

SOUNDS AUSTRALIA SUBMISSION NATIONAL CULTURAL POLICY

Sounds Australia is the only national organisation solely dedicated to music export, with over 15 years of experience building expertise and fostering influential networks across international music market events. Each of the services delivered by Sounds Australia form the backbone of an adaptive, comprehensive and innovative strategy.

Diverse approaches and initiatives including international showcases, targeted networking events, and both inbound and outbound trade missions are designed to function independently and integrate seamlessly with the aim of connecting local artists and music businesses to global opportunities and audiences.

Sounds Australia's program provides the specific support Australian artists and their teams need to thrive on the world stage. With extensive global networks and a premier program of activity, Sounds Australia's services empower Australian artists, amplifying their global impact. Driven by the vision for Australia to be global leaders in music export, Sounds Australia reinforces the nation's reputation as a hub of innovation and diversity in music, delivering lasting cultural and economic benefits to Australians both at home and abroad.

Sounds Australia is globally recognised as the benchmark for music export success. With sector-wide buy-in and trust, Sounds Australia is universally respected and valued as a forward-thinking, reliable and inclusive leader in the music industry. The organisation fosters strong relationships, listens to diverse voices, and consistently delivers impactful outcomes, earning the confidence and commitment of the Australian and global music industry.

Since 2009, Sounds Australia have secured 3,224 business outcomes, facilitated 23,639 dedicated meeting opportunities and represented 2,297 acts in 86 cities across 30 countries.

FAST TRACKING AUSTRALIAN MUSIC SUCCESS GLOBALLY

Sounds Australia has expedited the artist discovery process and catapulted multiple acts into the consciousness of the world's most influential music industry across the North America, Asia, UK, South America and Europe, ensuring that from their very first export outing, Australian artists are connected with key industry leaders and decision makers, resulting in increased professional and commercial outcomes.

Sounds Australia's showcases have become renowned as the places to see the next generation of global superstars and household names, such as:

Amyl & The Sniffers, Amy Shark, Angie McMahon, Baker Boy, Budjerah, Confidence Man, Courtney Barnett, Cub Sport, DMA'S, Eccca Vandal, Electric Fields, Flume, Gang Of Youths, G Flip, Go-Jo, Haiku Hands, Hermitude, Julia Jacklin, Kasey Chambers, King Stingray, Lime Cordiale, Mallrat, Methyl Ethel, Middle Kids, Pacific Avenue, Peach PRC, Peking Duk, Ruel, Rūfūs Du Sol, Sampa The Great, Teen Jesus & The Jean Teasers, The Teskey Brothers, Thelma Plum, Tkay Maidza.

BUILDING ON REVIVE:

FROM FOUNDATIONAL SUPPORT TO TRADE-ALIGNED GROWTH

The first phase of REVIVE facilitated a material strengthening of Australia's music export capability, both in scale and sophistication. Sounds Australia's submission outlines how the next phase of Australia's National Cultural Policy should move beyond effective foundational support to scaled, coordinated, trade-aligned growth.

The delivery of REVIVE in January 2023 enabled Sounds Australia to upgrade systems and deliver more outcomes for the Australian music industry abroad. With international opportunities rebounding post 2020, data collected in 2024 and 2025 showed a 23% increase of Australian artists showcasing at international festivals, alongside 25% more networking events (2025 vs 2024), a 33% increase in dedicated meetings, and a 65% increase in masterclass and workshop attendance. Outcomes reported by artists and industry across 2024 and 2025 are the highest in the history of Sounds Australia.

REVIVE-backed support via Music Australia has strengthened and accelerated market diversification, enabled deeper bilateral exchange through inbound and outbound engagement, improved measurement and lifted outcomes to historic highs.

In the 2024-25 financial year, APRA AMCOS reported record high international performance royalties in 2024-25 - \$98.8 million (+14.8% YoY) with 6,868 international performances by 679 acts (+19% YoY).

A key driver of this growth is Sounds Australia's program of inbound and outbound trade missions. The shift from physical to digital consumption and unlimited international access via digital streaming platforms (such as Spotify, Apple Music and YouTube) represents a fundamental change in the music industry's ecosystem, demanding new, adaptive and progressive approaches to market penetration. While global distribution is now technically frictionless, meaningful engagement, visibility and sustainable growth require intentional strategies that respond to local contexts, networks and cultural nuance.

Integral to the existing Sounds Australia model, trade missions provide artists and industry with curated access, market intelligence and pathways to partnerships. In 2024-25, Sounds Australia led trade missions into India, Indonesia, Thailand and Mexico, as well as facilitating inbound trade missions for international music industry around existing events such as Melbourne International Film Festival, Melbourne International Jazz Festival, SXSW Sydney, Party in the Paddock and Laneway Festival, increasing international engagement for Australian artists and industry whilst reducing their costs to market access.

