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Local Minimum Content Requirements on Commercial Radio: An Australian Case Study

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Abstract

In Australia, commercial radio stations are required to play a minimum percentage of Australian content, set by the Australian Communications and Media Authority. The percentage differs depending on the category of station and the style of music played. This paper considers four major commercial radio stations in Melbourne, Australia, focusing on support within the sector for Australian content. The research examines if the stations are filling the required local content quota and if they are doing so within peak times of 6:00 a.m. to 6:00 p.m. or stacking Australian music in off-peak periods.

Currently, there is no up to date academic research available on commercial radio stations across Australia and the self-regulating practices designed to ensure that a suitable amount of local content is being played on air, in particular within peak airtime. This research aims to understand if there is a connection between the local content quotas and actual airplay by accessing radio station playlists available through the Radio Monitors database. The purpose of this data collection is to understand better the exact amount of support given to Australian content by commercial radio, which will help create a discourse around what should be the obligations of stations with regard to local content quotas.

Keywords: local content quotas, Australian music, commercial radio, radio airplay, CRA, Commercial Radio Australia, Australian music industry

Introduction – Background on Local Content Quotas

This research examines Australian radio focusing on support within the commercial radio sector for Australian local content and looks at the overarching effects of airplay on local artists and the Australian music industry. By doing a comparative analysis with the Canadian CANCON local content quota system and looking into how New Zealand handled deregulation of its local content quotas, the paper strives to find a better and

more efficient way of balancing a market-based approach with the need to support the local music industry.

Australian commercial radio stations, are required under the Australian Music Code of Practice Guidelines, “to promote the role of broadcasting services in developing and reflecting a sense of Australian identity, character and cultural diversity, by prescribing minimum content levels of Australian music” (AMPCOM 2016, 5). Australian government-funded national radio stations such as ABC and national youth broadcaster Triple J do not fall under the above code, however, as a comparison, the research will look at the playlist of Triple J during the same period. Triple J is required to play a minimum of 40% Australian content, which is well above the 25% mandatory quota set for commercial radio.

Here, local content and Australian music is defined as work that is written, created, and performed by Australian artists, either in Australia or overseas. The Australian local content standard was introduced in 1942 by the Australian government as a component of the Broadcasting Act to build and maintain local music as part of the Australian culture. In the years following, the local content quota was raised from the initial token amount of 2.5% to 5% in 1956 and was increased to 20% in 1976. In 1987, a compliance period was put into place from 24 hours a day to between 6:00 a.m. and midnight, these amendments remained standard until 1992 when the new Broadcasting Services Act increased the local content quotas to 25% and made them part of a self-regulatory code for commercial and community broadcasters. In 2004, due to the Australia-United States Free Trade Agreement, caps on music quotas were set at 25%, and deregulation of the quota system was adopted. “In the event the quotas are lowered, they cannot again be increased. In the event the quotas are removed, they cannot be reintroduced” (Gailey 2012).

From 2004 to 2016, commercial radio’s self regulatory compliance of local content was overseen by Commercial Radio Australia and the music industry committee AMPCOM that represented the Australian Recording Industry Association (ARIA), the Phonographic Performance Company of Australia (PPCA), The Australian Music Publishers’ Association Ltd. (AMPAL), music rights organization APRA AMCOS, the Musicians’ Union of Australia, and the Media Entertainment and Arts Alliance (MEAA). However, the industry committee AMPCOM was disbanded and since March 2017 Commercial Radio Australia has had sole stewardship of overseeing the minimal content requirements, reporting annually

to ARIA with the Australian Communication & Media Authority supervising the compliance of the code.

The Australian music content quota requirements, which apply to commercial radio licenses are currently reflected in the Commercial Radio Codes of Practice (see Appendix 1). This code commits commercial radio broadcasters to quotas of Australian music depending upon the individual station's predominant format (see Appendix 2). The maximum quota requires Category A stations, which predominately play top 40, mainstream rock, album orientated rock, contemporary hits, alternative, and pop music to transmit 25% Australian music. Also, one-quarter of the music played must be new Australian music as stated in the Code of Practice, and:

Radio stations whose format is within categories A, B or C of sub-clause 5.2 (a) must play a percentage of New Australian performances as a proportion of total Australian Performances prescribed by this provision, shall be in accordance with the following table, when calculated across all Australian Performance Periods occurring in a financial year, subject to 5.5 – the provision does not apply to a licensee that does not include New Releases in its weekly play lists, having regard to its format. (Commercial Radio Code of Practice 2018, 9)

AMPCOM and the CRA state that the quotas depend upon whether or not there are sufficient new Australian releases available that are suitable to each station's format. In the case that there is limited supply or a "substantial decrease of Australian performances released, CRA may revise the percentage required of New Australian Performances as a proportion of total Australian performances" (AMPCOM 2016, 7).

By examining the online source, Radio Monitors, and compiling data over a one-week period on four commercial radio stations in Melbourne, the research aims to understand the exact amount of Australian content played on commercial radio. This data may then open the debate into how the Australian music industry can encourage compliance of the mandatory 25% minimum requirement of Australian content and what incentives the government could develop to maintain and support Australian content on commercial radio. The paper also looks at the difference commercial airplay makes for those artists lucky enough to secure it by using the ex-

ample of Melbourne band The Teskey Brothers, whose career trajectory was boosted by two spins during peak time on one commercial radio station in Melbourne.

According to the Statistical Snapshot report prepared by Music Australia for a music industry partnership developing a National Contemporary Music Plan, it states, the “Australian Contemporary music industry [is a] multi-billion dollar contributor to Australia’s economy and culture,” the industry currently contributes an estimated “\$4 to \$6 billion [annually] to the Australian economy” (Music Australia 2017). With these figures in mind, it is important to nurture and continue to develop the Australian music industry for its continued growth within the economy. Adhering to the minimum requirement of content quotas will ensure that the Australian music industry thrives into the future. There is a clear role for both state and federal governments along with industry stakeholders to monitor and encourage cultural uptake by multinational broadcasting companies that might overlook their responsibilities.

