: ARIA/PPCA, Available at: aria.com.au/submissions/productivity-commission-2025, accessed 8 April 2026.

273. Creative Australia 2025, *Harnessing data and digital technology: Creative Australia submission*, submission to the Productivity Commission, 6 June, 06062025_Creative Australia submission_Productivity Commission review.pdf, accessed 21 April 2026

274. Billboard (2025), 'Australia's Productivity Commission rejects AI training data exception in final report', *Billboard*, https://www.billboard.com, accessed 8 April 2026; Productivity Commission (2025), *Final Report — Harnessing Data and Digital Technology*, Australian Government, Canberra. Available at: pc.gov.au/inquiries/completed/digital-technology/report, accessed 8 April 2026.

275. The Guardian (2025), *'Proposal to allow use of Australian copyrighted material to train AI abandoned after backlash'*, The Guardian, 19 December 2025. Available at: theguardian.com, accessed 8 April 2026; Bird & Bird (2025), *'Australia abandons AI training data copyright exception',* Bird & Bird, https://www.twobirds.com, accessed 8 April 2026.

276. Attorney-General's Department (26 October 2025) announcement on copyright and AI, Australian Government, Canberra, https://www.ag.gov.au, accessed 8 April 2026. CAIRG was established in December 2023 and directed to consult on three priority areas in October 2025. Confirmed by Bird and Bird (2025) *'Australia: Update on AI and Copyright'*, https://www.twobirds.com, accessed 8 April 2026, and MinterEllison (2025) legal analysis, https://www.minterellison.com, accessed 8 April 2026.

277. MinterEllison (2025) analysis of AI and copyright in Australia, MinterEllison, Melbourne, https://www.minterellison.com/articles/increased-ai-regulation-final-senate-report-key-takeaways, accessed 8 April 2026.

278. Anthropic (1 April 2026) *'Australian Government and Anthropic sign MOU for AI collaboration',* Anthropic, https://www.anthropic.com/news/australia-MOU, accessed 8 April 2026; Department of Industry, Science and Resources (2026) Memorandum of Understanding between the Australian Government and Anthropic on AI Collaboration, Australian Government, Canberra, https://www.industry.gov.au/publications/memorandum-understanding-between-australian-government-and-anthropic-collaboration-ai-opportunities, accessed 8 April 2026.

Australia's policy process is occurring against a backdrop of more advanced international regulatory development. The European Union's AI Act came into force progressively from August 2025. Obligations on providers of general-purpose AI (GPAI) models, including requirements to publish summaries of training data content and to maintain policies for respecting copyright opt-outs, applied from August 2, 2025. Broader provisions, including mandatory watermarking and labelling of AI-generated content, will apply from August 2, 2026. Penalties for GPAI-related obligations can reach up to 3 per cent of global annual turnover or EUR 15 million (higher penalty tiers apply under other AI Act provisions). Australian platforms and rights holders with European exposure have begun aligning compliance practices accordingly.[279]

The following developments in the EU, US, UK, and elsewhere, do not directly bind Australian rights holders but provide the international context within which Australian policy is developing and against which Australian operators with international exposure are aligning.

In November 2025, the Munich Regional Court issued the first significant European judicial ruling on AI and music copyright. The court held that the memorisation of song lyrics within a large language model constitutes an act of reproduction under German copyright law, and that the defendant could not rely on the text and data mining exception where the memorisation and reproduction of copyright material extended beyond the scope of that exception as the court construed it. The ruling is under appeal.[280]

In the United States, more than 70 separate copyright infringement lawsuits related to AI training data were active by January 2026.[281] Three significant judicial decisions issued across 2025 clarified aspects of the fair use doctrine as applied to AI training, though the law remains unsettled.[282] The US Copyright Office confirmed that works lacking sufficient human authorship do not qualify for copyright protection, a position with direct implications for AI-generated music commercially exploited without human creative input.[283]

The United Kingdom, the closest comparable English-language market to Australia, maintained its existing copyright framework following a consultation that received more than 11,500 submissions. The government's final response, published in March 2026, did not proceed with a commercial text and data mining exception, and the Data (Use and Access) Act 2025 included no AI copyright provisions.[284]

In February and March 2026, Google DeepMind launched Lyria 3 and Lyria 3 Pro, AI music generation tools embedded within its Gemini applications. Gemini has more than 750 million monthly active users, making this by reach the largest single deployment of AI music generation capability to date, though not all Gemini users have active access to the music generation feature.[285]

279. European Parliament and Council of the European Union (2024) Regulation (EU) 2024/1689 of the European Parliament and of the Council (AI Act), Official Journal of the European Union, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32024R1689, accessed 8 April 2026. GPAI model obligations applied from 2 August 2025; broader provisions including mandatory content labelling apply from 2 August 2026. See also EU AI Office (2025) GPAI Code of Practice, https://www.euaiact.com, accessed 8 April 2026.

280. Munich Regional Court I, Case Nº 42 O 14139/24 (11 November 2025), reported in Billboard (November 2025https://www.billboard.com, accessed 8 April 2026; analysed by Bird and Bird (2025) *'GEMA v OpenAI: German Court Rules Against OpenAI',* Bird and Bird, https://www.twobirds.com, accessed 8 April 2026. OpenAI is appealing.

281. Madigan, K. (2026) 'AI copyright lawsuit developments in 2025: A year in review', Copyright Alliance, 8 January. Available at: https://copyrightalliance.org/ai-copyright-lawsuit-developments-2025/ (Accessed: 14 May 2026).