To implement each of these missions, additional funding has been required, separate from Sounds Australia's core operational budget, from state government and DFAT. These grants can only be accessed a finite number of times, impacting the sustainability of Sounds Australia's capacity to deliver these trade missions. The cycle of applications and acquittals is a significant drain on staffing resources and diminishes time invested in core operational activities. Without strategic investment, the growth of Australia's \$1 billion music export industry is critically threatened.

Australia's broader trade portfolio, long established as a key enabler for industries such as education, agriculture, wine and spirits, biomedical innovation and technology, is best placed and most appropriate to support this additional and essential mechanism, complementing the current music export model and strengthening pathways for sustainable international market development.

Australia's music industry consistently identifies a coordinated, national export program as one of its most critical strategic assets. Across more than fifty international engagements led by Sounds Australia in 2025, feedback from participating Australian music industry reflected an overwhelming consensus: Sounds Australia is delivering high value outcomes through trusted relationships, market intelligence and on-the-ground facilitation that would be impossible to replicate independently. Participants consistently describe the program as "invaluable," "instrumental," and "incredibly supportive", highlighting its role in providing meaningful access to global networks, creating a strong sense of community in complex international environments and enabling artists and businesses to navigate increasingly competitive and fragmented markets.

This same body of feedback also points to the next phase required to sustain and grow Australia's global market share and capitalise on the progress that has already been made. It is now clear that demand for export activity now exceeds available resourcing, with pressure in high-cost markets and hyper growth territories where sustained presence and long-term relationship-building are essential. Participants highlight the need for increased investment to scale international visibility, deepen engagement in priority markets (including Asia, Latin America, UK, Europe and the US), and convert pathways into sustained commercial outcomes beyond initial market entry.

The current international environment calls for a deliberate evolution of Australia's music export model to ensure it is globally competitive and aligned with how other export industries are supported nationally. While the underlying model is proven, structural gaps remain in how artists and businesses transition from readiness into sustainable international market participation and growth.

The next phase of national cultural policy must recognise culture as a lever for both significant economic growth and influential soft power. This requires a more unified, cross-sector approach that effectively connects music with its complimentary counterparts in screen, fashion, gaming, tech and tourism to present a cohesive and globally competitive Australian creative identity. In an increasingly crowded international landscape, fragmented approaches are diluting impact.

Sounds Australia is essential for sustainable artist careers. The next phase must focus on scale, continuity and deeper market integration, ensuring Australian artists and businesses are competitive, connected and positioned for long-term success in an increasingly saturated global ecosystem.

To ensure Australia remains competitive and high-impact force for commerce, diplomacy and influence in an increasingly challenging global landscape, Sounds Australia and music export must be recognised and funded by both Arts and Trade.

FIRST NATIONS FIRST - INTERNATIONAL ACCESS AND EQUITY

A Dedicated First Nations International Bursary Framework

Sounds Australia's program demonstrates that First Nations artists are foundational to Australia's international cultural presence. There is no cohesive global representation of Australian music without the voices of Aboriginal and Torres Strait Islander artists, and international audiences are increasingly engaging with these artists as central to Australia's cultural identity.

However, access to international opportunity remains structurally inequitable. While First Nations artists are increasingly being identified by global market leaders, programmers and tastemakers as export-ready and primed for international success, the ability to take up these opportunities is often constrained by the absence of immediate, targeted financial support. This is particularly acute where invitations to major global showcases, panels and performance opportunities arise with short lead times or fall outside traditional grant cycles. The result is a persistent gap between recognition and participation, where internationally validated demand cannot be met with aligned support, limiting both the artists' capacity to build sustainable global careers and Australia's ability to present a genuinely representative and competitive offering on the world stage.

Leveraging international market selection as a qualifying mechanism for financial support would mitigate this risk, embedding real-time global validation into funding decisions, streamlining access to support and removing slow, misaligned processes that currently prevent high-potential First Nations artists from converting international opportunity into sustained global pathways.

Sounds Australia is proposing the establishment of a nationally supported First Nations International Bursary Framework as a core mechanism under the next iteration of the National Cultural Policy.

This would establish a dedicated, responsive funding stream to enable Aboriginal and Torres Strait Islander artists, managers and music businesses access funds to realise confirmed international opportunities across showcase festivals, trade missions and cultural exchange platforms.

Enabling a dedicated bursary recognises the distinct realities shaping First Nations artists' access to opportunity, including deep connection to Country, residency in remote and regional communities, higher travel costs, and cultural and structural barriers to engaging with traditional grant systems, ensuring support is responsive to lived context, rather than forcing alignment with processes that can be inaccessible or misaligned with how opportunity arises.

Designed to respond to real-time demand, the bursary would support costs associated with international mobility, alongside the practical and cultural considerations required to ensure safe, supported and sustainable participation.

This approach builds on the foundational work delivered under REVIVE, including increased First Nations representation across international programs and the development of culturally informed approaches to global market engagement and relationship building.

