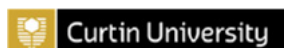




MAKING MUSIC WORK:

*Sustainable Portfolio Careers
for Australian Musicians*

Brydie-Leigh Bartleet
Dawn Bennett
Ruth Bridgstock
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Final report for the Australia Research Council (ARC) Linkage Project, *Making Music Work: Sustainable Portfolio Careers for Australian Musicians* (LP150100497)

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The views expressed herein do not necessarily represent the views of the ARC, nor the project's partners.

This report has been peer reviewed by the project's partners, Advisory Group members, and leading experts in the field.

The images used throughout the report consist of publicly available stock images, as well as professional photographs supplied by the eleven musicians featured in this report

For additional information

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LIST OF ACRONYMS

ABC	Australian Broadcasting Corporation
ACT	Australian Capital Territory
AMC	Australian Music Centre
AMCOS	Australasian Mechanical Copyright Owners Society Limited
ANZSCO	Australian and New Zealand Standard Classification of Occupations
APRA	Australasian Performing Right Association Limited
ARC	Australia Research Council
ARIA	Australian Recording Industry Association
CEO	Chief Executive Officer
CI	Chief Investigator
DLGSC	Department of Local Government, Sport and Cultural Industries (WA)
DMA	Doctor of Musical Arts
ECR	Early Career Researcher
IFPI	International Federation of Phonographic Industries
NEA	National Endowment for the Arts
NSW	New South Wales
NT	Northern Territory
P2P	Peer-to-peer
PL	Professional Learning
QCRC	Queensland Conservatorium Research Centre
QLD	Queensland
SA	South Australia
SPSS	Statistical Package for the Social Sciences
TAS	Tasmania
VET	Vocational Education Training
VIC	Victoria
WA	Western Australia

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EXECUTIVE SUMMARY

Making Music Work: Sustainable Portfolio Careers for Australian Musicians (2015–19) was a national Australian project which examined the ways in which Australian musicians navigate their portfolio careers. The vast majority of Australian musicians undertake a portfolio career which encompasses a variety of concurrent and often impermanent roles. While this is not a new phenomenon, major shifts in how music is made, paid for and consumed, as well as a changing commercial, funding, educational and policy landscape, further complicate the factors which impact how musicians develop and sustain their careers. *Making Music Work* sought to provide a more nuanced and granular understanding of these key sector dynamics and how musicians navigate them.

Making Music Work employed a national survey of 592 musicians and 11 in-depth interviews with a diverse group of musicians. Participants, who were aged from 18–24 years to over 75 years, practised in a variety of genres with popular music the most common. More than four in ten musicians reported having more than 20 years' professional experience, with another 25% reporting between 11–20 years' professional experience. Participants reported between one and five concurrent roles including in performance, composition, direction, production and teaching. The most common mode of employment was self-employment, which accounted for almost half the responses.

The project was funded by an Australia Research Council Linkage Grant (2015–2019, LP150100497) and led by the Queensland Conservatorium Research Centre, Griffith University, with one chief investigator located with Curtin University. Industry partners included the Australian Council for the Arts, Create NSW, Creative Victoria, the Western Australian Government Department of Local Government, Sport and Cultural Industries (DLGSC) and the Music Trust.

Musicians' work and careers

This report provides a detailed snapshot of the musicians' work practices, taking into account key variables such as geographic location, age, gender, education, work experiences and music genres. The findings show that to engage across a variety of markets, genres and performance sites, including in online, digital, community and educational settings, Australian musicians need diverse and agile skillsets. Among the 592 survey participants in the *Making Music Work* study, the most common types of music work activities were music teaching/education, composition, performing, producing, instrumental music, and vocal music. The portfolio career in music emerges as the most prevalent form of work, with more than six in ten participants holding more than one role at the time of the survey. The roles that were most likely to be undertaken as part of a portfolio career included, artistic or



music director, music teacher (private tuition) and instrumental musician. Participants most often held either one (37%) role or two (27%) concurrent roles, and 21% held either three, four or five concurrent roles. The most common role titles were “instrumental musician” and “music teacher” (private instrumental or vocal teacher). The musicians who reported a single role were almost all working in education institutions or as studio teachers.

The most prevalent form of work for Australian musicians is the portfolio career, which features multiple, often impermanent concurrent roles. To engage across a variety of markets, genres and performance sites, including in online, digital, community and educational settings, Australian musicians need diverse and agile skillsets.

According to the study data, sixty percent of musicians work only in contemporary genres with 15% working only in classical genres and 26% working across classical and contemporary genres. Sixty percent of roles are situated in the commercial sector, with the community and not-for-profit sectors accounting for 21% and 19% of roles respectively. Self-employment is the most common mode of work, with less than one-fifth of all work being paid on a continuing (salaried) basis. The data also suggest that over half of Australia's portfolio musicians receive income from non-music related sources; non-music work accounted for an average of 89% of musicians' overall income. The average annual income for survey participants, based on all current work, was \$41,257.18, with a median of \$30,576.

In addition to mapping the diversity of musicians' work practices and career configurations, sources of income and unpaid work, the study outlines the career development strategies used by musicians to find, acquire and/or create

work. On average, the survey participants had used 2.93 different career development strategies over the preceding 12 months; work creation and informal strategies were more commonly used than formal strategies. The most popular developmental strategies included establishing or continuing an enterprise, band or ensemble, and using informal social networks. The use of networks was reflected in the experiences of the eleven interviewed musicians, who described the vital nature of these networks in the development and maintenance of their portfolio careers. Interview participants emphasised the importance of networks in terms of peer support and collaboration, generating and accessing work, and informal professional learning.

Over half of Australia's portfolio musicians receive income from non-music related sources; non-music work accounts for approximately 90% of musicians' income overall. Musicians use multiple strategies to find, acquire and/or create work and networks are essential. Digitisation and new technologies offer new opportunities for creative collaboration and work acquisition, and new challenges for gaining visibility in the massified market. The most common sources of career challenges reported by musicians are the inter-related challenges of insufficient work, financial stress and the prevalence of precarious work.

The report also examines the impact of digital and online environments and how these environs influence the configuration, viability and business practices of portfolio musicians' work. All eleven of the interviewed musicians recognised that digitisation of the music industry alongside new technologies in business and social media have changed the ways in which musicians develop and sustain their careers. In positive terms, the digitisation of the music sector has facilitated new ways of working including new approaches to creative collaboration and both identifying and securing work. Negative implications include more difficulties in “cutting through” the massified, online and virtually connected music market.

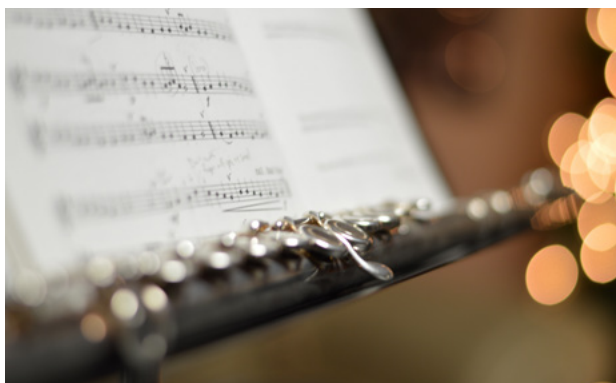
The most common sources of career challenges reported by musicians were the inter-related challenges of insufficient work, financial stress, and the prevalence of precarious work. Challenges relating to income generation and managing finances also emerge as central themes. Specifically, musicians reported difficulties in generating a liveable wage and acquiring sufficient paid or appropriately paid work opportunities. Diminishing Federal and State Government grants were another common source of concern. Financial stress was further impacted by the need to avoid over-exposure or “over-gigging”, thus reducing the amount of income generated by performances in order to develop a long-term, sustainable career. The most common sources of career difficulty were examined for differences by gender, career stage, region of residence and genre. Notably, females were significantly more likely to indicate financial stress, but no other differences were found including for genre.

Musicians' education

Both survey and interview data indicate that Australian musicians are well educated; 90% of survey participants had completed formal post-secondary education and 70% held tertiary qualifications in music. On average, survey participants believed that their post-secondary educational experiences had prepared them for their music careers to some extent, but 30% of musicians reported that it had only done so "a little" or "not at all"; similar findings were echoed by the interviewed musicians. No differences were found in gender, region of residence, or career stage (read here as time since formal education was completed). However, contemporary musicians assigned significantly lower ratings for career preparation than their classical and mixed genre counterparts. Of the 11 interviewed musicians, four held doctoral qualifications and one was enrolled in doctoral studies. Of the remainder, two musicians had completed or partially completed music-related Masters' degrees and two more musicians held bachelor-level degrees: one in music and another in commerce. Of the musicians who held PhDs, two musicians had articulated into doctoral study without undergraduate music training, instead gaining direct access via a Masters' degree by way of decades of professional music experience; the remaining two musicians had engaged in formal post-secondary level education.

The report highlights gaps in portfolio musicians' initial skills development and career support, informing recommendations for developing these capabilities both within formal education and training and as a feature of professional learning. The most common professional learning activities reported by the musicians were in music (for example, instrumental or vocal techniques, music theory) and in pedagogy (music teaching). In line with increased online visibility and competition, the most important professional learning needs identified by both case study and survey musicians were related to small business administration and management roles.

Australia's musicians are well educated and they tend to adopt a learning mindset. Their most crucial professional learning needs centre on marketing and administering their business. Musicians report that their post-secondary education prepared them to some extent for their careers; however, they emphasise the need to be prepared for the demands of career self-management and portfolio careerism.



Musicians' health, wellbeing and career satisfaction

Musicians' health and wellbeing is of growing interest to the music industry and the arts sector more broadly. Almost one-quarter (23%) of the survey participants indicated that they had a disability; the most commonly reported disability was mental illness, which was reported by 12.8% of respondents. In noting the importance of maintaining their physical and mental health as they traversed their careers, musicians reported their engagement in day-to-day activities including hobbies, regular exercise and healthy eating and sleeping habits.

In spite of the challenges inherent in establishing and maintaining a career in music, the musicians conveyed overall satisfaction with their careers. Musicians' rationale for staying in the profession related to their passion for music and the centrality of music to their identities. Overall, enjoyment of music making was the strongest career motivator for musicians alongside a strong desire to develop individual skills and capabilities; these motivations can be summarised as career calling and a learning mindset. In contrast, the weakest career motivators emerged as career-related stability.

Musicians emphasise the importance of maintaining physical and mental health. Reporting overall satisfaction with their careers, musicians note that career satisfaction encompasses financial, creative and emotional wellbeing. Of concern, the most commonly reported disability amongst musicians is mental illness; this could be related to the challenges of precarious, highly competitive and irregular work.

The study focused on realities of portfolio careers and the external landscape affecting musicians; however, we note that creativity and musicians' identities are equally important considerations. As our findings show, satisfaction with a portfolio career in music concerns not only the music and non-music work which "add-up" to a financially satisfying career, but also the factors which contribute to creative satisfaction and those which align with the musician's identity.

Recommendations

Making Music Work presents a comprehensive and detailed picture of the working lives, career trajectories and economic circumstances of musicians in Australia. The findings provide significant insights which have relevance to musicians and the music and broader arts sectors, as well as to the music institutions and organisations which provide professional training and lifelong learning opportunities.

Across the survey and in-depth interviews, musicians revealed how they negotiate life as a musician and the balance between making money and making art. These subtle shifts are testament to the emotional, creative and financial agility with which adept musicians negotiate their futures and make music work. Given the rich and detailed nature of the study data, it is neither possible or desirable to extract a simple map or model to inform musicians entering the field. Rather, the research reveals the multifarious ways in which Australian musicians carve out a life as a musician against a backdrop of considerable challenges. The report concludes with eight key recommendations for the key cultural organisations, educational institutions, policy makers and funding bodies which seek to support and enhance the livelihoods of Australian musicians. These are summarised below.

R1. State and Territory-based music organisations should renew and collaborate on professional learning programs relating to small business management and networked forms of work, collaboration and learning.

R2. Multiple agencies should collaborate to build collective agency and maximise capacity by maximising the visibility of, and access to, collaborative professional learning programs across jurisdictions.

R3. Post-secondary educational institutions should utilise the evidence from research, industry and alumni partnerships and secondary datasets to engage in evidence-based curricular reform. This should both include broad career development learning, small business management and inclusive notions of career “success” in music.

R4. Post-secondary educational institutions should take collective action to reduce the prevalence and impact of mental and physical health conditions among Australia’s music workforce.

R5. Post-secondary institutions should emphasise inclusion, diversity, equity and access in admissions, processes and public engagement.

R6. Providers of initial and ongoing professional learning should support and develop broad facets of musicians’ careers, recognising that the administrative and career development learning aspects of a musician’s practice often underpin the outputs and outcomes of their creative work.

R7. Aspiring musicians should be made aware of their ethical rights and responsibilities and associated support mechanisms and sources of advice.

R8. The music sector should increase the provision of specialist and peer support mental and physical health initiatives through further research and education and by informing the establishment of industry codes of practice and clearer identification and support pathways for those in distress.

R9. The music sector should advocate for the revision of national data collections so that multiple and impermanent job-holdings can be recorded.



RESEARCH TEAM

Chief Investigator: Professor Brydie-Leigh Bartleet (QCRC, Griffith University)

Professor Brydie-Leigh Bartleet is Director of the Queensland Conservatorium Research Centre (QCRC), Griffith University. She is one of the world's leading community music scholars whose research has advanced our understanding of the cultural, social, economic, and educational value of music and the arts in First Nations' Communities, prisons, war affected cities, educational and industry contexts. She has worked on five nationally competitive grants, five research consultancies, and four prestigious fellowships (totalling over \$1.2 million), and 150 research outputs. She serves on the Board of Music Australia, has served as Chair and Commissioner of the International Society for Music Education's Community Music Activities Commission, and is Associate Editor of the *International Journal of Community Music*. In 2014 was awarded the Australian University Teacher of the Year, in 2018 she was awarded an *Art for Good Fellowship* (Singapore International Foundation), and in 2020 she will be a Fulbright Scholar at New York University.

Chief Investigator: Professor Dawn Bennett (Curtin University)

Dawn Bennett is John Curtin Distinguished Professor of Higher Education and Director of the EmployABILITY and Creative Workforce Initiatives with Curtin University, Australia. She is acknowledged internationally as an expert on the development of graduate employability within higher education and the characteristics of careers in music. A National Senior Australian Learning and Teaching Fellow and Principal Fellow of the Higher Education Academy in the UK, Dawn is an Adjunct Professor with Griffith and Monash Universities, a Visiting Fellow with the University of the Arts, Helsinki, and a Research Fellow with the Australian National Centre for Student Equity in Higher Education. Dawn has led or contributed to over AUD\$6 million in research grants from which she has published over 240 academic articles and 10 books. Publications appear at Researchgate.

Chief Investigator: Professor Ruth Bridgstock (Centre for Learning Futures, Griffith University)

Ruth Bridgstock is Professor and Director (Curriculum and Teaching Transformation) in Learning Futures at Griffith University. Ruth is passionate about fostering 'future capability' in learners, teachers and educational institutions. Ruth engages in research and scholarship into education for the changing world of work and social challenges we all face, capability needs, and approaches to learning in the digital age. She designs, develops and evaluates innovative curricula and teaching approaches for the development of these capabilities. Ruth is Principal Fellow of the Higher Education Academy (now Advance HE UK), and Australian National Senior Teaching Fellow for *Graduate Employability 2.0*, which is concerned with social capital and how learners, teachers and institutions can connect with others to enhance their learning and work practices. Ruth's books include *Creative Work Beyond the Creative Industries: Employment, Innovation and Education*

(Edward Elgar, 2014), *Creative Education Pathways Within and Beyond the Creative Industries* (Routledge, 2016), and *Higher Education and the Future of Graduate Employability: A Connectedness Learning Approach* (Edward Elgar, 2018). Ruth's blog can be found at futurecapable.com.

Chief Investigator: Professor Scott Harrison (QCRC, Griffith University)

Professor Scott Harrison has experience in teaching singing and music in primary, secondary and tertiary environments. He has over 20 years of experience including performance, opera and music theatre as both singer and musical director. He is recognised as a leader in the research on masculinities and music with publications including *Masculinities and Music* (2008), *Male Voices: Stories of Boys Learning through Making Music* (2009) and *International Perspectives on Males and Singing* (2012). Scott served as co-editor of the *International Journal of Music Education*, and is the recipient of an Australian Award for University Teaching. A Fellow of the Australian Office for Learning and Teaching, Scott currently serves as Director, Queensland Conservatorium Griffith University.

Chief Investigator: Professor Paul Draper (QCRC, Griffith University)

Professor Paul Draper is an Adjunct Professor at Queensland Conservatorium Griffith University. Throughout a 25-year career at Griffith his portfolio has included leadership and strategic direction for digital arts communities including film, design, music and cyber-studies. At Queensland Conservatorium, he has taught and convened degree programs in artistic research, music and multimedia, and is the recipient of grants and awards in these areas. He has supervised to completion numerous research higher degree students in PHD and Doctor of Musical Arts (DMA) programs. In 2016, he won the AEL award for excellence in research supervision.

Chief Investigator: Professor Vanessa Tomlinson (QCRC, Griffith University)

Professor Vanessa Tomlinson is a percussionist, devoted to using the skills of listening to enhance community engagement. She does this through performance, composition, improvisation, site-specific work, environmental works, intercultural work and architectural collaborations. She is recognised as a leader in the area of Artistic Research, co-editing *Here and Now* (2016); an examination of Artistic Research in Australia, and producing many significant research outputs in this area. Her performance work has received numerous awards including two Green Room Awards, and two APRA AMCOS /AMC Awards and she has undertaken artistic residencies through the prestigious Civatelli Ranieri (Italy) and Asialink (China).

Research Fellow: Dr Christina Ballico (QCRC, Griffith University)

Dr Christina Ballico has a strong background in the music, media and arts sectors, with her research broadly examining the relationship between music and place, including aspects such as creative and cultural capital, business and career development, popular music culture and policy, and music cities. She currently sits on the Editorial Board of the *IASPM Journal* and is a former student researcher and

ECR/PhD subcommittee member of the ARC Centre of Excellence for Creative Industries and Innovation, and a former member of the West Australian Music Council. She is the co-editor of the forthcoming collection *Music Cities: Evaluating a Global Policy Concept* (Palgrave Macmillan, 2020).

Partner organisations

Australia Council for the Arts

Australia Council for the Arts is the Australian Government's arts funding and advisory body. The Australia Council's strategic plan reflects Council's desire to make more visible the vitality of our arts and culture, and to recognise the evolving way that Australians make and experience art. Australia Council's role is to support the unimagined along with the reimagined, the unknown and experimental along with the keenly anticipated. They are a champion for Australian arts both here and overseas and invest in artistic excellence through support for all facets of the creative process and are committed to the arts being more accessible to all Australians.

Create NSW

Create NSW works to deliver the NSW Government's priority of fostering excellence in arts, screen and culture in the State. Create NSW develops targeted strategies and provides support to the arts, screen and cultural sectors. It collaborates across government and builds strategic partnerships with the Commonwealth and local government, as well as supporting connections between the arts and business sectors. Create NSW is responsible for managing and delivering over \$2 billion of cultural infrastructure projects and administering funding programs that support key arts, screen and cultural organisations, artists and film and television content makers to develop and produce Australian work. Create NSW also works closely with the State's six Cultural Institutions, the Sydney Opera House, the Australian Museum, the State Library, the Museum of Applied Arts and Sciences, the Art Gallery and Sydney Living Museums and the State significant organisations, the Museum of Contemporary Art, Carriageworks and the National Arts School.

Creative Victoria

Creative Victoria is the Victorian Government body which champions, grows and supports Victoria's creative industries, by investing in the ideas, talent, organisations, events and projects that make Victoria a creative state. Creative Victoria fosters new opportunities for innovation, collaboration, cross-promotion and economic growth, both across the creative industries and in the broader community, and work to raise the profile, reach and impact of Victoria's creative industries, support the career development of local artists and creative professionals, and ensure that all Victorians benefit from creative and cultural opportunities.

Western Australian Government - Department of Local Government, Sport and Cultural Industries (DLGSC)

The Department of Local Government, Sport and Cultural Industries (DLGSC) works collaboratively with government, community organisations, peak bodies and other stakeholders to achieve our vision of creating a vibrant, inclusive and connected WA community. DLGSC's mission is to enable dynamic and inclusive communities and support the WA economy through effective regulation and the facilitation of outstanding sporting and cultural experiences and

opportunities. The culture and the arts business area of DLGSC supports the delivery of arts and culture activities through strong evidence-based policy, research and funding across Western Australia to achieve State Government outcomes. The business area undertakes the development and implementation of research and industry projects to strengthen the policy basis of its programs and services. Working with a range of stakeholders and partners, the business area provides information and opportunities to foster growth, connections and access to industry intelligence. This includes statistics on cultural funding, employment, attendance and participation, and Western Australia's values and attitudes towards culture and the arts. The business area funds non-government arts organisations as a base from which they can then generate additional income through sponsorship, box office and other agencies to support their annual program of activities. It also provides project funding to provide artists and creatives to undertake a broad range of projects and activities across multiple art forms. Investment in arts and culture is essential to ensure Western Australians have ongoing access to arts and culture activities.

Music Trust

The charitable organisation Music Trust works "with energy, imagination and authority for music." It advocates for recognition of musicians and music education, presents Awards, and hosts a Knowledge Base on music in Australia, and will make available its networks and thorough knowledge of the sector.





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The *Making Music Work* team would like to thank our project partners, the Australia Council for the Arts, Create NSW, Creative Victoria, the Western Australian Government Department of Local Government, Sport and Cultural Industries (DLGSC), and the Music Trust. These partners provided significant cash and in-kind contributions towards the study, and showed a firm commitment to both enhancing our knowledge of how Australian musicians navigate their portfolio careers and how best to create the supportive conditions which will allow these musicians to thrive into the future.

We extend our thanks to our partner representatives who provided valuable insights throughout the project: Paul Mason (Australia Council for the Arts), Dr Rachel Perry (Australia Council for the Arts), Chris Pope (Australia Council for the Arts), Andy Rantzen (Australia Council for the Arts), Christen Cornell (Australia Council for the Arts), Cassandra Carolin (Create NSW), David Everist (Create NSW), Sam Wild (Create NSW), Bria Baker (Creative Victoria), Christopher McDermott (Creative Victoria), Marty Cunningham (DLGSC), Paul Caulfield (DLGSC), Dr Tina Askam (DLGSC), Rebecca Sheardown (DLGSC), Roz Lipscombe (DLGSC), Pete Guazzelli (DLGSC), and Dr Richard Letts (Music Trust).

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We would like to acknowledge the Traditional Custodians of the lands on which we conducted this research. We pay our respect to Elders past, present, and emerging, and extend that respect to all First Nations' Peoples involved in this project and research.

Last but not least, we would like to thank all the musicians who completed the survey and participated in our interviews and who generously shared their time, perspectives and experiences.



CHAPTER 1: RESEARCH CONTEXT

Most Australian musicians pursue portfolio careers, which feature multiple permanent and/or impermanent paid roles. These roles might include, among others, performance, composition, song writing, recording, arranging, musical direction, teaching, community projects, administration, marketing, health promotion activities, sound engineering and retail. Australian musicians also undertake work outside the music sector, including music work embedded within another economic sector (for example as music therapists working in the health sector) and both skilled and unskilled work unrelated to music.

Although portfolio careers are not a new phenomenon, a raft of factors is impacting how 21st-century musicians develop and sustain their careers. These include shifts in how music is made, paid for and consumed, reduced government funding and commercial revenues, and a changing educational and policy landscape. The *Making Music Work* study provides a deeper contextual understanding of these key sector dynamics and musicians' navigation of them. Despite the study's emphasis on portfolio careerists, the research findings have relevance for all Australian musicians and the potential to strengthen how Australia equips, educates and supports musicians to build careers into the future. This opening chapter provides a brief overview of the research context and key outcomes.

For the purposes of this study we define a musician as someone who practices music in one or more specialist fields (Bennett, 2008a). We consider musicians as multi-professionals whose portfolios of work can encompass roles such as music creation and performance, technical roles, education, retail, and many more. We limit the discussion to musicians who include performance within their portfolio of roles.

Setting the context for this study

While many musicians enter the music industry with dreams of stardom and riches, or simply the expectation of earning a living from their music making, the majority are not able to build sustainable careers within the music sector. Globalisation, digitisation, regulatory and policy environments, and other influences on the Australian and global music industries mean that musicians must navigate new contexts and new business models, possess new and diverse skill sets and be willing to engage across a range of markets (see Draper, 2009, 2012; IFPI, 2019; Rogers et al., 2004). These include the capacity to work across music genres and a range of performance sites encompassing online and digital environments (Masnick & Ho, 2012) as well as in community and educational settings (Bartleet et al., 2009; Bartleet & Higgins, 2018; Harrison, 2011). Such social, cultural and technological developments have caused some of the most profound changes in musical history (Schipper, 2009), making the career path into music both more exciting and more challenging than ever before.

Notwithstanding the challenging landscape for musicians, Australia's music industry contributes strongly to the nation's economy. Data collated by Music Australia reveals that by 2016 the Australian music industry contributed between \$4–6 billion annually to the economy. Live performance spend sees a 3:1 return on investment, with Live Performance Australia ticketing data showing that Australia's live music industry generated at least \$1.88 billion in 2017 (LPA, 2018; Music Australia, 2016).