282. IPWatchdog (2025), 'Three landmark AI copyright decisions reshaping the legal landscape', *IPWatchdog*, https://www.ipwatchdog.com, accessed 8 April 2026.

283. US Copyright Office (2025), *Copyright and Artificial Intelligence: Part 3 — Generative AI Training*, US Copyright Office, Washington DC. Available at: copyright.gov/ai/ai-report-part-3.pdf, accessed 8 April 2026.

284. UK Government (18 March 2026) Copyright and Artificial Intelligence: Government Response, Department for Science, Innovation and Technology, London, https://www.gov.uk/government/consultations/copyright-and-artificial-intelligence, accessed 8 April 2026; Data (Use and Access) Act 2025 (UK), https://www.legislation.gov.uk, accessed 8 April 2026.

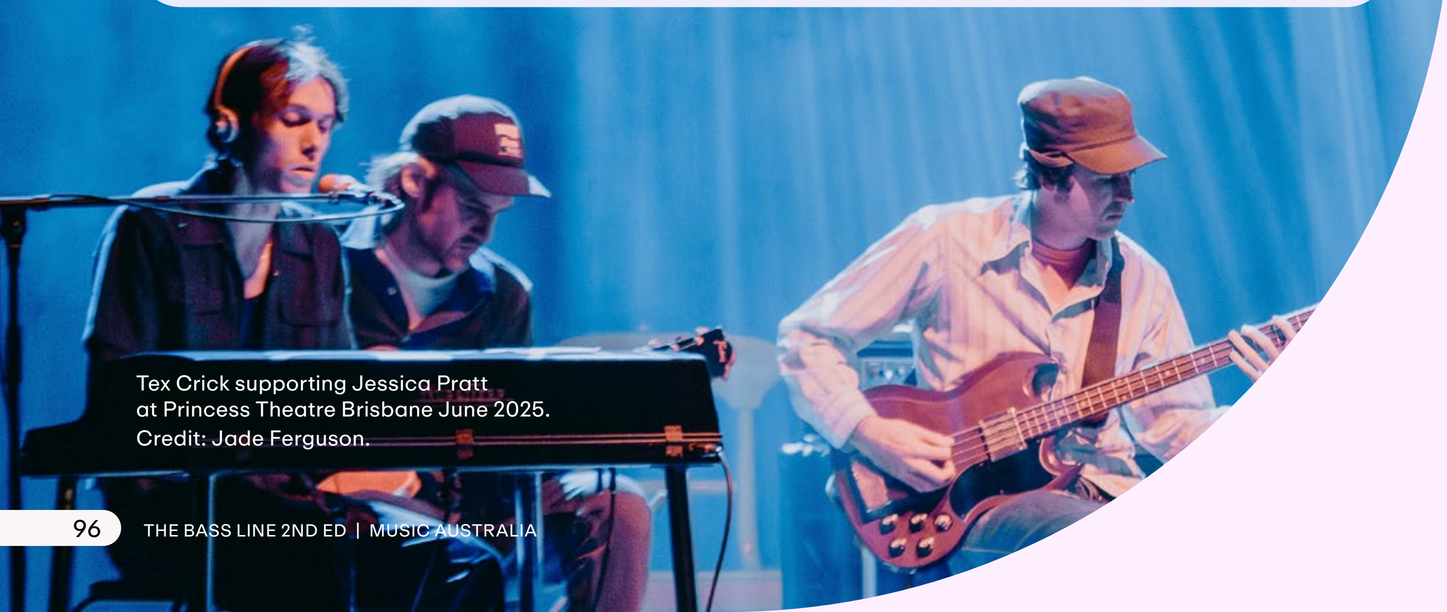
285. Google DeepMind (18 February 2026) *'Lyria 3: Our most expressive music generation model',* Google DeepMind, https://deepmind.google/discover/blog, accessed 8 April 2026; Google AI (25 March 2026) 'Lyria 3 Pro: Music generation in Gemini', Google AI Blog, https://blog.google/technology/ai, accessed 8 April 2026.

Threats and opportunities

The following matrix presents findings across four analytical domains: revenue and market structure; labour and creative roles; rights and revenue flows; and business operations. Each finding includes an assessed confidence level: **observed** findings are evidenced in available data and already occurring; **emerging** findings have early indicators with clear directional momentum but uncertain scale; and **anticipated** findings are plausible based on current trajectory but have limited direct evidence.

