

# Down, and Under Pressure: The Decline of Local and Non-Anglo Best-Selling Recording Artists in Australia 2000–2023

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Full Article

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**Abstract:** The global consolidation and platformisation of recorded music have attracted attention to changes in local artist representation in national sales charts and, more broadly, to the diversity of nationalities within recorded music markets. Global platform distribution has been perceived to aid local music economies and the diversity of cultural production. This article quantitatively analyses the annual Australian top 100 single and album charts 2000–2023 to determine Australian artist representation, Indigenous artist representation and diversity of nationality over the period. The data reveals, contrary to propositions of glocalisation and internationalisation, that Australian and non-Anglo artist representation has declined significantly, while North American and British artists have increased their presence in the Australian charts. It also finds that Indigenous chart representation over the period is low, stable and in line with population ratios. The data raises issues for artists, companies, policy makers and consumers in the Australian music industries.

**Keywords:** *artists • diversity • platforms • globalisation • glocalisation*

## 1. Introduction

Will Page and Chris Dalla Riva (2023, p. 2) argue that ‘glocalisation’ in the recorded music industry enables diversity in cultural production. Their research evidences an increasing number of local artists achieving success in singles charts across European markets. The importance of their analysis for the creative industries is in finding that platformisation, rather than homogenising national markets to dominant international trends, supports local representation thereby encouraging local industry investment and repudiating the need for regulation of creative markets (Page & Dalla Riva 2023). This contrasts with Australian industry discourse with *The Music’s* 2023 headline ‘Where are all the Australian artists on the ARIA charts?’ portraying a different reality for the Australian market (Varvaris 2023).

The multi-national nature of major record labels allows them to devise global release strategies for artists who have achieved success in their domestic markets.<sup>1</sup> In addition, the ease of access to global distribution via streaming platforms may lead to the expectation of increased diversity of country of origin within the Anglo-centric Australian market. The early 2020’s global success of Korean pop (K-Pop) artists, such as BTS and Blackpink, and

1 However, in the early 2000’s international releases were often only realised by local success, and even then, only if the international territory saw a market for the artist. Highly successful Australian artists such as Jessica Mauboy and Powderfinger were not released in many international markets.

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an increased profile for the Afrobeat genre have reinforced a perception of internationalisation within the global music environment. Poel et al. (2021, pp. 45–46) suggest that platformisation has enabled market access on a global basis and increased multi-national diversity across recorded music and other cultural production industries.

This paper provides a quantitative analysis of Australian and international artist representation in the Australian Recording Industry Association (ARIA annual top 100 single and album charts from 2000 to 2023 to explore Australian market national demographics during the period to determine if they align with propositions of glocalisation and/or internationalisation increasing local and/or national diversity within the market.

## 2. Market Consolidation

The global consolidation of cultural production has led to a discourse on the effects of concentrated ownership in the entertainment industries (Hesmondhalgh 2019; Poell et al. 2021; Prey et al. 2020). On one hand, it is argued that the democratisation of the recorded music industry (Bagal 2022; Brusila et al. 2021), long tail economics (Anderson 2006), easy access to immediate global distribution<sup>2</sup> and decreased home studio costs aligned with increased production quality (Keogh & Collinson 2020, p. 52; Poell et al. 2021, p. 12) have liberated artists from the traditional gatekeepers of industry (Álvarez Vázquez 2017; Edwards 2021). The 120,000 songs uploaded globally on Spotify daily (Luminate 2023) can be seen as evidence of a flourishing international environment of recorded music production and distribution. Indeed, Murphy & Hume (in Morrow et al. 2022, p. 215) proffer that the industry is entering ‘the age of the artist’ with independence, fandom, fragmented markets and artist/entrepreneurial agility as key attributes in the contemporary music ecosystem.

On the other hand, it is contended that the global consolidation of the recorded music industry, strengthened by algorithmic recommendation, has created strong gravitational pulls on creators to conform to platform design and entrenched the position of market leaders (Edwards 2021; Eriksson & Johansson 2017; Giblin & Doctorow 2022; Poell et al. 2021, p. 32; Prey 2018; Qu et al. 2023). Bilton (in O’Connor 2015, p. 290) further identifies a power imbalance between creators, most often small businesses, and distributors, dominated by multi-national corporations, as a counterweight to the democratisation of cultural production, often leading to platform dependency for artists and creators (Poell et al. 2021, p. vii).

The ecosystem of the recorded music industry has experienced increased consolidation in the 21st century. Whereas there were five major labels in the early 2000s, currently there are three.<sup>3</sup> At scale, national retail distribution networks have been largely replaced by global platform distribution via, in the west, platforms such as Spotify, Apple and YouTube (van Dijck et al. 2019). The author’s research of this article explores the impact of format change on (a) local artist market share within Australia and (b) the opening of the Australian market to international diversity.