The Australian music industry also generates some 65,000 jobs, half of which are full time. Although this represents an impressive turnover, it does not necessarily equate to a wealth of career opportunities for Australian musicians. The Australia Council's national research survey into the arts labour

market indicates that while the number of artists experiencing unemployment has been on the decline over the past 20 years, there is a continuing trend toward insecure work with four out of every five Australian artists working on a self-employed basis; this includes 78% of musicians and 81% of composers (Throsby & Petetskaya, 2017). As a consequence, many Australian musicians continue to undertake a range of paid and unpaid, predominantly part-time and freelance music-related work, sometimes supplemented by “day jobs” in unrelated fields, in order to carve out a viable living (Bridgstock, 2005; Throsby & Hollister, 2003; Throsby & Petetskaya, 2017). This non-arts related work appears to provide the most secure financial pathway by way of salary or wages-based income (Throsby & Petetskaya, 2017), whereas music-related work may include a broad spectrum of activities including performing, teaching, composing, managing, and administering (Hannan, 2003).

Such activities play out across diverse music genres such as classical, pop, techno, musical theatre, world music and jazz, and combine to form what is now frequently referred to as a “portfolio career” (Cawsey, 1995). Despite the prevalence of these portfolio careers in Australia there are major gaps in our understandings of how they operate due to their multifaceted nature and, in turn, how they contribute toward the country’s economy, social and cultural fabric and national identity. Such gaps mean that these career patterns are not only inadequately understood by the music sector, but that the formation and implementation of effective policy, funding, training and continuing career support strategies for these musicians remain well behind their potential (see Bartleet et al., 2012, 2019; Bennett & Bridgstock, 2015; Carey & Lebler, 2012; Harrison, et al., 2013).

In response to such gaps and over the course of this research there has been considerable policy debate and activity relating to the Australian music sector. During the project period, for example, a range of Australian Federal and State government inquiries into the music and broader copyright industries have sought to better understand the needs of the sector, to identify areas needing assistance and, ultimately, to improve conditions for musicians, industry workers and the sector as a whole. These have included a Federal review of factors contributing to the growth and sustainability of the Australian music industry; a Federal review of the Australian Copyright Act; and State-based inquiries into the music and arts economies (in NSW and QLD). All the while, new and renewed funding allocations for programs supporting music education in schools and in the broader contemporary music sector have been made by the Victorian and Western Australian governments respectively.

In light of this complex landscape, the *Making Music Work* report aims to make inroads towards addressing current gaps in understanding how portfolio careers operate in the Australian context. The report draws on evidence and insights from our nation-wide survey, which yielded responses from 592 musicians, as well as in-depth interviews with a diverse group of eleven Australian musicians.



Project significance and outcomes

Making Music Work features the first national survey of its kind to precisely examine *how* musicians develop, sustain and steer a portfolio career in Australia. Specifically, it focuses on the ways in which musicians traverse multiple roles in successive and concurrent contexts and the factors driving such career structures. Other studies into the value of the Australian music industry are regularly captured in a range of research resources (see for example ARIA, 2019; IFPI, 2019; LPA, 2018). Similarly, major research has explored the broader economic realities of arts work in Australia (Throsby, 2007, 2008, 2010; Throsby & Petetskaya, 2017; Tolmie, 2017) as well as the financial situation of musicians (Moskovich, 2015), issues of equity and diversity (Eikhof et al., 2019; Hennekam & Bennett, 2017) and characteristics of career across the career lifespan (Bennett & Hennekam, 2018). However, there remained a lack of understanding about the structure of musicians’ working lives. This lack of understanding was further compounded by the focus and limitations present in existing datasets such as national census data and the higher education graduate outcome surveys.

***Making Music Work* maps the creative, social, cultural and economic realities of the portfolio music career and delivers recommendations to address the realities this presents for Australian musicians. In doing so, the study provides a uniquely detailed and granular picture of the working lives, career trajectories and economic circumstances of portfolio musicians in metropolitan, regional and rural/remote centres of Australia.**

Using a multi-year, mixed-methods approach, *Making Music Work* delivered the following outcomes:

- A detailed picture of portfolio musicians' work in Australia, taking into account key variables such as geographic location, age, gender, education and work experiences and music genres;
- Identification of key factors which influence the ability of portfolio musicians to create sustainable work practices, including factors which influence migration, health and wellbeing, and sectoral attrition;
- Evidence on the impact of digital and online environments and how these environs influence the structure, income and viability of portfolio musicians' work and business practices; and
- Identification of gaps in portfolio musicians' initial and ongoing professional learning and career support, informing insights and recommendations for initial and career-wide professional learning.

By building a more detailed understanding of the ways in which musicians manage portfolio career structures, it is anticipated that the project outcomes will assist government, industry and the education sector to provide appropriate funding, regulatory measures, training and development opportunities into the future.



Project outputs

The aforementioned outcomes have been achieved through the following suite of outputs, designed to target a wide range of stakeholders.

- Short videos of participants sharing insights about their careers for the music industry: <https://www.youtube.com/channel/UCB0R9oczzKc0O4Ogl909j4g>;
- Concise career profiles of the interview participants outlining significant factors that have influenced their careers: www.makingmusicwork.com.au/casestudies;
- A summary brochure highlighting the key findings of the research as well as recommendations for the music industry, broader arts sector and relevant organisations, institutions and government departments;
- Easily accessible fact sheets from the survey findings, hosted on the *Making Music Work* website: www.makingmusicwork.com.au;
- Peer reviewed academic papers on the project's findings;
- Conference presentations at the Contemporary Music Roundtable (Sydney, 2017), The Protean Musician: Joint Research Centres Conference at the Norwegian Academy (Norway, 2017), WAMCon 2018 (Perth, Australia), and Music Careers Symposium (Lismore, 2019).
- Radio interviews on ABC Radio National, ABC Southern Queensland, 98.9FM (Brisbane), RTRfm (Perth) as well as brief stories in industry outlets, such as Music Australia's E-News, Music Industry Inside Out, Music Insight, NiTRO, and Scenestr.

Report overview

Chapter 2 provides a detailed overview of the extant literature. This sets the context for the study and highlights gaps in knowledge and literature which the *Making Music Work* study sought to address. Chapter 3 provides a brief outline of the project's research design and approach. Chapter 4 presents detailed findings of the project's national survey of musicians and Chapter 5 examines significant themes arising from eleven in-depth interviews with a diverse group of musicians. The final chapter, Chapter 6, presents conclusions and recommendations arising from the research. Overall, the report seeks to provide insights that can assist in optimising musicians' career configurations, forging robust public policy, and devising strategies with which to approach major sectoral challenges.



CHAPTER 2: LITERATURE REVIEW

This chapter synthesises a large body of extant literature which explores the portfolio career phenomenon and the current realities of the music sector in order to outline critical issues facing 21st-century musicians. To set the context for this chapter we begin with a brief overview of the dynamics of the music sector both globally and nationally. We then move on to examine the current realities of portfolio careers and the characteristics of working musicians. These insights provide important contextual information for understanding a range of factors impacting upon emerging and established musicians and the Australian music industry and arts sector more broadly.

The global dynamics of the music sector

To understand how musicians work, it is constructive to briefly discuss the global dynamics of the music sector and how this ever-changing landscape is navigated by working musicians. Over the past two decades, for example, the music sector has been buffeted by global, technological and demographic challenges and change, which have combined to fundamentally affect how music is created and consumed. These changes have significantly impacted the sector's ability to invest in and nurture talent and its support of musicians' engagement with audience development.

Despite global, technological and demographic change, musicians emerge as a passionate, agile and persistent workforce. The literature illustrates musicians' commitment to music and the pride they take in their work (Gross & Musgrave, 2017; van den Eynde, Fisher & Sonn, 2016). The vital processes of creativity, pursuit of a musical vision and commitment to musical exploration remain at the heart of what it is to be a practising musician today (Throsby & Petetskaya, 2017).

Musicians and artists report that passion and persistence, along with self-belief and hard work, are the most important features of career advancement. These factors can also underpin a musician's identity, along with a range of external factors including income, type and quantum of music and non-music work, government policies, and available opportunities (Cloonan & Williamson, 2017; Throsby & Petetskaya, 2017).

Influential digital shifts include the introduction of the mp3 software format; the rise and fall of illegal P2P file sharing services (e.g. Napster, Kazaa, and LimeWire); freemium digital music distribution services such as YouTube, Apple Music and Spotify; social media platforms including MySpace, Facebook and Twitter; online music publicity and booking services such as Sonicbids; and the proliferation of communication services such as email. This has occurred alongside sweeping changes to recording technologies and musical editing software.

The innovations embedded in this technological change have had profound impacts, fuelling enormous industry growth and decline. In the 1990s the new compact disc (CD) format became hugely popular, offering up to twice the amount of music on a vinyl record. The CD was cheap to produce and attracted a premium. It led to a global music sales boom, with recorded revenues rising from US\$7.4 billion per annum in the 1980s to \$38 billion by 1999 (IFPI, 2000; Rogers & Preston, 2016). These super-sized profits were not without controversy and resulting legal inquiries; neither were they to last. The next major digital innovations, in the form of downloading, file-sharing and then digitised streaming, saw recorded music sales in 2014 drop to US\$14.3 billion (IFPI, 2015). As widespread P2P file sharing and piracy cannibalised revenues, the music industry was caught largely unprepared.

2014 was also the year when streaming revenues marked the path to the future, with licensed digital sales equalling physical sales for the first time (Klein et al., 2016). This represented a fundamental shift, summarised by Arditì (2018, p. 302): “The recording industry is changing from a business model dependent on the sale of commodities to a model based on subscriptions and streaming”. The IFPI (2019) reported a steady return to growth in the subsequent four years (to 2018), with \$19 billion in global recorded sales achieved in 2018. Sales were primarily driven by streaming, which in 2020 accounts for close to half of all global recorded revenues

The resulting impacts of this turbulent period on musicians have been substantial. As licensed streaming services proliferate, a chastened recording industry is making do with less. Finance for investment in music by major labels has reduced such that less money is directed to fewer artists; Watson (2016) asserts that the artists who receive this funding are predominantly those most likely to recoup costs. New business models have also evolved; these include “360 degree” or “multi rights” deals which encompass all revenue that an artist brings in (Stahl & Meier, 2012). There is also a shift in emphasis from recording artist to artist as brand, with intermediaries taking a stake in multiple income streams, from publishing and touring to sponsorships (Tessler, 2016).

Major record labels have led much of this activity, maintaining traditional power structures and with a small number of large firms continuing to dominate (Rogers & Preston, 2016). Labels, while historically generating their profits primarily on the production and sale of recorded music formats, are now accessing revenue streams traditionally reserved for musicians (Byrne, 2012; Stahl, 2013). As Hracs (2010, p. 55) elaborates:

Technologies have lowered the barriers to entry, and afforded individual musicians unprecedented levels of control, freedom and opportunity to produce, promote and distribute their products. ... At the same time, however, these opportunities have been accompanied by increasing demands and personal risk. As record labels ‘roll-back’ supports and services traditionally provided to signed musicians, musicians are now required to perform a growing range of creative and business tasks independently.

The rise of online distribution and streaming services, and resulting decline in the sale of physical music formats and investment in recorded music have, as detailed above, had enormous impacts on the music industry. While, the latest figures from the International Federation for the Phonographic Industry (IFPI, 2019) reveal that revenues from licensed streaming services (such as Apple and Spotify) continue to grow, with the Australasian market ranked second in the world for streaming profits at the end of 2018, recorded music profits have not fully recovered to the levels they were in in 1999. It remains to be seen whether or not streaming services will ever be able to generate the same profits as physical sales (Owsinski, 2018). A range of legal challenges are also underway around the world with regard to the amount musicians receive from streaming (Hannan, 2019) and the

capacity of streaming services in specific markets (Deahl, 2019). Of interest, there is evidence that these debates and issues predominantly relate to contemporary music and associated modes of engagement from audiences, and Groot (2017) argues that the classical music sector has largely been removed from these discussions.

Technological innovation has had other global impacts on musicians’ working lives, including those of displacement and de-skilling. The advent of innovations such as drum machines, synthesisers and particularly the disc jockey (DJ) has progressively enabled the sound of a full band to be delivered by one performer (Williamson & Cloonan, 2016). As such, the uptake of digital technologies in the music industry has resulted in some of the biggest shifts, challenges and possibilities the sector has experienced. As Klein et al. (2016) explain, technological advancements and associated cost savings intersect with both musicians’ aesthetic values as artists and with the commercial realities of life as a working professional. As a result, musicians in the 21st century have unprecedented levels of “control, freedom and opportunity to produce, promote and distribute their products” (Hracs, 2010, p. 55), allowing them to work in more independent, self-reliant and innovative ways (Goold, 2018; Leyshon, 2009).

Music economics have long been underpinned by the superstar effect wherein most revenues and resources flow to a few – generally mainstream – artists (DiCola, 2013). This began to change at the turn of the 21st century when barriers to entry were swept away by technological changes, in turn facilitating affordable production and distribution (Graham, 2013). This opened the way for enormous music niches, chronicled in the book *The Long Tail* by music journalist Chris Anderson. With this came a hope for wider market and consumer access, as “superstars” made room for an almost endless stream of niche markets and artists (Anderson, 2006).



What is clear from the literature internationally is that musicians now operate outside the constraints of a single dominant paradigm such as a major record label and have been doing so for some years, albeit with significantly less investment. Similarly, technological advancements such as the proliferation of email and social media platforms have facilitated the business of music, including booking and promoting performances, and promoting releases and tours. However, increased autonomy brings other challenges. While new doors have indeed opened along with a massive quantum of online music content—some estimates suggest there to be 30 million music tracks online—many of the old dynamics still apply (Klein et al., 2016). As in the past, only a tiny percentage of artists can earn the majority of their living from music, both in recorded and live music (Klein et al., 2016).

Despite increased awareness of issues confronting women and other marginalised groups, aspects of music such as jazz, music technology and composition retain systemic inequities (Macarthur, 2014; North et al., 2003), as does the formal music curriculum (Peters, 2016) and the gender imbalance within leadership roles (Gould, 2005). These inequalities impact both aspiring and practicing musicians (see Bennett, 2008a; Browning 2016; Henderson, 2013).

Dynamics of the Australian music sector

Australians have a great love for music. More people attend live music than sport (Roy Morgan Research, 2014), with over 40 million attendances at popular music events each year (Whiting, 2014). Australia also enjoys strong overseas export success (Homan, 2012) and a high level of public engagement: some 15% of Australians participate in music making and 97% listen to recorded music (Australia Council, 2017).

The Australian music economy reflects the dynamics of a small, dispersed and distant market with its own distinct challenges. Australia has a small cultural economy relative to its global peers (O'Connor & Gibson, 2014) and is predominantly a copyright-using market (Graham, 2013). In the ten years to 2014, copyright incomes declined from 4.1% to 1.8% of exports (Australian Copyright Council, 2015). Australian music, while a strong copyright contributor within the creative sector, has also been disproportionately impacted by global change. This has seen recorded music market share drop from third place globally in the early 1990s (Australia Council, 2012) to eighth in 2018 (IFPI, 2019).

In line with other global settings, the contemporary music sector in Australia is anchored by just three global major record labels, which are responsible for approximately 80% of the music produced and sold around the world (McDonald, 2018). Alongside these major labels is a range of independent labels, some aligned with the larger firms through distribution and financing deals (Ballico, 2013).

Australia has enjoyed the recent upturn in global recorded music and in 2018 posted \$526m in recorded music sales, a 12.5% annual increase, with streaming 70% of the total (ARIA, 2018). Royalty flows to Australian composers and songwriters are also up 8.7% for 2017/2018 to \$420 million, driven by increasing digital music incomes (APRA AMCOS, 2019). It is

not yet clear whether this growth can be sustained and some industry sectors are concerned that the superstar effect is alive and well in the new digital music economy. A recent industry White Paper argues that international artists dominate local streaming charts and low payment rates, typically 0.005 cents per song, preclude viability for most Australian artists (Bainbridge, 2019; Brandle, 2019).

The pressures on recorded music revenues have increased the importance of live music income for Australian artists, with the music sector facing myriad policy, demographic and consumer choice challenges (Music Australia, 2016). While music continues to be a vibrant and economically important market, employing close to 65,000 people nationally, the challenges are not new and are historically well documented. A 2003 NSW Inquiry found a significant reduction in the number of live music venues in that State, attributable to “changes in leisure culture, in popular music styles and formats, in financial and legislative frameworks, in the composition of audiences, and in community demographics” (Johnson & Homan, 2003, p. 1)

Fifteen years later, the Sydney market in particular continues to face challenges, with a Parliamentary Inquiry identifying a “live music crisis” resulting from the closure of 176 live music venues during the four years to 2018 (NSW Parliament, 2018). While some cities sustain strong live music precincts and cultures, notably Melbourne and Brisbane, the national trend is for declining live music audiences across popular and classical music. The proportion of people attending popular live music events dropped 7% over four years to 32% in 2016, following a 2% decline in the four years to 2013. The decline of live music audiences is reflected across the country, across age groups, and across metropolitan and regional areas.

Music has also seen public participation rates decrease from 20 to 15% over the past four years – the largest decrease of any artform (Australia Council, 2017). In contrast, Australia's major classical companies are maintaining their market share with 1.7 million attendances in 2017 (AMPAG, 2019) and solid results predominantly driven by performances based on popular films (LPA, 2017). This compares favourably with the US where classical attendance data has shown a 2.3% annual decline over the five years to 2017 (NEA, 2019) and in England where the Arts Council reports attendances to be static (Arts Council England, 2017).

As with any jurisdiction, the impacts of technology and societal change can be moderated by legal and policy contexts (Cloonan & Williamson, 2016). A notable Australian example is the contested terrain of Australian content in broadcasts (Graham, 2013). Australia has a 25% local content quota prescribed under media law. Adherence by Australian commercial broadcasters to local quotas has been variable (Graham, 2013) and recent research suggests that it continues to be so (Donoughue, 2018). Industry is advocating for these quotas to be extended to streaming services (Donoughue, 2018) and it is also campaigning for increased local content under the “Australian Played” banner (<https://australianplayed.com.au/>). Ironically, Australian music costs broadcasters more than US content due to differing global copyright arrangements, thus incentivising commercial radio stations to play US rather than Australian music (Graham, 2013).

The Australian music industry has also been impacted by changes to taxation, changes in music licensing laws, and uncertainty and variability in arts policy and funding. There is continued concern regarding how much, or how little, musicians earn from their music and associated activities (Williams, 2015). Nonetheless, real policy opportunities exist. One interesting example can be found in the global growth in synchronisation deals, which license music for use mainly on screen-based media. The prevalence of synchronisation deals increased globally by 19.8% between 2016 and 2018 (IFPI, 2019); they are estimated to be worth over US \$10 billion in global revenues for two of the major players alone (Music Industry Insights, 2018). While this could see increased copyright incomes for Australian composing musicians, the caveat is that benefits here may not flow until stronger local content requirements are implemented as sought by industry (Make it Australian, 2019).

As Klein et al. (2016) suggest, musicians find themselves in new circumstances in light of technological advancements and (reducing) impacts of piracy on musicians' revenue streams, which ultimately intersect with a range of attitudes relating to debates around art versus commerce. As touched upon earlier and discussed in Bartleet et al. (2012, 2019), the upending of the conventional recording industry model has fundamentally shifted its structure and the ways in which money is generated.

The result of these current dynamics in the music sector mean that many musicians must self-manage a range of creative and business activities. Many of these activities, for example administration and marketing, are activities for which musicians may not have had adequate training (Throsby & Petetskaya, 2017). Although the figures have improved since the 2010 national study (Throsby & Zednik, 2010), Throsby and Petetskaya (2017) report that just over half of musicians and fewer composers rate their business abilities as good or better. As Hracs (2010) notes, these additional roles can result in complex, high stress environments for musicians, who find themselves needing to manage competing priorities. This further impacts allocation of time and how musicians structure their working days.

If they devote too much time to the business side, the creative content, on which their careers and earning potential rest, can suffer... It is clear that multi-skilling puts independent musicians in the difficult position of subordinating either their creativity or economic wellbeing. As a growing number of musicians choose the latter, the creative content of individual musicians and the scenes they participate in changes. (Hracs, 2010, pp. 60-61)

Notwithstanding these complex dynamics, there are benefits that come with the flexibility gained from portfolio work. The dynamic career trajectory can also open up the space for creative and artistic freedom, experimentation and risk taking, which may or may not transform into a viable financial opportunity. It seems also that the multiple challenges and impediments facing working Australian musicians do not

prevent them from being a satisfied group. Satisfaction levels are on par with the broader community, and well ahead of the OECD average, suggesting that they, like all Australians, benefit from a high quality of life (Throsby & Petetskaya, 2017).

The nature of portfolio careers in Australia

Portfolio careers for musicians are not new: 20 years ago, Australian musicians engaged in a range of work activities, with an average of half their time spent on their own music practice and the remainder divided across other music related and non-arts-based work (Throsby & Hollister, 2003). These dynamics applied to most artists across all other artforms. In the intervening period, financial precarity has spread to multiple occupational sectors and the term "gig economy" has become popularised. As Cloonan and Williamson (2017) point out, musicians have long worked for "gigs" and the term gig economy appears to have its roots in music.

[A] term, which may have its origin in popular music culture, is now being associated with an employment situation that is deemed to be precarious and exploitative ... while the adoption of the term "gig economy" may be a consequence of the economic instability caused by the financial crash of 2008, musicians have been working in the economy of gigs for the best part of a century and the nature of this work has been largely neglected. (Cloonan & Williamson, 2017)

What has changed is that the creative incomes of musicians have become more precarious, and while most musicians still spend around half their time on their creative work, they earn less income from it – down from 43 to 29% (Throsby, 2007; Throsby & Petetskaya, 2017).

The characteristics of portfolio careers in music, despite being long standing and widespread, are little studied with limited evidence and data to assist researchers (DiCola, 2013). Census collections in Australia and the UK amass only basic occupational data with questions such as, "In the main job held last week, what was the person's occupation?" (Australian Bureau of Statistics, 2016d); or "[What was your] employment in the area the week before the census?" (Office for National Statistics, 2015). These questions cannot capture the complexity of musicians' work. Graduate outcomes data are similarly rudimentary: in Australia, graduate destinations data are collected six months after course completion and focus on full time work. They also conflate design, media, the arts and the humanities into a single category (Jackson & Bridgstock, 2018). Where Australia is fortunate is in the six longitudinal studies into Australian artists at work, commissioned by the Australia Council for the Arts and led by eminent economist David Throsby, now spanning some thirty years: a rich data source widely referenced in this report. A detailed music snapshot from the 2017 study is included below.

MAKING ART WORK

A snapshot on performers and composers, from David Throsby and Katya Petetskaya's 2017 report: performers and composers

For thirty years economist David Throsby has investigated Australian artists at work, producing studies every four years. His latest, *Making Art Work*, was published in 2017. This work provides compelling longitudinal data for researchers. A snapshot from the latest report shows:

Numbers and demographics

Australia has 17,100 practising professional musicians, songwriters and composers. At 35% of Australia's 48,000 artists they comprise the largest single artform group. The number of musicians in Australia has increased slowly over the past thirty years, as has their mean (average) age which in 2014/15 was 46 for musicians and 51 for composers. Three quarters of Australian musicians live in capital cities, they have higher rates of mobility than most other artists, and are less culturally diverse than the broader labour force. 59% of musicians and 72% of composers have had engagements in other Australian states and territories and 39% of musicians and 50% of composers overseas.

Education

Australian musicians are highly skilled, through formal and on the job training, averaging more than seven years to obtain qualifications. Three quarters have attained a Bachelor's degree or higher.

Income

A high level of education does not necessarily translate into effective remuneration. Musicians have relatively low creative incomes compared to their peers, spending more time on non-arts work than any other art form. This may be attributable to the nature of the artform with regular rehearsal and performance schedules, unlike writers and visual artists who have more flexibility on their creative work hours. It is noteworthy that the evidence over time shows that the creative life of a composer is more economically sustainable than that of a musician.

The average for musicians' annual creative income in 2014-15 was the lowest of any artform, with only 13% of musicians able to meet their total income requirements from their creative work. In the seven years to 2017, the average creative income for musicians dropped from \$23,600 to \$15,600, and for composers from \$31,700 to \$19,100 (in adjusted 2015 dollars). Composers were just above the average for all artists (\$18,800). Two-thirds of musicians and one-third of composers earned less than \$10,000 from their creative work. Over 20% of musicians earned no creative income in the year of

the study (2014/15). Total income for musicians fared better when arts-related income was included (e.g. music teaching) and non-arts income was added in, with musicians above the national average of \$48,400. However, musicians' overall financial situation has remained the same.

Work

Most musicians are self-employed (78% of musicians and 81% of composers), on par with the average for all artists. Even more musicians and composers (both 86%) work on a freelance basis in their principal artistic occupation. This increased substantially over the 15 years to 2017 for musicians (up from 68%), with a smaller increase for composers (up from 77%). Fees and payments are the main source of creative income for musicians (82%) and composers (58%).