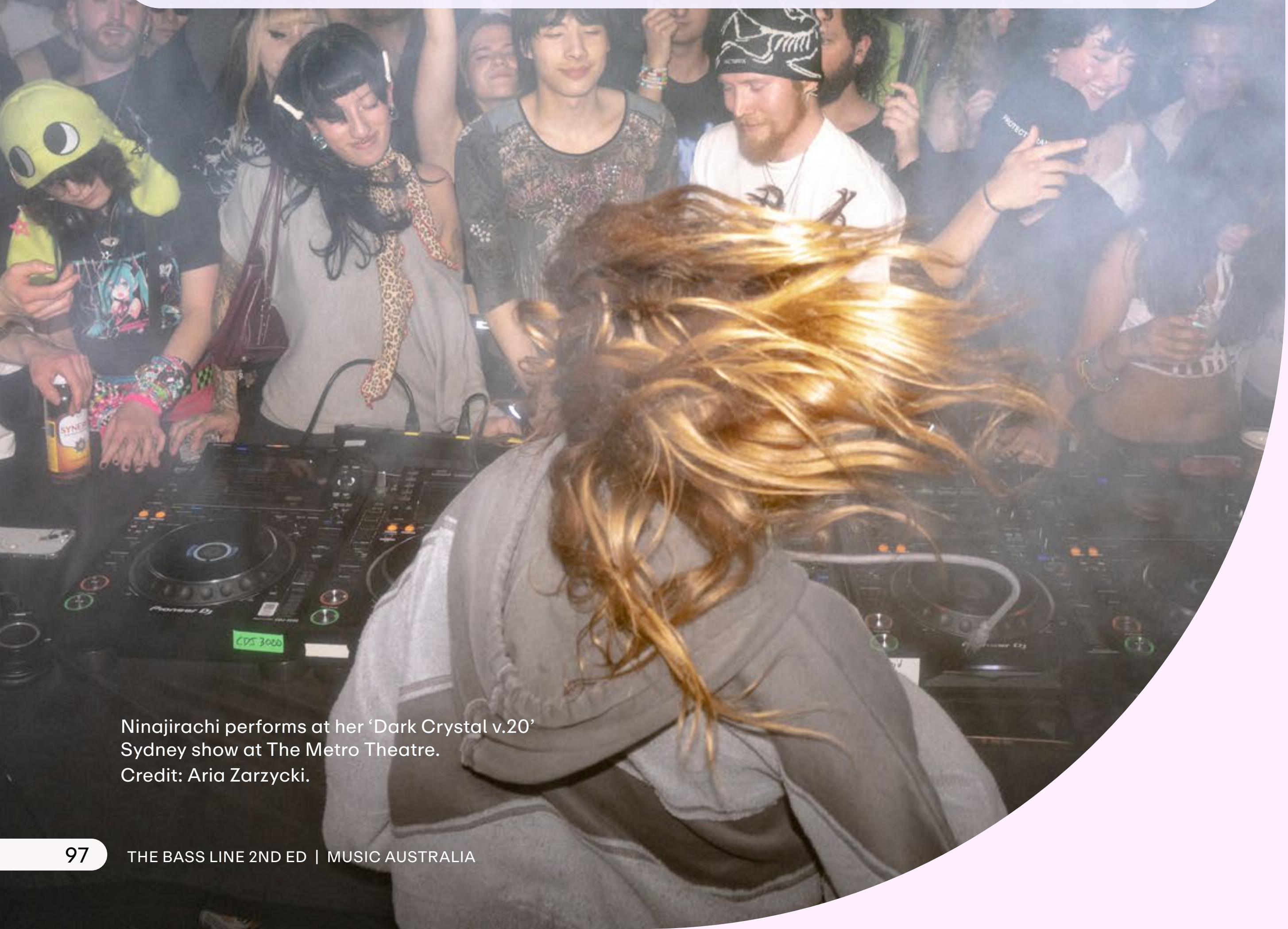
Table 31: Domain findings on AI threats and opportunities for the music industry

Domain	Finding	Segment(s)	Type
Revenue & market structure	**AI music generation at commercial scale.** As of early 2026, the leading AI music generation platform reported approximately two million paid subscribers and USD $300 million in annual recurring revenue, generating an estimated seven million tracks per day. Google DeepMind's Lyria 3, launched February 2026, is embedded across Gemini applications with more than 750 million users. The existence of AI music generation at this commercial scale is an observed fact; its effect on royalty flows is a separate and contested question addressed below.	Recording / distribution	Observed
	Algorithmic discovery bias against local artists. Available research suggests that ML-based recommendation systems on major streaming platforms tend to favour established artists and US-dominated listening patterns, with evidence of reduced discoverability for Australian artists. APRA AMCOS reported that the share of locally written or composed music streamed in Australia and New Zealand fell by 31 per cent over five years to 9.5 per cent in 2024-25. Creative Australia's *Listening In* (June 2025) reported industry data that found only 8 per cent of the top 10,000 artists streamed in Australia are Australian. A parliamentary inquiry has recommended streaming services increase algorithmic surfacing of Australian content.	Distribution / retail	Observed



Tex Crick supporting Jessica Pratt
at Princess Theatre Brisbane June 2025.
Credit: Jade Ferguson.

