

## Talent pipeline

- 5.1 Australian artists and the music they create is the product that every other part of the music industry exists to promote, sell, or develop. Making music takes a significant investment from artists – not only the cost of recording or staging music, but also the time involved in learning their craft and applying their knowledge and skills to create great music.
- 5.2 It is therefore essential that Australia supports and safeguards its ‘talent pipeline’, ensuring that Australian artists are able to create great music now and into the future.
- 5.3 This chapter will explore the talent pipeline, considering the support and education necessary to ensure that Australian artists have the skills, tools, and opportunities to create and succeed in the industry.

## Education and training

- 5.4 Participants emphasised the importance of music education, not only for the cultivation of future artists but also for the development of future audiences. The Australian Music Association (AMA) told the committee that ‘music education is central to a thriving music industry’.<sup>1</sup>

## Music in schools

- 5.5 School is one of the first places that many Australians are introduced to the process behind the creation of music – whether by learning an instrument or learning the basic building blocks of music theory. Many

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<sup>1</sup> Australian Music Association, *Submission 105*, p. 2.

participants emphasised the importance of investing in the music education of all Australians from an early age. The Australian Music Industry Network (AMIN) explained that:

Music education is definitely something we feel is a huge priority – ensuring everyone gets access to playing an instrument. It helps develop music audiences, musicians and industry professionals. It's all about industry renewal.<sup>2</sup>

- 5.6 The Australian Youth Orchestra (AYO) raised concerns that approximately 70 per cent of Australian primary school children do not have access to music education.<sup>3</sup> AMA advised that, while more than 80 per cent of independent schools offer music programs, 62.7 per cent of public primary schools and 33.8 per cent of public secondary schools have no dedicated music classes.<sup>4</sup>
- 5.7 West Australian Music (WAM) advised the committee that the availability of music programs in public schools ‘fluctuates widely’. It explained that public school music programs are ‘dependant on interested principals and senior teachers who are able to push music within the system because it’s something they believe in passionately’. However, ‘in other schools they don’t have these champions, so music falls far behind’.<sup>5</sup>
- 5.8 Participants praised Queensland’s public school music programs. The Australian Recording Industry Association (ARIA) noted that ‘Queensland is the one state that ensures every school does have a music program’.<sup>6</sup> AMIN agreed, explaining that ‘Queensland is definitely the one state that has consistently delivered when it comes to music education’.<sup>7</sup>
- 5.9 AYO told the committee that a number of countries are seeking to increase the importance and priority of music within schools and the school system. AYO explained that countries such as the United States, United Kingdom, Singapore, Japan, and Korea require almost every primary

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2 Ms Emily Collins, Deputy Chair, Australian Music Industry Network, *Committee Hansard*, Sydney, 22 November 2018, p. 41.

3 Mr Colin Cornish, Chief Executive Officer, Australian Youth Orchestra, *Committee Hansard*, Melbourne, 21 November 2018, p. 14.

4 Australian Music Association, *Submission 105*, p. 2.

5 Mr Michael (Mike) Harris, Chief Executive Officer, West Australian Music, *Committee Hansard*, Canberra, 28 November 2018, p. 9.

6 Mr Dan Rosen, Chief Executive Officer, Australian Recording Industry Association, *Committee Hansard*, 2 November 2018, p. 14.

7 Ms Emily Collins, Deputy Chair, Australian Music Industry Network, *Committee Hansard*, Sydney, 22 November 2018, p. 41.

school student to receive music education in their classroom, utilising a mix of specialist and generalist music teaching.<sup>8</sup>

- 5.10 Participants also praised a range of programs and organisations that encourage and support music in schools, in particular, the work of the Song Room; Musica Viva; Music: Count Us In; Major Performing Arts Organisations education programs; the APRA AMCOS Ambassadors Program and SongMakers Program; and the ARIA Music Teacher of the Year program.

## Conclusions

- 5.11 Music education is essential to the development and cultivation of Australia's next generation of artists. However, it is clear that the understanding and appreciation of music that results from music education is beneficial to all Australians, not only those who go on to pursue careers in the music industry.
- 5.12 The committee is disappointed by reports that so many Australian students do not have access to music education. All Australian students should have access to music education, whether within the independent or public school system. The committee commends those principals and teachers that are championing music in their schools; however, a child's access to music education should not be dependent on this.
- 5.13 This dearth of music education is particularly concerning during a time when other countries are seeking to increase the importance and priority of music within schools and the school system. If Australia wishes to remain competitive as a music export nation, we must not neglect to invest in the crucial first stage of the talent pipeline.
- 5.14 All Australian students at public primary and secondary schools should have access to music education. The committee commends Queensland for its dedication to music education. The Australian Government should strongly encourage states and territories to follow Queensland's example and ensure that all students have access to music education. To this end, the Australian Government should ensure that music education in primary and secondary schools is a key agenda item for the next meeting of the Council of Australian Governments.

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8 Australian Youth Orchestra, *Supplementary Submission 90.1*, pp. 3-4.

## Recommendation 11

- 5.15 **The committee recommends that the Australian Government ensure that music education in primary and secondary schools is a key agenda item for the next meeting of the Council of Australian Governments.**

## Equipping professionals

- 5.16 Participants emphasised the importance of high-quality education and training to prepare artists, technicians, managers, and other professionals for a career in the music industry. The Australian Independent Record Labels Association (AIR) told the committee that many musicians and creative people, ‘know what they would like to do, but they don’t know how’. AIR explained that:
- The great thing about the creative industries is that we already know the outcome that we want to achieve. Then we work backwards to gain the skills and support and the networks and the knowledge that we need to get where we want to go and achieve the results that we want...<sup>9</sup>
- 5.17 The Australian Major Performing Arts Group (AMPAG) told the committee that ‘educating the next generation of “elite” artists and developing career pathways post tertiary education are critical for classical music in Australia’. It advised that Major Performing Arts Organisations support emerging artists through collaboration with tertiary training institutions, elite competitions, and professional internal training programs.<sup>10</sup>
- 5.18 Musica Viva told the committee that elite training of musicians requires a unique learning approach. It raised concerns that, since the integration of conservatoriums into universities, there has been increasing pressure for music education to conform to a group-teaching model over limited weeks that is common to most other tertiary studies. Musica Viva asserted that music teaching should remain a ‘special case’ for funding and called for individual tuition to be well-supported.<sup>11</sup>

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9 Ms Maria Amato, General Manager, Australian Independent Record Labels Association, *Committee Hansard*, Melbourne, 21 November 2018, p. 6.

10 Australian Major Performing Arts Group, *Submission 77*, pp. 8-9.

11 Musica Viva, *Submission 53*, p. 3.

- 5.19 Kristy-Lee Peters, known professionally as KLP, told the committee that ‘there is no university’ for many artists and others in the music industry, rather ‘we kind of learn through doing it’. She explained that many people working in the music industry ‘learn through mistakes’ and ‘learn through the support around us’.<sup>12</sup>
- 5.20 Ms Peters advised that connections and support from those with experience and knowledge of the industry provides artists with a significant advantage. She told the committee that she was ‘very lucky’ that her father was a musician and could teach her about the ‘business side’ of the industry. However, she said that she sees many artists ‘that don’t have that and they’re just fumbling their way through it’.<sup>13</sup>
- 5.21 The Arts Centre Melbourne emphasised the importance of mentoring and ‘real life experiences’ for musicians and industry professionals. It explained that university is potentially ‘not a great fit’ for everyone in the music industry. Therefore, it is vital to ensure that there are other pathways and strong mentoring programs for those seeking a career in the music industry.<sup>14</sup>
- 5.22 The Arts Centre Melbourne advised that it currently offers five full-time Certificate III traineeship programs each year within the production team areas of Lighting, Sound & Vision, Wardrobe, Venue Technician, and Staging. It explained that the training programs combine formal classroom-based study with structured mentorship and have had a 100 per cent success rate in leveraging its industry networks to transition graduates into employment.<sup>15</sup>
- 5.23 TAFE NSW agreed, asserting that vocational training is vitally important to the future workforce within all sectors of the music industry. It explained that, unlike some sectors within the music industry (such as classical and jazz music), the mainstream music industry has not traditionally had a culture of formal training.<sup>16</sup>
- 5.24 Vocational education and training (VET) programs are being provided by an increasing number of practitioners, which offer practical, industry-relevant skills and knowledge. TAFE NSW advised that there are a myriad of music industry qualifications ranging from Certificate II to Advanced Diplomas in specialisations such as music performance; sound production;

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12 Ms Kristy-Lee Peters, *Committee Hansard*, Brisbane, 6 February 2018, p. 17.