65% of musicians and 89% of composers received payment from a royalty collecting society in the previous year (3% of a musicians' income and 16% for a composer). Musicians (along with writers) were less likely to receive a grant, prize or funding than other artists, with 45% of them receiving none. Composers fared better, with 68% receiving some form of support. Fewer musicians (13%) benefitted from tax averaging than all other artists, yet tax averaging can smooth higher and lower incomes over a four-year period.

Gender

Gender balance for musicians is similar to the broader work force with 55% males and 45% females. Composers, however, remain one of the most male-dominated creative professions with 60% men, although substantially improved from 91% thirty years ago. The biggest gender disparity is in income, with the full time pay gap in music and the broader arts appearing to favour men by 16%; this is higher than the pay gap across all Australian industries.

Trends

Discernible trends tracked in the five commissioned studies spanning 30 years include the following points.

- The number of professional musicians has grown at a rate slower than population growth;
- Fewer musicians are working for salaries and wages, consistent with broader artform trends;
- The sources of income have changed, with decreasing income coming from creative work;
- There is a significant rise in the number of musicians employed in their creative work as freelance (hourly paid) workers.

Gaps in understanding musicians' work extend to the areas of teaching (both in schools and the teaching studio), music therapy, community music and live music. To date, there are also gaps in the literature about non-arts related work, which comprises a large percentage of income (42%) for the average musician, and more data could assist in better optimising portfolio careers. There remains a need to address these issues and gaps by synthesising available data and providing new research evidence to build a more complete picture of the nature of the portfolio careers of musicians.

Features of music work in Australia

As we have outlined, music work has long been characterised by multiple concurrent roles within (situated) and outside (embedded) music. The portfolio careers of working musicians generally have some or all of the following characteristics: they are freelance (in part or whole), self-managed, involve multiple part-time and/or casual roles, prioritise the individual's own creative work, range across music and non-music related work, and have moderate total but low creative incomes.

Freelance work

86% of Australian musicians work on their own creative work on a freelance basis. Specialisms such as composition are almost exclusively freelance roles or roles undertaken within a setting such as higher education (Hennekam et al., 2019). Only 14% of all musicians undertake their creative work on a salaried full time or part-time basis. The majority of these musicians would be employed by Australia's professional orchestras and by the armed services (SSI, 2017; Throsby & Petetskaya, 2017). Australia is not alone in the prevalence of freelance work: a 2012 study conducted in the UK estimated that 94% of all musicians in the United Kingdom (UK) work as freelancers (Musicians Union, 2012).

Self-managed work

The vast majority (82%) of Australian musicians self-manage the support functions of administration and promotion (Throsby & Petetskaya, 2017). This entails a wide range of skillsets and capabilities to ensure sustainable careers. To succeed, a self-managed musician must build and implement a suite of effective creative, business and marketing skills. An entrepreneurial and proactive approach is required in multifaceted, complex working environments and musicians must balance creative and business workloads, knit together

multiple income sources and employers, manage financial and reputational risk and keep abreast of rapidly changing environments. These elements are explored further in the sections below.

Part-time work

Most musicians undertake their creative work on a freelance basis and few musicians earn all or most of their income from their main artistic occupation (Bennett, 2008c; Hracs, 2010; Throsby, 2008). There are few full time positions across multiple specialisms including performance, music management, sound engineering and conducting (Bennett, 2008a) and non-arts related work accounts for approximately half of musicians' gross income (Throsby & Petetskaya (2017) report that 42% of musicians' income in 2014/15 came from non-art related areas). Similarly, a survey conducted by Entertainment Assist found that three-quarters of Australian musicians earn income from outside the entertainment industry (Entertainment Assist, 2016). In the UK, too, 34% of musicians undertook work outside the music profession (Musicians Union, 2012), and musicians in the United States (US) music reported a second job (or 'side hustle'; Harrison & O'Bryan, forthcoming) for over one-third of all musicians (NEA, 2019).

Engagement in multiple genres of music can contribute to sustainable sources of income for musicians. Folk music provides one such example: writing from Canada, Miller (2018) found that the stylistic and social characteristics of the folk music genre can sustain small-scale economic activity over long periods of time. In Australia, musicians who include community-based work in their portfolios may receive small, but regular, honoraria from community groups and organisations or undertake short-term contracts and projects for larger arts organisations or local or state-based government departments (Bartleet et al., 2009; Schippers & Bartleet, 2013).

Multiple roles

Musicians undertake multiple roles across their own creative work, other music-related work and non-music work, detailed in Table 1 below. They also have multiple income sources: the *Making Art Work* study lists over ten income types including contract and salaried employment, sales, grants and prizes (Throsby & Petetskaya, 2017).

Table 1. How Australian musicians make a living (Derived from Throsby & Petetskaya, 2017)

Three major areas	Activity	Average income (%)	
		Musicians	Composers
Creative work	Artistic practice: performance, rehearsals, composition, song writing, related administration, marketing	30%	34%
Arts related work	Music teaching, arrangements, arts administration, marketing outside own practice	28%	45%
Non-arts related work	Other work derived from a non-arts occupation	42%	21%

Creative work

Australian musicians spend half their working time on their own creative work but derive only 29% of their income from this activity (Throsby & Petetskaya, 2017). Only 18% of musicians and 22% of composers work full time on their own creative practice (Throsby & Petetskaya, 2017). Fewer than a quarter of Australian musicians earn the majority of their living from their own creative work: less than in the US and UK where more than half of musicians achieve this (DiCola 2013; Musicians Union UK, 2012). Musicians' creative income in Australia comes from live music performance, composition, song writing, arranging, recording payments and advertising. There is limited data on the breakdown on these income streams, although there is consensus that live music performance provides the biggest source of performance-related income for musicians. This is seen in a national APRA study (2011), which determined that 60% of creative income came from live music, and in a Creative Victoria study (2011) in which 70% of musicians identified live performance as their primary source of income.

Arts-related work

Arts-related work is defined as work undertaken outside the musician's own creative practice but within the artform, and in music this activity is primarily represented by teaching work. Music teaching in schools and studios represents a substantial source of income for Australian musicians, with close to two-thirds of musicians and 80% of composers engaged in teaching and training. Arts-related work comprises 28% of musicians' incomes and for composers it delivers almost half their total incomes at 45% (Throsby & Petetskaya, 2017). In the US, DiCola (2013) found that on average 22% of musicians' income came from teaching, rising to 33% for classical musicians. While two-thirds of Australian musicians would like to spend more time on their creative work (Throsby & Petetskaya, 2017), the reality is that teaching provides a significant income stream for working musicians and is directly related to their primary creative occupation. Similar dynamics exist in the much larger US market, where DiCola (2013) reports that many musicians would also like to teach less.

Despite its relative importance, specific data on the quantum of musicians' work in schools and the studio is scarce, as both are unregulated and largely unreported other than in State school-based instrumental programs. However, teaching is a central activity for musicians. An illustrative insight is provided using school-based music education in Queensland as a case study (see below).

Income

Low creative incomes among Australia's professional musicians are well-documented historically. In 2014/15, however, the creative incomes of musicians were the lowest of any artform. According to Throsby & Petetskaya (2017), musicians' average annual creative incomes have declined over the past 25 years, down from \$22,000 in 1986-87 to \$15,600 in 2014-15. Composers' incomes dropped from \$32,800 in 1986-87 to \$19,100 (Throsby & Hollister, 2003; Throsby & Petetskaya, 2017). Total incomes, which include earnings from all sources, fared better for musicians but not for composers. Musicians' incomes grew from \$45,400 in 1986-87 to \$56,200 in 2014-15 and composers dropped from \$69,300 to \$53,000; these figures are adjusted into 2015 dollars and median incomes are generally lower (Throsby & Petetskaya, 2017). While composers' overall incomes are lower, they are able to derive a higher total proportion from their own creative and music related work (79% compared with 58%), as illustrated at Table 1.

It is clear, especially with income from creative practice, that little has changed in real terms: musicians' incomes have increased sufficiently in nominal terms to keep pace more or less with inflation, but no more. The one positive aspect to all this is that the average total income for musicians and composers in 2014-15 was the highest for all artforms (the average for all artists was \$48,400). While this makes it the most financially attractive field for a working artist, it is still well below the average for all Australian employees of \$61,600 gross income per annum. This is largely attributable to the non-arts income earned by musicians. Little is known about the sources of this income or the types of work undertaken, hence this was a focus in our survey (detailed in Chapter 4).

Illustrative example: Musicians employed in Queensland school music education

Queensland has 1,745 schools. The Queensland State Government, which runs 70% of schools, claims to have the most extensive school music education program in Australia. It employs over 400 instrumental music teachers in 300 full time equivalent positions to deliver instrumental music in State schools (Langbroek, 2013). The majority of these positions are filled by practising musicians. Assuming a similar rate of

employment in non-state schools, this is the equivalent of four hours of weekly employment in schools for every working musician in Queensland. Actual numbers would of course vary, with a high probability a smaller cohort of musicians spend more hours teaching in schools, but – in the absence of more verifiable data – this illustrates the important role school music education plays in employment of practising musicians.

Number of schools in Queensland	1,745	1,236 government and 509 non-State schools (ACARA, 2018)
Number of musicians in Queensland	3,420	based on 20% of the national population
Number of FTE equivalent instrumental teacher positions in Queensland schools	390	State and non-state schools
Number of hours employment per artist per week	4 hrs	

Characteristics of portfolio musicians in Australia

Musicians' identities

A musician's identity is wrapped up in a complex set of factors and attributes. Intrinsic elements are key drivers, including talent, motivation, persistence and self-belief, as are individual achievement and autonomy (NEA, 2019). The ways musicians approach their craft – including at the base level of considering themselves to be a musician – are also important to shaping identity. Key factors include the levels of income derived from musical activities, the ways in which musicians work across a variety of music, music-related and non-music roles, and how they engage with a cross-section of genres and musical instruments. As Bennett (2008a, p. 3) explains:

It is incomplete to describe a musician as a performer. Musicians engage in multiple roles within and outside the music profession, and success is meeting personal and professional goals rather than a pre-conceived hierarchy of roles.

Another factor is the blurring of lines between professional and amateur musicians, and full and part-time roles. As Finnegan explains (2007, p. 12):

Some [musicians] regard music as their only real employment (with varying success in terms of monetary return), some value it as an enjoyable but serious recreation outside of work, and some treat it as a part-time occupation for the occasional fee.

These variances exist due to the differing levels of importance musicians place on pursuing music as a career, in the opportunities available to them, and in the differing stages of these careers (Throsby & Petetskaya, 2017). To this end, Finnegan's work also contributes strongly to debates around the everyday nature of music making and activity in society, further reflecting the nuanced nature of engaging in music activities, and identification as a musician. Hracs et al.'s (2011) commentary on the Canadian experience is relevant also to the Australian experience.

Even defining who is and who is not a musician proves challenging. Census figures record those who self-identified as musicians in reporting their income; but being a musician may be a fluid identity only partly linked to primary sources of income. Professional musicians are rare in Canada. Many other people who consider themselves musicians combine performance with teaching, music promotion, or other employment strategies that give them time to make music.

Beyond baseline notions of identity and its relationship to cultivating a music career, Hracs (2010) explains that self-reflexivity is increasingly important to the ways in which workers engage in what Beck (1992) terms the "risk society." This is important for musicians as they "attempt to seize opportunities and minimise risk" (Hracs, 2010, p. 48) by employing entrepreneurship across their practice.



Musicians' entrepreneurship

Despite gaps in the literature on musicians' career trajectories, the extant research confirms that most musicians work in a highly diversified environment in which they balance multiple concurrent roles, face non-linear career progression, take on higher levels of risk than workers who engage in full time work, and require an entrepreneurial mind-set to negotiate a highly competitive market (Baumol & Throsby, 2012; Bennett & Burnard, 2016; Farr-Wharton et al., 2015; Le et al., 2014; Throsby, 2010).

This means that gaining and developing entrepreneurial skills and attributes is of critical importance for musicians. Entrepreneurship in this context entails the self-management of a career, venture start-up and management, and the ability to identify and make the most of new opportunities (Bridgstock, 2013). Entrepreneurial imperatives embrace the entire life cycle of professional music, summarised by Tschmuck (2016) as running across production, distribution, concerts, merchandising, branding, rights management, and marketing. Bennett and Hennekam (2018) agree that an entrepreneurial mindset is important across the lifecycle, with precarity a feature across the career and most prevalent in early and late-career.

The literature discusses a range of beneficial behaviours including conviction, appetite for risk, proactivity and managing complexity. Similarly, Haase and Lautenschläger (2011) describe "entrepreneurial conviction" as vital to being able to succeed, explaining:

Skills such as creativity, proactiveness, leadership, risk taking propensity and wakefulness are decisive for successful entrepreneurial ventures. ... Without entrepreneurial conviction, i.e. the right mindset, awareness, motivation, and attitudes, no individual will undertake sustainable efforts toward business creation. (p. 146)

Wikström (2013) contends that the music economy has empowered the artist/manager to play a stronger entrepreneurial role. Wikström details how an enterprising portfolio musician can operate freely and be less constrained by risk aversion and limits found in major companies. An appetite for risk can offer pathways for new artists and genres. An example can be found in recording, where, as major labels have grown more risk averse, opportunities have grown for musicians to work with independent labels able to take on more risks than major companies (Wikström, 2013). Being proactive and engaged can strengthen career opportunities by seeking out rather than waiting for work, as does connecting with professional networks. In a profession where work is gained through informal channels, networking is considered vital within music, aiding informal learning and providing support and opportunities for collaboration (Coulson, 2012), albeit with inherent challenges such as the unequal power relations within industry networks and the blurred boundaries between fragmented professional and social, professional and amateur, global and local networking spaces (Hennekam et al., 2019a).

Managing complexity emerges as a typical aspect of career for most working musicians. This includes securing multiple activity and income streams to mitigate financial risk and provide sustainability (Wikström, 2013), mastering specialised skills such as digital promotion and engaging with corporate brands, and dealing with the rise of the “do it yourself” culture which sees musicians embrace everything from media management, direct to fan sales and fundraising, to production and distribution (Tschmuck, 2016). An example of financial risk is seen within the “high production costs, low reproduction costs” nature of the copyright industries feature high upfront costs which require significant reproduction to recoup investment (Wikström, 2013) and the need to engage in a “future state” whereby no-one can predict the outcome of a good until it is released to market (Jones, 2012; Wikström, 2013).

Of interest, while entrepreneurship clearly has a role in a portfolio career, musicians do not necessarily see themselves as entrepreneurs; indeed, Coulson (2012, p. 257) notes that the opposite can be the case. Enterprising behaviours amongst the musicians studied by Coulson noted that the individualistic and competitive profile of the traditional entrepreneur did not apply.

[W]hile the musicians were aware of, and embraced, certain sorts of enterprising behaviour as necessary for establishing and maintaining a place in the music world, the narratives of their working lives were not generally expressed in terms of an entrepreneurial identity.

Mobility is another creative and economic necessity for musicians. High rates of mobility are found amongst Australian musicians and in the artistic community. Artists are required to be geographically mobile, available for extended and irregular working hours, and – by undertaking a more diversified set of roles to support their musical endeavours – required to work across a range of sites and for a range of employers and clients (Hennekam & Bennett, 2016b; Hesmondhalgh & Baker, 2011; Morgan et al., 2013). Mobility connects with a range of “push”

and “pull” factors that exist around work in the arts, balancing desires for creativity and freedom with the need to embrace multiple activities for financial security (Bennett, 2016; Bridgstock, 2005; Byrne, 2017; Nelken, 2013; Sacks, 2016).

Almost 60% of Australian musicians have had interstate engagements and 40% have had engagements overseas, with higher rates for composers. The most commonly reported motivators for travelling overseas are to strengthen networks, enhance profile and visibility, and to engage in creative interactions (Throsby & Petetskaya, 2017). It goes without saying that Australian musicians effectively compete with international touring acts in the billion-dollar global concert business (Tschmuck, 2016), and in the classical music sector they also successfully compete with international performers who migrate to take up opportunities within Australian orchestras and opera companies (Harrison et al., 2013).

Gender parity

In recent years, increased attention has been paid to the gendered nature of the music industry. This has been driven by the need to recognise women’s contribution in the performance, chart and award spaces, eradicate gendered behaviours and disadvantage and recognise women’s historical contributions to music (Strong, 2011). The contemporary music sector, for example, has taken steps to increase the prominence of women in the performance space (Davies, 2018; Levefre, 2018); championed the development of women only music awards (Murphy, 2018); and worked to create “safe spaces” in live music venues, particularly with regard to gendered violence (Stockwell, 2017). Widespread violence against Australian women in music was brought to public attention in December 2017 with an open letter to the music industry under the #meNOMore banner, now signed by over 1,100 women who decried gendered violence against women and called for change (#meNOMore, 2017). In 2018, an industry wide code of practice was introduced for the Live Performance Industry (LPA, 2018). Annual surveys by the Australian Broadcasting Corporation (ABC) youth music station *triple j* highlight improving gender parity while noting key gaps particularly in decision making roles and earnings for female songwriters (McCormack, 2019, 2020).

Challenges with providing recognition and opportunities for women concerns both the contemporary and classical music sectors, including within higher education and conservatoires. For example, Harrison (2007, 2013) found that while the education system tended to have a higher proportion of female participants across all sectors (primary, secondary, tertiary), this does not parlay into senior roles within conservatories and across music genres. Specific instrument types and engagement with particular genres was also highly gendered, with females yet to fully break the glass ceiling in areas such as jazz, metal, rap and, in the classical sphere, brass and percussion (see Strahle, 2017). As Armstrong (2013) noted, the contested nature of creative work may have particular implications for female freelance musicians and more critical attention is needed.

Such considerations relate to working conditions, recognition and formal study, and also to the programming choices

of festivals and major arts organisations. In the area of composition, Macarthur et al. (2017) found a strong correlation between the amount of research conducted on women's music and that of its performance in the concert hall. As Macarthur et al. (2017) cautioned, discussion around gender equity in programming still needs to be maintained in order for action to be taken, more so since Australia is yet to reach a tipping point in relation to gender parity in programming.

We are mindful that our research can also address such issues by providing a strong voice for women in our work. As such we aimed for gender parity in both the survey and interviews in an effort to make significant inroads in raising the prominence of women in the music sector, and beginning to speak openly about related concerns such as sexual assault and harassment in the sector. Likewise, there is much higher education institutions can be doing to address such issues in programming and addressing gender parity more broadly. For instance, the Sydney Conservatorium of Music's *Composing Women* program provides an opportunity for four postgraduate women students to work closely with industry partners such as the Sydney Symphony Orchestra and the Sydney Chamber Orchestra, to develop their own work along with professional skills.



In other examples, in 2017 the Australian National University hosted the *Women in the Creative Arts conference* and in 2018 Monash University initiated a *Gender Diversity in Music Making* conference, to promote greater engagement with the music of composers and performers who identify as female or non-binary in gender across the composition and performance of all styles of composition, improvisation, song writing, installation, film music, jazz, classical, pop, experimental, noise and world musics. The Queensland Conservatorium Griffith University has also run a critically acclaimed *Amazing Women* concert series dedicated to celebrating the diversity of music composed by women and has committed to gender parity in its externally facing program by 2025. Recent discussions stemming from a 2019 New Opera Now (NOW) workshop held at the Queensland Conservatorium Griffith University have spearheaded discussions around female representation in opera in both the music industry and education more broadly. Similarly, a 2019 conference on gender and diversity in the creative arts explored initiatives designed to address the current challenges and provide positive examples of gender equity.

Despite these examples, Bennett et al.'s (2018) international study of women composers finds that the pedagogical practices and curricular design that might support aspiring women composers are in urgent need of attention. Composition continues to be the most male-dominated of all Australian artforms despite improvements over the past fifteen years (Throsby & Petetskaya, 2017). Numerous composers surveyed noted by Bennett and colleagues noted the under-representation of music composed by women in their higher education curricula. The composers also described their unpreparedness for a career in music, including strategies with which to overcome gendered behaviours. Devenish et al.'s (2020) paper *Teaching Music in the MeToo Era* explicitly examines this topic across four higher education tertiary institutions and discusses successful inclusion strategies for women in music. These include mandatory quotas in recital programs, mentoring programs, and coursework devoted to women in music.

Musicians' mental and physical health and wellbeing

The mental and physical health and wellbeing of working musicians has become an increasing concern for the sector. While the positive aspects of music and broader arts and cultural engagement are well established in the literature (MacDonald et al., 2013; Wilkinson et al., 2007), and a wealth of research has been undertaken in relation to injury rates among musicians and other performing artists, recent research has revealed the challenges associated with working in music in relation to mental and physical health and wellbeing.

Low incomes, irregular work patterns, romanticised notions of the "tortured artist" and the dismissal of music as a worthwhile career pursuit have all negatively impacted the mental and physical health and wellbeing of musicians. Teague and Smith's (2015) examination of the implications of work-life balance among musicians highlighted some of the difficulties and stresses that are unique to musicians, the lure of opportunity, and the expense of responsibility. In a similar vein, recent

research by Gross and Musgrave (2016) and by van den Eynde et al. (2016) reveals that working in the music and/or broader arts sector – as a musician or otherwise – can have a significantly detrimental impact on individual mental and physical wellbeing.

A 2016 research project for Entertainment Assist, an Australian Entertainment Industry body, surveyed 2,407 performing arts performers and support workers. The study found that 44% of respondents reported moderate to severe anxiety, 10 times higher than the general population; 15% reported moderate to severe depression, and suicide attempts were at a rate more than double the general population. This study also reported on US research which found that pop musicians in the US had a life expectancy twenty years shorter than the general population (van den Eynde et al., 2016).

A UK study into musicians' mental health (N = 2,200 musicians) conducted for Help Musicians UK, a musicians' charity, found that 71% of respondents had experienced high levels of anxiety and over two thirds had experienced depression (Gross & Musgrave, 2017). Over half the participants reported that help was hard to find. Both studies identified reasons including challenging working conditions, health impacts from anti-social hours, complex issues of competition identity, self-belief and perceptions of success, financial precarity, challenging work cultures including some reports of abuse, managing multiple jobs within a portfolio career, and unsupportive work environments. The Australian study found similarly high levels of non-medical drug and alcohol use, and sleep disorders. Gross and Musgrave concluded:

Although the causes of mental health problems are multi-faceted, there appears to be a perceptible and uncomfortable link between the epidemic of mental ill-health amongst musicians, and the working conditions within the music industries. In this sense, working in the music industries appears to be making people sick. (Gross & Musgrave, 2017, p. 6)

Recommendations in Australia and the UK include increased specialist and peer support systems, such as the Support Act Wellbeing Helpline established in 2018 (<https://supportact.org.au/wellbeinghelpline/>), continued research and education, and industry codes of practice. Although there is some evidence in the literature linking certain personality types and behaviours to people drawn to creativity, van den Eynde et al., (2016, p. 21) note Jamison's conclusion that "not all creative people have mental illness, and most people who have mental disorders are not necessarily creative. What is apparent is that there is a disproportional rate of psychopathology in highly creative persons".

The evidence surveyed suggests there are workplace risks for the mental health of musicians, underlining the imperative for more knowledge and action. Far more research is needed to understand these causal effects. Organisations such as Entertainment Assist are championing such research, raising awareness about mental health in the Australian entertainment industry more broadly through commissioned research, advocacy for workplace and educational transformation

and informing support pathways for workers in distress. Understanding the pressure points for this, as well as underlying rates of mental illness and physical limitations for those working in the music sector, will undoubtedly assist in the development of support structures with the sector.

Music education and ongoing learning in the music industry

The critical role that music education needs to play in adequately preparing students for music careers is increasingly becoming the focus of research. Within this, student engagement and the practicalities of career development learning have been a particular topic of interest (Bennett, 2008c; Draper & Cunio, 2014; Draper & Harrison, 2011; Schippers et al., 2016; Tolmie, 2017). This research has engaged with both post-graduate research degrees and undergraduate music degrees. A significant criticism levelled at undergraduate music training is that it often "replicates knowledge based teaching" (Rowley et al., 2015, p. 1). More broadly, a range of studies has also examined career and student satisfaction post-degree (Bennett & Bridgstock, 2015; Bridgstock, 2011) and whether or not music training has adequately prepared musicians for their careers in place-specific contexts (Ghazali & Bennett, 2017).

In Schippers et al.'s (2016) study of what mature-age doctoral students gain through returning to study, the story is similar: confidence, broadening of skills, clarity in practice, leadership, advocacy and national and international networks. A mid-career, focused period of study provides both a skill and confidence boost than will provide nourishment for the next chapter of music-making. Draper and Harrison (2018, p. 282) found that "musicians bend, shape, and evolve their own individual processes and outcomes over time in much the same way that they might improvise and/or adapt their creative works, commissions and performances in their workplaces." Furthermore, they noted that doctoral candidates "rejected the idea that 'career destination' might be a sensible term for creative artists, or that 'employer' or 'profession' aligns with the portfolio activities of a musician" (pp. 282).