## 3. The Australian Context

The International Federation of the Phonographic Industries (IFPI) ranked Australia as the tenth-largest market for global recorded music revenues in 2022 (IFPI 2023). As such, Australia ‘overachieves’ on a population basis.<sup>4</sup> Additionally, as an English-speaking market receptive to both American (#1 IFPI ranking) and British (#3 IFPI ranking) music production, Australia can play a key role in determining the global potential of artists from those music superpowers.<sup>5</sup>

The Australian market, similar to most mature music markets, experienced two format shifts during the 21st century. First, the Australian opening of the iTunes Store in 2005 introduced the paid download into the Australian music economy (Apple Newsroom 2005). iTunes downloads were introduced into the ARIA singles charts in October 2006 and the album charts in November 2007 (ARIA 2006, 2007). Second, the opening of Spotify in Australia in May 2012 signified the introduction of streaming into the market (Australian Associated Press 2012). Streaming data was

2 In the physical era release dates of recordings were staggered by country by country.

3 The three current major labels being Universal Music Group (UMG) which acquired EMI in 2013, Sony Music Entertainment (SME) who merged with (2004) and then purchased (2008) BMG, and Warner Music Group (WMG).

4 Wikipedia ranks Australia #56 on a world population basis.

5 The author, as General Manager Marketing for Universal Music and Sony Music Australia, is a first-hand witness to the use of Australia as a ‘test market’ on this basis. Examples of Australia as a ‘proving’ ground for international artists include Lady Gaga and Pink.

introduced into the ARIA singles charts in November 2014 and the album charts in May 2017 (ARIA 2014, 2017). iTunes downloading, whilst significantly impacting the market, did not halt the decline in recorded music revenues from the early 2000s to 2014, nor did it become a dominant format in the market, peaking at 47.9% of all recorded music revenues in 2014.<sup>6</sup> However, the emergence of streaming distribution correlates strongly with a rise in recorded music revenues both within Australia and globally from 2015. In 2017 streaming became the dominant recorded music format in Australia with 55.4% market share, rising to 88% share in 2023. (All figures calculated from: ARIA 2023c; IFPI 2022).<sup>7</sup>

Whilst ARIA does not disclose revenue share by a distributor, it is recognised in the recorded music industry that Spotify, Apple Music and YouTube dominate the Australian streaming economy with industry sources estimating these three companies have a 97% share of the streaming market and accrediting Spotify with approximately two-thirds of that number.<sup>8</sup> The triopoly of music distribution combines with the triad of major record labels to produce a highly concentrated Australian recorded music market. This accords with other aspects of Australian commerce. An investigation into market dominance by the *Guardian* involved the ranking of highly concentrated Australian industries (Visontay 2023). Developing this, the author has inserted music distribution and major label share of the annual 2023 top 100 single and album charts to create an Australian concentrated industries top six:

1. 97%: ARIA top 100 chart share 2023—Universal, Sony and Warner<sup>9</sup>
2. 95%: Domestic aviation—Qantas and Virgin
3. 85.4%: ARIA recorded music distribution—Spotify, YouTube and Apple Music<sup>10</sup>
4. 81%: Telecommunications—Telstra and Optus
5. 75.2%: Banking—Commonwealth, Westpac, ANZ and NAB
6. 65%: Food & grocery—Coles and Woolworths

Concentrated markets have a propensity to funnel choices for both consumers and suppliers to the profitable middle ground (Giblin & Doctorow 2022, p. 15), unlike the more competitive nature of high-street retail from the earlier part of the century (Turner 2022). However, increased accessibility to music distribution and the global nature of multi-national companies should not necessarily impair local or international representation in the annual Australian best-selling charts.

## 4. ARIA

ARIA is the trade association representing the Australian music industry and is owned by the three major record labels, UMG, SME and WMG. However, membership in ARIA is open to all Australian record labels and self-releasing artists, and ARIA claims over 100 members (ARIA 2023b). The ARIA Charts measure every week the best-selling recordings in Australia (with 'best-selling' incorporating music consumption via streaming platforms).<sup>11</sup> ARIA uses a weighting system to align streams with the value of physical and download sales. The calculation of this weighting is periodically reviewed in line with the major label accounting of relative values of streaming income.<sup>12</sup> Whilst ARIA collects sales data from over 1,000 physical and digital music retailers in Australia it does not claim to collect all data,<sup>13</sup> rather using diagnostic assessment to calculate the estimated percentage of non-collected data, in line with IFPI guidelines (ARIA 2023a). Details of chart calculations, code of practice and FAQs are available on the ARIA Charts webpage (2023b). In addition to weekly charts, ARIA also publishes end-of-year best-selling charts, including the annual top 100 singles and top 100 albums.

6 2014 also representing the low point of annual 21st century recorded music revenues in Australia and globally.

7 Figures drawn from ARIA and IFPI data as part of author's research.

8 Estimates based on anonymous information from industry insiders.

9 Major label share of 2023 top 100 singles 97%/top 100 albums 97%.

10 Industry estimates 97% of the total streaming share is held by Spotify, YouTube and Apple Music. Streaming revenues accounted for 88% of recorded music revenues in 2023. 97% of 88% equalling 85.4% (last decimal point rounded up).