13 Ms Kristy-Lee Peters, *Committee Hansard*, Brisbane, 6 February 2018, p. 17.

14 Ms Janine Barrand, Director, Australian Performing Arts Collection, Arts Centre Melbourne, *Committee Hansard*, Melbourne, 21 November 2018, p. 43.

15 Arts Centre Melbourne, *Supplementary Submission 71.1*, p. 2.

16 TAFE NSW, *Submission 116*, p. 1.

music business; electronic music production; composition; and music theatre.<sup>17</sup>

- 5.25 AMIN told the committee that state and territory music industry associations provide training and professional development for artists and others in the music industry. A number of participants praised AMIN's professional development programs RELEASE (for record labels) and CONTROL (for managers). AIR explained that:

Two key programs that received cross industry support and government funding were CONTROL and RELEASE for managers and record labels, respectively. Both of these programs were abundantly successful and if re-instated would create clear pathways for established managers and record labels.<sup>18</sup>

- 5.26 Sounds Australia noted the 'value and importance' of the RELEASE and CONTROL initiatives in helping to prepare the music industry for export activity.<sup>19</sup> Music Australia commented that the programs 'have strong industry engagement and outcomes' and recommended that the RELEASE and CONTROL programs be 'supported by government and increased'.<sup>20</sup>

- 5.27 AMIN told the committee that RELEASE and CONTROL were delivered by AMIN from 2011-2017. However, it advised that funding for these 'transformational initiatives' ceased in 2018 as a result of changes to the criteria for program funding from the Ministry for the Arts.<sup>21</sup>

- 5.28 Sounds Australia also highlighted Live on Stage (for artists) and Track Record (for Artist Managers), which later evolved into the International Music Makers and Music Managers fund. It explained that these grants were 'effective, timely and strategic' and 'provided important tangible support for a number of artists and industry professionals'.<sup>22</sup>

- 5.29 Sounds Australia told the committee that the Australia Council for the Arts (Australia Council) had previously administered these 'discrete funding schemes' which were 'targeted and fit for purpose for the contemporary [music] industry'. It called for the return of these or similar funding grants that specifically target the growth and sustainability of the Australian music industry.<sup>23</sup>

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17 TAFE NSW, *Submission 116*, p. 2.

18 Australian Independent Record Labels Association, *Submission 104*, p. 6.

19 Sounds Australia, *Submission 95*, p. 20.

20 Music Australia, *Submission 63*, p. [37].

21 Australian Music Industry Network, *Submission 35*, p. 2.

22 Sounds Australia, *Submission 95*, p. 29.

23 Sounds Australia, *Submission 95*, p. 29.

## Conclusions

- 5.30 Unlike some careers, there is no one clear, defined pathway for artists and others in the music industry. One artist may formally train in an instrument from a young age, study it through school, study at a conservatorium, and then be employed by an orchestra. Another artist may be self-taught, develop their music performing at local pubs, publish their music online, and be discovered by an overseas record label. Every successful artist's story and path is different.
- 5.31 Throughout the inquiry it has become clear that the ability to create great music alone is not enough to succeed. Industry knowledge, business acumen, and the ability to network and build connections are paramount to a successful career in the music industry. It is therefore essential that artists and others seeking a career in the music industry have access to the training and professional development necessary to succeed.
- 5.32 Vocational education and training, together with specialised training and mentoring programs, are valuable resources for those pursuing careers in the music industry. The committee notes the positive work of organisations such as the Arts Centre Melbourne for their programs mentoring and training music industry professionals in the early stages of their careers.
- 5.33 The committee is concerned by reports that Australian Government funding for strategic programs and initiatives, such as the Australian Music Industry Network's RELEASE and CONTROL initiatives and funding schemes such as the International Music Makers and Music Managers fund has recently ceased.
- 5.34 These programs had strong industry support and were reported to be achieving positive outcomes in building the capacity for Australian artists, artist managers, and record labels to grow their businesses and to develop and market their music in Australia and overseas. The Australian Government should invest in initiatives such as these to provide support for artists and industry professionals to grow their businesses.

## Recommendation 12

- 5.35 The committee recommends that the Australian Government invest in initiatives aimed at training and supporting artists and industry professionals to grow and develop their businesses, such as the:
- Australian Music Industry Network's RELEASE and CONTROL initiatives; and
  - Australia Council for the Arts' International Music Makers and Music Managers fund.

## Investing in talent

- 5.36 Throughout the inquiry, participants emphasised the challenges inherent in building a sustainable career in the music industry. Participants told the committee that artists operate as small businesses that are repeatedly required to make significant investments and take substantial financial risks in order to develop and market their product.

## New recordings

- 5.37 Participants told the committee that creating new recordings is an expensive but necessary investment; however, some raised concerns that the cost of recording music is increasingly greater than the income generated by the recording. The Association of Artist Managers (AAM) explained that investing in a recording is seen as necessary to access other income streams:

When you're looking at recording, you're saying, 'We've got to spend this because it's actually going to create a live situation or it's going to create some syncs or it's going to create some profile or some branding.' It's almost like a very expensive thing you have to do.<sup>24</sup>

- 5.38 Jonathan Zwartz, a professional artist, told the committee that recording an album costs approximately \$30,000 – comprising studio costs, musicians' fees, mixing, mastering, and production. He raised concerns that the low incomes generated by streaming is making it more difficult for artists to make back the money they invest in recording.<sup>25</sup>

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24 Mr Rick Chazan, Co-Chair, Association of Artist Managers, *Committee Hansard*, Sydney, 2 November 2018, p. 17.

25 Mr Jonathan Zwartz, *Committee Hansard*, Brisbane, 6 February 2019, p. 16.

- 5.39 Participants reported that it is the artist, rather than the record label, that is expected to bear the cost of recording. John Watson, President, John Watson Management, explained that 'the costs of making the sound recording are typically borne 100 per cent by the artist'.<sup>26</sup>
- 5.40 Furthermore, Mr Watson advised that, despite artists being the main investor in the creation of the sound recording, the record label typically receives the majority of the income generated. He explained 'as a general rule of thumb, 80 per cent of each dollar that is made out of a sound recording is going to the record company'.<sup>27</sup>
- 5.41 Clea Pratt, a professional artist, told the committee that advances in technology have enabled the production of high-quality recordings outside of traditional recording studios. She explained that this makes it possible for artists, such as herself, to afford to create recordings:
- I am very fortunate, because my partner...taught himself how to produce, how to record and started building a studio at his dad's farm on the Scenic Rim...I didn't have to have the financial burden of renting out a studio space or renting a producer... I don't even know how I would have recorded an album if I didn't have that. It would be unfathomable to think about how much money that is...That's how I'm surviving, doing it myself.<sup>28</sup>
- 5.42 The Australia Council told the committee that the PPCA-Australia Council Partnership helps artists to create new sound recordings. Grants of up to \$15,000 are provided to support the costs primarily associated with the creation of a sound recording, which may also involve costs associated with the promotion of that recording.<sup>29</sup> In 2018, five grants of \$15,000 were offered under the PPCA-Australia Council Partnership.<sup>30</sup>

## Record labels

- 5.43 Participants had differing views regarding the value and support provided by record labels and music publishers. The Australian Copyright Council (ACC) advised the committee that 'an artist or a writer who is

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26 Mr John Watson, President, John Watson Management; and President, Eleven: A Music Company, *Committee Hansard*, Sydney, 2 November 2018, p. 17.