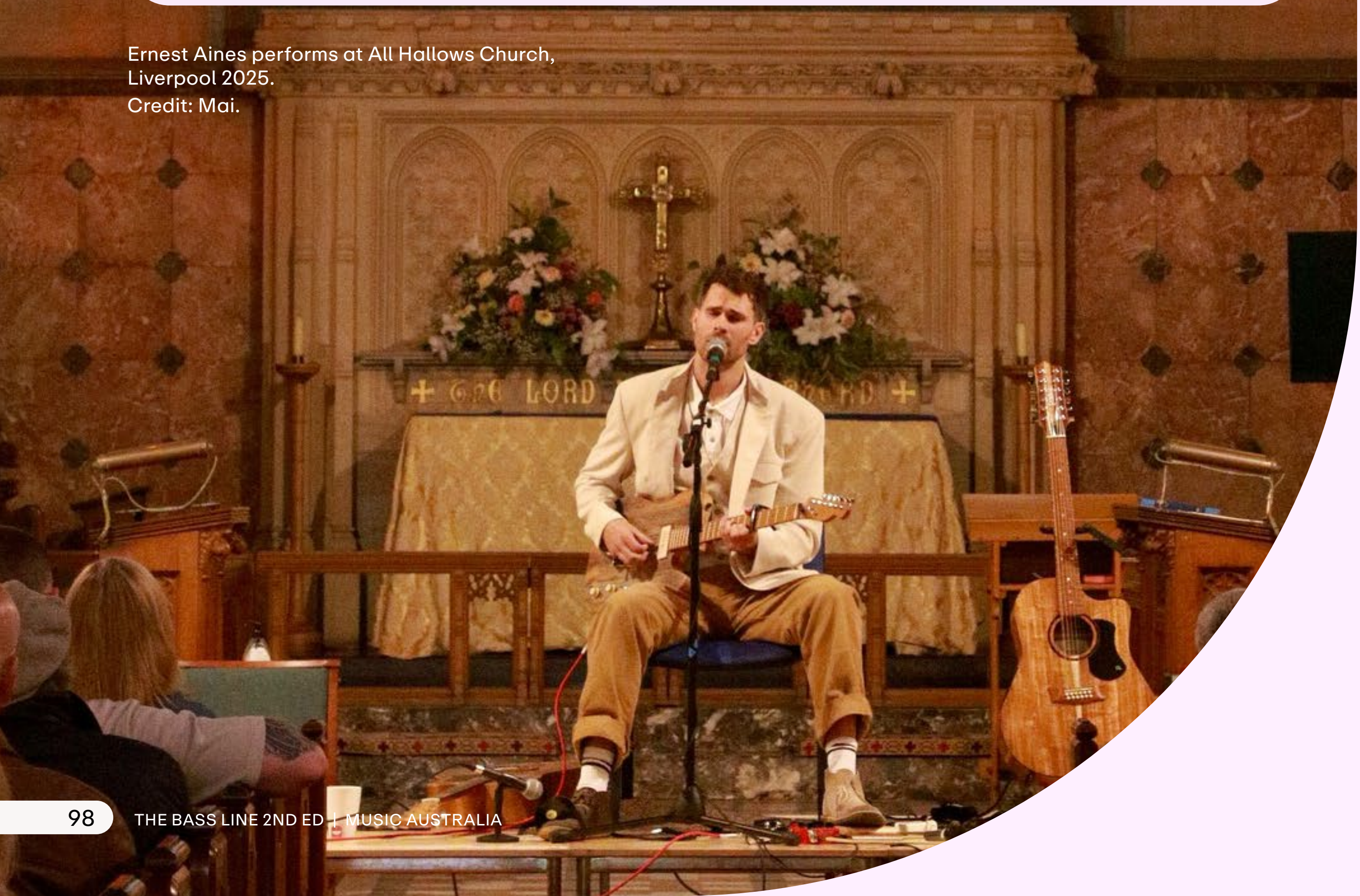
Domain	Finding	Segment(s)	Type
Revenue & market structure	**Sync displacement.** There are early signs that AI-generated and AI-assisted music is creating displacement pressure in sync licensing, particularly for lower-budget placements where cost and speed outweigh requirements for creative distinctiveness. Direct measurement of displacement is limited.	Sync / production	Emerging
	Catalogue licensing price pressure. AI-native music generation services are accumulating licensable content at marginal cost, creating structural price pressure on catalogue licensing and per-track rates in sync and stock music markets.	Publishing / distribution	Emerging
	Dynamic pricing in live music. Dynamic pricing tools are reported to increase live music revenue for events and operators where they are deployed, with gains concentrated in the highest-demand events and among the largest operators. Direct Australian data on revenue outcomes are limited.	Live music performance	Mixed
	Royalty flow displacement. APRA AMCOS projected in 2024 that, without licensing and consent frameworks, AI-generated music could displace approximately $519 million (23 per cent) of Australian music creators' revenues by 2028.	All segments	Emerging



Ninajirachi performs at her 'Dark Crystal v.20' Sydney show at The Metro Theatre.
Credit: Aria Zarzycki.

Domain	Finding	Segment(s)	Type
Labour & creative roles	**Session musician, arranger, and composer displacement.** Session musician, arranger, and composer roles in production and sync may decline as AI-generated parts and arrangements are substituted. This shift is beginning to be observable in production workflows and commissioning patterns.	Production / sync	Emerging
	A&R automation. ML tools are increasingly capable of performing pattern recognition and classification tasks (playlist curation, metadata tagging, and listening-trend analysis) that were previously performed by mid-level industry roles. The extent to which this is reducing headcount rather than augmenting existing roles is not yet well-documented.	Recording / distribution	Emerging
	Emerging AI roles. New roles are emerging around AI tooling, including AI music prompt engineers, AI music supervisors, and training dataset curators, though these roles are fewer, more concentrated, and more technically demanding than the roles they accompany.	All segments	Observed
	Creator AI adoption. 38 per cent of Australian creators are already using AI tools in their practice (APRA AMCOS, 2024), indicating that AI tool use has moved beyond early adopters, with material but not yet majority adoption across the creator workforce.	All / creators	Observed

Ernest Aines performs at All Hallows Church, Liverpool 2025.
Credit: Mai.