11 The author was a member of the ARIA Chart and Marketing Committee 2005–2014 & 2015–2017

12 In June 2023 the conversion rate was 170 premium, or 470 freemium, streams equalling the value of one album sale. (Briggs, C. (2023). *The number of Australian musicians in the local charts has plummeted, why?* ABC. Retrieved 09.07.23 from <https://www.abc.net.au/news/2023-07-09/australian-music-in-aria-charts-has-plummeted-heres-why/102575198>)

13 From a digital perspective, an omission is the platform TikTok.

The relevance of the value of charts for consumers is debated within the recorded music industry and in academic circles (e.g. Morrow et al. 2022, pp. 239–257). In an online world of seemingly unlimited, platform-centric music supply, it is argued that public awareness of the current #1 single or album has diminished (Watson, J., in Morrow et al. 2022, p. 250). But, Page and Dalla Riva (2023, p. 6) assert that the charts have increased in relevancy, bringing clarity to an overwhelmed marketplace by making “the popular more visible and the visible more popular”. Also, irrespective of public consciousness, the charts maintain industry meaning in the measurement of commercial impact at scale, marketing strategies and resource allocation.<sup>14</sup> The ARIA charts thereby represent a methodically consistent means to measure popular music sales within the Australian market.

## 5. Data and Method

The analysis covers the years 2000–2023. As well as being chronologically convenient, 2000 represents the peak of CD sales prominence and the emergence of Napster and peer-to-peer file-sharing technology which led to two key format changes; the iTunes download and streaming in recorded music (Hesmondhalgh 2019; Negus 2019; Tschmuck 2006).

The ARIA annual top 100 singles and albums are publicly available via the ARIA Charts website.<sup>15</sup> In order to produce the analyses offered here, the data was transcribed into Excel spreadsheets for each year of the top 100 single and top 100 album charts, recording the nationality and region of each artist(s). Additionally, all Australian artists were reviewed to determine the representation of indigenous/non-indigenous artists (based on publicly available information). The chart position of each release was given equal weighting, 1% per entry, to ensure that the data was not dominated by a handful of superstar artists at the top of the charts and to reflect an accurate representation of the most popular recordings from each year. Similar equal weighting methods were used in the recent *Fix the Mix* (Emily Lazar et al. 2023) and ‘*Glocalisation*’ of *Music Streaming within and across Europe* (Page & Dalla Riva 2023) reports on recorded music industry dynamics, giving consistency to analysis comparisons. Excel spreadsheet data entries were converted into 2D line graphs tracking annual trends by artist region. Overlaid on the graphs are flagged indicators of the two transformative format changes during the period, the chart accreditation of iTunes and Spotify sales.

It is important to note this research did not have access to self-reported data to verify artist nationality(ies). Instead, Google search, artist websites and Wikipedia entries were utilised to code artists into nationalities, and then regions. For most artists, determining nationality was a straightforward exercise. For example, it did not take long to recognise that Ed Sheeran is British, Taylor Swift is from the United States, Shakira is Colombian and Flume is Australian. Some groups required split nationality coding, the band Fleetwood Mac, for example, were coded as 50% British/50% US. Soundtrack albums required a deeper level of analysis given the variance of artists involved. Each artist was checked for nationality and a percentage was allocated to each nation. In some cases, such as 2001’s *Shrek OST*, as over 90% of the artists came from one nation, the US, the release was coded to that nation. In others, such as the #1 selling album of 2000, *Moulin Rouge OST*, the split was roughly one-third each to the US, UK and Australia/New Zealand. Whilst this leaves room for some margin of error, the purpose of the research is to examine trends between 2000 and 2023 and the level of micro-detail in absolute determination for multi-artist albums would not significantly alter the findings.

Nationality, however, is both complex and personal.<sup>16</sup> The US rapper Akon is proudly US *and* Senegalese, the country his parents originate from. For this purpose, as he was born and brought up in the US he was coded as American. The most complicated example in this survey was the artist Mika, born in Lebanon but raised in Paris and London. Using the culture of upbringing as critical to his musical development and entry into industry he was coded 50% French and 50% British. However, such examples are in the minority. Once the nationality was determined, the artists were then split into the following regions.

<sup>14</sup> A major challenge for the author, when responsible for marketing in the Asia-Pacific region, was the lack of official charts to act as a barometer for artist impact and therefore marketing resources.

<sup>15</sup> Except for the Top 100 Albums for 2006, which was supplied to the author by ARIA on request.

<sup>16</sup> As a personal example, the author is eligible to hold three passports (British, Australian and Irish).