Many musicians are engaged in the cyclic process of teaching and learning, with tertiary students also working as home-studio teachers and many teachers also engaged in or returning to higher education studies. Perhaps this is a logical phenomenon in music, given the tendency to share knowledge and actively renew both skills and knowledge in an industry that demands a high level of practical musical skill coupled with a broad-ranging industry understanding. As such, understanding the specifics of music education – across a range of learning environments – is critical to being able to adequately prepare students for what are becoming increasingly fractured careers. As Bennett (2016) explains, university graduates often experience multiple entry attempts and require support both during and after graduation. This might include mentorship, short courses, career counselling and access to resources such as equipment, scores, music or rehearsal space.

Reflecting challenges that exist in adequately capturing the nuances of portfolio careers in census data, Bennett (2016, p. 387) suggests that similar challenges exist in relation to national graduate destination surveys.

Most graduate data collections ignore multiple roles in favour of the position in which the most time is spent: the main occupation at a particular point in time. Further, respondents seeking work are assumed to be unemployed, whereas they may be seeking additional or more desirable work from a position of underemployment. As a result, government demands for higher education institutions to define and demonstrate graduates' successful entry into the labour market are confounded by inadequate graduate and labour market data, and the assumption that success is represented by a single, full time position.

This lack of understanding creates an additional hurdle to grasping the realities of portfolio careers in the music industry. Notwithstanding the challenges in adequately capturing post-graduation satisfaction and employment rates, it remains vital to examine the realities of music training. As Harrison et al.'s (2013, p. 173) study into the role of ensemble experience in music training reveals, music performance degrees have largely focused on what are known as four traditional pillars: "solo studies, ensemble studies, studies in music literature, and studies in musicianship." In recent years, however, the importance of engaging with non-music specific fields such as business, marketing and education have also started to be recognised, as has the need for greater flexibility in degree structures, and a shared understanding of ultimate career outcomes for students (Carey & Lebler, 2012).



Other recent work reaffirms the central role of industry/community-higher education partnerships in connecting students, courses and music schools directly with musicians, music work, music workplaces, and communities where music makes a difference (Bartleet & Higgins, 2018; Gaunt & Westerlund, 2016; Rowley et al., in press). Such relationships support responsive curriculum change and fostering students' work-relevant capabilities and professional networks (Bridgstock, 2019). In a context where much of musicians' ongoing learning and career development is based on informal and network-based learning, and where the work of musicians is undergoing significant and ongoing change, higher education's ability to build authentic connections and mechanisms for direct industry/community teaching and also programmatic updating is increasingly important (Lebler & Weston, 2015).

In addition to the research undertaken into music education in the university sector, recent research has also examined the ways in which musicians learn outside formal courses and programs. For instance, in particular how musicians engage in informal modes of learning throughout their careers (Ballico, 2015; Green, 2002). Developing a more detailed understanding of the ways in which musicians develop their professional practice across a range of portfolio career structures remains of critical concern for the sector at large.

Summary

Significant and changing dynamics within the music sector are influencing the ways in which Australian musicians navigate their careers. A growing body of empirical research has begun to reveal more about the dynamics of the local, national and global music sector, the nature of musicians' work, and the characteristics of musicians working with a portfolio career configuration. These studies have highlighted the precarious nature of music careers as well as some of the emerging issues impacting the lives of portfolio musicians. Although this literature provides significant slices of information, the literature review has highlighted major gaps in our understanding of the broader landscape: for example, music career trajectories, changing musical identities, voluntary and involuntary career transitions, and the balance of financial and creative imperatives. This provides an illuminating backdrop for the *Making Music Work* study.



CHAPTER 3: RESEARCH DESIGN

This chapter outlines the process of designing, developing, implementing, and analysing the *Making Music Work* survey and interviews. This mixed-method approach to data collection is consistent with other scholarly creative workforce studies, including those undertaken by the project's CIs in previous studies of musicians' identities, career trajectories, and work across a range of contexts and disciplines (see Bartleet et al., 2009; Bennett, 2010; Bennett et al., 2019; Schippers, 2009; Bridgstock, 2011; Harrison, 2007). The combination of quantitative and qualitative methods also allowed the *Making Music Work* research to focus on both the broader social, cultural and economic dynamics of how portfolio careers operate within the music sector and the ways in which these are experienced by musicians.

Research design, development, and implementation

The project's mixed methods approach entailed two substantial phases. Phase One comprised an in-depth qualitative/quantitative survey of musicians from around the country, while in Phase Two, semi-structured interviews were conducted with eleven musicians from across Australia. Phase One data collection was undertaken from September 2017 to May 2018 and Phase Two was completed between November 2017 and August 2018. The research was granted ethical clearance by Griffith University (see Appendix G).

Survey design, development and implementation

The survey design was undertaken over a period of nine months across late 2016 and early 2017. This process was primarily driven by two members of the research team: one (CI Bennett) who had previously developed and undertaken a large-scale qualitative survey of artists and arts workers

across three international destinations; and one (CI Bridgstock) who had significant experience in developing longitudinal quantitative career development surveys of creative workers and professionals. Specifically, the survey design was informed by a combination of the *Creative Workforce Initiative* instrument devised by CI Bennett and a range of research instruments developed by CI Bridgstock relating to career satisfaction, development and success (Bridgstock, 2011; Bridgstock, 2016). The design process of the survey was managed by the Research Fellow (Ballico), with the broader project team providing feedback and input during its design phase.

The survey first sought to describe the subjective and objective dimensions of musicians' careers including their career identities, the ways that they structure their various education and work experiences, their career motivations and their career outcomes. Second, the survey characterised musicians' career histories, educational and support experiences and trajectories, taking a developmental perspective to music work. Third, the survey engaged in some depth with issues identified in the review of literature as being salient to musicians' careers in Australia, including social support and social networks, structural changes to the music industry context, geographical movement and other strategies used to find or create work, and the mental and physical health of musicians.

The survey included descriptive quantitative items and validated scales relating to career planned happenstance (Kim et al., 2014), career motivations based on Schein's (1996) theory of career anchors, career success (Judge et al., 1995) and social support (Rottinghaus et al., 2012). The survey also included open-ended questions relating to musicians' career identities, formative events in their careers, the roles of social networks in career development, and their own definitions

of career success. Open to everyone who self-identified as professional musicians in Australia, the survey represents the most comprehensive characterisation of musicians' careers and career experiences across all areas of practice to date (see Appendix B).

The survey was hosted on the Key Survey (www.keysurvey.com) online platform. This platform was chosen due to its ability to provide the nuance in detail needed for capturing such a broad range of perspectives and experiences, and in turn, useful and meaningful data. The security of this platform was assessed by Griffith University and deemed suitable. Mindful that the survey, with upwards of 50 questions, would require a time investment of 40+ minutes, most questions were voluntary, with skip logic applied, and participants could complete the survey in multiple sittings.

All partner organisations were consulted on the structure and broad design of the survey, with minor amendments made following their feedback. The final step, prior to launch was piloting the survey with a small number of musicians. The survey was promoted through a combination of: emails through existing networks and contacts available to the research team; partner organisation email lists; the project's social media accounts (Facebook and Twitter); paid advertisements/promotions (including through music conference gift bags and Facebook campaigns); and editorial coverage on a range of online and broadcast media outlets. In addition, hard copy promotional postcards were produced and distributed in music and instrument retailers, cafes and universities around the country. Survey promotion was undertaken across the data collection period.

In order to assist with obtaining a wide range of perspectives from around Australia, and specifically to ensure that the perspectives of musicians living in remote and rural areas were captured, six research consultants were contracted to assist in the promotion of the survey to specific communities. This additional approach was undertaken between February and March 2018 and included the following states: NSW, VIC, TAS and WA (in which two consultants were engaged, in the north and south of the state). Multiple attempts were made to secure consultants in the NT; however, this was not possible. These consultants assisted with the promotion of the survey in their respective towns and states through email dissemination and postcard distribution. In order to further support survey engagement, these consultants were provided access to complete the survey on the participants' behalf. This allowed them to facilitate survey engagement by way of phone interviews and/or allowed repeat completions of the survey on the same computer.

The total sample size for the survey was 592 musicians, of whom 586 entered responses online and 6 provided responses via an interviewer. A total of 273 musicians completed the entire survey, with some variation in the individual sample sizes for each question due to survey attrition and selective non-response.

No screening questions were used to limit the analysis. Recognising the complexity and subjective judgement involved in determining whether an arts practitioner is engaged in professional practice (see Throsby & Petetskaya, 2017) and

wanting to explore experiences of a wide range of music portfolio career configurations which might include diverse non-music work as well as music work, the research team allowed participants to self-identify as musicians.

Interviews

In order to complement, and thematically expand upon, the survey, qualitative, semi-structured interviews were undertaken with a diverse set of musicians from across Australia. These musicians were carefully selected by both the project team and project partners. An initial list of 44 potential interviewees was developed, based on the following criteria:

- Age range
- Career stage and career structure
- Education level
- Ethnicity and cultural background
- Gender
- Genres
- Location (both in terms of States and Territories and metropolitan, regional and remote)
- Nature of their broader sector engagement
- Portfolio career configuration

In total, eleven interviewees were selected to participate in the study. These included six female-identifying and five male-identifying participants from NSW, QLD, VIC and WA. The musicians performed on a range of instruments and across a range of genres, while also undertaking roles such as artist booking and/or management work, composing, conducting, grant writing, rehearsal studio management, song writing, teaching and/or workshop facilitation. Ten musicians were wholly financially sustained by their music and music-related work, with one also running her own real estate property management business (which granted her the flexibility required to continue pursuing a music career). Engaging with such a breadth of musicians and portfolio configurations allowed for a richness of discussion while supporting the development of a deeper understanding of the portfolio career experience.

All interviews were undertaken by the research fellow. Of the 11 interviews, nine were undertaken in face-to-face settings such as offices, cafes and the musicians' homes, with two conducted over the phone. Interviews were audio recorded and later transcribed for analysis. Interviews were an average duration of one hour, with one interview two hours in duration. The interviews utilised a base question set and were undertaken in a semi-structured manner. This approach facilitated a flow of conversation, allowed for nuanced experiences to be explored and enabled meaningful data to be captured (Le et al., 2014; Morgan et al., 2013).

Broadly, interviews explored the musicians' background, educational attainment and engagement, how they made money and find work, how they managed their workloads, attitudes toward success, how they took care of their mental and physical health and wellbeing, changes they had seen in

the sector over the course of their career, the impact of the sector's digitisation and the challenges, and opportunities they consider to be most pertinent for the industry moving into the future (see Appendix C). In addition, the team created short videos in which each participant responded to a question derived from key themes which emerged in their interviews. These "vox pops" have been made available on the project's YouTube channel (youtube.com/channel/UCB0R9oczzKc0O4Ogl909j4g), with the videos embedded in the online profiles.

Data analysis

Responses to quantitative survey items were analysed using SPSS 25.0. Findings were analysed and reported descriptively using multiple measures of central tendency and variation. Relevant inferential tests and comparisons were conducted with corrected alpha levels where relevant to correct for type 1 error. Where assumptions of statistical normality were violated for certain survey items, non-parametric tests were conducted. Open-ended questions were post-hoc coded thematically where relevant, and were either included in statistical analyses or reported separately in the text.

The qualitative interview analysis engaged a multi-layer approach, which began during the data collection period. In order to support an in-depth, nuanced and comparative discussion of the portfolio career experience, transcripts were thematically interpreted. This interpretation was coded in accordance with a code book which was developed by the research fellow (Ballico) and lead CI (Bartleet) in consultation with the research team. The code book was developed using a combination of the project's broad research questions, the interview questions, and broad themes identified throughout the fieldwork process. The code book covered a broad range

of topics associated with the musicians' career experiences, including administration and business management, career stages and associated career development, community engagement and support, creative freedom and autonomy, digitisation of the music industry, entrepreneurship, support networks, and work-life balance.

Following development of the code book, the interview transcripts were collectively coded by four team members with another CI acting as an inter-rater to check the coding. Upon completion, the team identified a list of eight queries to be applied to the data in an initial stage of interpretative analysis. Initial analysis was undertaken by an independent consultant who works extensively in NVivo-based qualitative analysis. Initial queries were run on the data to examine relationships between particular nodes, sub nodes and broader themes. The relationships examined were as follows.

1. Relationship between self-care/ work-life balance/ time management (health and wellbeing, mental health, physical health, work-life balance, time management)
2. Relationship between support, peer groups, further education (support networks, peer networks, networking, music education, formal music education, non-formal music education)
3. Physical and mental health/ resilience (health and wellbeing, mental health, career development, career challenges, career failure).
4. Social and networked mechanisms for career development – networks, informal face-to-face networks, social capital – including the roles of social support (networking, peer networks, career development)
5. Professional learning strategies and experiences, including informal learning, mentoring, formal options, what's missing? what's working and what's not? (professional learning needs and experiences)
6. Wellbeing, health, life-work balance (mental health, disability, career challenges, over/underemployment)
7. Career development strategies (ways to find / create work, also career identity development over time and constructing an adaptive and adaptable portfolio career that works for them) (career success definitions, career motivations, career development strategies)
8. Becoming / being established, age/ageing/in line with financial security, opportunities for work, mobility etc.

Summary

As outlined in this chapter, the *Making Music Work* project utilised a combination of quantitative and qualitative methods, and drew on a range of established approaches utilised by the team in previous studies. In doing so, it has yielded a wealth of rich data that is explored in the following two chapters.





CHAPTER 4: SURVEY FINDINGS

This chapter presents the findings of the online survey of Australian musicians' careers. Topics covered in the survey included

- characteristics of current music practice
- career histories
- current work roles and the portfolio career
- income, profit and loss
- professional learning approaches and needs
- educational backgrounds
- career success and career commitment
- extent and sources of challenges in career development
- psychological characteristics and career motivations
- career development and work generation strategies
- demographic and background variables

Participant profile

- A total of 592 musicians responded to the survey, of whom 273 answered all of the questions
- The most common participant age range was 35–44 years, but ages were reasonably evenly distributed between 25 and 64
- 54% identified as male, and 46% identified as female. Two participants identified as gender non-binary, transgender, or gender non-conforming
- Overwhelmingly, participants indicated that they were 'Australian', with 22% indicating an additional ethnicity
- Slightly more than two-thirds of participants lived in metropolitan areas, with one-third living in regional or rural areas
- 23% indicated that they were living with a disability, with mental illness being the most common type

The survey collected the following background and demographic information about the musicians'

- age group
- gender identification
- State and region of residence from postcode
- ethnicity and cultural background
- disability status and types

Age and gender

Shown at Figure 1, the most common age range for the participants was 35–44 years (23.05% of participants). Respondents were evenly distributed across the age groups between 18 and 64 years, with a much smaller proportion of participants indicating that they were 65 years or older (4.25%).

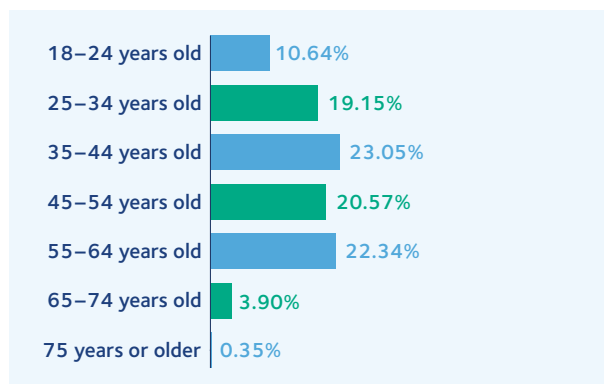


Figure 1. Participant age distribution. N = 282.

A total of 53.54% of the musicians who indicated their gender identification (282 participants) identified as male, and 45.74% identified as female. Two participants (0.71%) identified as gender non-binary, transgender, or gender non-conforming.

State and region of residence

Survey participants entered their postcode of residence. From this, State or Territory of residence and also geographic classification (metropolitan / regional / rural / remote) were derived from Australian Bureau of Statistics geographical classifications (Australian Bureau of Statistics, 2016c). The highest proportion of participants lived in VIC (28.31%), with 20.11% from NSW, 19.31% from WA, and 19.05% from QLD. Figure 2 represents these national percentages.

When expressed as a proportion of 2018 population figures (Australian Bureau of Statistics, 2018), Western Australia had 2.81 survey participants per 100,000 population, with 2.45 per 100,000 from Tasmania, 1.43 from Queensland, 1.26 from South Australia, 1.16 from Victoria, and 0.95 from New South Wales. No participants gave a Northern Territory postcode, although some participants' qualitative responses to other questions suggested that a small number of musicians who did not supply a postcode were residents of the Northern Territory.

Slightly more than two-thirds (69.84%) of participants lived in metropolitan areas, with 30.16% living in regional or rural areas. This aligns with the geographic distribution of the general population, with 2016 census data (Australian Bureau of Statistics, 2016a) showing 71% of Australians living in major cities. There were no remote postcodes found in the sample.

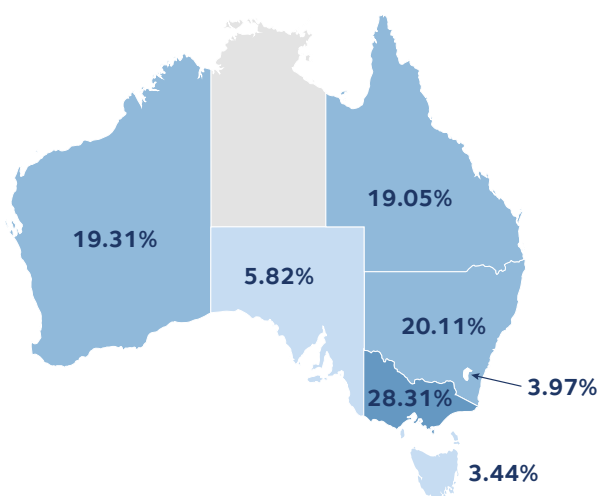


Figure 2. Participant State or Territory of residence. N = 378.

Ethnicity and cultural background

A total of 282 musicians responded to a question asking about the ethnicities with which they identified. The list of ethnicities supplied was from a standardised list based on Australian Bureau of Statistics (2016a) classifications. Shown at Figure 3, of the 282 musicians who provided information on ethnicity, 76.6% listed one ethnicity, 14.89% listed two, 6.38% listed three, and 2.13% listed four. Overwhelmingly, the musicians indicated that they were 'Australian' (86.17%) with 22% of musicians indicated another ethnicity as well as 'Australian'. 'British Isles' was the second most common ethnicity provided (22.34%), followed by 'East/South East' Asian (4.26%). 2.13% indicated that they identified as Aboriginal or Torres Strait Islander people (6 participants of the 282 who responded to this question). We note that respondents could choose more than one ethnic background.

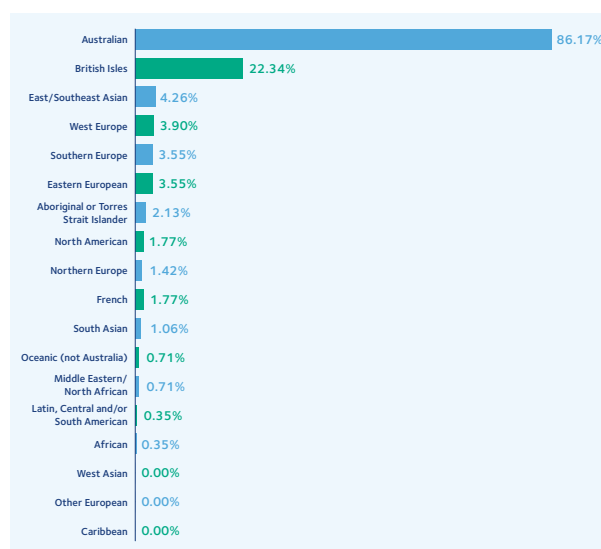


Figure 3. Identification with ethnicity. N = 282.

Disability

The musicians were asked whether they lived with a disability (a condition that has impacted their daily activities for 6 months or more). The list of disability types from which respondents selected was drawn from a standardised list in the Australian Disability Discrimination Act (1992), as reported by the Australian Network on Disability (2019). Illustrated at Figure 4, 23.40% of participants indicated that they had a disability, with 3.19% of participants indicating that they had two or more disabilities. The most common type of disability reported was mental illness, at 12.77% of the 282 musicians who responded to this question. By comparison, Australian Bureau of Statistics data for the general population indicates that in 2015, 18.3% of Australians were living with a disability of some kind. The most recent Australian Health Survey (Australian Bureau of Statistics, 2015) indicates that the prevalence of mental illness in the population in general is about 17.5%.

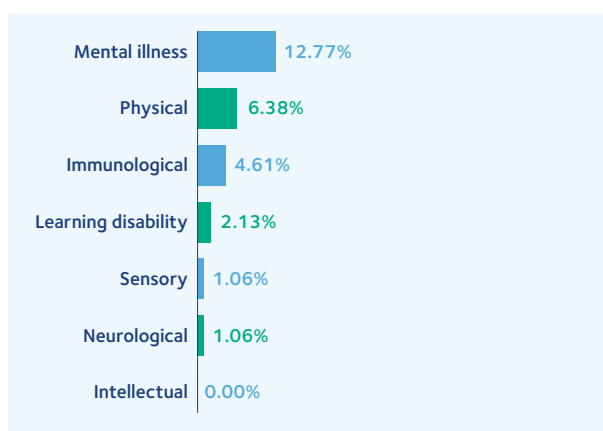


Figure 4. Living with a disability. N = 282.

Characteristics of music practice

- The most common types of music work activities undertaken were music teaching/education, composition, performing, producing, instrumental music and vocal music
- Six in ten musicians worked only in contemporary genres, with 15% working only in classical genres and 26% across classical and contemporary genres

Current professional practice and sharing of music work

A question in the survey asked musicians whether they shared their music work with people outside their friends and family network. Equivalent questions have been included in other surveys of artists and musicians as a potential screening item for professional practice. The vast majority of the 592 participants said that they shared their music work beyond their friends and family network (97.47%). All responses to the survey were included in the analyses, with no screening or filtering. For background to this decision, see 'survey responses' above.

Music work activities

Participants were asked to describe what they did in their music/music related work. For this question they were provided with an example prompt that included a variety of activities: 'I am a musician, a composer, producer, a music teacher, a music therapist, an artist manager, venue booker'.

The musicians' open-ended responses were then coded into activity themes. From the 586 responses, 1,591 activities were identified; 120 participant responses (20.48%) were coded into a single activity theme and 466 were coded into multiple activity themes, with an average of 2.72 activity themes per response.

Examples of single-themed responses include:

- I'm a classically trained opera singer. I have occasional gigs around Australia.
- I am an instrumental music teacher.

Examples of multiple-themed responses include:

- I am a cello teacher and also work for a business which provides string quartets for weddings and functions.
- Musician, concert producer and instrumental music teacher.
- I am a musician, a composer, a label manager and event coordinator.
- I play the mandolin in a part-time band that works 2-3 times a month, run a studio producing anything from demo's to albums to jingles to film scores. I also play a variety of instruments. But greatest income stream is from working as a sound engineer for festivals, concerts, corporate events, and council/state funded street events.
- I am a musician, self-managed, own record label, own promoter, own booker, producer, also a music teacher.

Illustrated at Figure 5, by far the most common activity theme was *musician (non-specific)* (57.68% of participants), corresponding to the very common response "I am a musician". Some participants gave more detail about the type of musician they were, with 14.33% indicating *instrumental musician*, and 13.14% indicating *vocalist*. In addition, 26.96% of musicians' responses contained *composer*, 12.63% indicated *songwriter*, 21.84% contained activities relating to *performer*, and 14.68% indicated *producer*.

Nearly 30% of responses contained at least one activity theme relating to *music teaching or music education (non-specific)* (27.82%). Some did provide details of a specific type of music teaching or education with which they were engaged, including *music teacher (lessons)* (13.31%), *school-based music teacher – early childhood to secondary school* (3.24%), and *higher education-based music teacher* (3.07%). A very long tail of activity themes included *sound engineer*, *booking agent*, *promotions and marketing*, *band and ensemble manager*, *arts administrator*, and *music therapist*, among others.

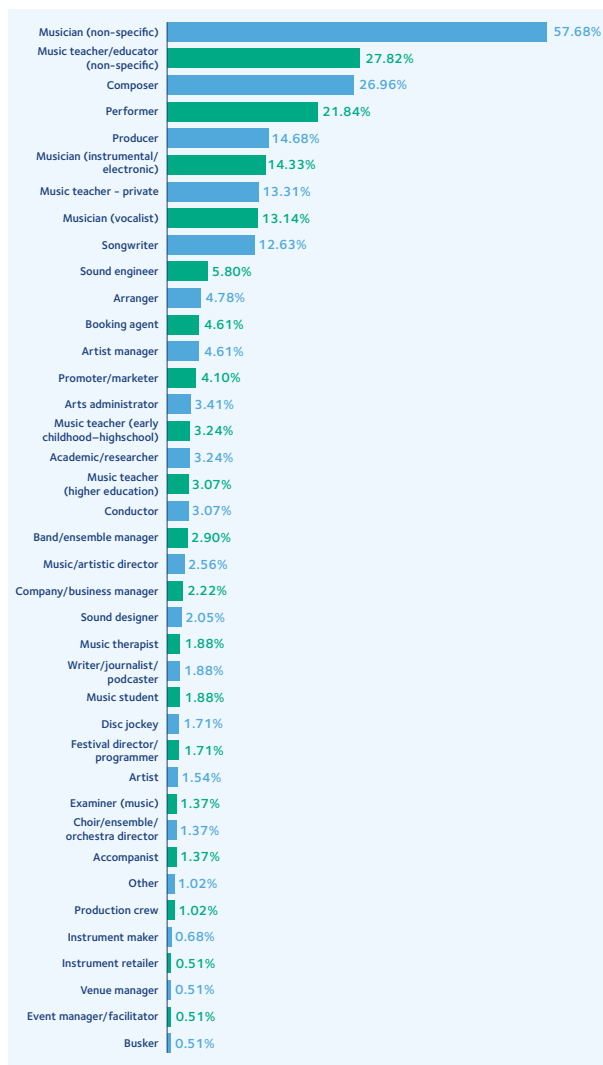


Figure 5. Activity themes: What musicians do in their music/ music related work. N = 586.

