THE REAL THING
AUSTRALIAN MUSIC IN A DIGITAL AGE

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CHANGING REVENUES

AN INDUSTRY THAT INVESTS IN ITSELF

TAKING AUSTRALIAN MUSIC TO THE WORLD

DIGITAL DOWNLOADS & STREAMING SERVICES

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MUSIC: PART OF OUR NATIONAL FABRIC

Australia’s musical heritage goes back thousands of years.

Indigenous Australian music is a part of the unique heritage of a 40,000-60,000 year history symbolised by the iconic sound of the didgeridoo. Australian bush music belongs to an oral and folkloric tradition and spawned our unofficial national anthem, Waltzing Matilda.

Australian artists’ international musical success spans all genres and reflects our rich cultural diversity.

AC/DC, Graeme Bell, Kasey Chambers, Cold Chisel, Brett Dean, Slim Dusty, The Easybeats, Rolf Harris, INXS, Jet, Paul Kelly, Yvonne Kenny, Little River Band, Jessica Mauboy, Men At Work, Midnight Oil, Kylie Minogue, Olivia Newton-John, Mick Nock, Jane Rutter, Savage Garden, The Seekers, Dame Joan Sutherland, Keith Urban, The Wiggles, Nigel Westlake, Yothu Yindi and Simone Young are just some of the big successes.

Melbourne-based Gotye’s “Somebody That I Used to Know” was a number-one hit in 18 countries. Composed and recorded in the artist’s home studio and released through an independent recording company, it has almost 400 million YouTube views.

Gotye has won 11 ARIA Awards and is a three-time Grammy winner. He is the first Australian to win the Grammy Record of the Year since 1975. He is the first Australian number-one act on the US Billboard charts since Savage Garden in 2000.

It’s with a sense of pride that Australia was ranked third in the world (after the US and UK) for recorded music product in the early 1990s. Since then, the industry has wrestled with massive change.

Digital distribution channels have altered the way music is consumed, forever.

The industry has risen to these challenges. Innovative business models have enabled it to operate successfully in the digital economy, delivering diversified products and opening new online markets. While global recorded music revenues declined in the past six years, digital sales have grown strongly in many territories, including Australia, comprising 46% of the local market.

According to the International Federation of the Phonographic Industry (IFPI), digital now accounts for 32 per cent of revenues worldwide.

In 2012, Australia ranked the sixth largest market for both digital and physical sales in the world and even higher on a per capita basis. Digital sales comprise 46 per cent of the local market.

The Music Council of Australia places the collective worth of Australian music industries at between $7-8 billion. The 2012 value of recorded music product alone was almost $500 million.

Royalty payments from public performances of music in media (television, film, internet, radio broadcasts, phone systems) and public spaces (gyms, hotels, nightclubs, supermarkets, retail stores) remain an important revenue stream for composers and musicians.

In 2012, revenue gathered by collection societies like APRA, AMCOS and PPCA exceeded $293 million, with much of that flowing directly to composers and artists or being re-invested by labels in developing new artists.

The Australian recorded music industry remains healthy and vibrant - and at technology’s cutting edge - in the face of massive market change. It needs a continuing supportive and sympathetic regulatory regime to ensure that unique Australian voices and stories are heard, here and overseas.

Music continues to drive the take-up of technology, social media and pop culture:

- 9 of the 10 most liked people on Facebook are musicians
- 9 of the 10 most watched videos on YouTube are music-related content
- 8 of the 10 most followed people on Twitter are musicians
The Australian music industry has been a vital part of our nation's economic and cultural fabric since the early 1900s. Australia's music history goes back much further.
WHAT DOES MUSIC MEAN TO AUSTRALIANS?

Our Music is Unique

Music both defines and reflects Australia’s unique culture. We derive a sense of pride from the successes of our artists. The Federal Government’s own website www.australia.gov.au puts Australian music in its cultural context:

The music of a culture reflects the intonation of language, rhythms of speech, noises in the environment and different aspects of life - all of which is culturally based. Every culture has music that is distinctive and an important aspect of its identity.

Defining an ‘Australian musical sound’ is about recognition of rhythmic patterns derived from our environment and a sense of place, as well as the Indigenous and the culturally diverse aspects of Australian life.