Literature Review

There have been several studies in the last decade that include research on local content quotas and key stakeholders in the music industry. In these studies, including a research paper prepared for the Music Council of Australia, we find support for local content and learn that the Australian music culture is strong and plays a key role in developing local music production. Paul Mason suggests that “these quotas are vigorously defended by the music community as being critical to the preservation of a local musical culture and industry” (Mason 2003, 1).

In the book, *Changing Stations: The Story of Commercial Radio* by Bridget Griffen-Foley, (p. 259) the history of local content quotas is traced back to 1942 when the first quota was introduced with 2.5 percent of radio time to be devoted to the work of Australian composers. *Changing Stations* gives a comprehensive insight into the introduction of the local content quota and details the changes in the Copyright Act, the Broadcasting Act, and the establishment of the many incarnations of Australian broadcasting bodies including the Federation of Australian Radio Broadcasters (established in 1930), the Australian Broadcasting Control Board (est. 1948), Australian Broadcasting Authority (est. 1992), Commercial Radio Australia (est. 2002), and the Australian Communications and Media Authority (est. 2005).

Since the Australian Music Performance code was put in place in 2001, a gap in the literature has been identified with regard to recent data on whether the commercial radio sector is meeting the local content requirements. The most up-to-date report on Australian Music content on commercial radio is by Hans Hoegh-Guldberg from 2011-2012 for Music In Australia/The Music Trust, Knowledge Base. The report concludes that AMPCOM, as the overseer of the elaborate system for the monitoring of commercial radio stations in Australia, believes that “compliance with the Australian Code of Practice is generally high in the five codes set up for different program formats, with nearly 100% for all except Category A which sets the highest quota, a minimum of 25%, for the most popular formats. Seven of the 49 stations under Category A fell short of the minimum quota in 2011-12” (Hoegh-Guldberg 2013).

In a report commissioned by Music Council of Australia, titled *Music and the Media: Government Regulation in Australia and Abroad*, Lyn Gailey states that the “compliance results reported to AMPCOM by Commercial Radio Australia are not subjected to independent scrutiny. It is a self-reporting exercise taken at face value,” and concludes that, “it is possible that in the absence of quotas, those reporting Australian music compliance at or marginally above the required quota may not deliver the same outcome” (Gailey 2012, 13).

It is hypothesized that increased support and selection of Australian music on commercial radio would have a positive effect on the entire Australian music industry. With more Australian artists receiving commercial airplay, the artists’ music sales will increase, income from live shows would also increase, and the sector as a whole would benefit from follow-on effects of a much healthier industry. As Paul Mason states, “Airplay drives sales, which drives local signings; and quotas ensure that commercial stations look at the independent sector” (Mason 2003, 6).

In the research paper commissioned by the Australian Government and Australia Council and written by Associate Professor Shane Homan titled, *The Music Recording Sector in Australia: Strategic Initiatives*, maintaining local content is an important factor in ensuring a healthy local music industry. Homan states that:

There was a consensus of opinion that the local content quotas for commercial radio broadcasters required investigation; if content rates could not be raised, then obliga-

tions could be tightened in relation to the times and spaces when Australian material was played. This has been a source of considerable tension between the music recording and copyright companies and Commercial Radio Australia. (Homan 2012, 13)

In the paper “From Coombes to Crean: Popular Music and Cultural Policy in Australia,” Homan examines several areas of contention with regard to minimum local content requirements on radio including the review into quotas on both analog and digital commercial radio devices in the *Convergence Review* in 2012. Submissions for the removal of the quotas and the maintenance of them were noted from both sides, however, in the final report dated March 2012, the *Convergence Review* recommended keeping the existing quotas and suggested extending them to “digital broadcasting landscapes and soundscapes” (Homan 2013, 391). The *Review* found that the quota system is generally effective, however, due to the developing nature of internet-delivered audio services, the report recommended it would be problematic and futile to apply quotas of local content to such services at this time.

The *Convergence Review* has been a fundamental tool in an ongoing trend by the state and federal governments who are continually struggling with the intertwining issues of increasing divergence of production and consumption. *The Review* has found that the quota question is still relevant especially with the decline of direct enforcement of the minimum requirement of local content and the multifaceted issue of fostering local production. *The Review* recommended that new media and the continued development and strengthening of the Australian cultural landscape needs to be reinforced and protected.

To summarize, it is concluded that while there has been academic discourse on the minimum requirements of Australian local content on both commercial radio and television, there is no current research that specifically aims to delve into the exact amount of local content played. The literature focused around this discourse is typically very encouraging of maintaining the minimum requirements on commercial radio. Support for upholding local content focuses around Australian music and the creative industries continuing to be an important cultural asset for Australia. In order for Australia to uphold its cultural identity, it is imperative that

Australian music continues to be broadcast and easily available to the entire population.

Opposing the Quotas

As mentioned previously, there has been research on local content quotas with regard to its effect on the Australian culture, society and reflecting a sense of Australian identity, with authors vigorously defending the need for content quotas. However, there are no examples of research on the exact amount of Australian content played on commercial radio as it is assumed that the commercial radio sector in Australia continues to act in accordance with the self-regulatory rules set out by the Australian Government with regard to the minimum requirement of local content. Some leaders within the Australian music industry hypothesize that the local quotas are not being maintained and that this is presented by the lack of Australian artists on the ARIA charts and meager percentage of Australian artists reaching a certain level of achievement in Australia and internationally.