Genres of music practice

Survey participants were also given the opportunity to provide their genre/s of music practice. From the 576 open-ended responses given, 1,446 specific genres were identified in the responses, corresponding to an average of 2.51 specific genres per musician. A total of 161 (28%) responses related to a single genre and 393 (68%) related to multiple genres.

Many of the responses provided were very specific. Examples included Art Music, Experimental, Inter/Multi-cultural, Meditation and Healing, Soundscapes, Gospel / Sacred / Worship, Drum and Bass, New Music, Swing, and Fusion.

From the specific responses, higher level genre coding categorised musicians' practice into classical, contemporary, and mixed classical/contemporary (for participants where responses contained both classical and contemporary elements). Shown at Figure 6, the majority of musicians (59.03%) worked only in contemporary genres, with 14.98% working only in classical genres, and 25.99% worked across classical and contemporary genres.

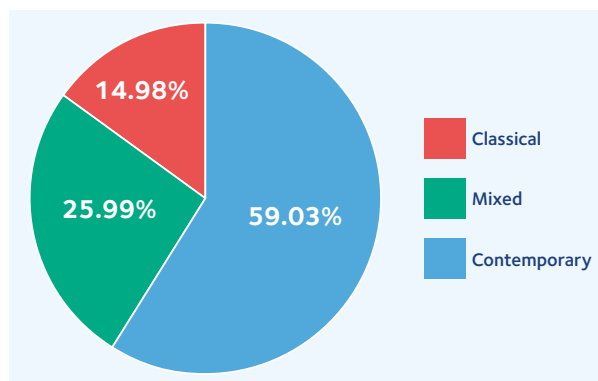


Figure 6. Participant genres. N = 554.

Career history

- Two-thirds of musicians began making music when they were younger than 12 years old
- Four in ten had more than 20 years' professional experience, with another quarter between 10 and 20 years' experience
- Nearly 60% of participants had spent time outside the workforce in the preceding two years. The most common reasons were travel, unemployment, and education / training

Starting age and length of career

Participants were asked at what age they had begun engaging in, or creating, music (either their own or learning other people's music). Illustrated at Figure 7, the majority of participants started engaging in music when they were younger than 12 years old (61.08% of participants), with another 27.07% starting at between 12 and 17 years of age. Significant differences were found for gender ($U = 7093$, $p < .001$), with males starting to engage with music significantly older (median = 12-17 years old) than females (median = under 12 years old) with 73.44% of male participants and only 45.70% of females starting to engage with music at under 12 years of age, and 36.42% of males and 15.63% of females starting to engage with music at between 12 and 17 years of age. No differences were found by region of residence.

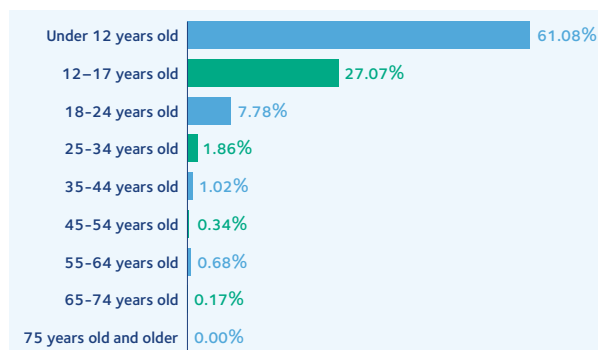


Figure 7. Age began engaging in music. N = 591.

The survey asked participants how long they had been working within the music industry, not including breaks and time outside the workforce. Illustrated at Figure 8, more than four in ten musicians (42.52%) reported having more than 20 years' professional experience, with another 25.40% reporting between 11–20 years' professional experience.

Significant differences were found for length of career by region of residence ($U = 11049$, $p = .001$) with regional and rural musicians having longer careers (median = more than 20 years' professional experience) than metro-based musicians (median = 10–20 years' professional experience).



Figure 8. Total years working in the music industry. N = 555.

For the purposes of statistical comparison, the six 'years of professional experience' categories were next collapsed into four categories: < 5 years (16.76%), 5–10 years (15.32%), 11–20 years (25.41%), and > 20 years (42.52%).

The musicians also reported for how long they had earned an income from their work in the music industry, using the same original six-category year ranges as the previous question. Shown at Figure 9, nearly one-third (32.72%) of participants

had worked in the music industry for more than 20 years. No significant differences were found however for length of career by region of residence.

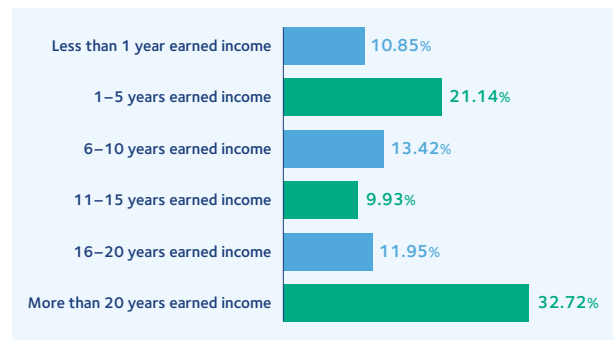


Figure 9. Length of professional experience – years of earned income from music. N = 555.

Formative career events

Respondents were asked, "Thinking back in time, what are the three most formative events in your music career?" Of the 594 musicians who responded to the survey, 484 (81.5%) provided one or more formative career moments. Responses ranged from a single word (e.g. "busking") to short sentences (e.g. "Attending workshops overseas, and getting recognition and validation from my role models"). Two responses were deemed invalid as they did not give formative moments (one musician, for example, gave a year (i.e. 2003) but no details of the formative event).

For this question only, analysis of the open data was conducted in three, inter-related steps and relied on two

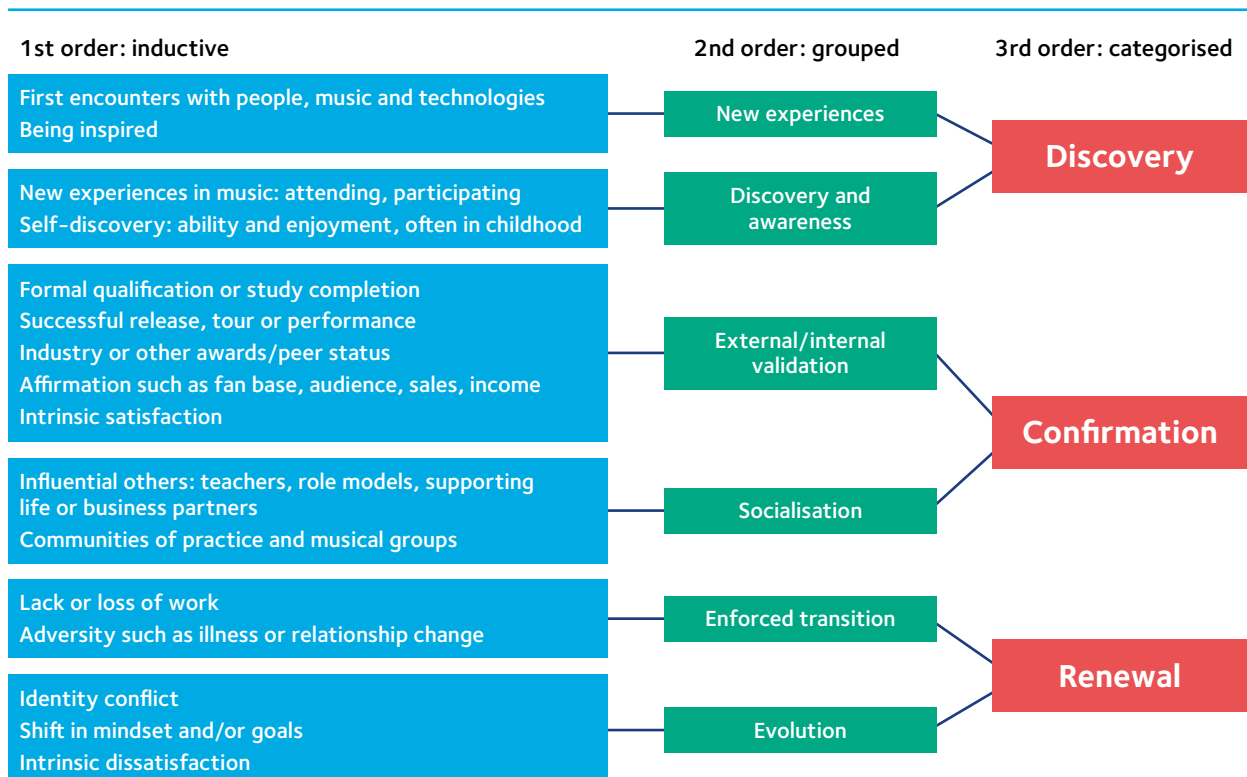


Figure 10. Categorisation of formative career events

coders. The coding resulted in descriptive codes using the participants' own words, located to the left of Figure 10, to higher level codes located in the centre of figure, to higher level, theoretically-informed dimensions derived from social-cognitive career theory (see Bandura, 1993). The final aggregated theoretical dimensions can be found at the right-hand side of Figure 10.

Seen in the quotes below, participants' descriptions of music making included performance, composition, music direction and production work, and the formative aspect related to either status recognition or to intrinsic satisfaction and enjoyment.

The first time I played to a large crowd.

Performing to Royalty in London.

Playing on a live television show.

Performing the first time.

The other formative aspect of music making was enhanced confidence and this was often related to trying something new.

Taking an opportunity to conduct a community choir when I had no experience in doing so.

Chamber music groups that really worked well.

Writing my own parts for a band that liked my style – this gave me a lot of confidence to use and develop my composition style.

Several examples of formative career events related to pre-professional experience; these examples highlight the importance of opportunities for aspiring musicians to gain industry exposure.

Not surprisingly, musicians' careers were heavily influenced by their ability to work with high-profile artists, to become established in a role, and by increases in gigs, sales or commissions, audiences or students and touring opportunities. Of interest, recognition was also defined as working overseas. This highlights the importance of touring programs, artist exchanges and other opportunities for exposure to major markets such as those in the US and Europe.

First musical act that existed long term enough to grow in both capability and audience following.

Touring an international band by myself in 2008.

Performing live overseas.

Touring up and down the East Coast with a covers band.

Performing in Memphis, United States.

Recording and performing local and internationally.

Touring North America / Canada in 2009.

Full [teaching] studio.

Specialist music education was a significant career driver in both pre-professional and professional contexts, and in both formal and informal modes. Many musicians wrote of intensive music studies, particularly at the post-secondary level. Other

respondents emphasised the importance of learning from more established musicians, both in mentorship situations and in opportunities to play with ensembles they admired. Many references to learning related to childhood; however learning was a feature in the accounts of musicians from early- to late-career. The accounts referred to broad professional learning and the acquisition of new skills and knowledge across the career lifespan, emphasising the need for musicians to become lifelong learners.

The final point to note here is the importance of recognition and validation, from fans, peers and family. As seen in the first quote below, family acceptance of music as a career sometimes had to be earned.

Parental and family acceptance of my path.

Family emerged as an important influence on the pre-professional formation of musicians, with many musicians identifying formative career events during childhood.

Listening to my family play music when I was a child.

Being exposed to a variety of music through family, church, school and friends.

Composing the chamber opera [title hidden] which was broadcast by the Australian Broadcasting Corporation. John Crawford granted me an interview about the work, and I was pretty dreadful in my responses, but the opportunity to begin to speak about my work was so important!

Receiving heart-warming letters of support in the grant writing process.

Climbing the Ladder, Recognition from Peers.

The findings can be understood using Strauss's (1962, p. 71) description of career development as a series of "turning-points" at which time people "have to take stock, to re-evaluate, revise, resee, and rejudge". In line with Strauss, the turning points described by musicians were motivated by both career and non-career concerns. None of the formative moments described by participants related to traditional career progression such as promotion within a firm. Shown at Figure 11, the most important formative career influence reported by musicians was the experience of making music. Only one musician located this event in childhood; however, several responses related to pre-professional exposure.

Routine types are even more important within discussions of insecure work because these musicians are likely to hold concurrent roles with different associated routines. Whilst this is a practical concern relating to time use and income, the "self-questioning" identity work identified by Beech and colleagues (2011, p. 39) indicates that musicians might combine multiple and contradictory types of routine which are not necessarily in line with their practical career concerns: "multiple concurrent roles which are variously aligned or not aligned with their musician identities". Implications include the need to explicitly value the routine or more mundane aspects of musicians' work, both within initial education and training and in funding programs.



Figure 11: Tree map of formative career events reported by musicians. N = 484

Time outside the workforce

A number of survey questions asked musicians about time outside of the workforce during the previous two years. The questions addressed the reasons for time spent out of the workforce, and the duration of time spent outside the workforce. Nearly 60% (57.28%) of participants had spent time outside the workforce in the preceding two years. Most commonly, those who had spent time out of the workforce had done so for a single reason (45.20% of the 57.28%), with 27.68% for two, and 19.77% for three reasons.

Shown at Figure 12, the most common reason for spending time outside of the workforce was *travel* (23.75% of all participants). This was followed by *unemployment*, at 23.41% of all participants. *Education and training* were reported by 21.40% of participants, followed by *illness or disability* at 15.72% and *family or caring responsibilities* at 14.05%.

'Other' responses to this question included unpaid aspects of music work such as recording albums or unpaid performances, not having work during school holidays, personal commitments such as moving house, and undefined underemployment.

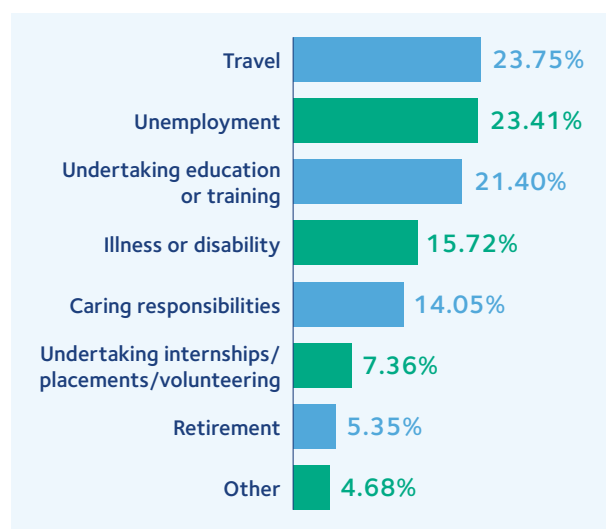


Figure 12. Reasons for taking time out of the workforce. N = 299.

With regard to the duration of episodes outside the workforce, the average (median) lengths of time differed according to the trigger. Time outside the workforce for travel, illness or disability, internships, placements and volunteering averaged 1–3 months. Episodes of time outside the workforce as the result of unemployment, caring and family responsibilities, and education and training all averaged 4–6 months. Musicians who indicated retirement as a reason selected an average duration of 22–24 months in the previous two-year period.

Table 2. Median length of time taken outside the workforce by each listed reason. N = 346 reasons.

Reason for taking time outside the workforce	Median
Travel	1–3 months
Unemployment	4–6 months
Undertaking education or training	4–6 months
Illness or disability	1–3 months
Caring responsibilities	4–6 months
Undertaking internships/placements/volunteering	1–3 months
Retirement	22–24 months

Moving for work

In total, 10% of survey participants reported having moved for work during the preceding two years. The survey allowed musicians to enter the details of up to three moves they had made during the previous two-year period. Details included the type of move, the duration of the move and the reasons for the move. After excluding moves that were unrelated to work and those which occurred outside the previous two years, a total of 26 musicians provided details about 41 moves. 15 of 26 musicians had moved once during the two years, six had moved two times, and four had moved three times.

Shown at Figure 13, the most common reason for moving was *project work*, accounting for 27.91% of responses. This was followed by *seeking employment*, which accounted for 16.28% of responses. When coding the comments for the 'other' category (for which there were 13 responses), key themes of *career building* and *proximity to the music community* were identified, at 11.63% of reasons each; these were added to the existing categories. The two remaining 'other' responses could not be coded.

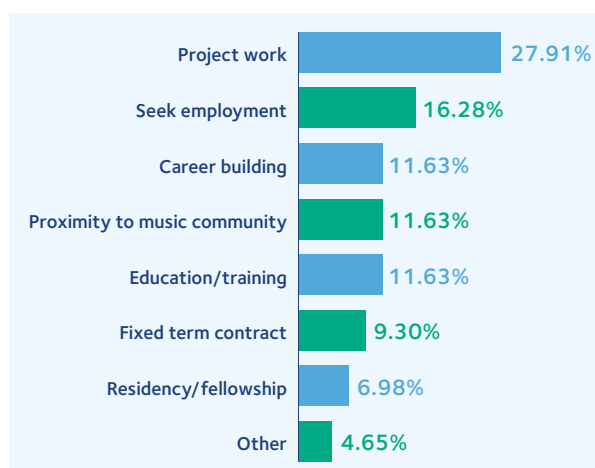


Figure 13. Reason for moving. n = 43.

Participants were mostly likely to move for work internationally (39.02% of moves), followed by interstate (21.95%) and from an outer suburb to an inner suburb (14.63%) (see Figure 14). Participants were least likely to move from an urban area to a regional or rural area or vice versa (both 9.76%), or from an inner-city suburb to an outer suburb (4.88%). Further analysis by reason for move could not be conducted because of small sample sizes.

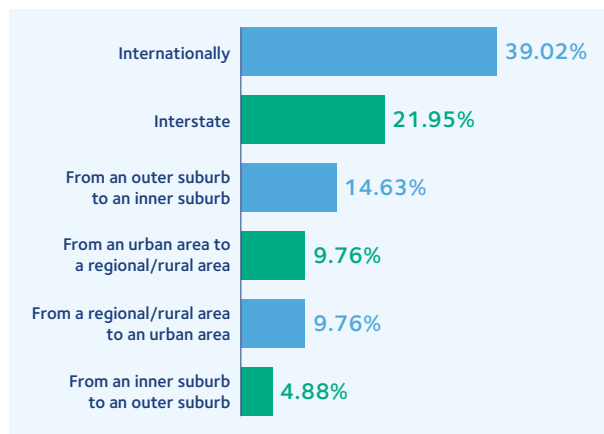


Figure 14. Type of move reported. $n = 41$.

The length of moves in months ranged from 2 weeks to the entire two-year period. Overall, the average length of a move for work was 8.4 months ($SD = 1.25$ months) with a median of 6 months.

Current work

- Participants most often held either one (37%) or two (27%) current roles, and 21% held either three, four or five current roles
- The most common role titles were *instrumental musician*, at 25% of roles, and *music teacher (private tuition)*, at 10.36% of roles.
- A very long 'tail' of diverse ANZSCO codes corresponding to job titles provided by 2 or fewer musicians comprised a total of 9.64% of the role titles
- The roles that were most likely to be undertaken as part of a portfolio career (multiple job role career) included: artistic director, music director, music teacher-private tuition, and instrumental musician
- 60% of job roles were undertaken in the commercial sector, with community and not-for-profit sectors accounting for 21% and 19% of the roles respectively
- Self-employment was the most common mode of employment. Roles that were most likely to be undertaken on a self-employment basis included composer, singer, and actors, dancers and other entertainers

Income and payment

- For almost half of the current paid roles, musicians were paid a total rate for a body of work, with less than a fifth of all current work being paid on a continuing (salaried) basis
- The average annual income for survey participants based on all current work was \$41,257.18, with a median of \$30,576.
- More than half received income from non-music related sources, accounting for an average of 89% of the musicians' overall income
- The median number of paid hours per week across all current roles totalled 22 hours, with the median number of unpaid hours totalling 10 across all current roles, for a total of 32 hours' work per week across all current roles
- The main reasons for unpaid work were *career development and building a career profile, contributing to my discipline, enjoyment, using my skills, and expressing myself creatively*
- One-third had access to some employer-based superannuation contributions in their music related work. 7% had access to a private health insurance scheme; 6% had access to salary packaging, and 5% had access to a life/disability insurance plan

Current roles

The musicians provided information about their most recent work roles. This question included all kinds of work roles, including all paid, volunteer and unpaid work, and music / music-related and non-music work.

For each role, the musicians provided the following information:

- role title
- sector of work (commercial, not-for-profit, community)
- start date if relevant
- end date if relevant
- basis for employment (self-employed, casual, contract, ongoing, part-time, full time, volunteer/unpaid)
- basis for payment (total rate for a body of work, hourly rate, salary)
- income / wage
- frequency of payment (project / contract, hour, week, fortnight, month, year)
- average hours worked per week paid and unpaid

From this information, the research team were able to construct a current work role profile for each participant. Most commonly, as shown at Figure 15, participants held either one (37%) or two (27%) current roles, but 21% held either three, four or five current roles and 15% indicated that they were not currently working. No significant differences were found for gender, region or career stage, suggesting that multiple roles persist across the career lifespan.

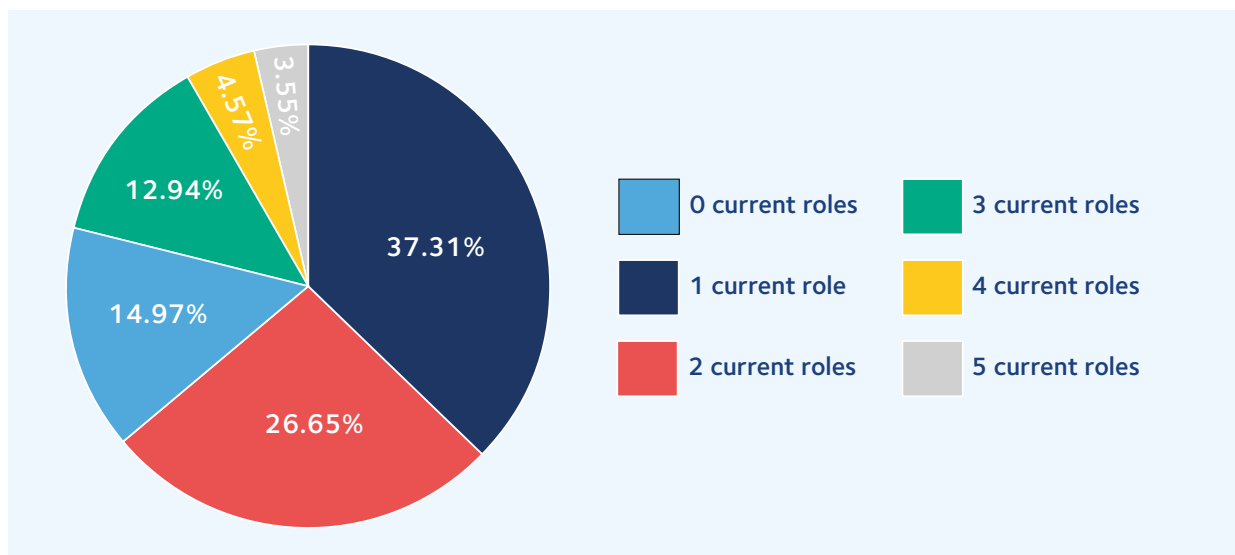


Figure 15. Number of job roles currently held by participants. N = 394.

The title for each of the musicians' work roles was coded according to the Australian and New Zealand Standard Classification of Occupations (ANZSCO) 6-digit codes (Australian Bureau of Statistics, 2013). In total, 648 current roles were listed by participants, of which 560 had enough information to be coded with a 6-digit ANZSCO code. The remaining 88 roles comprised either roles outside ANZSCO's occupational scope (such as student or parent); or roles which were unidentifiable due to lack of information (for example, "lab assistant" or "co-ordinator") and were not included in further coding.

Of the 560 role titles that could be coded, the most common role titles were *instrumental musician* at 25.18%, and *music teacher (private tuition)* at 10.36%. Music teaching roles account for 20.71% of all role titles and included *music teacher (private tuition)*, *school music teacher* and *general music tutors and teachers*. A very long 'tail' of diverse ANZSCO codes corresponding to job titles provided by two or fewer musicians comprised a total of 9.64% of the role titles provided. The top 24 ANZSCO codes are presented at Figure 16; these codes accounted for 90.36% of the coded job titles. The ANZSCO codes associated with each of these role titles can be viewed at Appendix D.