We Care About Music – A Lot

According to research carried out for the Music Council of Australia, 79 per cent of Australians agree that music brings families together and 83 per cent say that music is an important or very important part of their life. According to the authoritative UMR 2013 Lifelounge Report into youth attitudes, young people aged 16-30 say that music is in the top three things that define who they are, together with life experiences and friends.

We Listen - A Lot

According to the Australia Council for the Arts, almost all Australians (99 percent) listen to recorded music, and 92 percent do so weekly or more. On average, Australians deliberately listen to recorded music every one to two days (222 times a year).

Some 57 per cent attend live music events each year, making music the biggest art form in Australia. By comparison, only 42 per cent of us undertake physical activity for sport, recreation or exercise, weekly or more. The ABS report, Arts and Culture in Australia: A Statistical Overview (2011), puts the total time spent by all Australians on listening to music (1.1 million person hours per day) on a par with visiting entertainment and cultural venues (1.3 million person hours per day) and time spent on religious activities (1.3 million person hours per day).

We Consume Music In Many Ways

Australians buy three recordings per second. Australians purchased almost 100 million sound recordings in 2011, including CDs, vinyl, digital tracks and music ringtones. The ABS says that in 2009-10, each Australian household spent an estimated $380 on music-related goods and services, totalling more than 52 billion economy-wide. That compares to household spending on internet charges, dental fees and domestic holiday airfares. Australians consume music in many ways with sales almost evenly split between physical and digital formats and an increasing number of streaming services available.

FM radio is the major traditional media broadcast outlet for Australian music. It represents more than 70 per cent of the commercial radio industry’s annual $1 billion total revenue and 66 per cent of its profit.

We want to play it

Australians agree that playing an instrument is fun, a good way of expressing yourself, and gives a sense of accomplishment. One third of kids learn to play musical instruments outside of school, and 70 per cent of adults end up wishing they had learned.

Fifteen per cent of Australians list playing music as a hobby.

We Lap It Up Live

According to Live Performance Australia, audience demand for major music performances topped 10 million tickets in 2010-11 – generating sales of $1.21 billion across musical theatre, festivals, opera, classical and contemporary music.

That equates 41.97 million attendances, mainly in pubs, clubs and restaurants, with 6300 gigs staged each week across the country, helping to sustain almost 15,000 jobs.
AUSTRALIA IS THE SIXTH LARGEST MUSIC MARKET IN THE WORLD

WE BUY THREE RECORDINGS PER SECOND
AUSTRALIAN MUSIC — A DIVERSE ECOSYSTEM

Take a look at a medium-sized regional centre or suburban area of metropolitan Australia. Music has a presence, whether it’s through a live venue like a pub or club right down to the music supplies store that sells guitar strings to musicians, the caterers that feed people at gigs, the print shop that produces posters and the screen printer that turns out T-shirts.

Music is global but its impact is local. The local radio station uses music to build and maintain audiences. The local newspaper relies on revenue from venue advertising. Some of the most significant music festivals on the calendar are income generators for regional centres.

The Falls Festival (Marion Bay, Tasmania, and Lorne, Victoria), Gympie Muster, Golden Plains and Meredith Festivals (Meredith, Victoria), Bluesfest and Splendour in the Grass (both at Byron Bay, NSW) and the Woodford Folk Festival (Woodford, Queensland) all focus on rural Australia.

Increasingly popular concerts at wineries like A Day On The Green attract thousands of fans from cities who spend up in regional towns. And who can forget the Tamworth Country Music Festival which attracts 60,000 visitors to its 2,200 events, involving 4,000 different performances across 90 venues in 10 days.

FROM THE BUSH TO THE WORLD

Graeme Connors is an internationally successful country and mainstream singer-songwriter who travels the world yet chooses to live in his birthplace Mackay, Queensland.

With 17 albums, and songs recorded by Slim Dusty, John Denver and Jon English, and a string of awards including 14 Golden Guitars, Graeme is a passionate advocate for Australian music, best known for the hits “A Little Further North” and “Let The Canefields Burn.” His songs especially resonate with regional audiences:

“Music isn’t just a business – it’s a stage for thousands of Australian creative people to take our stories and culture to the rest of the world.

“When it comes to performing live, we are world class. If you can step onto a stage in Australia and look your local audience in the eye, you can take that honesty anywhere.

“On the song-writing side, it’s about telling stories. To me, you’re in an ideal situation if you’re from a regional centre – you have access to particular knowledge rather than general - there are stories all around you.

“On the economic side, some of the biggest music festivals on the Australian calendar take place outside capital cities.