Domain	Finding	Segment(s)	Type
Rights & revenue flows	**Training data without consent.** Published catalogues are being used as AI training data without creator consent or compensation, constituting an unresolved transfer of economic value from rights holders to AI developers. This is the central legal dispute in music AI globally.	All segments	Observed
	Royalty pool dilution. Goldman Sachs estimated in its June 2025 music industry analysis that AI-generated content currently accounts for approximately 0.1 per cent of the total recorded music royalty pool, based on informal executive discussions ("industry checks"). Under current regulatory settings, CISAC and PMP Strategy project this displacement to reach 24 per cent of music creators' revenues by 2028 (worst-case scenario, unchanged regulation). The near-term dilution risk from AI-generated content attracting fraudulent streams is significant: Deezer reported approximately 85 per cent of streams on fully AI-generated tracks as fraudulent across 2025.	Distribution	Mixed
	Attribution for AI-assisted works. Royalty attribution for AI-assisted works remains technically and legally under-defined. As the proportion of AI-assisted releases grows, existing attribution frameworks will face increasing strain, particularly in co-writing, session, and arrangement roles.	Publishing / production	Emerging
	Market-led licensing frameworks. Licensing frameworks between AI developers and rights holders are developing, as evidenced by the Merlin/Udio and Kobolt/Udio agreements, UMG/Meta agreement, the UMG/Udio settlement, and the WMG/Suno and WMG/Udio settlements. These create a pathway to consent-based compensation.	All segments	Observed
	Consumer transparency expectations ahead of regulation. Consumer expectations for transparency around AI-generated music are running ahead of regulatory requirements. UK consumer research found that 81.5 per cent of listeners believe AI-generated music should be clearly labelled (BPI, 2025). A Deezer/Ipsos survey (n=9,000, 8 countries, October 2025) found 97 per cent of respondents could not distinguish AI from human music in a blind test; 80 per cent want labelling.	All segments	Observed

Teenage Dads at THE AUSSIE BBQ,
Reeperbahn Festival, 2025.
Credit: Marcelle Bradbeer.

Domain	Finding	Segment(s)	Type
Business operations	**AI detection and disclosure infrastructure.** Streaming platforms have begun building operational infrastructure to identify and label AI-generated content. Deezer's detection system processes 150,000+ daily deliveries and has been commercially licensed to third parties from January 2026. Apple Music launched voluntary Transparency Tags (March 2026). Spotify adopted the DDEX industry standard for AI disclosures in music credits (September 2025). TikTok implemented mandatory AI content labelling via C2PA Content Credentials (January 2025).	Distribution / retail	Observed
	Streaming fraud detection. ML-based streaming fraud detection is now standard across major distribution platforms. Apple Music's demonetisation of approximately two billion fraudulent streams in 2025 demonstrates the scale of the problem and the effectiveness of AI-based solutions in protecting legitimate royalty flows.	Distribution	Observed
	Production cost reduction. AI tools are reportedly reducing production, marketing, and administrative costs for labels, publishers, and independent operators, with reported compression of margins in some roles and improvements in throughput and output quality in others.	Production / management	Mixed
	Major versus independent capability gap. The capability gap between major platforms investing in proprietary AI infrastructure and independent operators is widening. Small businesses and independent artists face structurally higher costs of access to comparable tools, reinforcing existing market concentration.	All segments	Emerging

Wayside.
Credit: Ash Betton.

AI is affecting Australia's music industry in ways that vary substantially by segment, application type, and the regulatory and commercial frameworks that govern its use. The evidence reviewed here points to three clear findings: AI-generated content is entering the market at significant volume and commercial scale; displacement of human-commissioned work is most observable in lower-tier sync and production music; and consumer expectations for AI transparency in creative works are running ahead of current regulatory settings.

The Australian Government's decision to rule out a TDM exception, combined with the emergence of market-led licensing frameworks internationally, reflects a rapidly shifting regulatory environment. Commercial conditions for businesses navigating AI adoption are shifting just as fast. This spotlight will require updating as this environment develops and as longitudinal data on adoption and economic impact becomes available.

Ayda Akbal, studio headshot, 2024.
Credit: Caroline Stucky.

4.7 Spotlight 6:
Local government: enabling, regulating and investing in place

Local government occupies a structurally significant and place-based role within Australia's music ecosystem. While the Commonwealth establishes national funding settings and intellectual property frameworks, and state and territory governments determine planning legislation, liquor licensing and environmental protection regulations, councils are critical in supporting and regulating the local conditions in which grassroots music activity occurs.

The 537 councils across Australia have both a practical and spatial influence on local music ecosystems. Council's manage public space, assess development applications, issue permits, respond to amenity concerns and, in many cases, own and operate performance infrastructure. The cumulative effect of these functions plays a key role in the viability of live performance, festivals, rehearsal activity and community participation. Our research identified more than 100 councils across Australia who actively support local music, including through music strategies and action plans, music events and festivals, funding and industry development programs and resources, planning and regulator activities such as special entertainment precincts to foster live music venues and activities.

At its most visible, local government functions as an enabler of place-based music activity. Councils facilitate access to civic venues, parks and streetscapes; administer event approvals; provide grants and fee waivers; and deliver their own cultural programming. In metropolitan municipalities, this may be framed within creative industries or night-time economy strategies. In regional areas, where alternative infrastructure providers are limited, council-managed facilities and event programming can represent the backbone of local live music ecosystems.