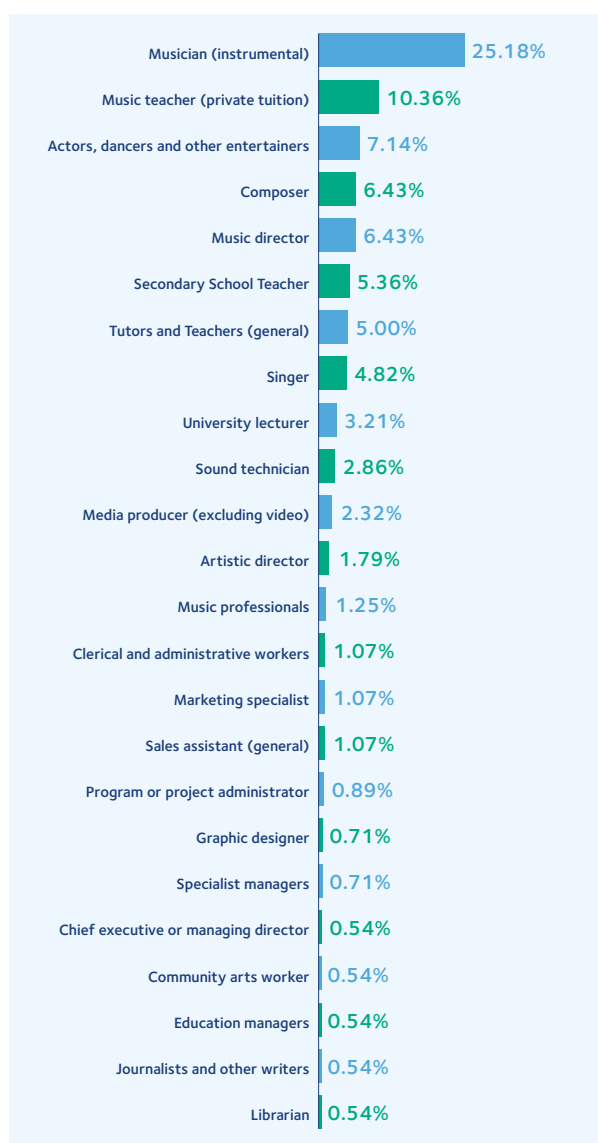


Figure 16. Top 24 most common job titles for current roles. N = 560.

Statistical analysis was undertaken to determine which roles were most likely to be undertaken as part of a portfolio career configuration (multiple concurrent work roles). All twelve of the most common specific work roles were more likely to be associated with a portfolio career configuration than a single role (traditional) career. Shown at Figure 17, the roles most likely to be undertaken as a single role included private tutors and teachers (46.43% of participants), university lecturer (38.89%) and secondary school teacher (36.67%). The roles that were most likely to be undertaken as part of a portfolio career included artistic director (90%), music director (86.11%), music teacher-private tuition (86.21%) and instrumental musician (82.27%).

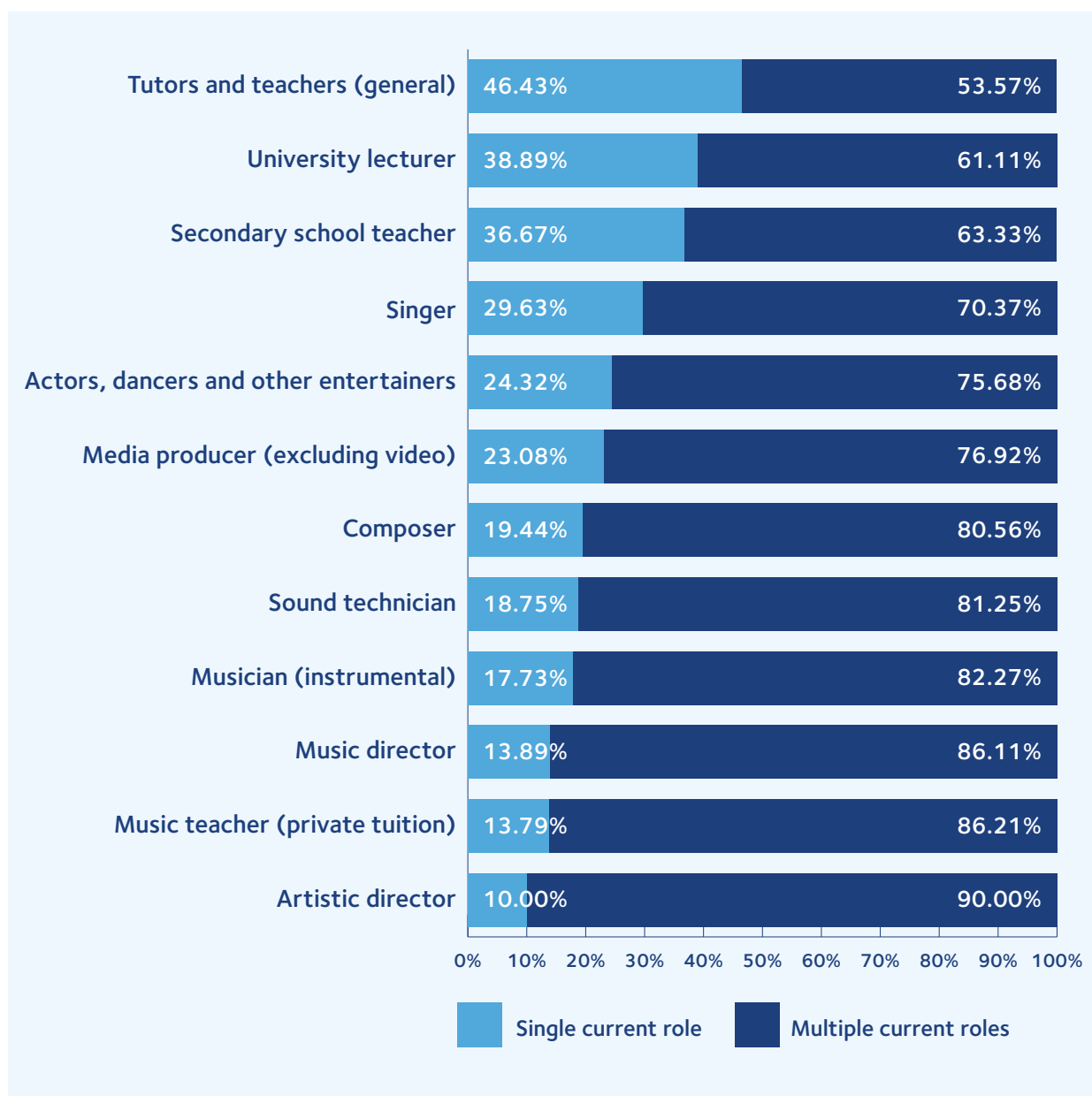


Figure 17. Proportion of current roles – single role or multiple roles for 12 most common roles. N = 450.

Industry sectors

Figure 18 illustrates the industry sectors in which current work was reported, using Markusen's (2010) notion that creative work involves a series of relationships which cross the divides separating commercial, non-profit, public, and informal community sectors. In our study, commercial roles were the most common, with 60% of all current work falling into this category. The community and not-for-profit sectors accounted for 21.03% and 18.85% of the roles respectively.

Shown at Figure 19, work roles most likely to be undertaken in the commercial sector included sound technician (86.67%), followed by singer (77.78%) and music teacher (private tuition) (77.59%). Roles most likely to be undertaken in the community sector included music director (63.89%) and artistic director (50%). Roles which were comparatively more likely to be undertaken in the not-for-profit sector included artistic director (30.0%), media producer (23.08%) and university lecturer (22.22%).

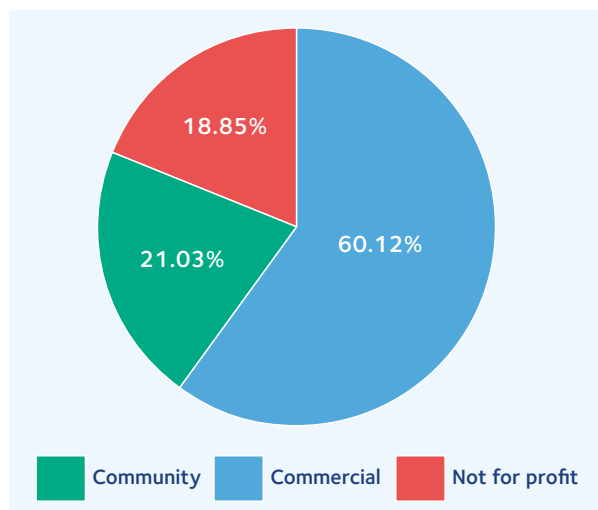


Figure 18. Industry sector of current roles. N = 642.

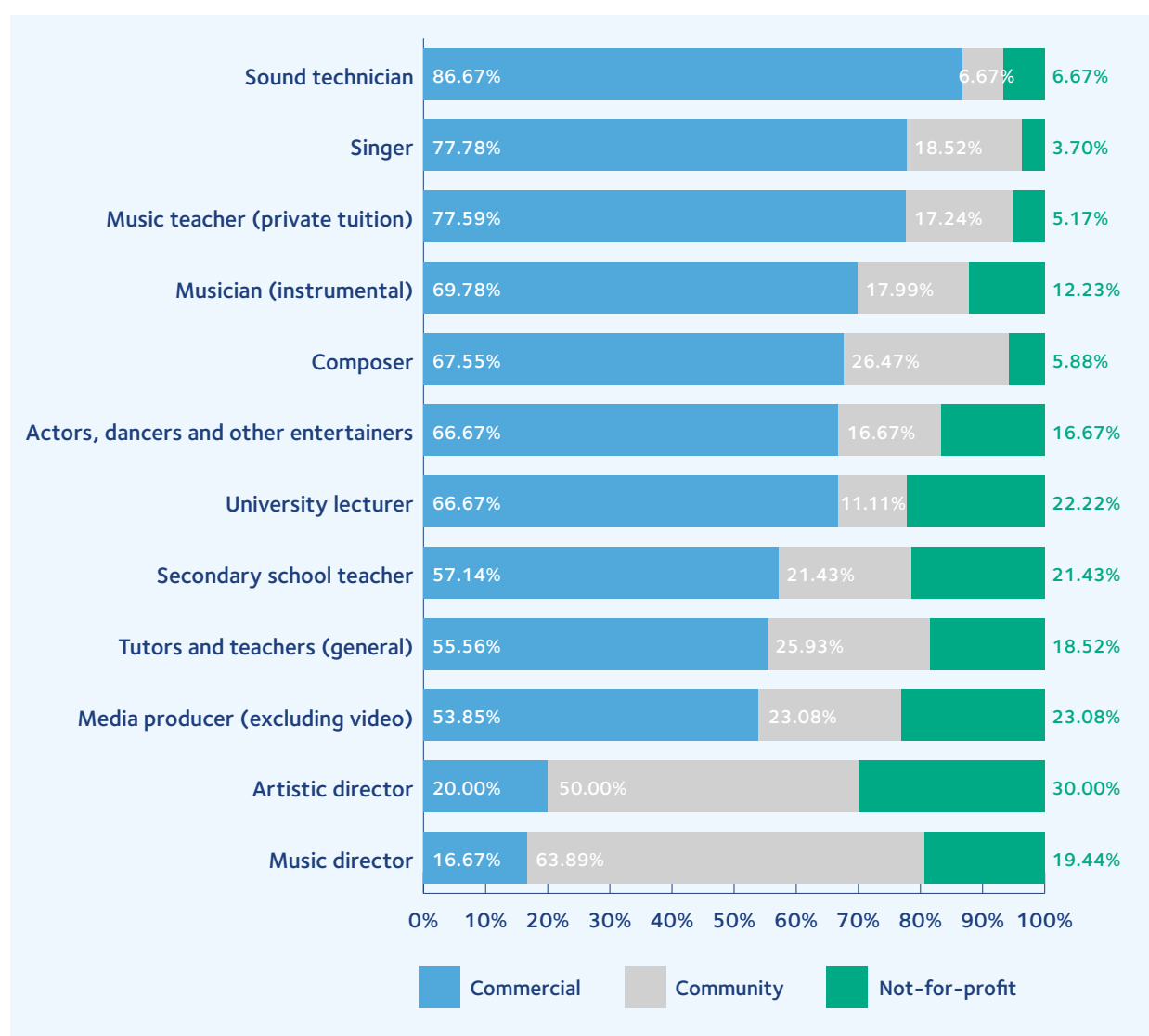


Figure 19. Industry sector for the most common current roles. N = 441.

Modes of employment

Shown at Figure 20, self-employment was the most common mode of employment across the current roles and accounted for 44.35% of the 584 responses. Part-time contract roles accounted for a further 15.58% of the roles, with volunteer / unpaid roles and casual roles accounting for another 13.18% and 12.50% respectively.

A borderline association was found between employment type and career stage ($X^2 = 16.79$, $p = .05$), but further analysis failed to identify any clear differences between the career stage groups.

The roles which were most likely to be undertaken on a self-employment basis included composer (75.00%), singer (69.57%), and actors, dancers and other entertainers (66.67%) (see Figure 21). Roles which were comparatively likely to be undertaken on a full time basis included media producer (27.27%), university lecturer (26.67%), and artistic director (22.22%). Part-time or casual employment arrangements were associated with university lecturing roles (73.33%), and work as a music teacher in private tuition (46.30%) or secondary school teacher (46.15%). Musicians were most likely to volunteer or engage in unpaid work in media producing (36.36%) and music direction roles (27.27%).

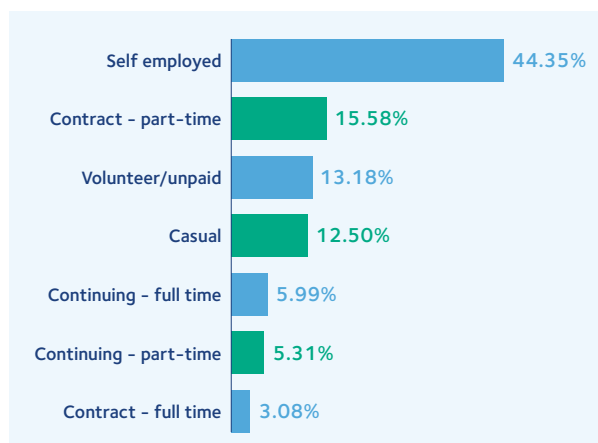


Figure 20. Modes of employment. N = 584.

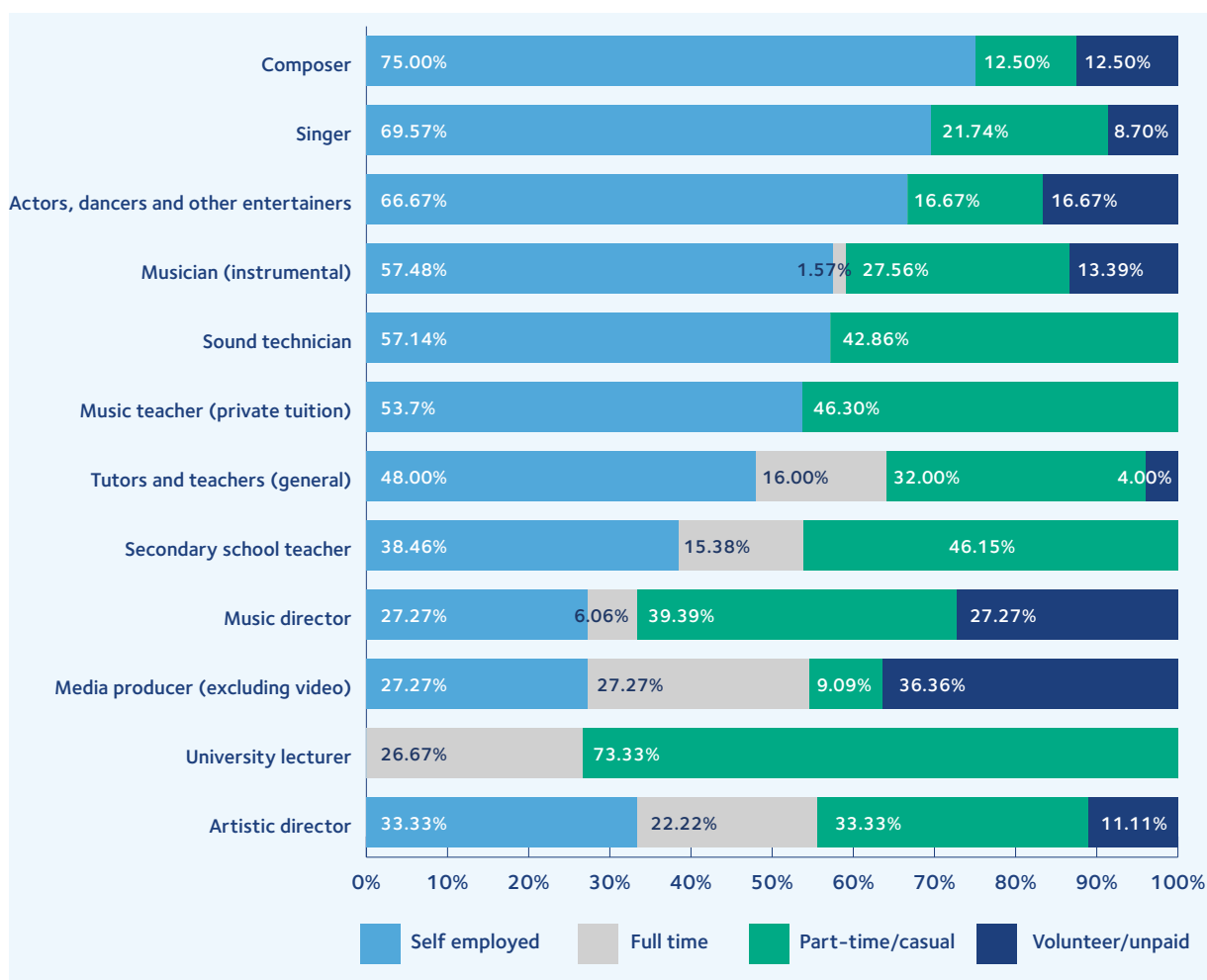


Figure 21. Employment type for most common current roles. N = 405.

For almost half the current paid roles (49.12%), musicians were paid a total rate for a body of work, with less than a fifth (18.71%) of all current work being paid on a continuing (salaried) basis (see Figure 22).

No association was found for gender and region of residence for type of payment, but an association was found between career stage and payment type ($X^2 = 21.59$, $p = .001$) with musicians with less than five years professional experience holding more roles paid at an hourly rate than those at other career stages.

Musicians were most likely to be paid as a contractor (paid a specific amount for a task or project) or as an hourly paid employee. As shown in Figure 23, the percentage of hourly paid work was reported as follows: as an actor, dancer and other entertainer (93.10%), composer (92.88%), singer (90.88%), or media producer (87.50%). Musicians were most likely to be paid on an hourly basis when working as a self-employed music teacher (private tuition) 81.82%, and as a university lecturer (73.33%). The roles of secondary school teacher (37.04%) and artistic director (33.33%) were most likely to be paid on a continuing (tenured, permanent) basis.

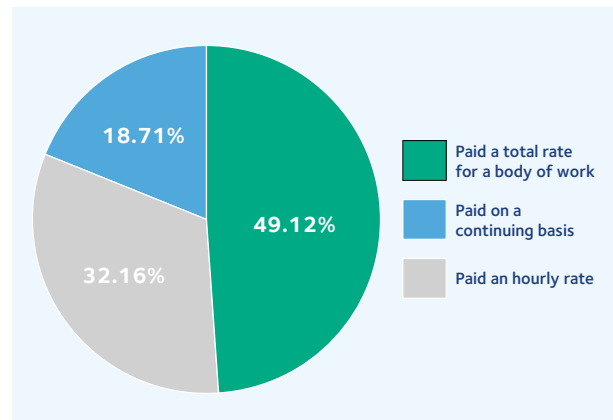


Figure 22. Payment type for musicians' current work. N = 513.

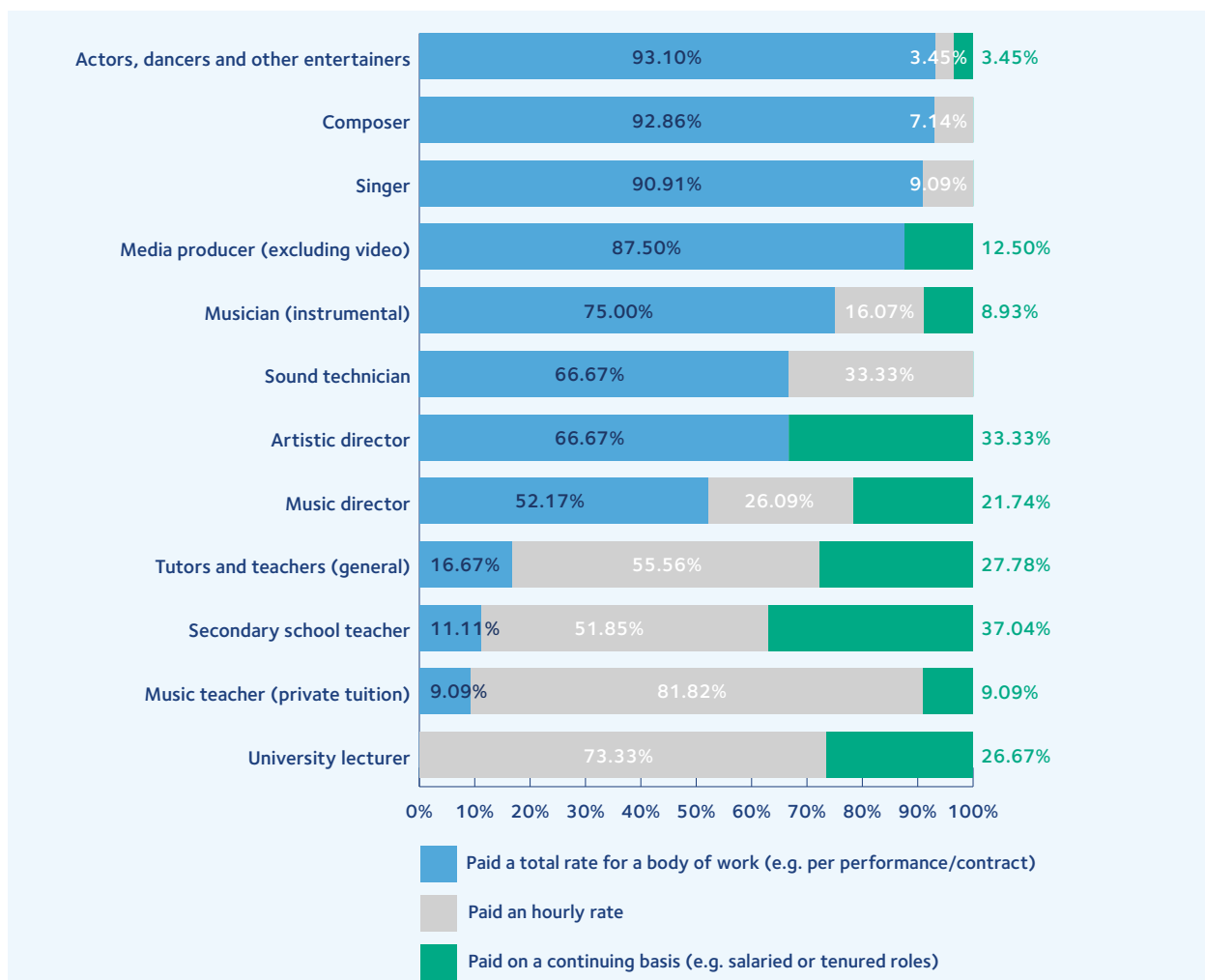


Figure 23. Payment type for most common roles. N = 361.

Annual income

Annual incomes were calculated based on the cumulative pay of different types across all current work roles for each survey participant. The average annual income for survey participants based on all current work was \$41,257.18 ($SD = \$56,885.84$), with a median of \$30,576. There was significant variation in annual incomes between participants, evidenced by the wide standard deviation obtained. The data for income were highly skewed, with five highly paid musicians reporting annual incomes of between \$150,000 and \$600,000, and the rest reporting annual incomes between \$0 and \$150,000.

Because the income variable was highly skewed, for further analysis the annual income variable was grouped into seven categories in \$15,000 increments, with income brackets of: <\$15,000, \$15,000–\$30,000, \$30,000–\$45,000, \$45,000–\$60,000, \$60,000–\$75,000, \$75,000–\$90,000, and \$90,000+ (see Figure 24). Non-parametric tests of group difference revealed no significant difference in annual income for gender [$U = 2908$, $p = .626$] or region of residence [$U = 2208$, $p = .604$]. However, differences by career stage were found [$H(3) = 11.75$, $p = .008$] with a median of up to:

- \$15,000 for musicians with less than 5 years' experience;
- \$30,000–\$45,000 for musicians with 5–10 years' experience;
- \$15,000–\$30,000 for musicians with 11–20 years' experience; and
- \$30,000–\$45,000 for musicians with 20+ years' experience.

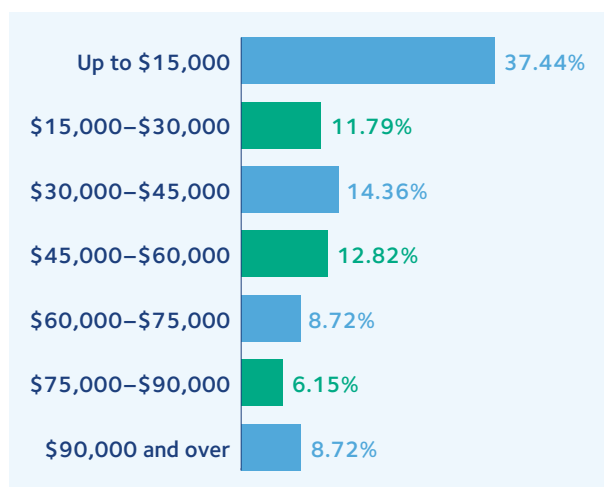


Figure 24. Distribution of annual income. $N = 195$.

