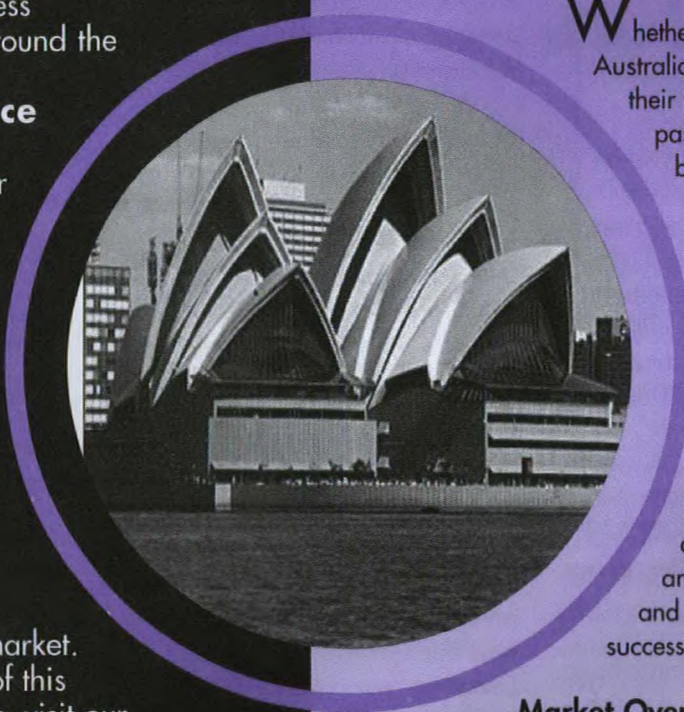


AUSTRALIA The Recorded Music Market

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This is an overview of the market. For a more in-depth study of this market and for other studies, visit our Web site. When you are prepared to do business abroad, you can use our Web site to get in touch with our offices around the world and request personalized services electronically.

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Whether it's rock, jazz or opera, Australian music fans don't nurse their tastes. They indulge them passionately with near record-breaking concert attendance levels and CD purchases. In 1999, Australia was among the top 10 recorded music selling countries.

While support for local artists is strong, nearly 80% of all records sold in Australia are by international recording artists. Many Canadian artists, including Céline Dion and Shania Twain, have enjoyed success down under.

Market Overview

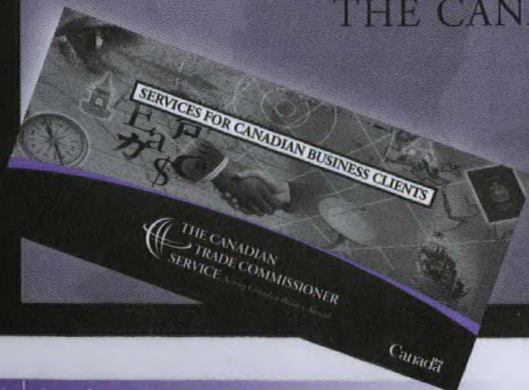
Australia has a long musical history and has contributed greatly to the international music scene with groups such as the Bee Gees and AC/DC. With a population of 19 million people, Australia has a vibrant music industry and is recognized as a major pool of creative talent.

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In 2000, the market for recorded music in Australia was valued at \$512.6 million; a 29% decline over 1999. Despite the drop in sales, overall growth in the industry was 38% between 1995 and 2000. This aberration was largely due to the introduction of the GST, the falling Australian dollar and the Sydney Olympics. The international success of Australian musicians and songwriters has contributed to overall growth in the retail music market. The market recovered in the first half of 2001 with a 13% increase over 2000.

Market Formats and Trends

Demand in the Australian recorded music market has supported a variety of music formats, from pop to classical. Besides buying compact discs (the most popular music medium in Australia), almost 75% of the population attends rock concerts annually. Approximately 26% of Australians attend musicals (including opera), and 14.5% attend classical music concerts. While rock remains a big draw, country music is rising in popularity, and more jazz is played in Australia per capita than any country in the world.



Opportunities

Canadian music artists have opportunities to access Australian radio, television and in-store promotions on a national level and

can establish themselves in the Australian music charts with the help of their record company. Opportunities are also available for Canadian musicians to perform at numerous musical festivals throughout Australia. The Canadian government and private music organizations provide Canadian musicians with funding for international showcase and tour support, and attendance at industry events.

Multinational record companies including Sony, EMI and Warner hold an estimated 90% market share of revenue earned by record companies operating in the Australian market. As such, independent Canadian musicians should focus on the independent sector. Some Australian independent distributors including MGM Distribution and MRA Entertainment have expressed interest in Canadian recording artists.

Market Access

Recorded music by Canadian artists in Australia is mainly distributed through multinational record companies. Canadian artists should consider retaining an Australian agent

to market their sound recordings to music retailers, including the independents.

Local chain stores, such as Sanity and Delta, dominate the recorded music retail market in Australia. However, locally based independent retailers remain very important to the industry. The major buying group for the independent store is Leading Edge Music, which represents 12.5% of the market.

See Potential?

To learn more about this market, read *The Recorded Music Market in Australia*, prepared by the Market Research Centre of the Trade Commissioner Service. This report and hundreds of others are available on-line at www.infoexport.gc.ca

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