The debate on local content requirements on commercial radio has been taking place for over three decades. In 1982 the Australian Broadcasting Tribunal in consultation with Commercial Radio Australia believed that most stations were playing more Australian-produced music than they needed to and highlighted the preference by CRA to remove the then 20% quota. “Over 100 submissions were made to the inquiry into Australian music on the radio with only three in favour of abolishing the quota” (Griffen-Foley, 277). At this review, Midnight Oil’s lead singer Peter Garrett appeared and issued an open letter supporting the local content requirements stating that his band “wouldn’t have stayed alive if we hadn’t got the airplay we did” (Griffen-Foley, 277). This argument has resurfaced many times over the past decades and continues to be a matter of concern for those within the Australian music industry who feel that for Australian artists to survive and carve out a career, they need the support of Australian broadcasters.

Commercial Radio Australia opposes local content quotas and supports the removal of the Australian music content quota requirement. CRA believes that “greater effort needs to be expended at the production level to ensure that a wide range of quality Australian music content continues to remain both available and attractive to music consumers” (Commercial Radio Australia Ltd 2011). In a submission to the Contemporary Com-

munity Safeguards Inquiry, July 29, 2013 by Commercial Radio Australia Ltd., the report put forth an argument for continued self-regulatory status by commercial radio stations across Australia, contending that the sector is well suited to the self-regulatory model. While determinedly defending self-regulation, they believe that the “current industry culture, combined with strong commercial incentives to comply with audience expectations and provide valued local content and a diversity of views, strongly implies that self-regulation would work as successfully as would coercive regulation, except with significantly less regulatory burden.” As the CRA considers the continuation of the local content quota system and its effect on the Australian cultural landscape as a burden, this is a detrimental position for them. In arguing for continued self-regulation, Commercial Radio Australia also states that “pure self-regulatory models without any form of government or statutory involvement are rare, the application of such a model to the commercial radio sector is not without precedent” (Commercial Radio Australia Ltd. 2013).

The removal of AMPCOM from the compliance process was spearheaded by CRA in late 2016 with the revision of the Code of Practice completely excising AMPCOM’s role from monitoring Australian content. The Australian Communications Media Authority (ACMA) then opted not to replace AMPCOM with any overseeing reviewing process. Since the exclusion of the overseeing body AMPCOM in March 2017, and the introduction of the current co-regulatory regime under the Broadcasting Service Act, CRA is reporting compliance annually to ARIA, with the ACMA overseeing compliance of the Code. For this research, a request was put forward to APRA for access to the broadcast reports from the selected commercial radio stations; however, this request was denied with APRA’s representative saying that this information was strictly confidential. With this in mind, we ask ourselves, what do APRA and the radio stations have to hide, and if radio content is broadcast publically, why is this information confidential?

Comparing International Quota Systems

When comparing similar research from Canada on local content quotas, the quota system CANCON and how the regulations and enforcement of CANCON help maintain a clear Canadian cultural identity, we see how the Canadian Government, by enforcing the minimum requirement of local content on Canadian radio, has assisted in building a robust and vibrant

local music industry. Four different research papers on the Canadian music industry were chosen for comparative analysis, with a focus on the local content quota system CANCON. The methodologies behind the research papers are varied using quantitative, qualitative, and mixed method approaches, and give a comprehensive view of the overall success of the Canadian quota system.

Since the introduction of CANCON in 1971 on AM radio and 1976 on FM radio, the local content quota was set at 35% Canadian domestic releases. Domestic or local releases are determined by a system called MAPL (Music, Artist, Production, Lyrics) and require two of the four criteria be met for a song to qualify (through citizenship and location) as Canadian content. In the years following the introduction of CANCON we see a marked increase of Canadian music being played on Canadian radio—jumping from the average of 4% to 7% to the required 35% (Skinner, Lorimer, and Gasher, 174-175).

There are pervasive opinions that foreign content broadcast on domestic radio without limitation stifles the creation and access to local music, a critical part of a nation's culture and commerce, and that local music is displaced by foreign music (Stein-Sacks 2012, 1).

The research also examines New Zealand, which deregulated its content quotas also due to its Free Trade Agreement with the U.S.A., removing their quota system completely in return for governmental financial support initiatives to help develop the New Zealand music industry. However, the mechanisms that have been put in place to support the local industry and the deregulated free market approach have affected New Zealand's creative industries significantly in the past decade. As New Zealand has more radio stations per capita than anywhere else in the world, NZ On Air was established to administer funds collected by the broadcasting fee with a brief that included the provision for subsidizing and supporting local music. The NZ On Air music schemes such as New Tracks, which promote New Zealand songs to radio, and music programs that sponsor radio and television music programs that showcase New Zealand music and artists are in effect the alternative to local content quota and has helped to improve the proportion of New Zealand acts played on radio. The local content percentage is currently sitting at approximately ten percent. NZ On Air is aware of the significance of commercial radio support stating its focus on getting more local music played on air, agreeing that "commercial radio remains important because it's still the way the majority of

people connect with music” (NZ On Air 2017). To support New Zealand artists, NZ On Air has funding for the production of airplay-ready material and the promotion of the songs to help market them to radio. In 2017 alone, NZ On Air also funded other initiatives to promote New Zealand Music by supporting commercial radio stations with financial benefits with a total of NZD \$935,000 going to eight commercial radio stations around the country.

Materials and Methods

Primary data for this research was sourced directly from Radio Monitor’s website. The guideline for the methodology is to extract data systematically from the independent Radio Monitor website over a period of one week from June 5 to June 11, 2017. As a comparison, information from The Album of the Year and ARIA websites was gathered to assess the number of Australian artists released during the twelve months prior to the June 2017 research period. The aforementioned will indicate the appropriate availability of broadcast-worthy material in the lead-up to the period of investigation.