Sources of income, profit and loss

Participants were provided with a list of 15 potential income source types (see Table 3), and were asked to assign each a percentage of their overall income, with all sources to add to 100%. For example, a participant may have had three main sources of income: performance fees accounted for 70% of their total income, with 25% from non-music related income or employment, and 5% from sales of digital music. An 'other' source type was included in addition to the 15 specified source types, to account for sources not included in the pre-populated list.

A total of 299 participants responded to this question, providing an average of 3.06 sources of income (ranging between 1 source and 11 sources of income). The most commonly reported source of income was *performance fees*, with 65.55% of participants indicating that they received some income from performance fees. Performance fees only accounted for 15% of the musicians' overall income on average¹, although this varied by individual ranging from 1–100% of overall income.

While 65.55% of the participants indicated that performance fees comprised at least some of their income, more than half (51.84%) of the musicians reported that they received income from non-music related sources. The third most common source of income was *music teaching*, which was reported by 48.83% of participants as being a source of income. Non-music related income accounted for an average of 89% of the musicians' overall income.

Publishing and royalties, sale of physical music, and sale of digital music were also fairly common sources of income, with 25.08%, 21.07%, and 20.07% of participants reporting some income from these sources, but the median proportion of income from these sources was comparatively low, at an average of 3%, 5%, and 2%.

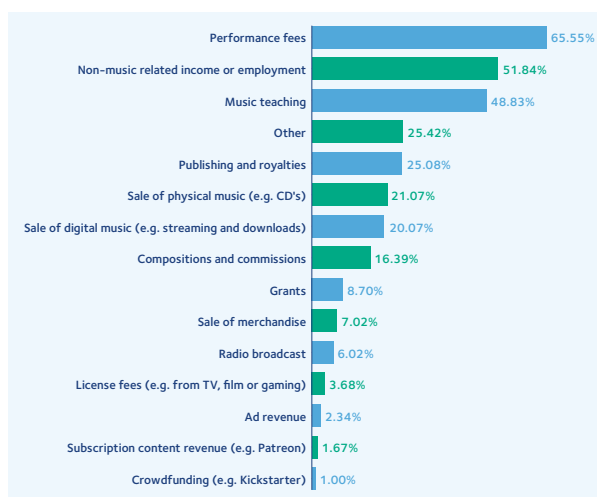


Figure 25. Proportion of participants by sources of income. $N = 299$.

¹ All averages reported in the sources of income section of this report are medians

Table 3. Sources of income. N = 299.

Sources of income - % of total income	n	Median	Min%	Max%	M	SD
Performance fees	196	15%	1%	100%	25.89%	26.45%
Non-music related income or employment	155	89%	4%	100%	72.42%	31.34%
Music teaching	146	50%	1%	100%	51.84%	33.96%
Other	76	47%	1%	100%	46.93%	36.07%
Publishing and royalties	76	3%	1%	100%	6.17%	12.88%
Sale of physical music (e.g. CDs)	63	5%	1%	30%	6.60%	6.81%
Sale of digital music (e.g. streaming and downloads)	60	2%	1%	100%	5.05%	12.87%
Compositions and commissions	49	5%	1%	50%	8.63%	9.10%
Grants	26	10%	1%	80%	17.00%	20.96%
Sale of merchandise	21	3%	1%	30%	5.95%	7.79%
Radio broadcast	18	1%	1%	10%	3.44%	3.43%
License fees (e.g. from TV, film or gaming)	11	5%	1%	20%	5.64%	5.45%
Ad revenue	7	1%	1%	50%	12.71%	19.57%
Subscription content revenue (e.g. Patreon)	5	5%	1%	15%	6.40%	6.07%
Crowdfunding (e.g. Kickstarter)	3	10%	2%	30%	14.00%	14.42%

Percentages are averages based on responses to each category.

No differences were found for region of residence or career stage in the top three sources of income (performance fees, non-music related income or employment and music teaching). However a significant difference was found for gender for non-music related income ($U = 7223, p = .002$) accounting for 21-30% of total income for males, and 1-10% for females; and music teaching ($U = 10684, p = .003$) with males reporting a slightly higher proportion of total income earned than females (both medians however in 1-10% category). No differences were found for gender on performance fees.

Survey participants also reported on their overall profit/loss position for the previous financial year. Of 305 respondents who answered this item, 179 reported a profit, and 126 reported a loss. The average profit reported was \$20,376.81 ($SD = \$26,365.66$) based on 156 responses, and the average loss was \$6 060.86 ($SD = \$12,058.09$) based on 115 responses.

Paid and unpaid work

For each current role, survey participants provided the average number of paid and unpaid hours they worked in a typical week. The total paid and unpaid hours worked across all roles was then calculated for each survey participant.

The median number of paid hours per week across all current roles totalled 22 hours, with the median number of unpaid hours totalling 10 across all current roles, for a total of 32 hours' work per week across all current roles. The ratio of paid to unpaid hours suggests that overall, roughly a third of all work completed by musicians is unpaid, with a median paid-to-unpaid ratio of 0.52. However, it is important to note that there was significant variation in paid, unpaid and total hours worked, as seen by the large range scores in Table 4. There were no significant differences found in overall ratio of paid to unpaid work for either gender, region of residence or career stage.

Comparisons were also conducted between the most common job titles to explore whether there were systematic differences in the ratio of paid to unpaid work. A significant difference was found, [$F(11,270) = 3.96, p < .001$] with singers reporting a greater proportion of unpaid work than all other tested roles. No other differences were found among the top twelve most common job roles.

Table 4. Descriptive statistics for paid and unpaid hours worked per week across all current roles. N = 226–248.

Average hours worked per week across all current roles	n	Median	Min	Max	Mean	SD
Paid work hours across all current roles	244	22	0	87	21.52	18.11
Unpaid work hours across all current roles	248	10	0	100	15.86	16.74
Unpaid : Paid work hours (ratio)	226	0.52	0	80	2.33	7.67

Reasons for unpaid work

The 58.93% of participants who were engaging in unpaid work were asked their reasons for doing so, for each current role in which they did at least some unpaid work. The musicians selected as many options as applied from a pre-populated list of possible reasons. In addition to the pre-populated reasons, an 'other' response option was provided, and these were post-hoc coded.

Participants each provided an average of 2.87 reasons for engaging in unpaid work. There were six very common reasons given for engaging in unpaid work (see Figure 26). The most common reason given was *career development and building a career profile* (38.04% of participants who engaged in unpaid work), followed by *contributing to my discipline* (35.43%), *continuing to work outside paid hours* (35.28%), *enjoyment* (35.12%), *using my skills* (33.74%) and *expressing myself creatively* (33.13%).

Musicians provided specific illustrative examples relating to some of the categories. These included:

Continuing to work on paid work outside paid hours:

- Setting up & packing down music gear in unpaid hours
- Running a business that is only paid when we do shows
- Preparation of music for rehearsal, reviewing rehearsals, planning for overall prep for concerts
- Administration, media and publicity, bookings and management etc

Contributing to my discipline

- Enabling friends who would otherwise have art buried away if someone didn't help them construct it
- Enabling folk clubs to exist financially
- Doing a favour/lending a hand to fellow musicians

Contributing to wider community / society

- Give back to elders in community at rehab ward of local hospital
- Contributing to a community/ cultural event

Access to employment-related benefits

Survey participants were asked if they had access to a range of employment-related benefits in at least one of their current roles. As shown in Figure 27, one-third (31.21%) indicated that they had access to some employer-based superannuation contributions. Seven percent (7.09%) had access to a private health insurance scheme or a health plan. Only 6.38% had access to salary packaging, and 4.96% had access to a life/disability insurance plan separate to their superannuation.



Figure 26. Reasons for unpaid work. n = 652.

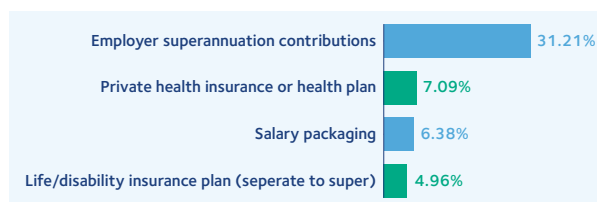


Figure 27. Participants who have access to employment-related benefits. n = 282.

Career development strategies

- On average, participants had used 2.93 different strategies over the preceding 12 months
- Work creation and informal strategies were more commonly used than formal strategies
- The most popular strategies were establishing or continuing an enterprise, band or ensemble, and using informal social networks
- Certain types of formal strategies were rated as the most effective, including answering a call for work and using an agent/manager
- Less experienced musicians used somewhat different career development strategies than more experienced musicians

Survey participants indicated which strategies they had used to find, acquire or create music or music-related work in the last 12 months, and if so, how effective they had found the strategies to be, using a 1–5 scale from ‘not at all effective to very effective’. An ‘other’ response option was provided however no significant themes were added to the strategies and are thus not presented. The list of strategies provided included:

- **Formal strategies**, such as using a job search agency, job boards, agents / managers, and attending an open call to audition
- **Informal strategies**, such as through work experience and social networks
- **Work creation strategies**, such as establishing or continuing an enterprise, band or ensemble

On average, participants had used 2.93 different strategies over the preceding 12 months. Typically, musicians used a combination of all three strategy types, although work creation and informal strategies were more commonly used than formal strategies. The most popular strategies overall were establishing or continuing an enterprise, band or ensemble

(78.82% of participants), and using informal social networks (both face to face, at 70.28%, and online, at 65.38% of participants). As shown in Table 5, in terms of the effectiveness of the strategies, certain types of formal strategies were rated as the most effective, including answering a call for work and using an agent/manager the most (3.94 and 3.85 out of 5 respectively). Establishing / continuing an enterprise, band or ensemble was also highly rated, at 3.83 out of 5.

Formal strategies

Shown in Figure 28, the most commonly used formal career development strategy was answering a call for work (52.43%), which was also found to be a relatively effective strategy with an average effectiveness score of 3.94 ($SD = 1.26$). While searching music / arts job boards and general job boards were relatively commonly used approaches (36.46% and 30.90%), they were both noted to be relatively ineffective ($M = 1.71$, $SD = 0.94$; $M = 1.78$, $SD = 1.02$ respectively). Using an agent or manager was comparatively uncommon (12.85%) but reported by participants as reasonably effective ($M = 3.85$, $SD = 1.26$). Less experienced musicians were more likely to search on jobs boards (both music/arts-specific and general) than more experienced musicians.

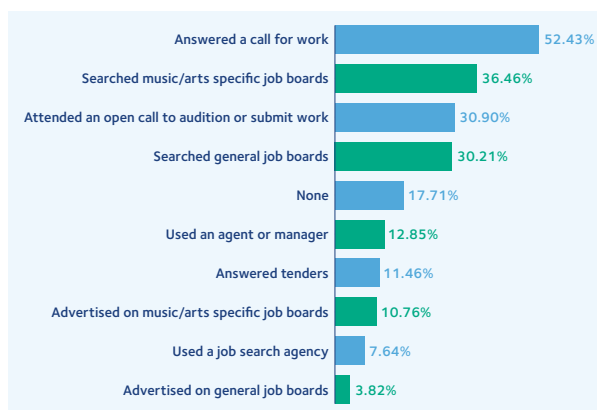


Figure 28. Participants who have used formal career development strategies in the last 12 months. $n = 288$.

Table 5. Mean and standard deviation rating of effectiveness rating for each formal strategy used.

Formal strategies for finding or acquiring (music) work	n	M	SD
Answered a call for work	132	3.94	1.26
Used an agent or manager	27	3.85	1.26
Answered tenders	30	3.00	1.41
Attended an open call to audition or submit work	71	2.62	1.31
Advertised on music/arts specific job boards	19	2.21	1.32
Searched general job boards	77	1.78	1.02
Used a job search agency	18	1.72	1.07
Searched music/arts specific job boards	86	1.71	0.94
Advertised on general job boards	6	1.67	0.82

Informal strategies

Informal social network-based strategies were very commonly used, at 69.79% for face-to-face network strategies, and 64.93% for online social network strategies (see Figure 29). Maintaining an online portfolio, store, website or blog was also a comparatively popular informal strategy (42.01%). Paid or unpaid work experience or internship strategies were less commonly used, at 9.72% and 19.79%.

Musicians in the early stages of their careers were more likely to undertake work experience or internships than more established musicians, with significant associations found between career stage and both paid and unpaid work experience/ internship strategies ($\chi^2 = 16.33$, $p = .001$ and $\chi^2 = 12.33$, $p = .006$ for paid and unpaid respectively). Musicians with 6-10 years' professional experience were more likely to engage in paid work experience opportunities than were musicians with 11+ years' professional experience. Musicians with 10 or fewer years of professional experience were more likely to engage in unpaid internships than were highly experienced musicians (>20 years' experience).

Face-to-face networking was the most effective informal strategy, at a mean rating of 3.62 ($SD = 1.22$). Those who had undertaken paid or unpaid internships or work experience indicated the strategies to be moderately effective ($M = 3.42$, $SD = 1.1$; $M = 3.2$, $SD = 1.23$ respectively). Less experienced musicians were more likely to engage in unpaid or paid work experience or internships than more experienced musicians (> 10 years' experience).

Work creation strategies

Shown in Figure 30, of the career development strategies presented, establishing or continuing an enterprise such as a band, ensemble, collective or business was the most commonly used, at 78.82%. It was also a comparatively effective strategy ($M = 3.83$, $SD = 1.13$). Online enterprise activities, such as a YouTube channel or live streaming were less frequently used, at 41.67%, and were also seen as less effective ($M = 2.85$, $SD = 1.12$). Only one quarter (25.52%) of musicians had applied for a grant in the preceding 12 months, with a mean effectiveness rating of 2.71 ($SD = 1.54$). Musicians with fewer than five years experience were less likely to apply for grants than those with more than ten years of experience.

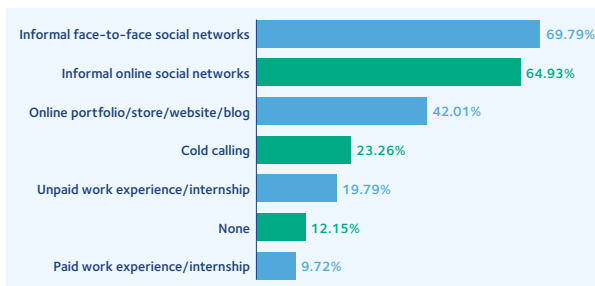


Figure 29. Participants who have used informal career development strategies in the last 12 months. $n = 286$.

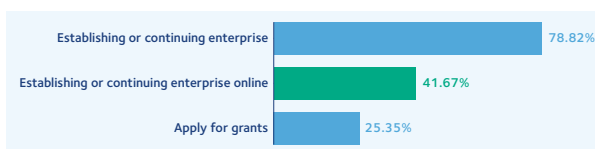


Figure 30. Participants who have used work creation strategies in the last 12 months. $n = 286$.

Table 6. Mean and standard deviation rating of effectiveness rating for each informal strategy used.

Informal strategies for finding or acquiring (music) work	n	M	SD
Informal face-to-face social networks	173	3.62	1.22
Paid work experience/internship	24	3.42	1.1
Informal online social networks	168	3.24	1.17
Unpaid work experience/internship	50	3.2	1.23
Online portfolio/store/website/blog	103	3.09	1.27
Cold calling	58	2.95	1.23

Table 7. Mean and standard deviation rating of effectiveness rating for each music creation strategy.

Strategies for creating music or music related work	n	M	SD
Establishing or continuing enterprise	195	3.83	1.13
Establishing or continuing enterprise online	103	2.85	1.12
Apply for grants	66	2.71	1.54

Role of informal social networks

An open-ended question asked the survey participants which roles informal social networks played in their career development. The musicians provided a total of 160 responses to this question, and of these 140 responses were able to be thematically coded. The remainder did not discuss the roles that social networks played in their responses, but rather made statements about the extent of importance of social networks (e.g., “yes very important to my career”). A total of 198 themes were coded across the 140 responses, which were then synthesised into higher order categories. The broad thematic categories are presented in Figure 31 below, along with the percentage of response themes in that category.

The most common role that informal social networks played in their career development was to generate work, accounting for 36.87% of all themes. Specific responses included: “friends, word of mouth and colleagues provide most of my opportunities for finding and generating music work”, and “most of my music work has been generated by word of mouth through networks of peers – I have developed a good reputation and am offered work because of it”.

Informal social networks were also used to promote and share work, accounting for 35.35% of all themes. This category included responses about audience development, such as “[social networks] have allowed me to reach a greater audience”; and building career profiles and networking, such as “very little direct impact – more about brand building” and “networking keeps my name recognised / remembered within the industry and amongst the general population”.

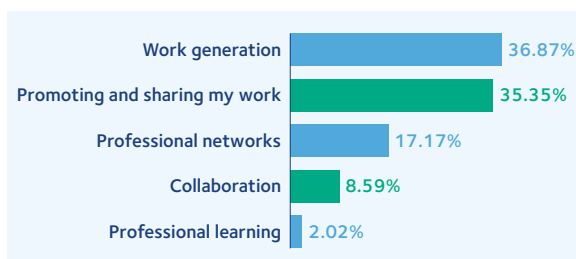


Figure 31. Thematic categories – role of social networks in musicians’ career development. n = 198 themes.

Role of agent / manager

The musicians who had used an agent / manager were most likely to have used them to book shows or tours (83.78%), negotiate contracts and fees (64.86%), and co-ordinate their promotions (40.54%). They were less likely to use an agent / manager to source funding (10.81%), arrange recording (18.92%), or manage finances (21.62%) (see Figure 32). We acknowledge that it remains a challenge to identify or assess the value of agents / manager to a musician’s career, since it is those artists who are already moderately successful who are able or likely to secure an agent.

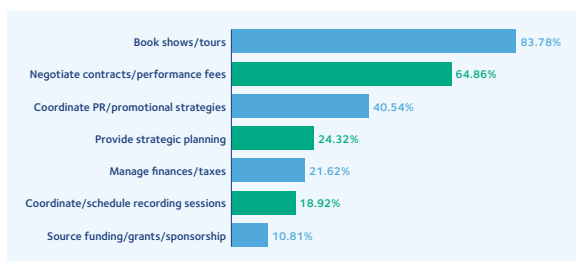


Figure 32. The roles performed by agents/managers. n = 37.



Career-related psychological characteristics of musicians

- *Enjoyment of music/doing what I love* was the strongest career motivator for participants, along with *development of individual skills and capabilities*
- *Security and stability* were the weakest career motivator
- Musicians tended to identify with *risk-taking*, *persistence* and *curiosity*, and were less likely to identify with *optimism* and *resilience*

‘Planned happenstance’ relates to an individual’s ability to make the most of chance events (both positive and negative) in career development (Mitchell et al., 1999). People who have strong planned happenstance capabilities are able to plan for their careers and engage in active career building, while remaining open to unexpected opportunities. Additional items were included to gauge the musicians’ levels of career resilience.

A second set of questions provided a series of possible career motivations, and asked musicians about the extent to which they identified with each. The list of career motivations was based on literature relating to “career anchors” (Schein, 1996). Specifically, people tend to identify fundamentally with a small number of motivators, although they can shift over the lifespan and with changes in career circumstances. The categories of career motivators included in this survey were:

- security / stability
- autonomy / independence
- lifestyle / work-life balance
- skill and capability development
- surmounting challenges
- service and contribution to others
- recognition from others
- enjoyment of work

Career planned happenstance orientation

The six sub-scale titles of the Career Planned Happenstance scale used in this survey are presented below, with an example item from each sub-scale. Musicians indicated the extent to which they agreed with each of the 18 statements, on a 1–5 scale (from ‘strongly disagree’ to ‘strongly agree’).

1. Optimism – ‘my future career is bright’
2. Flexibility – ‘I think that my career could change at any point’
3. Persistence – ‘I persist in my career plans even if I encounter challenges’
4. Curiosity – ‘I am interested in new industry trends and possibilities in my career’
5. Risk taking – ‘even though there is no guarantee of job success, I will still take on challenges’
6. Resilience – ‘when things don’t turn out as I’d hoped, I bounce back well’

Across the survey cohort, the participants assigned the highest mean ratings to *risk-taking* items ($M = 4.16$, $SD = 0.62$), and *persistence* items ($M = 4.12$, $SD = 0.61$), at between ‘agree’ and ‘strongly agree’. Their *curiosity* mean rating was also above 4 ($M = 4.08$, $SD = 0.61$). The mean ratings for *resilience*, *flexibility*, and *optimism* all fell between ‘neutral’, and ‘agree’, at 3.92 ($SD = 0.67$), 3.80 ($SD = 0.75$), and 3.64 ($SD = 0.84$). Overall, the career planned happenstance profile for the musicians surveyed is suggestive of persistence in the face of ongoing challenges. No differences were found by genre of practice or region of residence, career stage or gender.

Table 8. Descriptive statistics for the planned happenstance sub-scale. $N = 515$ –520.

Planned happenstance sub-scale	n	M	SD
Risk taking	519	4.16	0.62
Persistence	520	4.12	0.61
Curiosity	515	4.08	0.61
Resilience	519	3.92	0.67
Flexibility	519	3.80	0.75
Optimism	519	3.64	0.84

Career motivations

Musicians indicated to what extent they identified which each of 15 different career motivations on a 1–5 scale ranging from ‘not at all’ to ‘a great extent’. As shown in Table 9 over the page, *enjoyment of music/doing what I love* received the highest mean rating by a significant margin, at 4.84 ($SD = 0.52$), with 96.94% indicating they were motivated by *enjoyment of music and doing what they love* to a great extent. Development of individual skills and capabilities was also a strong motivator, at 4.59 ($SD = 0.73$), followed by a cluster of motivations relating to working with, others (‘*contributing to my community / culture*’ $M = 4.26$, $SD = 0.96$; ‘*contributing to my artform*’, $M = 4.28$, $SD = 0.93$; ‘*collaborating with others*’ mean = 4.24, $SD = 0.96$; ‘*helping others*’ $M = 4.13$, $SD = 0.98$).

The career motivation category which received the lowest mean rating was ‘*security and stability*’, at 2.32 ($SD = 1.15$), corresponding to ‘very little’, followed by ‘*financial rewards*’, at 2.90 ($SD = 1.15$). Rather than taking these findings to mean that musicians do not find career and financial sustainability to be important (which is certainly not the case – for more on this, see the section on self-defined career success), the findings indicate that many musicians are prepared to experience precarious employment and low / intermittent financial rewards in order to meet fundamental motivations around doing what they love, developing their capabilities, and contributing in positive ways to their communities.

Comparisons by demographic groups revealed significant differences for *financial rewards* by the different career stages [$F(3,542) = 6.87$, $p = .001$]. Musicians with 5–20 years’ professional experience rating financial rewards significantly less highly ($M = 2.62$, $SD = 1.20$ and $M = 2.76$, $SD = 1.23$ respectively) than musicians with more than 20

years professional experience ($M = 3.11$, $SD = 1.09$), even though, as reported elsewhere in this chapter, there were no differences found between the career stages for income. In addition, significant gender differences were found for *developing the skills and capabilities of others* $t(276) = -3.37$, $p = 0.001$] with females providing a higher rating, on average, than males ($M = 4.34$, $SD = 0.90$ and $M = 3.93$, $SD = 1.09$).

Career success, challenges, support and commitment

- Musicians were most likely to self-define career success in terms of financial sustainability through music work, followed by achievement of specific career goals
- On average, participants believed that they were moderately employable
- They assigned reasonable levels of agreement with career satisfaction questions, with the highest ratings assigned to satisfaction with meeting goals for development of new skills, and the lowest ratings assigned to goals for income
- The most common sources of career difficulty were *financial difficulty*, *lack of job security*, and *lack of opportunities*
- Overall, participants were committed to continue their careers in music. The top 'reasons to stay' themes were: *a love and passion for music*, and *music is central to my identity*

The survey contained a range of measures previously used by the research team to gauge subjective dimensions of career success among creative practitioners (Bridgstock, 2011; Jackson & Bridgstock, 2019) including:

- self-defined and self-rated career success
- self-rated employability in music and overall
- self-rated career satisfaction using a modified six-item validated career satisfaction scale (Greenhaus et al., 1990).

Participants provided information about the main sources and impacts of difficulties and challenges in their music careers. They rated how committed they were to their music careers, and provided reasons for their levels of career commitment.

Self-defined career success

Survey participants provided their own definition of career success in an open-ended response, and then rated how successful they were based on their given definition. Of the 281 open-ended responses provided, 253 of the responses defining career success could be coded thematically. Many of the definitions contained multiple elements, giving a total of 548 themes, or an average of 2.17 themes per response. The derived themes, along with the percentage of responses that contained them, are presented in Figure 33 below.

Shown in Figure 33 over the page, 'financial sustainability through music work' was by far the most common theme identified in the responses (26.44% of responses). Financial

Table 9. Mean 1–5 ratings for career motivations. $N = 555$.