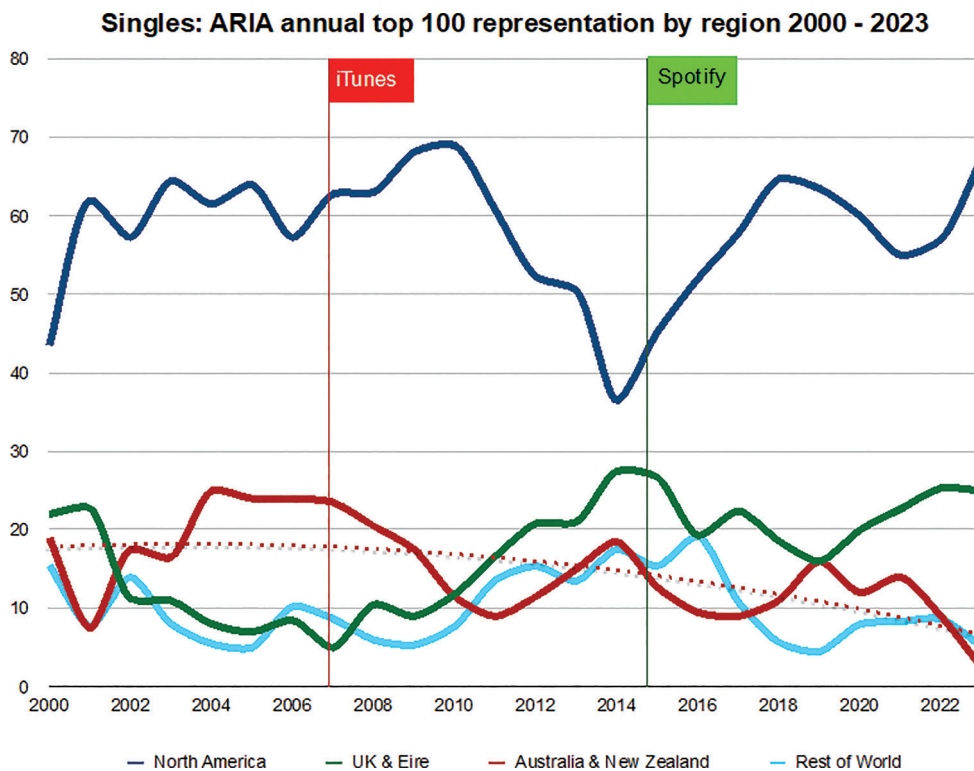
- North America (NA): The United States, Canada and Mexico.
- Australia and New Zealand (ANZ).
- The United Kingdom and Eire (UKE).
- Rest of World (RoW): All and any nations not included above<sup>17</sup>

North America is defined by geographical boundaries; the UKE were grouped separately from Europe for linguistic and cultural reasons; and ANZ were combined apart from the Asian region for linguistic and cultural reasons. The NA, ANZ and UKE regions are also described as English-speaking or Anglo (NB while Mexico does not fit in this category, only one Mexican artist, Carlos Santana, occupied chart positions during this period).

As previously noted, streaming distribution of recorded music entered the Australian market in 2012. By 2015 streaming accounted for 21.3% of Australian recorded music revenues and by 2017 streaming became the dominant format with 55.4% of recorded music revenues. As 2017 was the year ARIA included streaming data in both their singles and albums charts, for the most part, the analysis that follows contrasts regional and national chart representation on 2000–2016 (pre-streaming maturity) and 2017–2023 (post-streaming maturity) basis.

## 6. Findings

The annual top 100 single charts by region revealed:

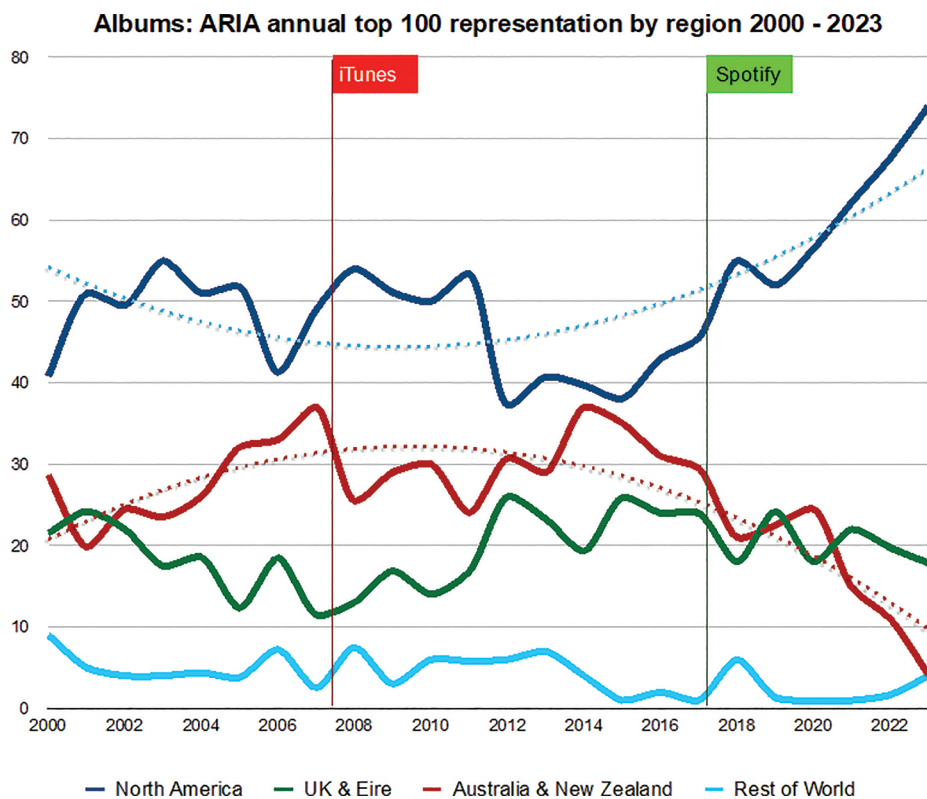


The data shows that North American artists have, for the most part, maintained market share across the period, the exception being a six-year dip between 2012 and 2017 which coincides with this century’s low point in recorded music revenues. Between 2000 and 2016 inclusive NA chart share averaged 57.1%. Since 2017 NA share has

<sup>17</sup> Approximately 92% of the world’s population.