27 Mr John Watson, President, John Watson Management; and President, Eleven: A Music Company, *Committee Hansard*, Sydney, 2 November 2018, p. 17.

28 Ms Clea Pratt, *Committee Hansard*, Brisbane, 6 February 2019, pp. 3-16.

29 Australia Council for the Arts, PPCA-Australia Council Partnership, <https://www.australiacouncil.gov.au/funding/funding-index/ppca-australia-council-partnership/>, accessed 1 March 2019.

30 Australia Council for the Arts, <https://www.australiacouncil.gov.au/news/media-centre/media-releases/ppca-and-the-australia-council-announce-recording-grants-recipients/>, accessed 7 March 2019.

supported by a record label or a publisher is in a much better position to exploit their work than an individual person who puts their material up on a social media platform'.<sup>31</sup>

- 5.44 ARIA advised that its record label members invest millions of dollars every year in the support, development, and marketing of recording artists. It pointed to a report from the International Federation of the Phonographic Industry (IFPI) into the value of recording companies, which found that, globally, record companies invest 27 per cent of their revenues into artist discovery and development, 'the R&D of the music business'.<sup>32</sup> ARIA explained that:

...you need to have the infrastructure here of the labels and the publishers and the managers who can invest in those artists so that, when they are able to take on the world, there's the infrastructure around them...What you want is the artist to focus on what they do very well, which is be a great artist, and you need that team around you in order to break those markets, to deal with all of the commercials and the business side around it.<sup>33</sup>

- 5.45 Artists are encouraged to have a record label, distributor, or aggregator when seeking to put their music on streaming services such as Spotify. However, streaming services are increasingly providing options for independent artists to upload their music directly, provided the content meets the streaming services' requirements.<sup>34</sup> Conversely, other services, such as triple j Unearthed do not accept music from artists that have a recording contract with a major record label.<sup>35</sup>
- 5.46 AMIN told the committee that, since the digital disruption of the 2000s and the resulting falls in revenue, record label investment in artist development has dropped significantly. It advised that artists are now expected to be 'entrepreneurs' with a clear understanding of their own marketing, audience, branding, and business needs (in addition to creating great music) before signing deals with a label.<sup>36</sup>

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31 Ms Kate Haddock, Chair of the Board, Australian Copyright Council, *Committee Hansard*, Sydney, 22 November 2018, p. 37.

32 Australian Recording Industry Association, *Submission 96*, p. 7.

33 Mr Dan Rosen, Chief Executive Officer, Australian Recording Industry Association, *Committee Hansard*, Sydney, 2 November 2018, p. 12.

34 Spotify, 'How do I get my music on Spotify?', <https://artists.spotify.com/faq/music#how-do-i-get-my-music-on-spotify>, accessed 25 February 2019; iTunes, <https://www.apple.com/au/itunes/working-itunes/sell-content/music-faq.html>, accessed 25 February 2019.

35 Triple J Unearthed, <https://www.triplejearthed.com/comps-and-resources/help>, accessed 25 February 2019.

36 Australian Music Industry Network (AMIN), *Submission 35*, p. 6.

5.47 Furthermore, participants told the committee that record label investment in artists is expected to be repaid by the artist, with some artists describing it as worse than a loan from a bank. Jonathan Zwartz, a professional artist, told the committee that ‘any money that’s afforded to an artist by a major record label is against future earnings’. He explained that:

Sometimes the rates can be usurious. You can be a very popular and successful major label artist and then, when you're no longer so popular and their label drops you, you can end up with a debt to that label of hundreds of thousands of dollars. All the money that they're spending on advertising campaigns or recordings or tours, you have to pay that back. As an artist, you have to pay it back.<sup>37</sup>

5.48 Kristy-Lee Peters, known professionally as KLP, told the committee that deals with major labels are ‘like the worst bank loan ever’. She explained that she is able to earn much more money as an independent artist releasing music under her own record label than she did under a major record label:

I've had two major label deals. I'm pretty sure it was something like 80 per cent that went to a major label. It's like the worst bank loan ever. I would keep 20 per cent, whereas now, as an independent artist [with my own record label], it's flipped. I can use a digital platform for streaming, and they take 20 per cent. And it's incentive based, so they only take it when they actually are getting streams and finding placement for my music. And then I keep 80 per cent.<sup>38</sup>

5.49 Participants also reported that very little of the money generated by the music is received by the artist until the record label’s investment is repaid. Clea Pratt, a professional artist, told the committee that that she has not yet received money from sales of her recent album as ‘my label takes all the income first, and whenever that money is paid off, like to a bank, then maybe I’ll see something’.<sup>39</sup>

5.50 The Australian Broadcasting Corporation (ABC) advised the committee that its record label, ABC Music, supports a range of genres that may be otherwise overlooked by other labels. This includes children’s, classics, jazz, and country, ‘through to triple j’. The ABC explained that ABC Music

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37 Mr Jonathan Zwartz, *Committee Hansard*, Brisbane, 6 February 2019, p. 11.

38 Ms Kristy-Lee Peters, *Committee Hansard*, Brisbane, 6 February 2019, p. 24.

39 Ms Clea Pratt, *Committee Hansard*, Brisbane, 6 February 2019, p. 3.

also represents leading classical music artists and Australian classical music organisations, including symphony orchestras and ensembles.<sup>40</sup>

- 5.51 The ABC advised that, during 2017-18, ABC Music released 212 titles – 98 titles for ABC Classics and 114 titles for Contemporary (including 47 ABC KIDS titles). 201 albums were released digitally across a number of platforms.<sup>41</sup> ABC Music operates under the commercial arm of the ABC, with all profits made going back into funding ABC content.<sup>42</sup>
- 5.52 The ABC told the committee that, in the most recent respective award presentations, ABC Music and ABC Classics collectively won six ARIA awards, three AIR Independent Music awards and three Country Music Australia awards, including single of the year and song of the year.<sup>43</sup>

### Capitalising on momentum

- 5.53 Participants raised concerns that many artists miss opportunities due to limited cash flow, especially at crucial times, such as following a successful overseas appearance. Sounds Australia identified cash flow as ‘one of the greatest barriers’ for Australian artists. It advised that it is essential for artists to be able to capitalise on and continue to build momentum after experiencing success overseas. Sounds Australia explained that:

If artists achieve their targeted outcomes and are successful for instance in securing a booking agent, signing to a label or being invited to open for a major tour or festival appearance, off the back of showcasing at SXSW [South by Southwest Music Festival] or Americana, then the most difficult thing to navigate are the costs involved for the act to return to the market within three to six months (at the most), to capitalise on the opportunity and build on their international career.<sup>44</sup>

- 5.54 Sounds Australia told the committee that the Export Market Development Grants scheme, administered by Austrade, ‘provides key financial assistance for exporting music businesses’. However, it noted that the retrospective nature of the program means that artists and industry must first have the cash flow to incur the export expenses. It explained that,

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40 Australian Broadcasting Corporation, *Submission 102*, p. 5.