This research notes not only the number of Australian acts broadcast during that period but also lists the percentage of music from international territories played with a comparison to the Australian content played. A comparative analysis is presented regarding the amount of Australian content released in the twelve months prior to the survey. The data collected is displayed in several bar graphs with a positivism philosophy to the research, relying on facts and the quantitative data obtained. The research approach for this study is a deductive approach, allowing the data collection to evaluate propositions or hypotheses related to the theory of the support of local content on Australian commercial radio. Advantages include the relatively inexpensive ability to research the readily accessible radio airplay data.

The content validity and reliability of this study, although a new design, measures the exact airplay of commercial radio stations by carefully monitoring every song played over each 24-hour period over a one-week period. While this study aims to identify the amount of local content played on commercial radio, additional studies might attempt to further research the effect of airplay for local artists on their careers.

Results

Only by studying the effectiveness of the current system and the actual amount of local content played on commercial radio can we understand the support of Australian artists and their relevance in today's market. The research objective is to define the exact amount of content played and put an end to the counter-arguments where 1) the CRA claims compliance and 2) industry stakeholders claim that radio falls well short of its obligations. This researcher's motivation is to compel improvements to the uptake of local content. This research shows that the self-regulatory approach is not working and without an overseeing body monitoring compliance, some commercial radio stations are not maintaining the minimum content requirements.

Research conducted across one week in June 2017 shows that of the three Category A and one Category C commercial radio stations in Melbourne, two of the three stations do not come close to the 25% Australian content quota allocation and the Category C station is also well below its 15% minimum requirement. The statistics show that out of the three radio stations not reaching the quotas, Nova Melbourne played the lowest percentage of Australian music. In addition, the local content played is largely delegated to the final hour of the day between 11:00 p.m. and midnight when the audience is significantly smaller than during the peak times of 6:00 a.m. to 6:00 p.m. The graphs below show that of the music played on each of the commercial radio stations, acts from the U.S. get the most airplay, followed by artists from the U.K., with Australian artists receiving a small percentage of airplay. The ABC's national youth network, Triple J, is upholding its minimum requirements and doing its best to cultivate and promote Australian local content, playing a diverse range of music (see Tables 1 to 10).

NOVA 100 Melbourne

Nova Melbourne played from 2.5% to 5.3% of Australian music between 6:00 a.m. and 6:00 p.m. on Monday to Friday, upping the percentage on the weekend to 7.8% to 9.5% between 6:00 a.m. and 6:00 p.m., which is significantly below the 25% required. However, the percentage for Australian music played within a 24-hour period are slightly higher ranging from 5.9% to 8.9% Monday to Friday and from 5.8% to 9.1% on Saturday and Sunday. This research shows that out of approximately 280 songs played per day, Australian artists were represented with a minimum

of 14 songs and the maximum of 32 songs played, and American artists were represented by a minimum of 106 songs and a maximum of up to 136 songs played during the 24-hour period (see Table 1). Overall, during the week of June 5 to June 11, 2017 between 6:00 a.m. and 6:00 p.m., Nova Melbourne played a total of 68 Australian songs compared to a staggering

NOVA 100 – Melbourne							
Songs Played From 6 a.m. - 6 p.m., June 5 - 11, 2017							
Nova 100 Melbourne	Australian songs played	American songs played	British songs played	European Union songs played	Canadian songs played	New Zealand songs played	Other
5 Jun 2017	7	49	37	14	8	1	6
6 Jun 2017	3	50	33	11	11	2	6
7 Jun 2017	3	46	36	16	9	1	6
8 Jun 2017	7	52	30	11	9	2	6
9 Jun 2017	6	42	36	13	8	2	7
10 Jun 2017	13	62	42	24	9	5	10
11 Jun 2017	16	64	44	25	10	3	6
Total Songs 6 a.m. - 6 p.m.	55	365	258	114	64	16	47
Songs Played Across 24 Hours, June 5 - 11 2017							
Nova 100 Melbourne	Australian songs played	American songs played	British songs played	European Union songs played	Canadian songs played	New Zealand songs played	Other
5 Jun 2017	26	116	87	31	16	2	12
6 Jun 2017	14	114	75	34	24	6	13
7 Jun 2017	16	118	75	36	22	5	13
8 Jun 2017	21	120	69	34	19	3	13
9 Jun 2017	23	106	75	34	17	6	16
10 Jun 2017	19	123	87	53	19	8	16
11 Jun 2017	32	136	88	49	23	5	15
Total Songs 24 Hours	151	833	556	271	140	35	98

Table 1. NOVA 100, June 5 - June 11, 2017.

437 American, 297 U.K., 134 songs by artists from the European Union, 77 songs by Canadian acts, and 20 from artists from New Zealand.

Ten Australian acts were given airplay on NOVA 100—some of those acts received only one play across the week. Artists with the highest airplay were Sia, receiving a total of 25 plays across 3 songs, PNAU receiving a total of 23 plays of the one song, Amy Shark received 18 plays of her current single, Bliss n Eso featuring Gavin James received 14 plays, Dean Lewis received 10 plays of his current single, Illy had a total of 12 plays, 6 of the song featuring Vera Blue and 6 plays of the track featuring McDougall. The artist receiving the most spins across two singles was Peking Duk, with the single featuring Elliphant receiving 23 plays and the single featuring Aluna George receiving 18 plays across the week, giving the artist a solid 41 plays across the week. This airplay, however, did not guarantee Peking Duk chart positions on the ARIA singles chart, week commencing June 5, 2017.

FOX 101.9 Melbourne

Of the total of 184 Australian tracks played across the week, Australian singer/songwriter Sia had 29 plays of her most recent single *Reaper* closely followed by Dean Lewis's track *Waves* with 27 spins. Starley's *Call On Me* followed with 16 plays, Peking Duk featuring Aluna George with 11 spins and Peking Duk featuring Elliphant *Stranger* with 10 plays, and The Veronicas' *The Only High* with 7 spins across the week. Of the 42 Australian acts receiving airplay, the remaining artists received from 1 play up to 4 plays during that week (see Table 2).

