

Music sector plan 2012-2014

1.1 The Music sector in Australia

Music is central to the cultural life contemporary Australia. The Australian music sector is defined by the scale of activity, the vibrancy and diversity of creative and business practice, and the high level of public engagement.

The activity of the Australian music sector encompasses the composition, performance, publishing and distribution of musical works. Our artists range from employed orchestral musicians to commercially supported bands and performers, through to self managed composers, songwriters and sound artists. This creates, in effect, a series of genre based sub sectors and artistic communities, each operating with a varying mixture of private and public support.

Consistent with music's deep engagement across the community, the practices of our musicians and interests of our audiences also reflect the diversity of contemporary Australia.

The Australia Council's 2009 report on Australian Participation in the Arts showed that nearly all Australians intentionally listen to recorded music, and over half attend live performances. In addition, the research also found that 10% of Australians play a musical instrument and 5% participate in organised singing.

Australia is in the top ten markets for recorded music internationally, with sales of more than \$384m in 2010. Recent research shows that there were over 40m attendances at live music performances in pubs, clubs and small venues in 2010, while Live Performance Australia's annual Ticket and Attendance Surveys show music accounting for the majority of ticket sales.

The Throsby report "Do You Really Expect to Get Paid?" (2010) indicates that 25% of the professional artist population are musicians, making them the largest sub group.

While being a final product in itself, music is a key element to a number of other cultural products, industries, and environments. These include film, television, gaming, dance and theatre works, broadcasting, advertising, retailing and education. Music is one of the primary content forms distributed via the internet and has been the driver of innovation in digital audience engagement and content delivery.

1.2 The Music Sector and the Australia Council

In 2010 / 11, the Australia Council invested a total of \$84.7 million in music.

\$5.7 million of this was provided through the Music Board to activities including the writing and recording of new music, the presentation of concerts and tours and festivals, professional development for artists.

The Music Board also supports 37 organisations through its Key Organisations and program funding. While the majority are presenting and performing organisations, this group also includes service organisations.

The Major Performing Arts Board provides annual funding of \$51.3 million to six symphony orchestras, two pit orchestras, two chamber music organisations (the Australian Chamber Orchestra and Musica Viva) and a period Orchestra (Australian Brandenburg Orchestra). The Major Performing Arts Board also provides annual funding of \$21.1 million to four opera companies.

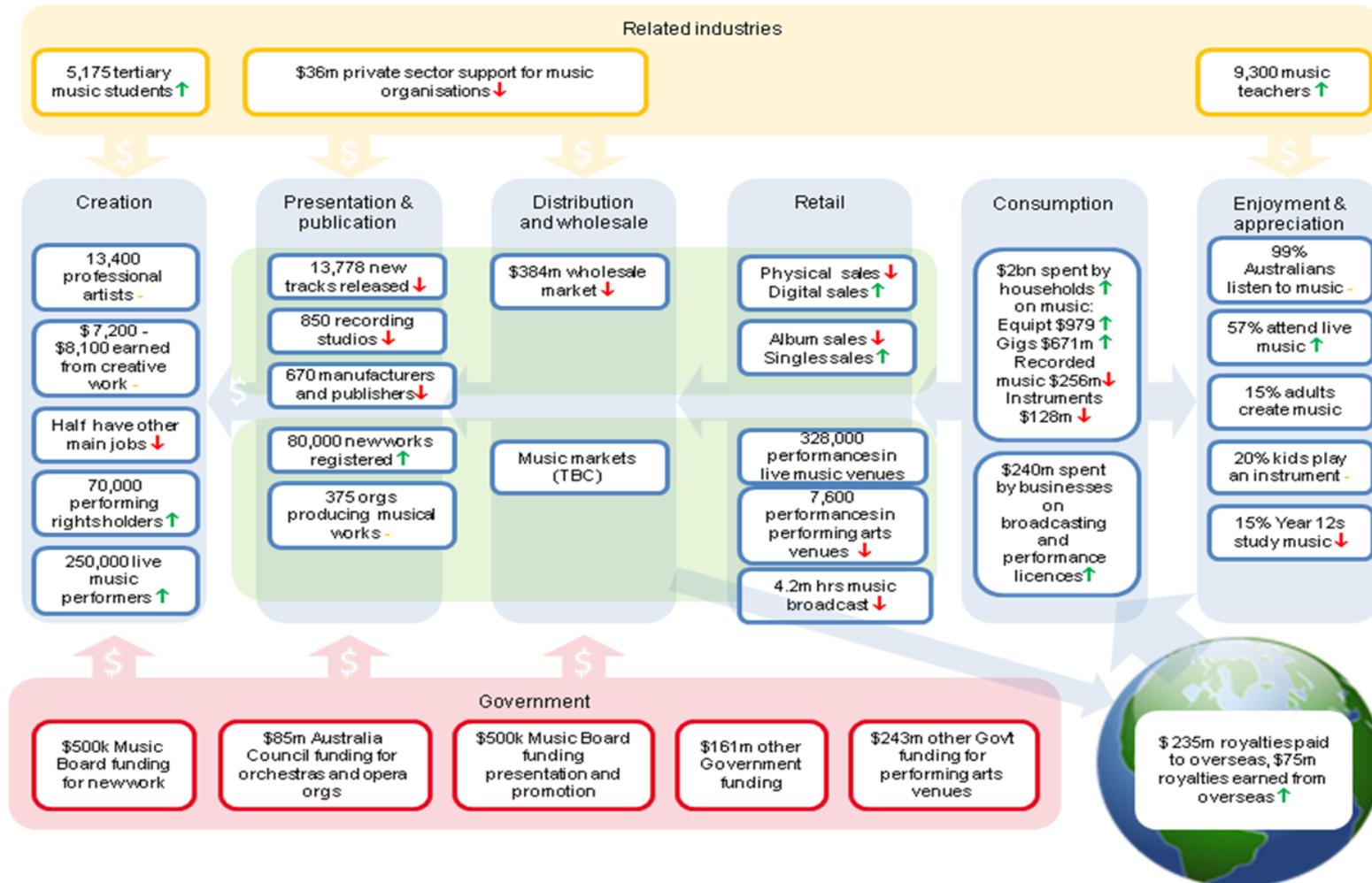
Further support for music is provided through the Arts Development Division via a range of music specific programs targeting international market development. These include foundation funding of Sounds Australia, a national export initiative established to provide a cohesive platform for the promotion of Australian music and music businesses at international markets. Other initiatives include funding for the Australasian World Music Expo and support for international touring and showcasing through International Pathways (in partnership with the Music Board) and Live On Stage.