increased 3.7% to an average of 60.8%, with a rising trend signified by 67.3% share of the annual top 100 in 2023. UK representation increased from the 2010s and has generally held chart share since. An average of 15.2% in 2000–2016 increased by 6.2%–21.4% for the period 2017–2022, which is testimony to the resilience of the UK market and its cultural relevance to the Australian market. ANZ chart representation averaged 19.6% between 2000 and 2009, with a peak of 25% in 2004.<sup>18</sup> The longer period to 2000–2016 reveals an average chart share of 16.6%. In the last seven years, 2017–2023, ANZ representation has declined 6.2% (exactly matching the UK incline) to an average of 10.5%, with a 2.5% share in 2023 suggesting a further downward trajectory. Unsurprisingly, given Australia's colonial history, the Anglo regions of NA, UKE and ANZ, have consistently commanded the majority chart share. This dominance has increased over the period. In 2000 the three English-speaking regions represented 84.5% of the chart, across 2000–2016 the average was 88.9%, between 2017 and 2023 the average increased to 92.7% and in 2023 94.8% of the top 100 annual best-selling singles were from the Anglo regions.

However, the increase in Anglo representation does not provide any advantage to ANZ artists. NA and UKE artists combined increased chart share from an average of 72.3% in 2000–2016 to 82.2% in 2017–2023, at the expense of both ANZ and RoW artists. The most consistent provider of RoW charting artists in Australia has been Europe, which peaked in 2016 with 15.3% share.<sup>19</sup> Since 2017, European representation has fallen to an average of 4.7%. The Caribbean has had moments of impact in 2006 (6.75%), 2011 (6.6%) and 2012 (7.7%)<sup>20</sup> but since 2017 the Caribbean average has fallen to 0.8% per annum. The rest of the world, those vast geographical and populous markets of Asia, Africa, South America, Eastern Europe and the Middle East, peaked in 2002 with three chart entries<sup>21</sup> and average 1.9% since 2017. Combined non-Anglo regions averaged 11.1% chart share between 2000 and 2016, declining to 7.3% since 2017, with 2023 recording a 5.2% share.



<sup>18</sup> Led by Shannon Noll (the #1 single of the year), Spiderbait, Joel Turner, Paulini and Delta Goodrem (all in the top 20).

<sup>19</sup> Led by Lukas Graham, Zara Larsson, DJ Snake, Galantis and Mo.

<sup>20</sup> Mainly led by Rihanna and Nicky Minaj.

<sup>21</sup> All by Colombian superstar Shakira.

The data suggests that since the maturity of streaming in the Australian market both Australian artist and non-Anglo single chart representation has declined in favour of artists from the USA, Canada and the United Kingdom.<sup>22</sup> The annual album charts demonstrate these trends more distinctly:

It is immediately apparent, from the trendlines, that the growth curve of NA chart share mirrors the decline of ANZ artist representation. Whilst the divergence commenced just prior to the addition of streaming data into the charts, it does correlate with the emergence of streaming into the market and has followed the growth of streaming in relation to recorded music revenues.

Between 2000 and 2016, NA artists occupied an average of 46.8% of the annual charts, but from 2017 that average chart share has increased by 12.2%–59%. The trajectory continues to track upwards, in 2023 NA chart representation of the top 100 albums registered 75%.<sup>23</sup> The UKE region, despite a dip in the mid-noughties, has proved consistent with a 20.5% share in 2017–2023, 1.4% up on a 19.1% average from 2000 to 2016. Traditionally, as the data indicates, the number of ANZ artists in the album charts has exceeded representation in the singles charts. Between 2000 and 2016 ANZ artists averaged 29.1% album chart share, with the period from 2017 registering a 10.9% decline to an average of 18.2%. The trajectory of ANZ chart share continues the downward pressure with 4.15% chart representation in 2023.<sup>24</sup>

Combined, the Anglo regions of NA, UKE and ANZ increased chart share from 91% in 2000, an average of 95% in 2000–2016, to an average of 97.7% in 2017–2023. As with the single chart data, the increase in Anglo chart share did not benefit ANZ artists as the NA portion of the Anglo share increased by an average of 12.2% from 2017, whilst ANZ share declined by 10.9% during the same period.

The data demonstrates high entry challenges for artists from non-English speaking regions. European artists trended between 3% and 5% share in 2000–2007, peaking in 2006 with 6.5% of the chart.<sup>25</sup> However, the years since 2017 have seen an average fall to 0.9%, with just one European artist, ABBA, registering in the annual charts in the last four years (2020–2023).<sup>26</sup> The Caribbean contributed a 4% chart share in 2000<sup>27</sup> and 3% in 2011, 2012 and 2023.<sup>28</sup> Despite three (catalogue) albums in the 2023 chart, the Caribbean chart average since 2017 is 0.6%. Outside of Europe and the Caribbean, representation has been scarce, with no artists represented in the 2023 chart. Combined, album chart share from non-Anglo regions more than halved from an average of 5% in 2000–2016 to 2.3% in 2017–2023. On a regional basis, the album charts have consolidated around artists from Anglo, and particularly North American, regions. Tracking chart diversity by country produces similar findings.