KIIS 101 Melbourne

In the 2015-2016 *Australian Music Performance Committee Annual Report*, KIISFM is listed as a Category C format, which encompasses soft adult contemporary/hits and memories/gold - classic hits, and news and sports talk radio. Category C stations are required to play not less than 15% Australian content, with not less than 15% of new Australian performances as a proportion of the total Australian performances. During the week of June 5 to June 11 between the hours of 6:00 a.m. and 6:00 p.m., KIIS played 0.75% Australian content on Monday, June 5 and up to 8.8% on Friday, June 9. Airplay on Saturday and Sunday made up a large percentage of the minimum requirements of local content from 14.4% to 21.7%. However, the majority of Australian songs were played from 6:00

FOX 101.9 – Melbourne							
Songs Played From 6 a.m. - 6 p.m., June 5 - 11, 2017							
FOX 101.9 Melbourne	Australian songs played	American songs played	British songs played	European Union songs played	Canadian songs played	New Zealand songs played	Other
5 Jun 2017	7	49	26	19	4	2	5
6 Jun 2017	7	55	24	20	5	1	3
7 Jun 2017	9	49	23	17	9	1	6
8 Jun 2017	5	53	25	13	10	3	5
9 Jun 2017	0	79	12	3	2	0	4
10 Jun 2017	19	52	31	20	8	2	12
11 Jun 2017	23	54	36	19	9	3	8
Total Songs 6 a.m. - 6 p.m.	70	391	177	111	47	12	43
Songs Played Across 24 Hours, June 5 - 11 2017							
FOX 101.9 Melbourne	Australian songs played	American songs played	British songs played	European Union songs played	Canadian songs played	New Zealand songs played	Other
5 Jun 2017	27	100	50	35	10	5	9
6 Jun 2017	19	109	51	34	11	4	7
7 Jun 2017	28	91	45	32	13	4	11
8 Jun 2017	25	94	45	28	17	6	8
9 Jun 2017	7	142	37	17	10	2	8
10 Jun 2017	31	121	63	46	14	4	18
11 Jun 2017	49	114	70	32	17	5	16
Total Songs 24 Hours	186	771	361	224	92	30	77

Table 2. FOXFM, June 5 - June 11, 2017.

a.m. to 8:00 a.m. and from 10:00 p.m. until midnight on Sunday June 11. On Saturday, June 10, of the 325 tracks played, only 37 of them were by Australian artists compared to 157 by Americans and 61 by acts from the U.K. (see Table 3).

Across the week, although KIISFM was not meeting its minimum requirement, it did play a substantially higher number of Australian artists compared to NOVA. NOVA played from a selection of 10 Australian acts while KIISFM drew from a total of 53. This variety in the number of Australian artists receiving airplay, albeit some just one or two plays

KIIS 101 – Melbourne							
Songs Played From 6 a.m. - 6 p.m., June 5 - 11, 2017							
KIIS 101 Melbourne	Australian songs played	American songs played	British songs played	European Union songs played	Canadian songs played	New Zealand songs played	Other
5 Jun 2017	1	53	32	14	12	2	7
6 Jun 2017	5	60	24	13	7	3	5
7 Jun 2017	9	49	24	14	6	4	6
8 Jun 2017	4	59	29	13	10	2	7
9 Jun 2017	11	59	24	17	3	3	7
10 Jun 2017	25	69	38	21	9	3	8
11 Jun 2017	39	72	38	15	8	2	5
Total Songs 6 a.m. - 6 p.m.	94	421	209	107	55	19	45
Songs Played Across 24 Hours, June 5 - 11 2017							
KIIS 101 Melbourne	Australian songs played	American songs played	British songs played	European Union songs played	Canadian songs played	New Zealand songs played	Other
5 Jun 2017	20	107	55	28	21	5	13
6 Jun 2017	24	104	61	22	14	6	10
7 Jun 2017	45	89	52	23	11	6	11
8 Jun 2017	30	121	46	23	13	4	12
9 Jun 2017	23	104	47	32	13	5	13
10 Jun 2017	37	157	61	36	17	4	13
11 Jun 2017	72	129	65	30	17	4	14
Total Songs 24 Hours	251	811	387	194	106	34	86

Table 3. KIISFM, June 5 - June 11, 2017.

in the week, is evidence that there is a plethora of good Australian music available.

TRIPLE M Melbourne

On the other end of the spectrum is Triple M, Southern Cross Austereo's rock station that is by all accounts doing its part in supporting Australian content, although this is not understood as support for new Australian music. During the survey week, Triple M's local content support ranged from 15.8% to 27.8% between 6:00 a.m. and 6:00 p.m. Monday to Friday, with overall Australian content played over a 24-hour period ranging from 20.7% to 33.3%. The statistics for Triple M differ from other stations as the local content played is spread across the board and not stacked in off-peak time slots between 10:00 p.m. and 6:00 a.m. However, the research shows that Triple M plays much less music than the other stations surveyed ranging from a total of 105 to 142 tracks played across the day. When comparing the number of Australian artists played to the number of American artists played across the week, the percentage is approximately half with the maximum 50 Australian songs played compared to 81 songs by American artists and 45 by acts from the U.K.

Of the Australian artists played on Triple M Melbourne there were a total of 55 different acts, however only 14 of those acts had released new material within the period from June 2016 to May 2017. This shows that although Triple M is very supportive of Australian music, playing the most variety of local acts, it is playing a substantial number of Australian artists from the 1980s and 1990s (see Table 4).