The ATSIA division and Community Partnerships committee and Artstart program all also support individual music projects.

1.3 The Australian Music Ecosystem

Australian music sector ecosystem

A statistical snapshot of annual activity



1.4 Sector needs and opportunities

- Given the scale and diversity of Australian music practice it is difficult to build a coherent view of all activity and promote constructive dialogue across the sector. There is a large amount of information and data collected about music, but the sector has identified a need to consolidate this work and provide a broad and long term overview.
- There is significant audience demand for live music. However national touring remains expensive and risky and local venues continue to face commercial and regulatory challenges.
- The local recording sector has been subject to the same structural changes that have transformed the global recording industry in recent years. While this has created an uncertain business environment, it has not diminished the creative and cultural significance of producing sound recordings.
- While local content regulation has ensured a minimum amount of Australian music is heard through traditional broadcast networks, new strategies may be required to support Australian musical voices in a converged media environment.
- Indigenous musicians and composers face significant and unique barriers to their career development. As a result their work is underrepresented on stage, on record and on air.
- There are unrealised opportunities for greater communication and collaboration between major performing arts companies, smaller companies and individual artists, particularly in the development and presentation of new Australian works.
- The international interest in and opportunities for Australian work of all types is significant and growing, but requires support, expertise and funds to capitalize on it.
- Australia Council research shows that of all artist categories musicians have both the lowest level of applications to grant programs and the lowest levels of success with those applications.
- The challenge is to find new relevant ways to support musical activity.

1.5 Music Board Goals & Workplan 2012-2014

The Music Board promotes excellence through its support of nationally and internationally significant artists, organisations and projects.

The Music Board aims to reflect and respond to the diversity of our musical culture by supporting excellence across the widest range of music types.

The creation and performance of new Australian work is a priority.

1. Support musicians and composers to develop and refresh their artistic practice

Musicians, composers and sound artists need time and resources to pursue new ideas, learn something new, work in a different way, experiment and research – and make better music.

- We will increase the number and value of the Fellowships we offer.
- We will increase the number of Residency opportunities we offer.
- We will increase the support we offer to artists through our Skills and Arts Development category. We will particularly encourage mid career artists to seek support through this category.
- Through our Skills and Arts Development category we will also fund organisations to deliver professional development programs to benefit the musical skills of others.

2. Fund the creation of new music by Australian composers and songwriters

The creation of new Australian work is a priority for the Music Board. Our funding provides artists with the time needed to create and refine their work.

- Through our New Work grant category we will fund composers, songwriters and sound artists to write and record new work. We will increase the funds available for this activity.
- We will specifically encourage and support collaboration between musicians and other artists by funding cross artform initiatives, building on the success of our Music Theatre and Music and Dance initiatives.
- The work of our Indigenous musicians is integral to our national culture and identity. We will specifically support indigenous songwriters and musicians through the Song Cycles program of initiatives.
- We will work in partnership with the recording sector to develop new resources and opportunities for the creation of Australian sound recordings.

3. Support the presentation of music to audiences nationally and internationally

The significant public engagement with music makes it central to our cultural life. Reaching audiences through live performance and touring is a fundamental activity for most musicians. Engaging with audiences online is also now essential. Presentation of new Australian music is a priority.

- Through our Presentation and Promotion grants we will fund live concerts and tours.
- We will encourage the development of new specialist touring opportunities through targeted initiatives, building on the success of the Sand Tracks remote indigenous community touring initiative.
- Based on the outcome of our research into the role of music festivals and events, we will create new programs to better support this activity.
- We will work in partnership with industry to promote and support local venues that present live music. This will include commissioning updated research on the economic value of live music venues.
- In partnership with the Market Development division of the Australia Council we will support international touring and showcasing and market development, through grants to artists and ongoing support to Sounds Australia and AWME.
- We will support research that increases the skills and capacity of our artists and organisations to engage with online audiences.
- We will support projects that present music to online audiences in new and innovative ways.

4. Fund the people and organisations that support the work of our best artists, and provide essential services.

Organisations, managers and entrepreneurs provide the structures to support and promote the work of musicians and composers. They help artists to access resources, and to connect with audiences, markets and the community, creating more sustainable careers.

- The multi-year funding we provide through our Key Organisations category supports leading organisations with an acknowledged national and international presence. We are currently reviewing this category over a three year period. In 2013 we will examine the groups, choirs and ensembles we support.
- Through our annual program grants we provide funding for organisations with a track record of achievement in presentation, service delivery, and skills development for musicians and composers.
- We will work with the Major Performing Arts Board companies to encourage increased collaboration and exchange across the sector.
- We will work with industry to support programs that offer skills development and resources for our managers, producers and entrepreneurs. This will include promoting the Australia Council's Emerging Leaders Development Program to the music sector.
- We will support projects to develop the ability of artists to establish and manage their own careers. We will continue to encourage musicians to seek support through the Artstart program.