Mornington Peninsula (VIC)

Mornington Peninsula Shire's *Music Plan 2025* sets out actions to strengthen local music networks, participation and industry capability, supported by initiatives such as *Peninsula LIVE,* which provides performance opportunities for local artists across the region. In a regional context, these initiatives sit alongside council-managed venues and community events that ancor live activity.[286, 287]

Councils also operate as regulatory authorities. They administer local planning schemes under state legislation, assess development applications for venues and rehearsal spaces, and determine operating conditions relating to hours, acoustic treatment and patron management. Although liquor licensing and environmental standards are established at state level, councils frequently manage frontline compliance and are the first point of contact in community disputes. In this way, a council's interpretation and application of planning provisions have direct implications for venue sustainability and event feasibility.

Recent national policy activity has reinforced the importance of local regulatory settings in the viability and sustainability of local music activity. The House of Representatives Standing Committee inquiry into the live music industry (March 2025), recommended that governments consider mechanisms such as special entertainment precincts and support for dedicated outdoor live music spaces, highlighting the importance of local planning and infrastructure decisions in sustaining live music activity.

286. Mornington Peninsula Shire (2025) *Music Plan 2025*. Mornington Peninsula Shire, Victoria, https://artsandculture.mornpen.vic.gov.au/files/assets/artsculture/v/1/music/mp-music-plan/music_plan_2025-final.pdf, accessed 5 March 2026.
287. Mornington Peninsula Shire (n.d.) *Peninsula LIVE – Your local sound*, https://artsandculture.mornpen.vic.gov.au/Music/Peninsula-Live-your-local-sound, accessed 5 March 2026.

LION performs at Midsumma Festival, Melbourne 2024.
Credit: Brittany Long.

NSW Special Entertainment Precincts

In New South Wales, Special Entertainment Precincts (SEPs) are established under the *Local Government Act 1993 (NSW)*. Councils may designate a precinct and adopt a precinct management plan that sets sound and trading conditions for the area, providing structured regulatory certainty for venues and clearer expectations for residents. The NSW Government has supported implementation through a SEP Kickstart Grant Program to assist councils with establishment and consultation costs.[288, 289, 290]

Comparable mechanisms also exist in other jurisdictions.

- QLD's Local Government Act 2009 enables councils to establish special entertainment precincts and regulate amplified music noise through local laws.
- WA has implemented a Northbridge Special Entertainment Precinct framework to provide greater certainty for venues, developers and residents.
- ACT has undertaken an Entertainment Precinct Study (2023) to inform potential legislative and planning reform addressing land-use noise conflict.
- VIC addresses land-use interface through an agent-of-change approach embedded within its planning framework, including Clause 53.06 and associated guidance. This policy framework seeks to manage conflict where new noise-sensitive development occurs near existing live music venues, placing responsibility for mitigation on the new development rather than the established venue.

288. NSW Government (n.d.) Special Entertainment Precincts, https://www.nsw.gov.au/business-and-economy/office-of-24-hour-economy-commissioner/vibrancy-reforms/special-entertainment-precincts, accessed 5 March 2026.
289. Australasian Legal Information Institute (AustLII) (n.d.) Local Government Act 1993 (NSW), s 202D Preparation of precinct management plan, https://www5.austlii.edu.au/au/legis/nsw/consol_act/lga1993182/s202d.html, accessed 5 March 2026.
290. NSW Government (n.d.) Special Entertainment Precinct Kickstart Grant Program. Available at: https://www.nsw.gov.au/grants-and-funding/special-entertainment-precinct-kickstart-grant-program, accessed: 5 March 2026.

Merryn Jeann.
Credit: Roxanne Montaro

Gold Coast (QLD)

The City of Gold Coast's *Music Action Plan 2021* links regulatory reform and industry support, delivered in part through Invest Gold Coast and the Gold Coast Music Office. The establishment of the Southport Special Entertainment Precinct provides defined noise and trading parameters to increase operational certainty for venues, while the *Live Music Fund* supports musicians and promoters with targeted grants.[291, 292, 293]

Infrastructure provision represents another central component of local government involvement. Councils commonly own and manage town halls, theatres, community centres, libraries and public open space used for music programming and activity. Councils' approach to asset renewal, capital upgrades and maintenance decisions are critically important in local contexts, as they can influence both the availability of spaces and their technical capability and accessibility. In growth corridors, early planning for cultural infrastructure can determine whether new communities include space for live performance and community music activity.

Music activity is also increasingly linked to economic development and tourism objectives, with a range of Councils integrating live music and festivals into visitor economy strategies, hospitality activation and precinct branding. In metropolitan areas, music often forms part of broader night-time economy frameworks, while in regional settings, it is often embedded within tourism development and community event calendars.

291. City of Gold Coast (n.d.) *Music Action Plan 2021. Gold Coast: City of Gold Coast,* https://www.goldcoast.qld.gov.au/Council/Future-plans-budget/Plans-policies-strategies/Our-plans/Music-Action-Plan, accessed 5 March 2026.
292. Invest Gold Coast (n.d.) *Music Office. Gold Coast: Invest Gold Coast,* https://www.investgoldcoast.com/grow-with-us/music-office, accessed 5 March 2026.
293. City of Gold Coast (n.d.) *Live music – Gold Coast Live Music Fund. Gold Coast: City of Gold Coast*, https://www.goldcoast.qld.gov.au/About-our-city/Arts-culture/Arts-culture-initiatives/Live-music, accessed 5 March 2026.

Ella Ion.
Credit: Olivia Ritchie.