41 Australian Broadcasting Corporation, *Submission 102*, p. 5.

42 Australian Broadcasting Corporation, <https://www.abcmusic.com.au/catalogue>, accessed 7 March 2019.

43 Australian Broadcasting Corporation, *Submission 102*, p. 5.

44 Sounds Australia, *Submission 95*, p. 29.

- ‘whilst providing an invaluable and necessary fiscal break to our sector’, the program ‘doesn’t tackle the immediate cash flow impediment’.<sup>45</sup>
- 5.55 Sounds Australia advised that the current model of federal funding ‘does not adequately provide a viable platform for funding support for international activity for the contemporary music sector’. It explained that, the timeframes for grant rounds for Australia Council Career Development Grants for Individuals and Groups and Arts Projects for Individuals and Groups in 2018-2020, prevent artists invited to participate in SXSU, The Great Escape, or Reeperbahn Festival from being able to apply for federal funding.<sup>46</sup>
- 5.56 Sounds Australia recommended that the Australia Council consider introducing a ‘quick response’ grants model similar to that used by Creative Victoria.<sup>47</sup> Creative Victoria’s Music Works Quick Response Grants provide support to individuals (up to \$5,000) and groups/organisations (up to \$15,000) to cover immediate opportunities.<sup>48</sup> There are five funding rounds per year and funded activities can begin three weeks after the closing date for each round.<sup>49</sup>
- 5.57 The Australia Council told the committee that it is working to find more flexible ways to support artists. It advised that it is developing a trial microloans scheme:
- We have seen small microloan programs for artists offered in Australia and overseas – very small pockets of them. We’ve done work with those organisations that have delivered them and we’ve identified that the repayment rates are extremely high. The defaults are less than five per cent, which is pretty phenomenal. We want to do the pilot and run it for a year, because more flexible ways of being able to support artists are the thing that drives the Australia Council.<sup>50</sup>
- 5.58 The Australia Council told the committee that it developed the program in response to feedback from artists calling for access to ‘quick response cash’ to address cash flow challenges. The Australia Council explained that it was ‘hearing a lot from the music sector – that cash flow was as much an

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45 Sounds Australia, *Submission 95*, p. 29.

46 Sounds Australia, *Submission 95*, p. 27.

47 Sounds Australia, *Submission 95*, p. 27.

48 Creative Victoria, Music Works Quick Response Grants, <https://creative.vic.gov.au/funding-and-support/programs/music-works/music-works-grants>, accessed 1 March 2019.

49 Creative Victoria, <https://creative.vic.gov.au/funding-and-support/programs/music-works/frequently-asked-questions>, accessed 7 March 2019.

50 Mr Frank Panucci, Executive Director Grants and Engagement, Australia Council for the Arts, *Committee Hansard*, Sydney, 2 November 2018, p. 28.

issue as getting a grant...this is a way of meeting that sort of need and for us to be thinking creatively about the sorts of support that we provide to artists'.<sup>51</sup>

## Unfunded excellence

- 5.59 The Australia Council is the Australian Government's principal arts funding and advisory body. It invests in artistic excellence through support for all facets of the creative process; increases awareness of the value of the arts; and is committed to the benefits of arts and culture being more accessible for all Australians.<sup>52</sup>
- 5.60 The Australia Council's investment in music is primarily achieved through its peer assessed grants program. It offers grants to individuals and organisations to support activities that deliver benefits to the arts sector and wider public, including national and international audiences.<sup>53</sup>
- 5.61 This includes the creation of new musical compositions and recordings; the presentation of new and existing repertoire in concerts, festivals and tours nationally; international touring, residencies and artistic collaborations; and broader sectoral projects, which support the development and promotion of Australian musicians.<sup>54</sup>
- 5.62 The Australia Council advised that an expert, arms-length peer assessment of artistic merit and excellence is central to the grant-making decisions of the Australia Council. It explained that the Australia Council's music panels bring together musicians, composers, and administrators that represent a broad range of cultural and geographic perspectives and areas of expertise. This allows the panels to engage in complex, rich, and respectful discussion of the relative merits of each application.<sup>55</sup>
- 5.63 The Australia Council told the committee that, since the launch of the new grants model in 2015, applications to the music category have accounted for 23 per cent of all applications received. However, proportionally, applications to music are increasing. It advised that music has received the highest number of applications in the first two rounds of 2018, representing 27 per cent of total applications received.<sup>56</sup>
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51 Paul Mason, Arts Practice Director, Music, Australia Council for the Arts, *Committee Hansard*, Sydney, 2 November 2018, p. 28.

52 Australia Council for the Arts, *Submission 98*, p. 2.

53 Australia Council for the Arts, *Submission 98*, p. 2.

54 Australia Council for the Arts, *Submission 98*, p. 2.

55 Mr Frank Panucci, Executive Director Grants and Engagement, Australia Council for the Arts, *Committee Hansard*, Sydney, 2 November 2018, p. 24.

56 Australia Council for the Arts, *Submission 98*, p. 8.

- 5.64 The Australia Council noted that the number of music applications submitted by individuals and groups is significantly larger than those from organisations. The Australia Council advised that, in line with overall Australia Council results, there is an average 17 per cent success rate for music applications.<sup>57</sup>
- 5.65 The Australia Council also delivers a range of initiatives on behalf of the Australian government, managing programs where the funds have been dedicated for specific purposes, such as the Playing Australia and Contemporary Music Touring Program,<sup>58</sup> which provide support to artists who perform in regional and remote areas.<sup>59</sup>
- 5.66 The Australia Council raised concerns that it is experiencing high levels of ‘unfunded excellence’. It explained that unfunded excellence refers to applications that are considered to be excellent by its peer assessment process but which could not be supported, given the budget available to distribute.<sup>60</sup>
- 5.67 The Australia Council told the committee that music applications have experienced a particularly high proportion of unfunded excellence. In its June 2018 funding round, 43 applications that were considered to be ‘excellent’ by the peers could not be supported given the budget.<sup>61</sup>
- 5.68 The Australia Council advised that an additional \$1 million would have been required in the June 2018 round to fund all music applications that the peers considered ‘excellent’.<sup>62</sup> The Australia Council explained that the high level of unfunded excellence demonstrates the ‘untapped potential for increased public investment, strategic partnerships, and related opportunity costs that are forgone when we’re unable to invest in those applications’.<sup>63</sup>

## Conclusions

- 5.69 A career in the music industry is hard-won. Throughout the inquiry, it has become clear that artists are required to make significant investments and take substantial financial risks pursuing a career in the music industry. In order to be successful, artists must not only invest in refining their musical

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57 Australia Council for the Arts, *Submission 98*, p. 8.

58 These specific grants are discussed in greater detail in Chapter 3 of this report.

59 Australia Council for the Arts, *Submission 98*, p. 2.

60 Australia Council for the Arts, *Submission 98*, p. 28.

61 Australia Council for the Arts, *Submission 98*, p. 2.

62 Australia Council for the Arts, *Submission 98*, p. 2.

63 Mr Frank Panucci, Executive Director Grants and Engagement, Australia Council for the Arts, *Committee Hansard*, Sydney, 2 November 2018, p. 24.

- talents; as small businesses, they must also invest time and money in developing and marketing their product and building their audience.
- 5.70 The committee is concerned that talented Australian artists may be discouraged from or unable to make new recordings because of the high cost of investment and the risk of low direct returns. New recordings are essential to the growth and sustainability of the Australian music industry. Without artists making new recordings, the recorded music industry and subsequently the wider music industry would grind to a halt.
- 5.71 The committee notes the positive work of the PPCA-Australia Council Partnership. This program demonstrates the benefits of the Australian Government partnering with the music industry. It is the view of the committee that Australian Government should invest in the partnership and that the grant program should be expanded to provide more opportunities for talented artists to create new recordings.

### **Recommendation 13**

- 5.72 **The committee recommends that the Australian Government invest in and seek to expand the PPCA-Australia Council Partnership and ensure that talented Australian artists have the capacity to create new recordings.**
- 5.73 The committee is concerned by reports that many artists miss opportunities due to limited cash flow, especially at crucial times, such as following a successful overseas appearance. The committee agrees that it is vital that artists have the capacity to capitalise on and continue to build momentum after experiencing success overseas.
- 5.74 The committee agrees that the timeframes for Australia Council grant rounds are not optimal for artists seeking to participate in international activities. It is counterproductive for the Australian Government to invest in supporting artists to promote their music in overseas markets only to leave them without the support to effectively capitalise on export opportunities generated from this promotion.
- 5.75 The committee notes the Australia Council's positive work to develop more flexible ways to support artists. The trial microloans scheme appears to be a promising way to enable artists to access 'quick response cash' to address cash flow challenges. The committee supports the microloans pilot.