TRIPLE J National Youth Network

Over the week researched, Triple J played from 47.7% up to 50% Australian content between the hours of 6:00 a.m. and 6:00 p.m. Monday to Friday, reaching up to 53.9% Australian content within a 24-hour period. The maximum songs played throughout a single day totaled 249 tracks made up of 131 Australian songs compared to 56 tracks by American artists and 40 by U.K. artists. This shows that Triple J is effortlessly making the 40% minimum requirement of local content and also proves that there is sufficient Australian content available and worthy of airtime. Across the week from June 5 to June 11, Triple J played 824 songs by Australian artists compared to 381 by American acts and 290 by British artists (Table 5).

TRIPLE M Melbourne							
Songs Played From 6 a.m. - 6 p.m., June 5 - 11, 2017							
TRIPLE M Melbourne	Australian songs played	American songs played	British songs played	European Union songs played	Canadian songs played	New Zealand songs played	Other
5 Jun 2017	13	48	12	3	2	0	0
6 Jun 2017	19	38	16	2	0	0	1
7 Jun 2017	22	43	13	2	0	0	1
8 Jun 2017	22	44	13	1	0	0	1
9 Jun 2017	22	36	17	3	0	0	1
10 Jun 2017	8	20	7	0	0	0	0
11 Jun 2017	7	22	8	0	0	0	1
Total Songs 6 a.m. - 6 p.m.	113	251	86	11	2	0	5
Songs Played Across 24 Hours, June 5 - 11 2017							
TRIPLE M Melbourne	Australian songs played	American songs played	British songs played	European Union songs played	Canadian songs played	New Zealand songs played	Other
5 Jun 2017	27	74	25	4	2	0	0
6 Jun 2017	33	68	36	2	0	0	2
7 Jun 2017	35	70	29	3	0	0	1
8 Jun 2017	33	59	22	2	0	0	1
9 Jun 2017	26	50	24	4	0	0	1
10 Jun 2017	30	66	25	2	0	0	0
11 Jun 2017	48	81	45	2	1	0	1
Total Songs 24 Hours	232	468	206	19	3	0	6

Table 4. TRIPLE M, June 5 - June 11, 2017.

Research was also conducted to establish the amount of new Australian releases available using data from The Music Network and Album of The Year websites for the period June 2016 to May 2017. It is estimated that there were 290 registered Australian releases during this time, and in

TRIPLE J							
Songs Played From 6 a.m. - 6 p.m., June 5 - 11, 2017							
TRIPLE J	Aus- tralian songs played	Ameri- can songs played	British songs played	Euro- pean Union songs played	Can- adian songs played	New Zea- land songs played	Other
5 Jun 2017	65	30	16	7	1	4	3
6 Jun 2017	65	29	25	4	3	2	2
7 Jun 2017	57	25	30	6	2	1	0
8 Jun 2017	68	22	23	8	4	2	0
9 Jun 2017	53	26	17	6	4	3	1
10 Jun 2017	70	38	24	5	5	2	2
11 Jun 2017	75	34	24	10	6	4	2
Total Songs 6 a.m. - 6 p.m.	453	204	159	46	25	18	10
TRIPLE J							
Songs Played Across 24 Hours, June 5 - 11 2017							
TRIPLE J	Aus- tralian songs played	Ameri- can songs played	British songs played	Euro- pean Union songs played	Can- adian songs played	New Zea- land songs played	Other
5 Jun 2017	129	53	32	11	4	5	5
6 Jun 2017	131	56	40	12	3	3	4
7 Jun 2017	117	58	45	12	5	4	2
8 Jun 2017	130	42	40	11	11	5	2
9 Jun 2017	109	56	41	22	7	4	2
10 Jun 2017	108	65	43	11	8	3	5
11 Jun 2017	100	51	49	11	8	4	4
Total Songs 24 Hours	824	381	290	90	46	28	24

Table 5. TRIPLE J, June 5 - June 11, 2017.

the eight weeks prior to the radio research, from April 3 to May 26, there were 44 total Australian releases from both major label and independent artists. Of artists released within the twelve months up to June 2017, the following acts were the only ones receiving significant airplay on com-

mercial radio: Amy Shark, Illy, Sia, Peking Duk (with various artists), Dean Lewis, and Bliss n Eso all with substantial airplay on NOVA, KIIS, and FOXFM, followed by Birds of Tokyo, Samantha Jade, The Veronicas, Starley, and Sheppard all getting from ten to sixteen plays within a week. Table 6 shows the number of releases within the twelve months leading up to the research. The artists and releases receiving significant airplay on commercial radio are predominantly new releases, defined as a sound recording which has been on sale for a period not exceeding 12 months from the date recorded in *The ARIA Report* as the initial release.

Australian Album Releases June 2016 to May 2017	
June 2016	24
July 2016	24
August 2016	42
September 2016	37
October 2016	34
November 2016	23
December 2016	5
January 2017	8
February 2017	26
March 2017	23
April 2017	18
May 2017	26
TOTAL	290

Table 6. Number of Australian new releases from June 2016 - May 2017.

Discussion

The results of the desktop research were compelling, showing a small percentage of Australian music being played on commercial radio. Of the artists that were played, there were only six acts receiving frequent airplay, sufficient enough to translate to actual chart positions and sales. In the ARIA Singles chart for the week commencing June 5, 2017 there were a total of three Australian acts in the Top 50: #22 Dean Lewis *Waves*,

#33 Bliss N Eso featuring Gavin James *Moments*, and #49 Starley *Call On Me – Ryan Riback Remix*.

One limitation of this research is that only one week was examined in one capital city in Australia. Melbourne has a population of over 4.8 million people, accounting for 19.05% of the national population, ranking as the second most populated city in Australia after Sydney, in New South Wales. Taking the population of Melbourne into account, and also looking at the percentage of the total listeners for each of the stations, it is estimated that the limited data represents 30.7% of Melbourne listeners as per radio ratings as of April 24, 2018. This week was chosen at random during the Australian Performance period of 126 hours occurring in each week between the hours of 6:00 a.m. and 12:00 a.m. With this period in mind, we have found that with the small amount of local content being played it is dubious whether these stations would come close to the minimum requirements, in particular playing Australian music within peak airtime.