“It’s also proving easier for musicians to base themselves in the bush than ever before. You can step on a plane and be anywhere in hours. The reach of the internet - and promotional vehicles like Triple J’s Unearthed series to discover and promote new talent - means you can live in regional Australia and contribute to the national fabric.”

A CHANGING LANDSCAPE

The arrival of the MP3 format in the early ‘90s was the catalyst for global change in the music industry. Digital distribution channels suddenly brought a new convenience to the way music was obtained and shared. One in four U.S. “bricks and mortar” record stores in 2002 had closed by 2005. That was a net loss of 1,900 shops in three years.

That trend was mirrored around the world although many traditional outlets have embraced digital channels. About half of Australian music retailers are using the digital channel – many with a combination of a traditional storefront that caters to a specific market. Globally, Apple launched its digital store iTunes in 2003, selling 25 million digital tracks in its first year. By 2006, sales had reached 1 billion.

The key to this explosion was Apple’s iPod, the leading MP3 device. Unit sales reached 220 million by November 2006 – or 73 percent of the total digital music-player market. By February, 2010, iTunes sales passed the 10 billion song mark.
NINE-IN-TEN AUSTRALIANS LISTEN TO RECORDED MUSIC ONCE A WEEK OR MORE

That’s 1.1 million hours a day

Gotye
CHANGING REVENUES

Australians are buying more music than ever before and there are a number of factors disrupting the market. Piracy has had a massive impact on the recording industry - but it is starting to return to growth. According to ARIA’s wholesale sales figures, there was a four percent increase in the value of the Australian recorded music industry in 2012. The increase to $398.1m was the first upwards trend in annual wholesale figures since 2009.

The continued uptake of digital music, combined with a host of new streaming services entering the local market means 46 percent of the market’s value came from digital products in 2012, compared to 36.7 percent in 2011. The number of physical products sold in 2012 declined by only 6.42 percent on the previous year, a vast improvement on the 13.85 percent drop in 2011. Physical products continue to remain the industry’s dominant revenue earner, accounting for 54 per cent of the market.

This signals the continued demand for CDs, DVDs and vinyl among a large portion of the Australian music buying public.

AN INDUSTRY THAT INVESTS IN ITSELF

There’s good reason for government to support music. The cultural and economic benefits are many. Critically, these benefits flow to Regional Australia and not just cities, in the form of tours, local music shops, live music venues, media outlets, music supplies and amplification hire outlets and music teaching.

In the face of market challenges, the Australian music industry invests hugely in innovative business models and support for new and emerging talent. Record labels – large, small and independent – are integral to this. IFPI’s Investing in Music report shows that record labels put 16 per cent of their revenues into developing new artists. If that figure included marketing, it would be 26 per cent.

The music industry’s non-marketing development spend exceeds the R&D investment of industries like software and computing (9.6 per cent) and is on par with the pharmaceutical and biotech sector (15.3 per cent). Record companies have defied the global economic downturn to invest $4.4 billion annually in artist development and marketing, despite declining revenues in recent years.

While our strong dollar plays against exporters, investment like that in Australia’s vibrant and diverse music scene ensures many of our brightest and best artists still take our stories and sounds to the world.

The core purpose of a record company remains discovering, developing and promoting talent – and that can be very expensive. But even small labels shoulder costs and investments that are largely invisible to the consumer.

Although the digital era has opened opportunities, it has not substantially reduced record companies’ costs of doing business.
According to 2011 research, Victoria boasts the highest number of live music venues in the country (600) and they hosted 5.4 million attendances in 2009-10.

More than the 4.3 million through the gates at the AFL’s home and away season games.

Believe in yourself always - if you don’t, who will?

Jessica Mauboy

There are few better female role models in Australian music than Jessica Mauboy. The Darwin-raised singer, songwriter and actress (Bran Nue Dae, The Sapphires), Australian Idol runner-up and multiple award-winner has been a part of In2Oz, an Australian Government program promoting closer ties with Indonesia, and a participant in the Sony Foundation’s annual fund-raiser that raised half a million dollars for youth cancer centres in 2012.

“It was amazing to be a part of In2Oz – I have such a strong tie to Indonesia because my father was born there. To be there as an Aussie representative was magical.

“I feel music is all about human interaction and relationships – every time I sing there is so much emotion and I feel like I am sharing myself and my story with my audience.