Maribyrnong (VIC)

Maribyrnong City Council's *Live Music Action Plan 2026–2028* positions live music within a broader creative and economic development agenda, outlining support for venues, promoters and artists, including programming initiatives such as Amplify. Its *Festival City* approach and *Festivals and Activation Framework* further integrate funding, public space activation and governance settings to support live performance.[294, 295, 296, 297]

Local government's role frequently extends beyond funding and regulation to coordination and mediation. Councils often convene stakeholders including venues, residents, traders and state agencies, particularly in areas experiencing residential intensification or land-use change. This dual role as both a supporter and regulator is inherent to local government's statutory responsibilities. Councils promote cultural and economic activity while also administering compliance and amenity frameworks. In practice, tensions are managed through rule-based approvals, cross-department coordination and, where available, precinct-based planning mechanisms that clarify expectations for the community and the industry.

Capacity-building initiatives have also emerged that position councils as active delivery partners within local music ecosystems. APRA AMCOS has invested in the *Live and Local* program, delivered in partnership with the Live Music Office, to strengthen local government capability and support practical actions such as industry forums, networking, professional development and locally delivered programming.[298, 299] This approach recognises this multi-dimensional role, ie that Councils are regulators, convenors and facilitators within local music communities.

294. Maribyrnong City Council (2024) *Live Music Action Plan 2026–2028*. Melbourne: Maribyrnong City Council, https://www.maribyrnong.vic.gov.au/Building-and-Planning/Current-and-future-planning/Strategies-Plans-and-Policies/Live-Music-Action-Plan, accessed 5 March 2026.
295. Maribyrnong City Council (n.d.) *Amplify program*, https://www.maribyrnong.vic.gov.au/arts-and-culture/Programs/Participation-Programs/Amplify, accessed 5 March 2026.
296. Maribyrnong City Council (n.d.) *Festival City*, https://www.maribyrnong.vic.gov.au/festivalcity/About, accessed 5 March 2026.
297. Maribyrnong City Council (2022) *Festivals and Activation Framework 2022–2026*. Melbourne: Maribyrnong City Council, https://www.maribyrnong.vic.gov.au/files/sharedassets/festival/v/1/maribyrnong-festivals-and-activation-framework-2022-2026.pdf, accessed 5 March 2026.
298. APRA AMCOS (n.d.) Entertainment precincts support, https://www.apraamcos.com.au/about-us/news-and-events/entertainment-precincts-support, accessed 5 March 2026.
299. Northern Beaches Council (2024) Striking a chord – Northern Beaches live music revival, https://www.northernbeaches.nsw.gov.au/council/news/media-releases/striking-chord-northern-beaches-live-music-revival, accessed 5 March 2026

Music in Exile.
Credit: Kevin McDowell.

Warrnambool (VIC)

Warrnambool City Council's *Creative Warrnambool Strategy* includes commitments to grow live music through initiatives such as *Warrnambool Live*, alongside community grants and festival funding streams that support local cultural activity. In a regional municipality, such programs operate in tandem with council-managed infrastructure and event delivery, amplifying council's relative influence within the local ecosystem.[300 301]

Despite this breadth of activity, quantifying local government investment in music presents a range of challenges. Music-related expenditure is typically distributed across arts and culture, events, economic development, community services and asset management budgets. In addition, in-kind contributions, including subsidised venue hire, fee waivers, staff advisory time and marketing support, are not consistently valued and reported. Capital and maintenance costs for venues and infrastructure tend to be embedded within broader infrastructure programs rather than identified as music expenditure and financial reporting categories are not standardised across jurisdictions, which limits comparability and aggregation.

These factors have complicated our attempts to estimate total local government investment nationally and have likely resulted in underestimation of local government's cumulative contribution. The absence of consolidated reporting does not diminish impact, rather, it obscures it.

Across metropolitan and regional contexts, local government functions simultaneously as enabler, regulator, infrastructure provider and funder. Its authority derives from state legislation, yet its influence is exercised at the scale of local neighbourhoods, places, streets and civic spaces. Through planning decisions, asset management, grant allocations and event approvals, councils are central to fostering and supporting the operating environment in which Australia's local music ecosystems develop, adapt and are sustained.

300. Warrnambool City Council (2025) *Creative Warrnambool: strategy and live music initiatives*. Warrnambool: Warrnambool City Council, https://creative.warrnambool.vic.gov.au, accessed 5 March 2026.
301. Warrnambool City Council (n.d.) *Arts and Culture Funding*, https://www.warrnambool.vic.gov.au/arts-and-culture-funding, accessed 5 March 2026.

5. Future directions

The future directions outlined in this section will build on the first two editions of The Bass Line by continuing to refine data collection and analysis to enhance robustness, granularity and time-series measurement, strengthening the evidence base for industry dialogue, decision-making and investment. Future methodological improvements will continue to be guided by data availability, evolving industry dynamics, and emerging research and best practice. Time-series continuity will be maintained to ensure comparability across editions and where improved data in later editions materially affects earlier estimates, prior results will be revised and transparently reported in line with standard statistical practice.

Future editions may also incorporate targeted stand-alone research, data collection and consultation to further deepen and improve industry-wide insights.

The Darwin Symphony Orchestra performs 'Wuyal's Journey', featuring Rirratjingu Songman Banula Marika; Yidaki player and dancer Dalkanbuy Munungurr; choreographer and dancer Rachael Wallis; and dancers Ineke Wallis and Ganghurrminy (Loretta) Yunupingu. This performance formed part of DSO's Heaven and Earth concert, presented at the Darwin Festival 2025 at the AANT Centre.
Credit: Paz Tassone.