Commercial radio has a greater reach, especially with the mainstream audience, than community radio which suggests that the culture of listening to the radio and using it as the underlying foundation to discover new music is alive and well in the twenty-first century, regardless of the ability to access all types of music from internet resources. The power of commercial radio was seen when a local Melbourne band called The Teskey Brothers, who were virtually unknown to commercial radio, were featured on a segment on Melbourne radio station Triple M's breakfast show *Live From Eddie's Desk* with Eddie McGuire.

The Teskey Brothers formed in 2008 and up until twelve months ago, the band was playing its regular three sets on a Sunday afternoon to a loyal, local audience at the St. Andrews Hotel in the Yarra Valley to a maximum of fifty people each week. With the independent release of their album *Half Mile Harvest* in early 2017, the band's popularity had risen—not due to a large marketing budget or social media campaign—but from word of mouth and support from specialty community radio shows. However, the act went from selling out smaller venues in Melbourne in early 2017 to four sold-out shows at the Corner Hotel in July, with a capacity of 800 per night due to a single act of commercial radio support during peak time. The airplay and live performance on Triple M's *Hot Breakfast* led to a significant amount of ticket sales for the band's Melbourne shows. The marketing manager at the Corner Hotel, Sally Mather, explained by email, "The Triple M spot had a massive impact on ticket sales. We had maybe

sold a couple of hundred tickets over a three-week period before the performance on the *Breakfast* show and then sold out three shows in a couple of days after that, and then a fourth show sold out over the next week” (Mather 2017). The Teskey Brother’s manager, Jeremy Furze, concludes that the appearance on commercial radio unquestionably made a difference to ticket sales and provided daily ticket sales numbers and recording sales figures to support this hypothesis (see Figures 1 and 2).

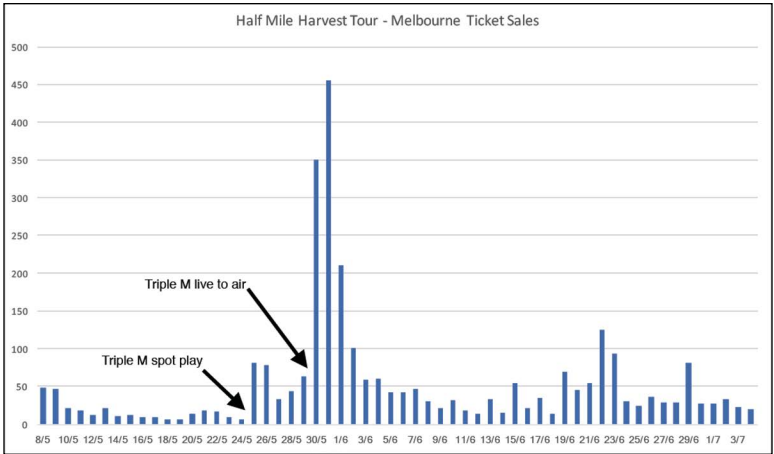


Figure 1. The Teskey Brothers: Half Mile Harvest Tour – Melbourne ticket sales.

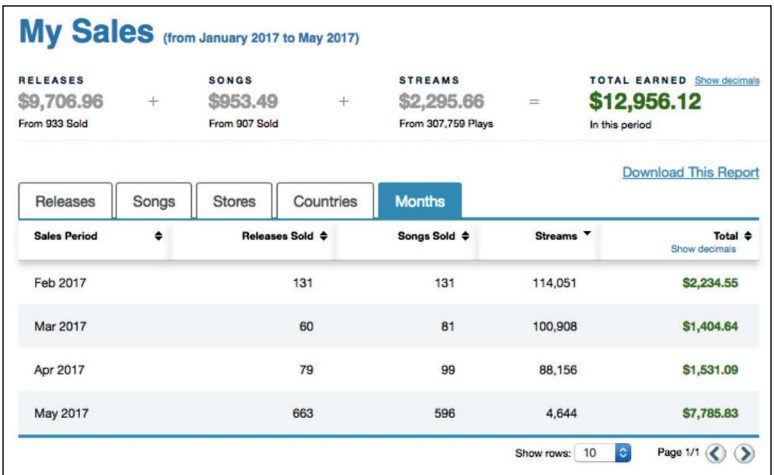


Figure 2. The Teskey Brothers: Sales – February-May 2017.

Conclusion

Currently there are more artists across all disciplines generating creative outcomes and stimulating the cultural industries in ways never seen before—this is evident in the number of Australian artists releasing material. However, an insignificant percentage of the musical acts released each year benefit from commercial radio airplay. As the research results demonstrate, out of an estimated fifty Australian artists receiving airplay over a one-week period, only six of these acts received a significant enough amount of airplay to benefit their careers, with only three acts receiving enough airplay to chart in the Top 50 singles charts.

To compete on a global level with online streaming and digital services, commercial radio stations in Australia need to distinguish themselves from the world market by supporting and playing more local content. Playing Australian artists will give commercial radio more content and would differentiate themselves from the global stations and content service providers, allowing Australians to hear Australian music on Australian commercial radio stations. CRA should focus on localizing its programming to be competitive globally.

A collaborative approach by each sector within the music business is required to effect change. The music industry must seek ways to support commercial radio and enable it to take up more local content. For a long time, there has been a combative approach from both the music industry and commercial radio. Mechanisms need to be found in order to change the attitudes of commercial radio station program directors around the country. Commercial radio has fallen short of the quotas because it has failed to see the cultural and commercial benefits of supporting Australian content. A healthy local music industry can only enhance commercial radios listenership. It is important that Australia continues to cultivate a healthy, thriving music community and in turn, a music industry that is economically viable for years to come. This can only be done with support across all sectors of the industry for local musicians, songwriters and artists.