- 5.76 Nonetheless, it is clear that a more rapid response for grants is necessary to meet the needs of Australian artists, especially those seeking to capitalise on and build on their success in international markets. The Australia Council should introduce a 'quick response' grant to ensure that Australian artists are able to take advantage of time-sensitive opportunities to promote their music in overseas markets as they arise.

#### **Recommendation 14**

- 5.77 **The committee recommends that the Australia Council for the Arts introduce a 'quick response' grant to ensure that Australian artists are able to take advantage of time-sensitive opportunities as they arise.**
- 5.78 Investment in Australian artists is essential to the sustainability and growth of the Australian music industry. The 'unfunded excellence' experienced by the Australia Council represents a missed opportunity for investment in exceptional and high-quality artists and their music. It is clear that the Australian music industry is not lacking in talent; however, its growth may be hindered by insufficient investment.
- 5.79 The committee is of the view that the funding for the Australia Council peer assessed grants program should be reviewed. The Australian Government should invest in and expand the peer assessed grants program to ensure that opportunities to invest in 'excellent' Australian artists are not missed as a result of insufficient funding.

#### **Recommendation 15**

- 5.80 **The committee recommends that the Australian Government invest in and expand the Australia Council for the Arts peer assessed grants program.**

### **Building audiences**

- 5.81 Throughout the inquiry, participants and artists emphasised the importance of accessing, developing, and growing an audience for their music. Participants highlighted the invaluable role of the ABC and community radio in supporting and broadcasting Australian music, especially in the early stages of an artist's career.

5.82 The role of commercial radio, streaming, and screen industries in building audiences, as well as incentives to encourage the use Australian music are considered in Chapter 4 of this report.

### National broadcaster

5.83 The ABC told the committee that, as the country's preeminent cultural institution, it views its contribution to Australian music as a central tenet of its public service obligations. It advised that the privileged position it has as an independent and trusted cultural institution enables it to have a positive impact on the music industry.<sup>64</sup>

5.84 The ABC explained that it has supported many young Australian artists during the most vulnerable and challenging stage of their careers, 'when they would have received no commercial airplay or interest from record labels and distributors'.<sup>65</sup> Its work supporting and promoting Australian music primarily comprises:

- ABC Radio, including analogue and digital radio music networks;
- ABC Music, its independent record label;
- supporting and broadcasting music festivals and tours, including Splendour in the Grass, Tamworth Country Music Festival, Port Fairy Folk Festival; Wangaratta Jazz Festival; Australian Festival of Chamber Music in Townsville; ABC Classic Kids: Sounds Like Australia; triple j One Night Stand; and Ausmusic month concerts;
- Ausmusic month, an ABC-led focus on Australian music every November, that includes a range of events such as concerts, programs, and the triple j Awards;
- initiatives to promote the benefits of music education for children, their families and the broader community, such Don't Stop the Music, What is Music?, How Music Works, and Sounds Like Australia;
- television programs such as the recently launched program The Set, which airs live performances in front of a studio audience on Wednesday and Saturday nights; and
- the triple j Unearthed online platform.<sup>66</sup>

5.85 ABC Radio reached 4.7 million metropolitan Australians in an average week in 2016-17 and has a 22.3 per cent share of the five-city metropolitan market. The ABC has two analogue national music radio stations, triple j (with a five-city metropolitan average weekly reach of 1.91 million) and

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64 Australian Broadcasting Corporation, *Submission 102*, pp. 8-9.

65 Australian Broadcasting Corporation, *Submission 102*, pp. 8-9.

66 Australian Broadcasting Corporation, *Submission 102*, pp. 3-7.

Classic FM (with a five-city metropolitan average weekly reach of 729,000), as well as several popular digital radio stations including Double J, ABC Jazz, ABC Country, and triple j Unearthed.<sup>67</sup>

- 5.86 The ABC has no mandated Australian content quota obligations; however it reported that its radio networks far exceed the Australian music content requirements set for commercial radio stations (Table 5.1).<sup>68</sup>
- 5.87 Many participants praised the ABC for its work promoting and supporting Australian music and its important role in the Australian music industry. The Australia Council advised the committee that ‘national broadcasters continue to play an important role in supporting the Australian music industry and championing Australian artists through radio, television, and their involvement in music festivals and events’.<sup>69</sup>

Table 5.1 ABC Radio Network Australian music percentage

ABC Radio Network	ABC Network 2017-18 Target	ABC Network 2017-18 result	Comparable commercial quota requirement
ABC RN	25 per cent	43.8 per cent	N/A
ABC Local Radio	25 per cent	45.33 per cent	N/A
ABC Classic FM	30 per cent	51 per cent	Not less than 5 per cent
triple j	40 per cent	58.04 per cent	Not less than 25 per cent
Double J	35 per cent	35.6 per cent	Not less than 25 per cent
ABC Jazz	25 per cent	29.1 per cent	Not less than 5 per cent
ABC Country	25 per cent	65.77 per cent	Not less than 20 per cent
Triple j Unearthed	100 per cent	100 per cent	Not less than 25 per cent

Source Australian Broadcasting Corporation, *Submission 102*, p. 4.

- 5.88 Music Australia told the committee that the ABC makes a ‘vital contribution to music in Australia, and represents a key Australian government investment in Australian music’. It explained that the ABC networks, and triple j in particular, ‘play a vital role in discovery and development of Australian contemporary music’. Music Australia called for continued and expanded investment in the ABC.<sup>70</sup>
- 5.89 The South Australian Music Industry Council and Music South Australia told the committee that it is ‘impossible to overstate the importance of the pivotal role that the ABC plays in the larger ecosystem of the Australian music industry’.<sup>71</sup> Leah Flanagan, a professional artist, agreed, asserting

67 Australian Broadcasting Corporation, *Submission 102*, p. 4; Australian Broadcasting Corporation, *Investing in Audiences: Annual Report 2017*, Vol. 1, pp. 63-66.

68 Australian Broadcasting Corporation, *Submission 102*, p. 4.

69 Australia Council for the Arts, *Submission 98*, p. 29.

70 Music Australia, *Submission 63*, p. [35].

71 South Australian Music Industry Council and Music South Australia, *Submission 107*, p. 1.

that the ABC's support and promotion of Australian music, particularly in regional and remote Australia, is 'vital'. She explained that without the ABC 'we cease to have a platform to get our music out to a wider audience and also to audiences outside major cities'.<sup>72</sup>

## triple j Uearthed

5.90 triple j Uearthed is a web-based platform where Australian independent artists can upload and share their recordings online. Through triple j Uearthed, artists control their own rights, have free access to upload their music, and manage their profiles. There are approximately 80,000 Australian artists active on the platform, with 136,500 songs uploaded and almost 240,000 reviews posted by the audience.<sup>73</sup>

5.91 The ABC told the committee that triple j Uearthed is 'a uniquely ABC innovation and has become a platform that has revolutionised the Australian music industry'. It advised that triple j Uearthed provides a 'direct line to the audience for artists who may not have had a platform to otherwise do so' and 'acts as a pathway to airplay on triple j and other ABC music networks'.<sup>74</sup> Chris Scaddan, Head of Music and Creative Development, ABC, explained that:

We have a team who listen to every single track which is uploaded, assessing it for its relevance for airplay. It then exists within its own radio network and online outcomes but it also feeds that music through to triple j, Double J and other parts of the ABC to get airplay.<sup>75</sup>

5.92 Many participants praised triple j and the Uearthed platform. The Australia Council advised the committee that triple j Uearthed is one of Australia's leading platforms in supporting new, independent local music. It noted that artists such as Flume, Amy Shark, and Tash Sultana were all discovered on Uearthed.<sup>76</sup>

5.93 AIR told the committee that 'triple j Uearthed is fantastic'. It explained that it has 'really broken ground for a lot of the new artists coming up' and described it as an 'amazing platform for a lot of these young Australian artists'.<sup>77</sup> Adrian Mauro, a professional artist, told the committee that,

72 Ms Leah Flanagan, *Committee Hansard*, Brisbane, 6 February 2019, pp. 18-19.

73 Australian Broadcasting Corporation, *Investing in Audiences: Annual Report 2017*, Vol. 1, p. 64.

74 Australian Broadcasting Corporation, *Submission 102*, p. 7.

75 Mr Chris Scaddan, Head of Music and Creative Development, Australian Broadcasting Corporation, *Committee Hansard*, Sydney, 22 November 2018, p. 9.