## 7. ARIA Chart Representation by Country

As previously indicated, prior to allocating artists into regions they were first identified by country, with each chart entry accredited with 1%. In the album charts, soundtracks, compilations and other multi-artist albums nationality was allocated percentage according to participation. For example, the 2000 album *Riding with the King*, by BB King (US) and Eric Clapton (UK) resulted in 50% splits to those countries. 2009's *Twilight* OST was allocated 66.6% to the US and 33.3% to the UK as an approximate ratio of representation on the album.<sup>29</sup> In the single charts, most split percentages were from featured artists. For example, the 2022 single 'Stay' by The Kid Laroi (Australia) and Justin Bieber (Canada) was allocated 50% to each country.

From this information, the percentages by county were tallied to determine the number of countries represented in the annual top 100 single and album charts. Any country with less than 1% in any annual chart was excluded on the basis that representation was not significant enough to warrant inclusion, and to ensure that featured artists did not disproportionately affect the data. For example, the 2012 single 'Slummer Paradise'

<sup>22</sup> The authors research shows that Irish chart share has also declined over the last seven years.

<sup>23</sup> Undeniably assisted by 10 Taylor Swift entries.

<sup>24</sup> ANZ artists in the 2023 top 100 selling albums were: 15% allocation for Tame Impala and The Kid Laroi inclusion on the Barbie OST; The very best of INXS at #58; Tame Impala's 2015 album *Currents* #76; Spacey Jane #87; and The Kid Laroi's 2020 album *F\*ck Love* #94.

<sup>25</sup> Represented by artists such as Andrea Rieu (three entries), Il Divo, ABBA and Daft Punk.

<sup>26</sup> Abba's 'Voyage' album in 2021 and 'Studio Albums' collection in 2023.

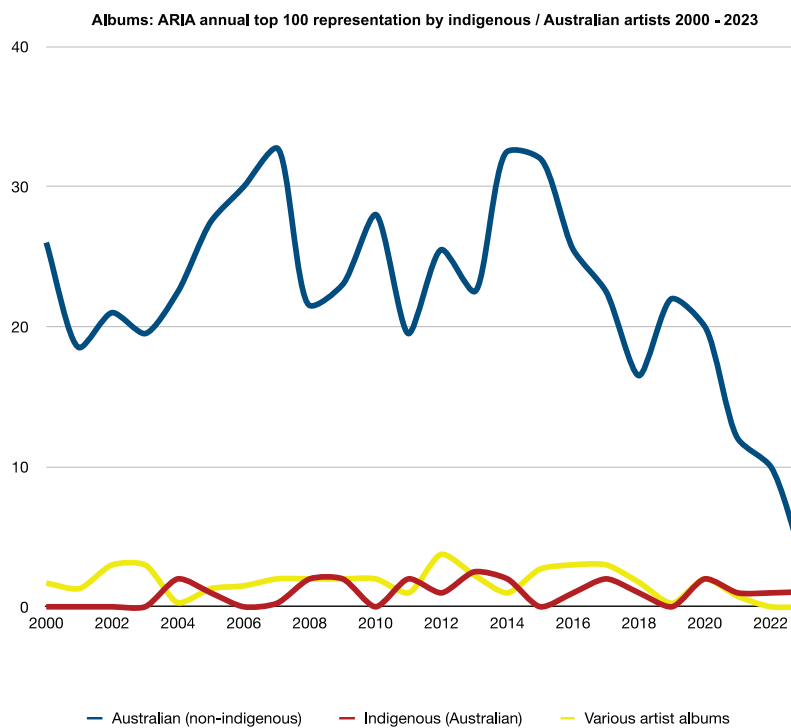
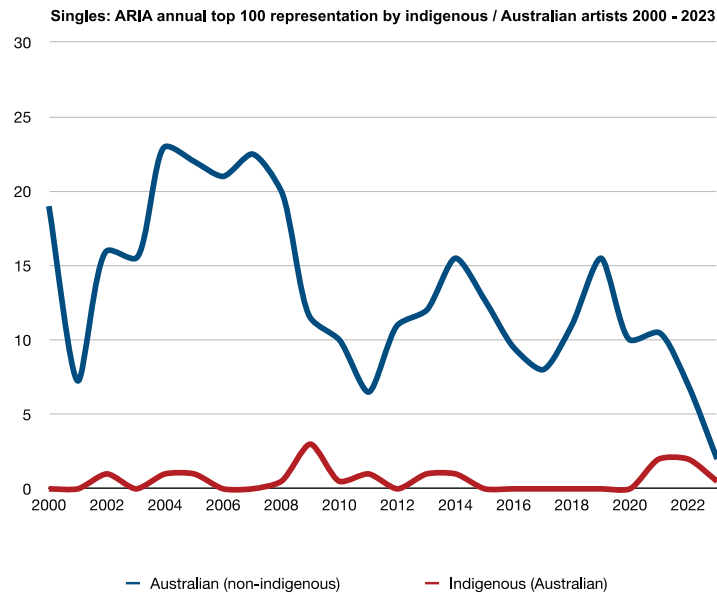
<sup>27</sup> Ricky Martin x2, Buena Vista Social Club and Bob Marley.

<sup>28</sup> All supplied by Rihanna x6, and Nicki Minaj x3. Noting that the three Caribbean chart entries in 2023 were catalogue albums – entries from Rihanna's 2007 and 2016 albums and Nicki Minaj's 2018 album.

<sup>29</sup> Noting that one track, *Eyes on Fire*, on *Twilight* was by Danish artist Blue Foundation. This was not deemed significant enough to complicate the calculation.