Since the completion of this research paper in March 2018, as of April 1 ARIA, APRA, and CRA have begun working together on an agreed monitoring framework to look at what the commercial radio stations are doing and how they're meeting the required quotas. They are currently using the same Radio Monitor database to scan playlists and monitor compliance. There has also recently been an Australian Federal Government

Senate Inquiry on the Local Content Quotas on both radio and television in May 2018. A submission to the inquiry using this research was submitted, the results of the Senate Inquiry are still to be announced. In September 2018, the Australian Government also called for a Parliamentary Inquiry into the Australian music industry—this research will be used in a submission to this inquiry with regard to growth and sustainability of the music industry. Stay tuned.

Appendix 1

Commercial Radio Australia Limited ACN 059 731 467
15 March 2017

CODE OF PRACTICE

1. Australian Music

5.1. A Licensee must ensure that during the Australian Performance Period, either:

5.1.1. the applicable proportion of the total time occupied by the broadcasting of Music by the radio service consists of Music performed by Australians; or

5.1.2. in the case of a Licensee which broadcasts Musical Items of a reasonably similar duration, the applicable proportion of the total number of Musical Items broadcast by the radio service consists of Musical Items performed by Australians.

5.2. For the purposes of 5.1, the applicable proportion of total time or total number of Musical Items (as the case may be) in respect of a radio service, must be determined based upon the predominant format of the service in accordance with the following scale:

Category	Format of Service	Applicable Proportion
A	<ul style="list-style-type: none">• Mainstream Rock• Album Oriented Rock• Contemporary Hits• Top 40• Alternative	Not less than 25%
B	<ul style="list-style-type: none">• Hot/Mainstream/Adult Contemporary• Country• Classic Rock	Not less than 20%
C	<ul style="list-style-type: none">• Soft Adult Contemporary• Hits & Memories• Gold – encompassing Classic Hits• Hip Hop	Not less than 15%

D	<ul style="list-style-type: none"> • Oldies • Easy Listening • Easy Gold • Country Gold 	Not less than 10%
E	<ul style="list-style-type: none"> • Nostalgia • Jazz • NAC (Smooth Jazz) 	Not less than 5%
F	All other formats of service (including, without limitation, programs which are predominately comprised of open-line, news, talk and sport content)	N/A

5.3. In the case of a radio service whose format is within categories A, B or C of 5.2, the broadcast of New Australian Performances as a proportion of total Australian Performances prescribed by this provision, shall be in accordance with the following table, when calculated across all Australian Performance Periods occurring in any financial year, subject to 5.5.

Category	New Australian Performances as a Proportion of Total Australian Performances
A	Not less than 25%
B	Not less than 20%
C	Not less than 15%

5.4. The commitment on the part of a Licensee to play a minimum level of New Australian Performances in accordance with 5.3, is subject to the release of such Performances by the Australian record industry in numbers that are substantially the same as those released in the financial year ending June 1998. If, in any financial year, there is a substantial decrease in the release of New Australian Performances, CRA may revise the proportions of New Australian Performances as a proportion of total Australian Performances, contained at 5.3, provided that any change that may eventuate will not affect the Licensee's obligations under 5.1.

- 5.5. The provision at 5.3 does not apply to a Licensee that does not include New Releases in its weekly play lists, having regard to its format.
- 5.6. For the purposes of 5.3, the category into which a radio service falls must be nominated by the Licensee.
- 5.7. For the purposes of 5.2 and 5.3, where more than one performer is involved in a musical performance, the Musical Items concerned shall be regarded as being performed by an Australian if the performance is predominantly by one or more Australians.
- 5.8. A Licensee must notify CRA by written notice of any material change to the format of a radio service operated by it, having regard to the tables in 5.2, no later than 7 days after the change is made.
- 5.9. CRA will provide regular yearly reports to ARIA on the performance by Licensees in relation to this section 5.
- 5.10. This section 5 does not apply to Digital-Only services. This exemption will be reviewed in conjunction with the next material review of this Code.

Appendix 2

Total number of Commercial Radio Stations in Australia	260
Total Number of Category A Stations	44
Total Number of Category B Stations	73
Total Number of Category C Stations	112
Total Number of Category D Stations	19
Total Number of Category E Stations	3

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CHRISSIE VINCENT started her career in the music industry in 1981 at Festival Records in Sydney, Australia. With over thirty-seven years experience in the music and entertainment industry, Vincent has worked with some of the biggest names in music, both in Australia and internationally (based in Los Angeles for five years at Virgin Records Worldwide) working with acts including the Rolling Stones, Lenny Kravitz, David Bowie, Sex Pistols, Smashing Pumpkins, and Australian artists and bands including The Living End, Pete Murray, Don Walker, Jeff Lang, Tim Rogers, Tex Perkins—the list is endless. She has worked in various capacities including publicity, artist management, TV production, record promotion, radio promotion and music television at MTV in Australia and the U.S.



In 1999 she branched out as an independent publicist establishing Chrissie Vincent Publicity & Management, working on successful publicity campaigns for events such as Falls Festival, St. Kilda Festival, St. Kilda Film Festival, Pyramid Rock Festival, Boogie Festival, the Australasian Worldwide Music Expo, and CD and national tour campaigns for both local and international touring artists. In January 2015, Vincent accepted the position of Head of Entertainment Management at Collarts (Australian Collage of the Arts) where she oversees the Bachelor of Applied Business degree and lecturing in Entertainment Management.

In November 2017 Vincent was the first person to complete a Masters Degree in International Music Business at the Box Hill Institute, and in March 2018 she released her thesis on local content quotas on Australian commercial radio. The research results have already made changes in airplay. Her interests lie in music and cultural policy where she is using her passion and deep understanding of the business to ensure a sustainable music industry for her students well into the future.

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