76 Australia Council for the Arts, *Submission 98*, p. 29.

77 Mr Ashley Woodford, Director, Australian Independent Record Labels Association, *Committee Hansard*, Melbourne, 21 November 2018, p. 7.

‘triple j is amazing’. He stated that ‘I basically got my start from triple j with my own original works, like triple j Unearthed and things like that’.<sup>78</sup>

- 5.94 The ABC advised that triple j Unearthed is ‘integral to the way the entire Australian contemporary music industry discovers new music, with Australian music labels using the Unearthed website for A&R [artist and repertoire] research and to discover new talent’.<sup>79</sup> Sounds Australia agreed. It told the committee that Australian artists have experienced rapid national and international success after their music was discovered on triple j Unearthed:

... Hatchie was an example. She put her song on Unearthed. She fell asleep. She woke up. The amount of people that had listened to that song and got in touch, including a UK booking agent who got it! She had a UK agent before the month was out almost, and then the following year she was playing on a stage in Brighton with us at The Great Escape with that agent. So people are looking. They're using portals like Unearthed. They're using all sorts of ways to now discover Australian music...<sup>80</sup>

- 5.95 However, the ABC advised that Unearthed is focused on young audiences; it is matched with triple j and contemporary music. The ABC told the committee that it ‘would love to expand Unearthed to genres of music that cater to older demographics of audiences, older music fans, more traditional forms of music, such as folk, jazz, world music’. The ABC explained that these demographics and genres are currently part of the triple j and Unearthed community but are not highlighted and do not achieve the same outcomes as contemporary music.<sup>81</sup>

## Community radio

- 5.96 A number of participants highlighted the importance of community radio. The Community Broadcasting Association of Australia (CBAA) told the committee that community radio stations ‘provide an avenue for local musicians and artists to be broadcast on airwaves across the world’. It explained that they ‘serve as a catalyst for building diverse and passionate music communities that support vibrant live music scenes and the venues that host them across the country’.<sup>82</sup>

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78 Mr Adrian Mauro, *Committee Hansard*, Brisbane, 6 February 2019, p. 19.

79 Australian Broadcasting Corporation, *Submission 102*, p. 7.

80 Ms Peta (Millie) Millgate, Executive Producer, Sounds Australia, *Committee Hansard*, Sydney, 2 November 2018, p. 3.

81 Mr Chris Scaddan, Head of Music and Creative Development, Australian Broadcasting Corporation, *Committee Hansard*, Sydney, 22 November 2018, p. 11.

82 Community Broadcasting Association of Australia, *Submission 67*, p. 1.

- 5.97 CBAA advised that many internationally-successful Australian artists' first radio play was on community radio. It explained that artists such as Dan Sultan, Gotye, The Vines, Emily Wurramara, Wolfmother, Hermitude, Courtney Barnett, and Jeff Lang all received support and airplay from community radio in the early stages of their careers.<sup>83</sup>
- 5.98 Adrian Mauro, a professional artist, told the committee that community radio is a 'massive help' for artists. He explained that airplay on community radio not only helps artists to build audiences but is a key factor that helps to motivate artists and retain talent:
- Having small, independent community radio stations supporting you, as a songwriter anyway, gives you that motivation to keep going, rather than just throwing in the towel because you're like, 'At least someone's listening and someone's appreciating what I'm trying to produce.'<sup>84</sup>
- 5.99 CBAA advised the committee that the popularity of community radio is on the rise. The 2018 Community Radio National Listener Survey reported community radio's highest ever listening levels, with almost a third (29 per cent) of Australians (approximately 5.7 million) tuning in to the almost 450 community radio services operating across Australia each week, compared to 3.76 million in 2004.<sup>85</sup>
- 5.100 A number of participants highlighted the popularity and success of community radio in Melbourne. CBAA told the committee that, according to the 2017 Melbourne Live Music Census, more music fans in Melbourne listen to community radio stations Triple R, PBS FM and public radio station triple j than any commercial stations. It noted that 'this occurs nowhere else in the world'.<sup>86</sup> The ABC explained that:
- I think Victoria – Melbourne in particular – is always held up as a fantastic example of broadcast infrastructure that really supports Australian music, with very strong community radio in Melbourne... That's why Melbourne is one of the best cities in the world for music, and live music in particular. It's because it's ingrained into the culture of that city. Artists know that they will be heard and that they can get their music out there and audiences know very early that live music and consuming music is part of the culture and something that they should be doing.<sup>87</sup>
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83 Community Broadcasting Association of Australia, *Submission 67*, p. 3.

84 Mr Adrian Mauro, *Committee Hansard*, Brisbane, 6 February 2019, p. 30.

85 Community Broadcasting Association of Australia, *Submission 67*, p. 2.

86 Community Broadcasting Association of Australia, *Submission 67*, p. 3.

87 Mr Chris Scaddan, Head of Music and Creative Development, Australian Broadcasting Corporation, *Committee Hansard*, Sydney, 22 November 2018, p. 10.

- 5.101 The Victorian Music Development Office, highlighted the links between the popularity of community radio in Melbourne and its thriving live music scene. It advised that the opportunity for relatively unknown artists to be heard by a large audience through community radio is an important element that drives the live sector. The Victorian Music Development Office explained that this 'results in a greater awareness and a greater appreciation of some of those smaller acts that then go on to develop further'.<sup>88</sup>
- 5.102 CBAA told the committee that many of their listeners reported that specialist music programs and Australian music are their main reasons for listening to community radio. It advised that across Australia, no less than 37 per cent of music broadcast on community radio is from Australian artists, surpassing the 25 per cent required under the Community Radio Broadcasting Code of Practice. Furthermore, CBAA advised that many individual stations are setting their own quotas to increase Australian content and improve diversity:

For example, 4ZZZ in Brisbane has airplay quotas, and is working to increase these by the end of 2019. Currently the station's Australian music quota is 30% (target 40%), local 15% (target 30%), new music 30% (remains), Indigenous (new target of 5%), and female and non-binary 30% (target 50%). The station reports that they are currently hitting all target quotas, and since the beginning of 2018 their Australian music airplay is averaging 60%.<sup>89</sup>

## Conclusions

- 5.103 The ABC and community radio play a critical role in the Australian music ecosystem and the talent pipeline. The ABC and community radio champion and provide airplay for a wide range of genres and styles that would otherwise be unlikely to receive airplay on mainstream commercial stations. They also support, promote, and provide airplay for many Australian artists in the most vulnerable and challenging stages of their careers.
- 5.104 The committee notes the ABC's commitment to meeting its obligations under the ABC Charter to encourage and promote Australian music. The high proportions of Australian music played on ABC analogue and digital radio stations highlights the vast and growing repertoire of high-quality

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88 Ms Bonnie Dalton, General Manager, Victorian Music Development Office, *Committee Hansard*, 21 November 2018, p. 19.

89 Community Broadcasting Association of Australia, *Submission 67*, p. 2.

Australian music across all genres and styles as well as demonstrating audience demand for Australian music.