## 8. Indigenous Australia

The decline in Australian chart share over the period is not shared by Indigenous Australian artists. The research did not have access to self-reported data to verify the nuanced and complex area of indigenous identification (Yunkaporta 2019, p. 5), rather relying on Google search and Wikipedia to determine identification status.<sup>35</sup>

<sup>35</sup> While not the key focus of this paper, the pathways of Indigenous Australians in the music industries deserve wider exploration by researchers more familiar with this area.

The chart data was examined line by line to detail the number of Australian Indigenous and non-Indigenous artists in the annual top 100 single and album charts. Indigenous Australians are represented by the red line, non-Indigenous Australians by the blue line and multi-artist albums by the yellow line.

The data highlights the decline of all Australian artists in the best-selling single and album annual charts. More specifically, Indigenous Australian artists appear to have low representation in the charts both overall and in relation to non-Indigenous Australians. However, whilst from a low base the number of charting Indigenous artists has not changed significantly over the period. During the 24-year period in review, 14.5 singles by 4 artists held placings in the end-of-year single charts.<sup>36</sup> These 14.5 singles represent just 0.6% of the 2,400 charting singles during the period. However, in the context of Australian-only artists, the data shows that of the 333.5 Australian artist singles that made the annual charts during the period, as a percentage, Australian Indigenous artist share is 4.3%. In the album charts, 23.75 albums by eight artists held placings in the end-of-year charts.<sup>37</sup> These 23.75 albums represent 0.99% of the 2,400 charting albums over the period. However, in the context of Australian-only artists, the data shows that of the total of 599.2 Australian artist albums that made the annual charts during the period, as a percentage, Australian Indigenous artist share is 4%. The percentage share of both the single and album charts are slightly above the Australian Government estimate of 3.8% of First Nations people living in Australia (Australian Institute of Health and Welfare 2023).

It is interesting to note that whilst the nine Indigenous charting artists are split five males to four females on gender lines, it is the female artists that account for 60.8% of all Indigenous chart entries. This is mainly due to the success of Jessica Mauboy, who accounts for an extraordinary 42.5% of all Indigenous chart entries.

## 9. Data Summary

The decline in the number of Australian charting artists during the last few years has been a source of industry discourse both in public (Briggs 2023; Eltham 2023; Musically 2024; Varvaris 2023) and private.<sup>38</sup> The analysis of ANZ artist chart data makes for sober reading. Single chart share declined from an average of 16.6% in 2000–2016, to 10.5% in 2017–2023 and just 2.5% in 2023. Album share declined from an average of 29.1% in 2000–2016, to 18.2% in 2017–2023 and 4.15% in 2023. Additionally, low as those numbers are, they hide the fact that, in 2023, only one new release Australian artist single, and one new release album qualified for best-selling charts.<sup>39</sup> Moreover, the gap caused by the decline in ANZ artist chart representation has not been filled by artists from outside the Anglo regions. RoW artist single share deteriorated from 11.1% in 2000–2016 to 7.3% in 2017–2023 and, album share from 5% in 2000–2016 to 2.3% in 2017–2023. The reduction of international diversity in the charts is emphasised by similar results obtained when measuring representation by country. Between 2000 and 2016 an average of 10.8 nations were in each annual single chart, between 2017 and 2023 this reduced to 8.3%, a decline of 23%. In the album chart, an 8.8% average in 2000–2016 fell to 6.3% in 2017–2023, a 25% decline.

## 10. Interpretation

Changes in cultural production produce contrasting results across regions and sectors (Hesmondhalgh 2019, p. 409; Poell et al. 2021, p. 31). The data derived from the Australian charts contrasts sharply with concepts of both the glocalisation and internationalisation of recorded music within the Australian market. Whilst Page and Dalla Riva (2023) found that the introduction of streaming platforms, particularly Spotify, led to an increase in the number of hit songs by local artists in several European markets, the data presented points to an opposite result in the Australian market. Likewise, the narrative that lower entry barriers and global distribution lead to an internationalisation of recorded music (Poell et al. 2021, pp. 45–46) does not tally with the Australian chart data. Four, interrelated, themes

36 The four artists being: Shakaya x1; Casey Donovan x2; Jessica Mauboy x7; and The Kid Laroi x4.5.

37 The eight artists being: Xavier Rudd x1; Casey Donovan x2; Jessica Mauboy x 10.25; Gurrumul Yunipingu x4; Troy Cassar Daley x0.5; Dan Sultan x1; Thelma Plum x1; and The Kid Laroi x4.

38 For example, the author attended a meeting with a dozen senior Australian managers on 24.05.23 called to specifically address the topic of declining Australian artist chart representation.

39 Dean Lewis #68 single and Spacey Jane #87 album in 2023.

play to the susceptibility of the Australian market to homogenisation in terms of national demographics: market concentration; algorithmic direction; the rise of catalogue sales; and language.