“I also love what the Sony Foundation do and have been a big supporter since the beginning. I know that if Australia comes together to support this cause, we will really accomplish something special for young people battling cancer.

“Being a film actress is something relatively new to me. Both my films have been such an amazing experience for me and I have been able to work with incredible people.

“I am so humbled when the media refer to me as a role model for women, the Indigenous community and for Australian musicians. I hope I am inspiring people to dream and to work hard – we can all achieve greatness if we set our minds to it.”

What advice would Jessica have for other women wanting to make a career in music?

“Be strong – be courageous – challenge yourself and always deliver the best that you can! Believe in yourself always – if you don’t, who will?”
TAKING AUSTRALIAN MUSIC TO THE WORLD

Asia represents a major new export focus for the Australian music industry. Digital channels and burgeoning or established cultural links present exciting opportunities.

According to a 2009 report co-authored by KPMG, the media and entertainment industry in India is forecast to grow at a compound annual growth rate of 12.5 per cent over 2009-13 to be worth $21 billion.

Austrade says digital music is creating a change in consumer buying with its market share expected to reach 60 per cent in 2013.

Live touring is the big opportunity for Australian music in China where Austrade points to a multitude of venues in Beijing, Guangzhou, Shenzhen and Shanghai. Shenzhen’s proximity to Hong Kong and reputation as an entertainment destination for expatriates makes it an ideal access point.

SOUNDS GREAT!

Sounds Australia is a great example of a partnership of government agencies, industry associations and commercial companies that helps put Aussie music on the world map. Its $1.7 million investment aims to help build exports, increase live music in local venues and encourage international touring artists to use local support acts.

PPCA is a partner in its initiatives that connect buyers of music with sellers. Sounds Australia coordinates attendance of bands and labels at international trade shows and music festivals, and provides expert advice and utilises new technologies to give Australian music wider exposure.

Sounds Australia has amped up the Australian music presence at key music industry events all over the world, including The Great Escape in Brighton UK, South by Southwest Festival in Austin, Texas, CMJ in New York City and MIDEM in Cannes, France.

AN INDUSTRY WITH A HEART

The Australian music industry’s philanthropic commitment is substantial. For example, Support Act financially supports artists and support crew who have fallen on hard times.

The Song Room is a national, not-for-profit organisation that provides opportunities for enhanced learning and development for disadvantaged children through music and creative arts. Direct industry assistance from PPCA and the private sector has helped The Song Room reach more than 150,000 kids.

The PPCA Performers’ Trust was established in 1975 to provide discretionary grants to artists and performers. Funds distributed now exceed $2.3 million.

Each year, the APRA Board sets aside 1.75 per cent of distributable revenue for projects promoting the use and recognition of music by APRA members.

Not-for-profit appeal Resound was established by the Music Council of Australia in 2009 after the horrific Victorian bushfires. It has donated more than 250 musical instruments to student musicians, studio teachers, schools and recording artists affected by the fires.

After the 2010-11 floods, the Music Council of Australia re-launched the Resound appeal, with Australian music bodies like PPCA and APRA AMCOS weighing in with financial support.

On the back of both these natural disasters, scores of local benefit concerts were organised by musicians, labels, managers, live music venues and promoters right across Australia.

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Eight-in-ten Australians say that music brings families together and rate it a very important part of their life.
The arrival of licensed music streaming services has opened new opportunities for Australian musicians and composers who can access fresh markets more easily than ever before. You can find a list of current services operating in Australia here: www.ppca.com.au/labels/list-of-current-licensers

ARIA figures show that digital sales grew by 31.14 per cent in 2012. Rising digital sales offset the decline in physical sales for the first time, after a 32 per cent decline in the size of the recorded music market over the previous decade. Australians purchased almost 140 million sound recordings in 2012, including CDs, vinyl, digital tracks and music ringtones. That equals more than four recordings being bought every second.