- 5.105 The ABC provides valuable support to the Australian music industry. In particular, the committee recognises the important role that the triple j Unearthed platform plays in the development and discovery of Australian talent. This innovative platform empowers Australian artists and provides a pathway, not only to airplay on ABC stations, but to the wider Australian and global audiences.
- 5.106 The committee commends the work of the more than 450 community radio stations around Australia. Community radio's dedication to celebrating and showcasing Australian music is integral to the growth and sustainability of the Australian music industry. Furthermore, community radio's rising popularity demonstrates that there is a strong and growing demand for the locally-focused and diverse content offered by community radio.
- 5.107 Community radio is an integral element in the music ecosystem, particularly at the local level. There is a clear link between the strength and popularity of local community radio and the health and growth of a city's live music scene. This is most clearly demonstrated in Melbourne, where community radio enjoys unprecedented popularity and which supports more music venues per capita than New York, Paris, London, Berlin, and Tokyo.

## **Retaining talent and fostering diversity**

- 5.108 Throughout the inquiry, participants emphasised the challenges faced by Australian artists and the toll that this can take on artists, managers, other industry professionals, and their families. In particular, participants told the committee that many Australian artists are overwhelmed by the financial and mental stress of building a career in the music industry.
- 5.109 The Media Entertainment and the Arts Alliance (MEAA) told the committee that, despite being highly educated and skilled, most artists cannot make a living from their music. It explained that the unreliability of the music industry and, in particular, the current nature of the recorded music industry, means that artists 'tend to be living in poverty, if you measure it by basic standards of average income'.<sup>90</sup>

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90 Mr Paul Davies, Director, Musicians, Media Entertainment and the Arts Alliance, *Committee Hansard*, Sydney, 22 November 2018, p. 29.

- 5.110 Katie Wighton, a professional artist, questioned the sustainability of being a musician in Australia. She told the committee that, despite being an ARIA award-winning artist and touring for 9 months of the year, her band, All Our Exes Live in Texas, 'did not earn enough money to pay rent and live properly'. She explained that:
- ...my band brought in about \$350,000 this tax year. I was paid \$11,000 of that \$350,000. That's not because we have a manager who is tight fisted and won't give us the money. It's because we grossed \$350,000 but we netted about \$50,000. So we each took less than five per cent from the year. To give you some perspective, we were on the road for like nine months of the year, so I cannot get another job, and \$11,000 is below the poverty line. So as an ARIA-award winning artist I'm still not able to make enough money to pay rent and live properly.<sup>91</sup>
- 5.111 Participants also emphasised the importance of fostering diversity in the Australian music industry, particularly with regards to female, non-binary, and First Nations artists. Cicada International told the committee that 'creating an industry that is competitive and sustainable must begin with inclusivity and gender equity'.<sup>92</sup>
- 5.112 AMIN told the committee that equal access of opportunity is 'a matter of both moral and commercial necessity'. It explained that, 'if the industry is perceived to be hostile to diverse people, its attractiveness as a career destination will be threatened and limit the industry's growth potential'. It noted that diversity is also critical to audience development, as audiences want to see themselves represented in the music they consume.<sup>93</sup>

## Female and non-binary artists

- 5.113 Participants told the committee that, while there is strong engagement in the music industry among females, the industry remains male dominated. Cicada International advised the committee that gender-based inequality in the music industry operates on two levels: who 'makes it' as a performing success story; and who 'makes the decisions' impacting the industry.<sup>94</sup>
- 5.114 In 2017, *Skipping the beat*, a report assessing the state of gender equality in the Australian music industry, found that 'male advantage is a

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91 Ms Katie Wighton, Musician, APRA AMCOS Ambassador, *Committee Hansard*, Sydney, 22 November 2018, p. 52.

92 Cicada International, *Submission 28*, p. 1.

93 Australian Music Industry Network, *Submission 35*, p. 5.

94 Cicada International, *Submission 28*, p. 1.

pervasive feature of the Australian music industry'. It asserted that 'radio playlists, festival line-ups, industry awards, peak bodies and major industry boards are dominated by male contributions and voices'.<sup>95</sup>

5.115 The report found that:

- women represent only one-fifth of songwriters and composers registered with APRA, despite making up 45 per cent of qualified musicians and half of those studying music;
- women creative artists earn far less than their male counterparts;
- women receive less airplay on Australian radio and are consistently outnumbered by men on triple j's annual countdown of the 100 most popular songs and albums;
- music festival line-ups are dominated (sometimes entirely) by male artists and male-lead acts;
- women are significantly less likely to be honoured in the music industry's most prestigious awards including the ARIAs, 'J' and AIR awards;
- women hold only 28 per cent of senior and strategic roles in key industry organisations; and
- there are no women on the boards of ARIA or AIR and women are underrepresented on the boards of all other national music industry peak bodies.<sup>96</sup>

5.116 The Australia Council advised that there have been a range of industry responses to the findings of gender disparity in the Australian music industry.<sup>97</sup> It explained that APRA AMCOS has introduced a range of new initiatives in 2017<sup>98</sup> to address the imbalance and that industry organisations such as AIR have ensured boards are more gender balanced.<sup>99</sup>

5.117 The Australia Council advised that, despite remaining male-dominated, gender balance is improving in the professional music population. The proportion of female musicians has grown from 31 per cent in 2001 to 45 per cent in 2016. The proportion of female composers has grown from 20 per cent in 2001 to 40 per cent in 2016.<sup>100</sup>

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95 Associate Professor Rae Cooper, Dr Amanda Coles, and Ms Sally Hanna-Osbourne, *Skipping a beat: Assessing the state of gender equality in the Australian music industry*, 2017, p. 2.

96 Associate Professor Rae Cooper, Dr Amanda Coles, and Ms Sally Hanna-Osbourne, *Skipping a beat: Assessing the state of gender equality in the Australian music industry*, 2017, p. 2.

97 Australia Council for the Arts, *Submission 98*, p. 24.

98 For more information see APRA AMCOS, *Submission 94*, p. 33.

99 Australia Council for the Arts, *Submission 98*, p. 24.

100 Australia Council for the Arts, *Submission 98*, p. 23.

- 5.118 The Australia Council also advised that, in the June 2018 grants round, 73 per cent of music grants awarded to individual artists were awarded to women. It noted that this was a significant increase from previous rounds, in which women were awarded 45 per cent of music grants between 2015 and 2017.<sup>101</sup>
- 5.119 A number of participants praised the inaugural Australian Women in Music Awards, held in Brisbane in October 2018. Music Australia told the committee that the awards, ‘give the opportunity to acknowledge female contributions to the music industry’.<sup>102</sup>
- 5.120 Cicada International explained that the Awards will be ‘the first time in Australian music history that women will be recognised and acknowledged for their contribution and value across all areas of industry’. It told the committee that the Awards received hundreds of nominations for the 14 award categories, ‘demonstrating the variety and quality of female artists, songwriters, composers, producers, technicians, videographers, educators, and photographers that Australia has to offer’.<sup>103</sup>

## First Nations artists

- 5.121 Participants highlighted the critical role Aboriginal and Torres Strait Islander artists play in Australia’s music identity. First Nations Australian music and artists span all forms and genres, and have achieved significant critical and commercial success both in Australia and overseas.
- 5.122 APRA AMCOS advised the committee that its First Nations artist membership is increasing. It explained that there are now 1,468 First Nations members, an increase of 9.6 per cent from the previous year.<sup>104</sup> Furthermore, the Australia Council advised the committee that Australians are increasingly attending music performed by First Nations Australians. One in six (16 per cent) attended in 2016, double those that attended in 2009 (8 per cent).<sup>105</sup>
- 5.123 However, a number of participants raised concerns that First Nations music and artists continue to be underrepresented at Australia’s mainstream venues, festivals, and commercial radio. Leah Flanagan, a professional artist, told the committee that, despite being some of

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101 Australia Council for the Arts, *Submission 98*, p. 24.