High levels of market concentration are a feature of the Australian recorded music market, with three major labels (UMG, SME, WMG) controlling 90%+ annual top 100 chart share<sup>40</sup> and three distributors (Spotify, Apple, YouTube) accounting for 85%+ of all recorded music sales. This contrasts with a more competitive industry in the early 2000s containing six corporate groups (counting the independents as a single entity) vying for chart share, with none exceeding 30%.<sup>41</sup> The change has led to two principal companies emerging in each sector, with Universal<sup>42</sup> (label) and Spotify (distribution) commanding dominant market positions.<sup>43</sup> The leading platforms and labels operate based on American-led governance, design and structure (Poell et al. 2021, p. 84; van Dijck et al. 2019, p. 2). The US-centric nature of platformitisation relies on scale-based economics (Marshall 2015), with Australia's low population base acting as a disadvantage in the utilitarian aggregation of consumers to the profitable middle ground (Larson 2022; Nieborg & Poell 2018). In a risk-taking business (Bilton in O'Connor 2015, p. 289) an imperative drive for big companies is to create predictable consumer behaviours (Eriksson & Johansson 2017; Hesmondhalgh 2019, p. 326). Playlisting is one, prominent, tool that enables predictable outcomes.

Whilst playlisting provides a solution to the 'tyranny of choice' facing consumers it does so by popularity-led curation for the lean-back majority on the platform (Brusila et al. 2021; Klein et al. 2017; Sun 2018, p. 157). The distinction between lean-in and lean-back music consumers is not new. In the Australian market, labels would often target music enthusiast (lean-in) environments, such as radio station Triple J, prior to seeking to 'cross-over' to mass market (lean-back) commercial radio stations, such as 2DayFM and Nova. The power of a radio as a means of music discovery has been, per Australian artist manager John Watson (in, Morrow et al. 2022, p. 247), supplanted the playlist as the critical outlet for discovery. The dominant nature of the US in platform design, culture, utilitarianism and population skews streaming prioritisation back to the US (Giblin & Doctorow 2022, p. 80; Morrow et al. 2022, p. 241).<sup>44</sup> Predictable and homogenous outcomes are also favoured by the streaming-led pre-eminence of catalogue<sup>45</sup> recordings over new releases.

The pre-streaming recorded music economy was based on an ownership model (vinyl, cassettes, compact discs, downloads) with limited supply. The shift to streaming-led access, unlimited supply and economy benefits catalogue recordings at the expense of new release recordings. The author's analysis of the ARIA annual top 100 selling singles and albums points to new release album share declining from 72% in 2017 to 26% in 2023, and single share from 99% in 2017 to 59% in 2023. This aligns with the industry-wide new release share of recorded music declining from 65% of total revenues in 2002 (Brooks 2022) to approximately 30% in 2022 (Gioia 2022; Ingham 2022; Luminare 2023). The shift to catalogue diminishes the economic importance of new releases. The imperative for labels, particularly majors, to develop, market and promote new music in relation to share-holder value decreases accordingly. Industry commentators (Edwards 2023; Gioia 2022) in the US have accused the major labels of a collective failure to nurture new artists and new music. From an Australian perspective, the decline in new release chart representation potentially leads to diminished resource allocation for new Australian artists by major labels from parent companies. The fourth issue is the cultural challenge of language.

As noted, Page and Dalla Riva (2023) make the point that several European nations have experienced an expansion in chart activity for local, and local language, singles. The exception in their analysis were Eire (2023, p. 14), Austria, Switzerland, Belgium and Luxembourg (2023, p. 19). Where local content vied for exposure with the same language content from bigger neighbours, the disadvantage of scale resulted in a decrease in representation. The correlation for the Australian market suggests that where language is either not a cultural differentiator and/or the market is subject to strong cultural forces, in Australia's case the USA and the UK, those cultural forces are likely to dominate market exposure. The English-speaking advantage of Australian artists in terms of international exploitation in prime markets such as the US and UK is likely a weakness in domestic relevance.

40 In both the annual 2023 single and album charts the majors held 97% chart share.

41 Data derived from ARIA chart analysis by author.

42 In 2023 UMG held 43% share of top 100 singles and 62% share of top 100 albums.

43 Data derived from ARIA chart analysis by author.

44 Authors conversations with industry figures in Australia and New Zealand highlight the importance of playlists to communicate new music to audiences. However, the important playlists are, for the most part, based outside of Australia, in the US and/or UK, creating further access challenges for Australian artists.

45 Catalogue refers to recordings over two years old.

## 11. Conclusion

Page and Dalla Riva (2023, pp. 22–23) are explicit in arguing that the glocalisation of music distribution has created a ‘flywheel effect’ where domestic success stimulates global label investment further stimulating success for the benefit of local artists and consumers and repudiating the need for regulation in a flourishing free market environment. However, this analysis of the best-selling singles and albums in Australia 2000–2023 reveals a convergence of content by nationality towards North American and, to a lesser degree, British artists. Representation from both Australians and artists from non-Anglo countries has declined over the period, with accelerated decline coinciding with the emergence of streaming as the dominant recorded music format. Additionally, the increase in market consolidation, US-led governance, reinforced by utilitarian algorithmic design correlates with homogenisation by nationality of the Australian charts. The lack of a linguistic-cultural differentiator for Australian artists adds a broader challenge within the globalised recorded music market. Following the logic, if not the conclusion, of Page and Dalla Riva, declining domestic success could lead to global disinvestment to the further disadvantage of local companies, artists and consumers. This highlights the need for the exploration of cultural policy intervention to combat a highly concentrated and North American-dependent market if there is a desire to preserve and promote Australian musical cultural identity and notions of global diversity.

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## Conflict of Interests

The author declares no conflict of interest.

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