Digital media de-mystified

- An MP3 is a patented encoding format for digital audio which compresses sound and makes music easier to deliver and store in a digital format.
- Streaming is the delivery of subscription or advertising supported music over the internet. Streaming services enable consumers to listen to music without downloading a permanent copy of it. These services, like Spotify, are available in 60 countries and 39 are currently licensed in Australia. In 2012 revenues from digital recorded music sales (including streaming services) amounted to 46 per cent of total revenues, compared to 32 per cent in 2011.
- File Sharing is the practice of distributing or providing access to digitally stored information, such as computer programs, multimedia (audio, images and video), documents, or electronic books. Many computers simultaneously sharing pieces of digital data with each other over the internet makes downloading albums or movies faster.
- BitTorrent is an internet protocol that allows P2P (peer-to-peer) file sharing for distributing large amounts of data like movies and music. It has been estimated that P2P networks account for up to 70 per cent of all internet traffic (depending on geographical location).
- Graduated Response is a process introduced in many territories to reduce unlawful P2P file sharing with a strong emphasis needed on education. Consumers detected downloading unauthorised copyright material are sent a series of notifications with warnings to stop the infringing behavior.

WHAT IS COPYRIGHT?

Copyright protects the physical form of an idea or a piece of creative work by conferring exclusive rights on the owner. It should ensure a fair return on creative input and provide the lifeblood for innovation. When someone creates a piece of music, there is a system of rights and obligations that outline what someone can and can’t do with the material.

Copyright is an important set of rights granted to the creator of creative works which gives them the exclusive right to copy, distribute, adapt, perform or broadcast the work in public. Copyright owners can also license or permanently transfer or assign their exclusive rights to others.

In Australia, copyright protection is automatic. A work will be protected as soon as it is put in material form, such as being written down or recorded.
Fifth-generation family-owned company Alberts is all of those things and has been a significant part of the Australian music industry for more than 126 years.

Managing Director David Albert describes his business as “truly about the song”. To this end, Alberts has been working with influential artists like Gotye, AC/DC, Megan Washington, The Easybeats, John Paul Young, The Angels, Rose Tattoo and James Morrison, to name just a few.

“In the late 19th century when my great grandfather was managing the business, it was about getting on a boat to go overseas and bring back the song rights to international hits– now the focus is on taking Australian songs and stories to the world,” says David.

“In an industry that is continually changing the focus has to be entrepreneurial, innovative and open to change. We have to be constantly adapting and coming up with new ways of approaching the way we operate to be competitive.

“For example, we have a creative services team, complemented by in-house studios, engineers, producers and marketing and promotions personnel, who work with artists and songwriters to help them reach their full potential. We also work closely with our key partners overseas including sub-publishers and consultants to help to build the profile and reach of our artists globally.

“Lots of people now know about Gotye and his international success – few appreciate the many years of hard work this independent Australian artist took to get there.”

Alberts generally lets the artists it works with, and their successes, tell the story but David is proud of the role his company played in synchronising and promoting music from the Australian global hit movie “Strictly Ballroom”.

David says it’s impossible to quantify the impact creative exports like “Strictly Ballroom” and its soundtrack have had on Australia’s international cultural profile.

“Love Is In The Air” is a great example of an Australian song that became a hit around the world a second time after being on the soundtrack – it’s an iconic and instantly recognisable track and we’re proud to have played a part in that success,” he says.

“The success of the movie and its soundtrack go hand-in-hand and they’ve helped build the international reputation that director Baz Luhrmann has today.”
PIRACY

Piracy is the biggest threat to digital music distribution services. Denying musicians and composers a fair return for their work undermines creativity and stifles development of new and emerging talent. The International Federation of Phonographic Industries (IFPI) estimates that one in four internet users in Australia use illegal file sharing services on a monthly basis. More than half (57 per cent) of these users are using Peer-to-Peer (P2P) networks like BitTorrent.

The problem isn’t restricted to music. Paul McGuiness, manager of one of the biggest bands in the world in U2, recently said:

“WHY IS THE NEEDLE IN THIS DEBATE ON THE MOVE? FIRST, NO DOUBT, BECAUSE ‘FREE’ IS NO LONGER JUST A PROBLEM FOR THE MUSIC INDUSTRY. FILM STUDIOS, BOOK PUBLISHERS AND NEWSPAPERS ARE ALL NOW IN THE SAME STORM.”

In countries where graduated response policies work in tandem with consumer education, the impacts have been notable.

SUCCESS — GANGNAM STYLE

Korea’s recorded music market has attracted global attention because of its spectacular revival when the industry globally is still in a trough. Music sales in Korea increased in value by six per cent in 2011, following 12 per cent growth in 2010. This increase has been attributed to Korea’s anti-piracy laws that include a graduated response scheme – but that’s only part of the story.