102 Music Australia, *Submission 63*, p. 12.

103 Cicada International, *Submission 28*, p. 3.

104 APRA AMCOS, *Submission 94*, p. 10.

105 Australia Council for the Arts, *Submission 98*, p. 22.

Australia's most recognisable and internationally celebrated music, First Nations music is rarely heard on Australian commercial radio:

Indigenous culture is exported around the world. Anytime you think of Australia, everyone thinks of Indigenous culture, but, if you want to get Indigenous culture on the radio, ABC are the only people that are really doing it. You wouldn't know Dr G if it weren't for the local ABC in Darwin playing all of that stuff originally. He's one of the biggest exports we've ever had. A lot of Aboriginal people can't get play on these other commercial radio stations, and ABC is really supporting that industry.<sup>106</sup>

- 5.124 Music Australia told the committee that First Nations performing arts comprised just 120 works (approximately 2 per cent) of almost 6,000 works programmed and presented in 2015. This included theatre (36 per cent), contemporary music (31 per cent), and dance (15 per cent).<sup>107</sup>
- 5.125 Music Australia asserted that government needs to build cross-cultural engagement between mainstream presenters and First Nations artists and community. It explained that 'sector wide leadership and commitment is essential with federal government taking the leadership to continue discussions in vital two-way cultural conversations'.<sup>108</sup>
- 5.126 Participants praised a range of government and industry initiatives aimed at supporting First Nations artists. The Australia Council highlighted the work of the Central Australian Aboriginal Media Association (CAAMA) Music. It explained that CAAMA Music works with First Nations Australians at a community level, training, developing, and nurturing the talents and skills of artists and music industry workers through recording, performance, distribution, and publishing.<sup>109</sup>
- 5.127 APRA AMCOS told the committee that it established the Aboriginal and Torres Strait Islander Music Office in 2008 to support First Nations songwriters and composers. It operates a number of programs with industry organisations, such as Song Cycles Inbound and Staring Ground, focusing on professional development and education.<sup>110</sup>
- 5.128 APRA AMCOS advised that these programs are seeking to address issues such as the lack of performance opportunities, the physical distance of remote communities, and lack of economic return experienced by many First Nations artists. It explained that it is 'committed to listening and

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106 Ms Leah Flanagan, *Committee Hansard*, Brisbane, 6 February 2019, p. 29.

107 Music Australia, *Submission 63*, p. 11.

108 Music Australia, *Submission 63*, p. 11.

109 Australia Council for the Arts, *Submission 98*, p. 23.

110 APRA AMCOS, *Submission 94*, p. 11.

responding to the needs of Aboriginal and Torres Strait Islander music creators' and 'understanding and respecting the importance of Aboriginal and Torres Strait Islander music and culture'.<sup>111</sup>

- 5.129 Spotify told the committee that it is 'committed to increasing representation of and developing First Nations creators'. Spotify advised that, in addition to its reconciliation action plan, it has been working with First Nations creators to showcase Aboriginal and Torres Strait Islander artists through three key playlists – Deadly Beats, Black Australia, and Original Story.<sup>112</sup>

## Mental health

- 5.130 Participants told the committee that many artists and music workers experience mental ill-health. Support Act advised the committee that research indicated that artists and others in the music industry are more likely to suffer mental ill-health than the average Australian.<sup>113</sup> Support Act explained that 'it's an uncertain life working in the music industry, and this adds to the poor mental health that some experience'.<sup>114</sup>
- 5.131 Music ACT explained that artists and others in the music industry face particular mental health challenges that are inherent to the industry. These include career instability, precarious finances, the 'pressures of the 24/7 online media world', and demanding schedules that take artists away from home for long periods.<sup>115</sup>
- 5.132 AAM told the committee that 66 per cent of artist managers reported suffering a mental health challenge attributed to the work environment of the music industry.<sup>116</sup> John Watson, President, John Watson Management, explained that many artist managers are overwhelmed by the challenges of the job and the industry:

I was lucky to be able to go on and grow a business. The [artist managers] who were managing these other [artists] – one of them ended up flaming out with drug problems, one had a suicide attempt and had major mental health issues and continues to seek therapy for them and two others ended up leaving management

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111 APRA AMCOS, *Submission 94*, p. 11.

112 Ms Jane Huxley, Managing Director, Australia New Zealand, Spotify, *Committee Hansard*, Sydney, 22 November 2018, p. 2.

113 Support Act, *Submission 70*, p. 2.

114 Mr Clive Miller, Chief Executive Officer, Support Act, *Committee Hansard*, Sydney, 22 November 2018, p. 61.

115 Music ACT, *Submission 119*, p. 2.

116 Association of Artist Managers, *Submission 61*, p. 6.

and going to work within record companies because it was a safer way to go.<sup>117</sup>

- 5.133 Many participants praised the work of Support Act, a charity that delivers crisis relief services to music artists and music workers that are experiencing financial hardship, ill-health, injury, or mental health issues. Support Act told the committee that it aims 'to provide breathing space to help members of the music community get back on track when they have hit a rough patch'. Support Act explained that its assistance includes:
- paying the rent or the mortgage;
  - buying a bed or wheelchair;
  - paying for car repairs;
  - paying medical or dental bills;
  - paying phone, electricity or credit card bills;
  - providing referrals to other support services;
  - providing funding for funerals; and
  - supporting friends and families seeking to raise funds for an artist or music worker in crisis.<sup>118</sup>

## Conclusions

- 5.134 The Australian music industry is a challenging and highly-competitive industry in which to pursue a career. Many Australians dream of a career in the music industry and being able to make a living out of their passion and talent for music. However, as with many other creative industries, this dream remains out of reach for many artists.
- 5.135 Throughout the inquiry it has become clear that the majority of Australian artists, whilst making great music and contributing to the Australian music industry and broader community in a myriad of ways, will not generate sufficient income to live from their music alone. This is not necessarily a reflection of their skill or talent as artists, nor is it a recent phenomenon. Artists have always faced fierce competition when pursuing coveted positions in prestigious orchestras or seeking to be the next band to 'make it big'.
- 5.136 Demanding work schedules, long periods of travel, uncertainty, precarious finances, and long-term career instability are challenges that have always characterised the music industry. However, the digital

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117 Mr John Watson, President, John Watson Management, *Committee Hansard*, Sydney, 2 November 2018, p. 23.

118 Support Act, *Submission 70*, p. 1.

- disruption and its impact on the recorded music industry has made already challenging careers even more difficult; challenges which are further compounded for female, non-binary and First Nations artists.
- 5.137 Australians pursuing a career in the music industry invest significant time, money, and effort – often with little return. The committee is concerned that, if the return on this investment continues to decrease, it may discourage or hinder the development of Australian talent and compromise the talent pipeline for the Australian music industry.
- 5.138 It is vital that the Australian music industry work to ensure that artists and other industry careers are supported and sustainable, and that a diverse range of Australian artists are able to thrive. Investment in the support of Australian artists is essential to the retention of talent and, ultimately, the sustainability and growth of the Australian music industry.
- 5.139 The committee commends the work of organisations and initiatives that are seeking to address the gender imbalances in the Australian music industry and encourage and support First Nations artists. The committee is encouraged by reports that the proportion of female and First Nations artists are increasing; however, more must be done to ensure that diversity can flourish in the Australian music industry.
- 5.140 The committee also commends the work of Support Act. Throughout the inquiry, the committee heard from many artists who praised the service as well as those who had directly benefited from its crisis relief services. Supporting Australian artists that are experiencing financial hardship, ill-health, injury, or mental health issues is a vital part of preserving Australian talent and ensuring that artists are able to thrive, during the good times and the bad.

### **Recommendation 16**

- 5.141 **The committee recommends that the Australian Government invest in Support Act to enable it to expand its services and deliver crisis support for artists and others working in the Australian music industry.**

**Luke Howarth MP**  
**Chair**  
**28 March 2019**