Embedding First Nations Leadership

Central to this framework is that its design and delivery must occur in ongoing partnership with First Nations-led organisations, most critically the National Aboriginal and Torres Strait Islander Music Office (NATSIMO), alongside artists, managers and community stakeholders. This ensures that governance, decision-making and delivery uphold cultural protocols, reinforce creative sovereignty and reflect the lived realities of First Nations artists engaging internationally.

Driving Cultural and Commercial Outcomes

First Nations artists already demonstrate strong international demand and resonance across key markets including the US, UK and Europe. Enabling consistent participation will convert this demand into sustained commercial outcomes, deepen international partnerships and strengthen Australia's standing within the global music ecosystem.

By embedding a First Nations International Bursary within national policy, Australia can move from ad hoc support to a systematised, repeatable pipeline, ensuring that First Nations excellence is structurally supported as a core component of Australia's cultural and trade engagement with the world.

ENGAGING THE AUDIENCE - TRADE SUPPORT FOR MUSIC EXPORT

Culture as a driver of economic growth, soft power and global influence

Australia's music exporters operate as a high-performing, internationally competitive industry, yet music export remains primarily supported through arts policy frameworks rather than aligned trade mechanisms. This misalignment limits the ability of Sounds Australia to fully leverage national trade infrastructure, including coordinated market entry support, in-market facilitation and long-term export development strategies.

At a time when global demand for cultural content is expanding rapidly and peer nations such as the UK, South Korea and France (the third, sixth and seventh largest music markets respectively) are financially supported by trade portfolios, it is both timely and critical that Australia does the same. Australia, once positioned within the global top ten recorded music markets (IFPI 2026 Global Music Report), has since fallen out of this ranking, replaced by Mexico, underscoring the urgency of a more coordinated, export-driven approach.

Integrating Music Export into Australia's Trade Framework

Enabling music to operate as a cultural asset and coordinated trade sector will unlock greater commercial outcomes, strengthen alignment with national trade diversification strategies and maximise the role of culture as a driver of economic growth, soft power and global influence.

Formal integration of music export within the Trade portfolio, specifically Austrade, would position Sounds Australia and its stakeholders within Australia's broader export ecosystem, aligning activity with national trade priorities such as market diversification and international growth.

Creative Australia and Austrade play distinct but complementary roles within this ecosystem; one centred on cultural development and capability, the other on trade execution and market expansion. Creative Australia, as the Government's principal arts investment and advisory body, is responsible for generating the creative pipeline, i.e. supporting artists, IP creation, sector capability and international readiness across music, screen and the broader creative industries.

Austrade operates as Australia's trade and investment agency, tasked with accelerating exporters, building international market access, attracting investment and aligning sectors with national trade priorities.

The absence of a formally integrated approach between these functions is increasingly at odds with the scale and maturity of Australia's creative economy, which is already delivering significant economic returns, most notably a music industry generating \$8.78 billion in annual revenue and nearly \$1 billion in export income alone.

For artists, managers and music businesses, the integration of music export within the Trade portfolio would translate directly into improved access to priority markets, increased strategic in-market connections and higher conversion of international exposure into commercial outcomes, including touring, partnerships and licensing. At a systemic level, it recognises music as a scalable export industry, ensuring that existing capability is supported to deliver stronger economic returns alongside its established cultural value.

A Unified Cultural Export and Engagement Body

The next phase of the National Cultural Policy should establish a unified cross-sectoral cultural export and engagement advisory council, functioning as an overarching, nationally coordinated body dedicated to platforming Australian cultural excellence globally.

Across the broader creative industries, Australia's international activity remains fragmented, with music, screen, fashion and other sectors operating independently despite shared export pathways, audiences and markets. This limits the ability to present a cohesive Australian cultural identity and dilutes the overall impact of international engagement.

The establishment of a cross-sector cultural export and engagement advisory council would provide a coordinated mechanism to align Sounds Australia with its counterparts across creative industries including screen, fashion, gaming and sport.

While each sector demonstrates strong export success, the absence of formal alignment across industries limits Australia's ability to present a cohesive, high-impact cultural offering internationally. This fragmentation reduces both commercial outcomes and cultural influence, particularly in global markets where integrated creative ecosystems are increasingly driving engagement, investment and trade.

This body should operate across portfolios, including Arts, Trade, Tourism and Foreign Affairs, aligning international activity, market priorities and investment across creative industries.

By coordinating activity across global markets, this model would significantly increase the scale and impact of international engagement, unlock stronger commercial outcomes through shared access and collaboration, and ensure cultural activity is directly aligned with Australia's broader trade, diplomacy and global influence objectives.

From Cultural Capability to Global Trade Power

Connecting cultural capability with trade delivery, enables Australia to operate as a unified creative ecosystem in international markets. The result is a necessary and timely shift in how Australian culture is presented and monetised globally, ensuring creative output is not only culturally significant, but internationally competitive and commercially sustainable.