The other elements are the music industry’s confidence in the local product – K-Pop – typified by the global success of recent Australian visitor PSY and his song “Gangnam Style”. The online video is the first to have achieved more than a billion views, but PSY is no overnight success. The single was on his sixth album, showing what record label talent development can do.

The Korean market has moved up the international rankings in recent years, from number 23 in 2007 to number 11 in 2011, and is now a global exporter of music. Korea is proof that a strong local product, solid industry support and effective government policies and action can all make a difference to the environment.
Each household spends an average of $380 per year on music-related goods and services, on par with our outlay on Internet charges, dental fees and domestic holiday airfares. That’s $2 billion a year.
INNOVATION WORKS

JB Hi-Fi is Australia’s largest music retailer and close to the top 10 music retailers globally. It is the largest per capita music retailer in the world. It is a classic example of a bricks-and-mortar store that has embraced technology and expanded into digital sales.

JB Hi-Fi Marketing Director Scott Browning:

“We had to make the transfer across to the digital world to stay relevant and competitive. Consumers want greater choice and innovation and flexibility, and our hope is that they will move to platforms like ours.

“We have been operating a music streaming service which sits well with our business. We need a model we can compete from globally. It is likely that we will also introduce a download service to complement the offer.

“We are focused on the domestic market and not international yet. We have a long way to go before we do that. But it is a feasible target.

“This is a five-to-seven-year program. It will be tough initially. Australia is still in the early stages of taking up streaming because of broadband cost and speed.

“WE WANT TO SELL MUSIC TO CONSUMERS IN EVERY WAY WE CAN... ON DEMAND AT ANY TIME AND ON ANY DEVICE”.

“Copyright laws don’t impede these plans. They help by providing a platform to build from. Illegal downloads are our biggest competitor.”

MUSICAL RIGHTS ORGANISATIONS

In any piece of recorded music there are two copyrights – one for the musical work (lyrics and composition), and one for the recording of that musical work. For example, the song “Love is In the Air” was written by Harry Vanda and George Young and the iconic version recorded by John Paul Young. Therefore, rights attached to this version of the song are controlled by Vanda/Young’s publisher for the musical work, and John Paul Young’s record label for the recording work.

Different rights agencies help protect each of the separate copyrights.

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MUSICAL PERFORMANCES BRING MILLIONS OF FANS INTO HOTELS, CLUBS, CAFES AND RESTAURANTS, GENERATING 42 MILLION ATTENDANCES EACH YEAR AND $1.21 BILLION IN SPENDING.
Young people aged 16-30 say that music is in the top 3 things that define who they are.
THE FUTURE

The Australian music industry is evolving in ways that could only be imagined a decade ago. With quantum leaps in broadband speed and bandwidth, we’ll see even more changes in the way music is obtained and consumed. Technological convergence – where different digital systems evolve toward performing similar tasks – and an increasing focus on mobility in computing and communications mean we will be able to procure, consume and create more music in more places than ever before.

Australia’s music industry remains one of the most distinctive and innovative in the world but will only stay that way with strong regulatory support.

Over the next few years, PriceWaterhouseCoopers predicts:

- The Australian music industry will reflect global revenues and increase on average by 5 per cent compounded annually to 2016;
- The local digital distribution market will achieve an 18 per cent compound annual growth rate to reach $435 million in 2016, or 30 percent of the overall market.

Keeping Australian music strong needs:

- Royalty systems that are maintained and enhanced to provide a fair return to composers, musicians and the record labels and music publishers that invest in them;
- More effective protection for rights holders to combat unauthorised or illegal use;
- Vigilant copyright protection that is responsive and stays ahead of technological shifts.

Our copyright laws are strong but we need to stay mindful of international obligations and not lower the bar. Our royalty collection systems are robust but some elements need reviewing. For example, the very low royalty rate paid by commercial radio for use of recorded music dates back to 1968. It is the only such capped statutory rate in the country and has not been re-assessed for more than 40 years.

Music is generally well-funded by public and private sectors and not reliant on government hand-outs. Governments need to continue partnering with the music industry in areas such as innovative recordings, live performances, regional touring, and youth mentoring. Australia’s cultural and trade organisations need to continue promoting our musical talent internationally, especially throughout Asia where Austrade has highlighted untapped opportunities for music to champion the Australian culture.

With the right policy settings, Australian musicians will continue to write and perform the music that provides the soundtrack to our lives... and tell our stories both here and abroad.
THE REAL THING
AUSTRALIAN MUSIC IN A DIGITAL AGE