Area	Overview
Deep dive – artist managers	Building on the analysis undertaken in the Bass Line Editions 1 and 2, a dedicated analysis of artist management as a subsector would examine the structural and economic conditions shaping one of the music industry's critical roles considering matters such as career sustainability, remuneration models, the expanding scope of managerial labour in an independent-first industry, and the long development horizons that define the profession. The analysis would offer a detailed picture of a workforce that functions as the primary point of investment and coordination in Australian artist development, and strengthen available national industry data.
Deep dive – potential economic impact of AI on Australia's music industry	Building on the AI spotlight in this edition, the next edition will consider the potential economic impacts across the industry. This will explore potential impacts of both the risks (e.g. lost artist income, pressure on jobs, unfair use of creative work) and opportunities (e.g. lowering costs, speeding up work, or creating new ways to earn income).
Estimation of indirect economic contribution	Future editions will incorporate analysis of the music industry's indirect economic contribution (i.e. the upstream and downstream impacts to economic value added and employment). This analysis will build on the direct economic impact analysis in the first two editions and look at impacts within each part of the value chain, recognising the economic and business structures, value chain, and capital and labour structures differ greatly across the industry. This analysis will complement and build on the direct economic analysis to provide an understanding of the total impacts across the industry. This analysis will be supported by additional research, data collection, benchmarking, and supplementary analysis including, for example, value distribution and leakage across the industry.

Appendix A: Updated music industry value chain

The first step in undertaking the first edition of *The Bass Line* was to establish a comprehensive definition of the Australian music industry suitable for the purposes of undertaking an economic analysis. The value chain includes industry subsectors, the activities undertaken by those subsectors, and the key occupations of workers in those subsectors.

→ Read more about the approach to defining the music industry value chain in The Bass Line Edition 1

For the second edition, the value chain was expanded to provide a more detailed analysis of the music education subsector.

→ Read more about the development of the music education value chain in the More than notes on a page Australian Music Education Ecosystem report

Based on this work the updated and complete Australian music industry value chain is provided below.

Subsector	Key subsector activities	Key subsector occupations
Live music performance Activities and events where musicians perform music for payment (incl. professional, pro-am, community, and private settings).	• Contemporary music performances • Music festivals • Classical music performances • Opera performances • Music performances in other settings (e.g., musical theatre, cabaret, weddings, events etc)[302]	• 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 Upfront and ongoing income received by publishers and Australian composers and songwriters for the composition, licensing, rights management and ongoing use of their compositions.	• 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)

302.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
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 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	• A&r (artist and repertoire) • 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)
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

Subsector	Key subsector activities	Key subsector occupations
Music education Specialist music education and programs provided by artists/musicians and/or qualified music educators.	• Research, pedagogy, teacher training and professional development • Instruction and delivery (to students) • Youth pathways and showcase • Music examinations • Music retail *(captured in value chain Music Retail subsector)* • Industry support, investment and development *(captured in value chain Industry support, development and representation subsector)*	• Music education researchers • Academic professors • Curriculum designers • Teacher trainers • University lecturers • Administrators • Program coordinators • Music teachers/tutors. • Specialist technique trainers • Conductors • Administrative, coordination, events and program staff • Education specialists • Industry experts • Music retailers • Music retail operations • Programmers • Examiners/assessors • Certification members • Examiners/assessors • Administrators / coordinators
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

The changes to the value chain do not alter the analysis or methodology used in this edition. Instead, they provide additional detail that can be incorporated into the existing approach. This improves the depth and robustness of the analysis and highlights priority data gaps and research needs to inform the next round of data collection and analysis for the third edition.

Appendix B: Industry survey

A refined industry survey was undertaken for the second edition of The Bass Line, building on the survey undertaken for the first edition. The industry survey maintained the structure and coverage of the first edition while incorporating the following updates:

- Alignment of the industry value chain definitions and categories to reflect the refinements made as part of the second edition, particularly in relation to Music Education;
- Incorporation of new modules to support the deep dive analysis, including for insurance and music education; and
- Refining core survey questions and logic for occupations and where individuals and businesses work across the value chain in order to clarify and streamline attribution.

The survey was opened on Monday 13 October and closed on Sunday 9 November 2025, with a supplementary period from Tuesday 24 February to Tuesday 10 March 2026.

The following tables outline the number of respondents to the survey.

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	857
A for-profit business working in the music industry	47
A not-for-profit organisation, industry peak body or association working in the music industry	44
Total	**948**

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
ACT	21
NSW	296
NT	11
QLD	135
SA	55
TAS	28
VIC	224
WA	68
International	11
Total	**857**

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	25
25-29	28
30-34	43
35-44	132
45-54	127
55-64	98
65+	72
Did not respond	421
Total	**948**

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	269
Woman or female	235
Non-binary	11
Prefer not to answer	10
I use a different term (please specify)	3
Transgender	1
Did not respond	429
Total	**948**

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	8
Torres Strait Islander	1
Aboriginal and Torres Strait Islander	3
Neither	491
Prefer not to answer	23
Did not respond	422
Total	**948**

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	69
No	430
Prefer not to answer	25
Did not respond	424
Total	**948**

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	61
No	448
Prefer not to answer	16
Did not respond	423
Total	**948**

Source: Results of the industry-wide survey.

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