Career motivation	n	M	SD
Enjoyment of music/doing what I love	555	4.84	0.52
Developing my music skills and capabilities	550	4.59	0.73
Contributing to my artform	548	4.28	0.93
Contributing to my community/culture	552	4.26	0.96
Collaborating with others	547	4.24	0.96
Helping others	552	4.13	0.98
Developing the skills and capabilities of others	551	4.05	1.04
Meeting difficult or complex challenges	547	4.03	1.06
Being independent and having control over my career	548	3.99	1.12
Maintaining a balanced lifestyle	545	3.61	1.23
Seeking peer recognition	579	3.56	1.03
Seeking audience recognition	547	3.50	1.02
Being enterprising and entrepreneurial	549	3.36	1.26
Seeking critical recognition	549	3.32	1.10
Financial rewards	549	2.90	1.15
Security and stability	547	2.32	1.15

sustainability responses included: “being able to earn enough money to live on”, “being able to support my family”, and “regular income”. The next largest career success theme was ‘achievement of goals and outcomes’ (10.24% of responses), specific responses for which ranged from, “artistic achievement”, “creative fulfillment” and “achieving your music goals.” Recognition from peers and audience were also reasonably common themes in the responses, at 8.38% and 7.64% of the responses. Intrinsic success themes, such as “being happy or excited about the music I’m making”; and “creating the music that you love and making a living from it” accounted for 7.64% of the responses.

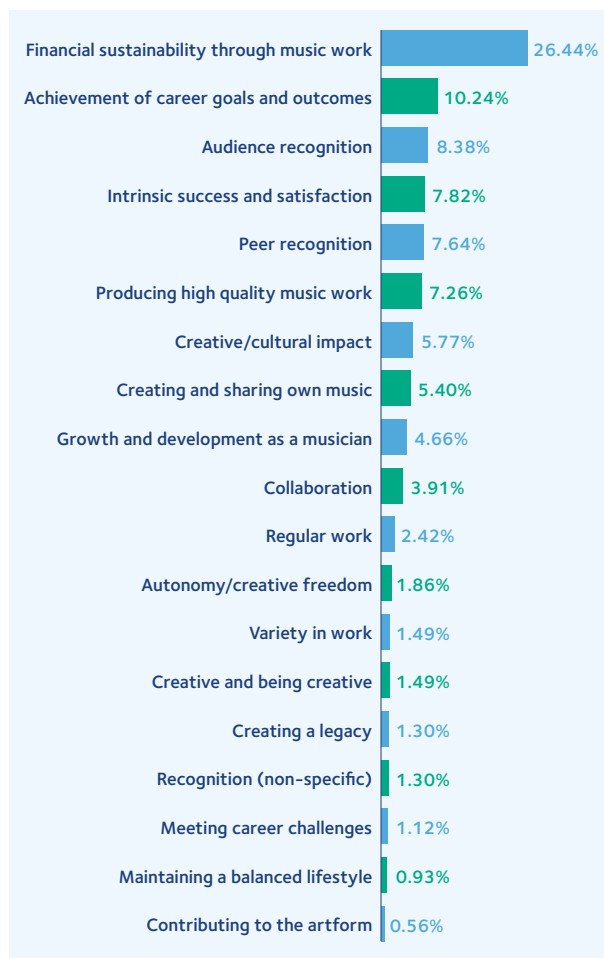


Figure 33. Self-defined career success themes N = 537 themes.

Based on their own definitions, musicians then rated their career success on a 1–5 scale, ranging from ‘not at all successful’ to ‘very successful.’ Based on 291 ratings, the average score was 3.13 ($SD = 1.25$), corresponding to ‘somewhat successful’ (see Figure 34).

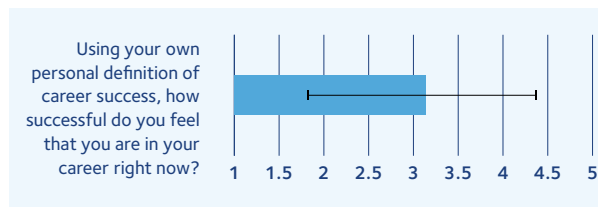


Figure 34. Mean and SD 1–5 self-defined career success rating. N = 291.

No gender differences were found for self-rated career success, however there were significant differences between musicians at the different career stages [$F(3,285) = 10.50$, $p < .001$]. Highly experienced musicians (over 20 years’ experience; $M = 3.50$, $SD = 1.17$) and experienced musicians (11–20 years’ experience; $M = 3.12$, $SD = 1.17$) rated their career success significantly more highly than musicians in the early stages of their careers (less than 5 years’ experience; $M = 2.50$, $SD = 1.05$).

Self-rated employability in music and in general

The musicians self-rated their employability in music and in general on two 5-point Likert scales which ranged from ‘not at all’ to ‘very’ employable. The respondents were prompted to think of employability in terms of their capabilities or strengths.

Shown in Figure 35, based on 290 responses, the average rating for employability in music was 3.98 ($SD = 1.13$) and for employability in general was 4.12 ($SD = 1.10$), corresponding to ‘moderately employable.’ There were no gender differences found. However, differences by career stage were found for employability in music, with highly experienced (more than 20 years) and experienced (10–20 years) musicians rating themselves as significantly more employable than early career stage (less than 5 years) musicians, ($F(3,284) = 9.95$, $p < .001$; $M = 4.30$, $SD = 0.96$; $M = 3.92$, $SD = 1.14$; $M = 3.40$, $SD = 1.18$ respectively). There were no differences by career stage for self-rated employability in general.

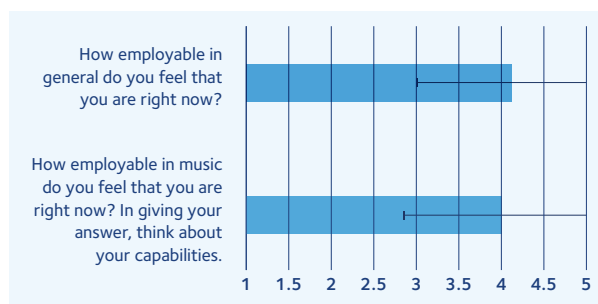


Figure 35. Mean and SD 1–5 ratings for music and general employability. N = 290.

Table 10. Mean 1–5 ratings and standard deviations for career satisfaction

Career satisfaction items	n	M	SD
I am satisfied with the progress I have made towards meeting my overall career goals.	289	3.61	0.98
I am satisfied with the progress I have made towards meeting my goals for income.	289	2.88	1.23
I am satisfied with the progress I have made towards meeting my artistic goals.	288	3.72	0.95
I am satisfied with the progress I have made towards meeting my goals for advancement.	287	3.37	1.01
I am satisfied with the progress I have made towards meeting my goals for the development of new skills.	289	3.81	0.89
I am satisfied with my progress towards achieving a career balance.	288	3.27	1.11
Career satisfaction across all items	290	3.54	0.69

Career satisfaction

Greenhaus et al.'s (1990) statistically validated self-rated career satisfaction scale was modified for use in this survey, with the addition of an item "I am satisfied with the progress I have made towards meeting my artistic goals". Participants rated their agreement with the career satisfaction items across the six dimensions using a 1–5 scale ranging from 'strongly disagree' to 'strongly agree.'

Shown in Table 10, the mean score across the six career satisfaction items was 3.54 ($SD = 0.69$), corresponding to a mid-point between 'uncertain' and 'agree'. Career satisfaction with *meeting goals for income* ($M = 2.88$, $SD = 1.23$) was significantly lower than the other dimensions, with the highest means associated with *meeting artistic goals* and *developing new skills* ($M = 3.72$, $SD = 0.95$ and $M = 3.81$, $SD = 0.89$). No significant differences by gender, region of residence or career stage were found.

Career difficulties

The musicians were presented with a list of potential sources of difficulty in their music careers, and were asked to indicate which of these (if any) applied to them. They were permitted to select as many sources of difficulty as they liked. On average, musicians indicated 1.62 main sources of career difficulty ($SD = 2.05$), the most common of which was *financial difficulty* (66.78% of participants), followed by *lack of job security* (55.36%), and *lack of opportunities* (49.83%) (see Figure 36).

The most common sources of career difficulty were examined for differences by gender, career stage, region of residence and genre. Females were significantly more likely to indicate financial sources of difficulty ($\chi^2 = 19.91$, $p < .001$), but no other differences were found.

Participants indicated any other sources of career difficulty that were of relevance to them via an open-ended response. These were coded thematically. Comments indicated smaller themes around balancing family and career, ethical and legal issues, the unpredictability of work, and lack of recognition. The themes their frequency of occurrence can be viewed in Appendix F.

A further question asked about the impact of career difficulties. A list of ten possible types of impact was provided, and the participants indicated to what extent they agreed the

statement applied to them. Responses were recorded on a 5-point scale, ranging from 'strongly disagree' to 'strongly agree'. The average rating across all of the items fell at the neutral point of the scale ($M = 2.98$, $SD = 0.96$), with *feeling stressed*, *having trouble maintaining work-life balance*, and *having problems finding time for myself* being slightly more common impacts (47%, 46%, 45% agree/strongly agree respectively), and *finding time for family*, *maintaining contact with family and friends*, and *physical health* being slightly less common impacts (34%, 32%, 31% agree/strongly agree respectively) (see Table 11 over the page).

Significant differences were found for gender [$t(272) = -2.84$, $p = .005$], with females overall indicating greater impact of career difficulties ($M = 3.17$, $SD = 0.92$) than males ($M = 2.84$, $SD = 0.96$). Gender differences were found for the specific items *have problems finding time for myself* [$t(272) = -3.17$, $p = .002$]; *have trouble maintaining a work-life balance* [$t(267) = -3.64$, $p < .001$]; and *experience anxiety* [$t(265) = -3.13$, $p = .002$] with females providing higher ratings on average than males in all instances. No significant differences were found for region of residence or career stage.

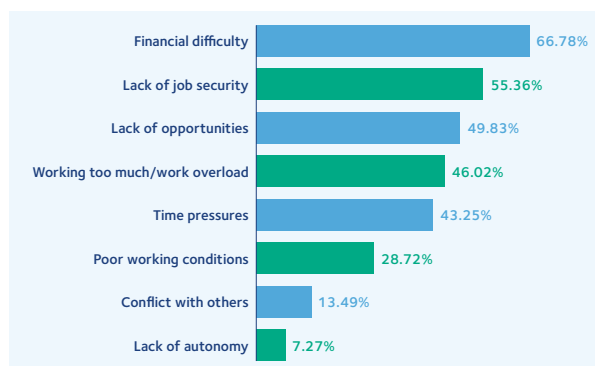


Figure 36. Sources of difficulty in participants' music careers. $N = 289$.

Table 11. Descriptive statistics for each type of item and an overall rating across impact of difficulties.

Statement	N	M	SD
Feel stressed a significant proportion of the time	283	3.20	1.25
Have trouble maintaining a work-life balance	280	3.15	1.28
Have problems finding time for myself	285	3.13	1.33
Experience anxiety	278	3.09	1.29
Experience sleep difficulties	283	2.98	1.31
Find it difficult to maintain my social life	285	2.92	1.22
Experience depression	279	2.88	1.35
Have problems finding time for family	284	2.82	1.18
Experience physical health problems	279	2.81	1.22
Find it difficult to maintain contact with friends and family	285	2.78	1.16
Career challenges across all items	285	2.98	0.96

Social support

A standardised 3-item social support scale was included in the survey (Seymour, Nicholson & Edwards, 2018), to gauge the extent to which family and others were perceived to be emotionally and instrumentally supportive of the musicians' careers. As shown in Table 12, on a scale of 1–5 from 'strongly disagree' to 'strongly agree', participants assigned an average rating of 3.72 ($SD = 0.90$) across all social support items, corresponding to just below 'agree' (4) but above 'uncertain' (3). Highest mean ratings were given around general career support from others ($M = 3.72$, $SD = 0.90$), with lower ratings given to help from family with career challenges ($M = 3.76$, $SD = 1.20$), and encouragement from others to meet career goals ($M = 3.46$, $SD = 1.11$). There were no differences found in social support by region of residence, gender, or career stage.

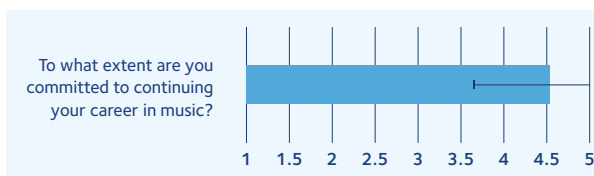
Table 12. Descriptive statistics for social support items and scale.

Social support scale	N	M	SD
My family is there to help me through career challenges	289	3.76	1.20
I receive all the encouragement I need from others to meet my career goals	287	3.46	1.11
Others in my life are very supportive of my career	288	3.96	0.94
Social support across all items	290	3.72	0.90

Career commitment

Musicians were asked to what extent they were committed to continuing their careers in music, using a 1–5 scale ranging from 'not at all, to 'a great extent'. Based on 289 responses, the overall mean rating was 4.54 ($SD = -0.84$), corresponding to between 'to a moderate extent' and 'to a great extent' (see Figure 37). A total of 86.51% assigned a rating of either 4 or 5 to this item. There were no differences found in levels of career commitment by region of residence, gender, or career stage.

Career commitment was significantly positively correlated with career satisfaction ($r = .286$, $p < .001$), self-rated career success ($r = .278$, $p < .001$), and both music-related employability and employability overall ($r = .365$, $p < .001$, $r = .255$, $p < .001$ respectively). No significant differences were found by gender, region of residence, or career stage.

Figure 37. Mean and SD 1–5 ratings for career commitment. $N = 289$.

Participants were also asked to explain their reasoning behind their level of commitment to continuing their career in music. Their open-ended responses were coded thematically.

A total of 267 musicians provided open-ended responses. Eight in ten (81.27%) of these provided at least one reason for staying in the industry; 12.4% of participants provided at least one reason for intending to leave; and the responses from 7 participants provided both reasons to stay and reasons to leave. In total, 442 themes were found in the 257 codable responses, equating to 1.72 themes per response. Of the coded themes, 86.43% were reasons to stay, and 13.57% were reasons to leave.

Shown in Figure 38, the top 'reasons to stay' themes were: *a love and passion for music* (29.84% of reasons to stay), and *central to my identity* (16.23% of reasons to stay). *Intrinsic rewards*, including responses relating to enjoyment and satisfaction, accounted for another 6.02% of reasons to stay, and *commitment over an extended career* (containing responses relating to 'being in it for the long haul') accounted for another 5.50%.



Figure 38. Themes for staying committed to a career in music. N = 382.

Indicative comments from musicians who were highly committed (mean rating 4-5, N = 250) included:

My passion for music is the one part of me that has never changed, and never will. It is the only thing I can see myself doing. It brings me so much joy to perform and teach, and without music I would be lost.

I love what I do, and the opportunities it affords me to travel, meet people, experience new things, be creative, communicate, and help shape the future of and value of music in Australia.

I find the process so far has been challenging but rewarding enough to continue in spite of set backs. I have nothing to lose and everything to gain. Making music is my life.

Music is the thing which motivates me the most, brings me great joy but it is difficult to make it really financially rewarding.

Shown in Figure 39, the most common 'reasons to leave' themes were: *financial stress/ lack of income* (31.67% of reasons to leave), and *family and caring responsibilities* (20% of reasons to leave).



Figure 39. Themes for reasons to leave a career in music. n = 60.

Musicians who indicated lower levels of career commitment (mean ratings 1-3, n = 39) provided responses as follows:

I'm still enjoying the work, my music and related skills are appreciated and the people I work with keep coming back for more, and I don't want to let them down.

I believe I still have potential to create music that connects to an audience.

I have been finding it increasingly difficult to reconcile my values and practical needs with the music industry in general. The hours are typically non-family friendly (especially in performance), and it is almost impossible to secure full time permanent positions.

I have achieved moderate success and recognition in my career. It is often hard to remain a positive outlook for the future of my career due to a variety of factors. Managing to balance the workload (many unpaid hours) and stress, whilst also raising a family. The relentless expenses involved in being a musician, and the limited support for Australian music on commercial radio.

Music has not been a reliable source of income for me. I have tried and know the boundaries of how to be one. Like most of us we forfeit our artistic dreams to support our families and lifestyles in the best way we can into the future. Music is an important part of my life both therapeutically and spiritually and will always be whether I make both money or happiness from it.

Educational background

- Nine in ten participants had completed formal education beyond secondary school, and seven in ten held tertiary qualifications in music
- On average, participants believed that their tertiary educational experiences had prepared them for their music careers to some extent, but 30% said that it had only done so 'a little' or 'not at all'

The survey asked musicians about their educational backgrounds within and outside music. Nearly nine in ten (87.06%) reported completing formal education beyond secondary school.

Educational background in music

Participants reported their educational qualifications in music. A total of 69.23% of the musicians held tertiary music qualifications (see Figure 40). Of these, 59.05% held one qualification; 20.71% reported two; and 20.20% reported three music-related qualifications. The most common highest level of qualification in music was a Bachelor's degree (19.58% of respondents), with one in three music-qualified participants holding a postgraduate qualification of some kind (29.37%).

For the purposes of statistical comparison, the seven categories of formal music qualifications were collapsed into two: *vocational education* (certificate 1 to advanced diploma level) and *higher education* (Bachelor's degree to Doctorate). An association between genre and the type of formal music qualifications completed was found ($\chi^2 = 19.77$, $p < .001$) with classical musicians more likely to hold degree qualifications, while contemporary musicians were more likely to hold vocational qualifications. No differences were found by gender, career stage or region of residence.

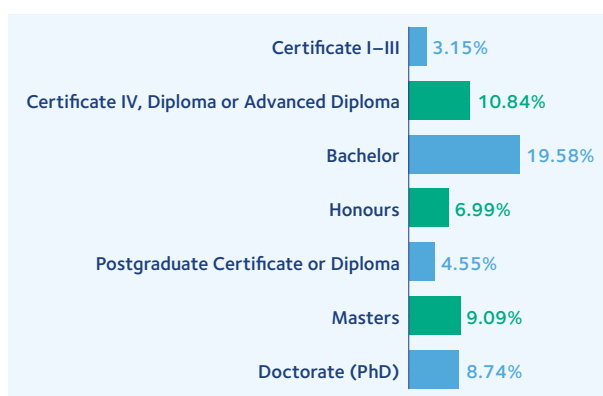


Figure 40. Highest level of music education. N = 286.

Shown in Figure 41, the most common broad field of tertiary study in music held by musicians with music qualifications was *music performance-classical* (19.93%), followed by *music education* (9.09%), and *music composition* (7.69%).

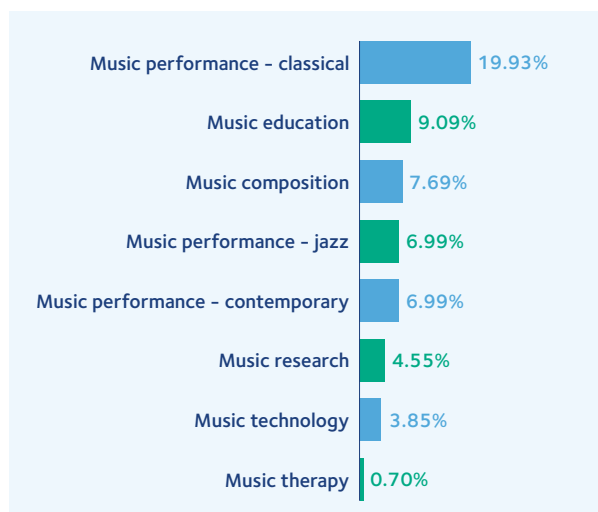


Figure 41. Field of highest level of music education. N = 286.

Educational backgrounds outside music

Roughly half of the musicians reported completing at least one non-music tertiary qualification (53.49%) (see Figure 42). Of the musicians who reported that they held at least one non-music qualification, 74.10% held one qualification, 15.66% held two qualifications, and 10.24% held three qualifications. Bachelors' degrees were the most common highest level of non-music qualification reported (17.83% of all respondents), with 21.68% of all participants being a non-music postgraduate qualification of some kind.

For the purposes of statistical comparison, the seven categories of formal non-music qualifications were collapsed into two: *vocational education* (certificate 1 to advanced diploma level) and *higher education* (Bachelor's degree to Doctorate). An association between gender and the type of formal non-music qualifications completed was found ($\chi^2 = 9.61$, $p = .002$) with females more likely than males to complete higher education qualifications, and males more likely than females to complete vocational education qualifications. An association was also found for career stage ($\chi^2 = 17.73$, $p < .001$) with musicians with < 5 years professional experience more likely to complete vocational education qualifications, and musicians with 10–20 years' experience more likely to complete degree qualifications. No differences were found by gender or region of residence.

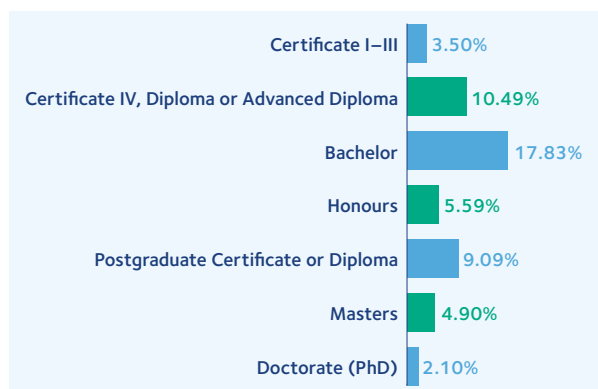


Figure 42. Highest level of non-music education. N = 286.

Shown in Figure 43, in terms of the broad fields of non-music tertiary study, *Humanities* was most common (7.69% of all respondents), followed by *Creative fields (non-music)* (5.24%), and *Business* (4.90%).

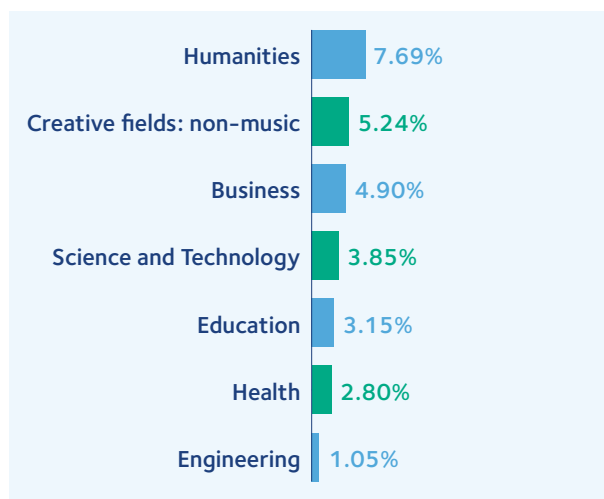


Figure 43. Field of highest level of non-music education. N = 286.

Educational preparation for music career

A survey question asked the musicians about the extent to which they felt that their post-secondary education had provided them with the skills required to develop their music careers. Participants reported their responses on a 1–5 point-scale, ranging from ‘not at all’ to ‘a great extent’.

The majority of participants (51.24%) responded that their post-secondary education had provided them with the required skills to a moderate or great extent. However, three in ten (30.24%) indicated that their education had prepared them ‘not at all’ or ‘a little’. An average rating of 3.40 ($SD = 1.40$) was obtained overall, corresponding to between ‘a little’ and ‘to a moderate extent’ (see Figure 44).

No differences were found in educational preparation ratings by gender, region of residence, or career stage. However, contemporary musicians assigned significantly lower ratings for career preparation than their classical and mixed genre counterparts [$F(3,277) = 6.40, p < .001$; $M = 3.10, SD = 1.46$; $M = 3.90, SD = 1.28$; respectively $M = 3.80, SD = 1.22$].

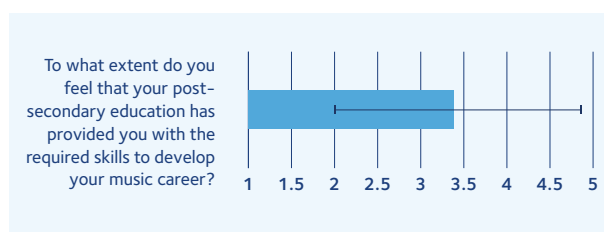


Figure 44. Mean and SD 1–5 ratings for postsecondary education preparation for career. n = 281.

Professional learning approaches and needs

- The top professional learning needs identified by musicians were *advertising, marketing, publicity, promotions* and *business administration and management*
- The most commonly undertaken professional learning topics were *music disciplinary learning (instrument, technique, theory)*, and *music teaching*
- Topics identified by a high proportion of participants as being areas of professional development need, where musicians also report they are not currently engaging in much professional development include:
 - advertising, marketing, publicity and promotions
 - business administration and management
 - accounting, financial management and tax
 - networking
 - digital technology and software – particularly non music-related software for business administration, marketing and social media (music-related software was well represented)
 - ensemble and band management
- Eight in ten held at least one professional membership, and APRA AMCOS was the most common type of membership held

Professional learning needs

Musicians were asked which skill development or areas of training they needed to support their music careers, and were provided with three open-ended response boxes. In total, 503 responses to this question were recorded from 217 participants. Their responses were coded thematically. The musicians reported an average of 2.36 professional learning theme needs each, across a total of 479 themes.

The two most common themes were *advertising, marketing, publicity, promotions* (corresponding responses by 30.54% of participants) and *business administration and management* (30.04% of participants) (see Figure 45). Another 15.27% of participants provided responses corresponding to *accounting, financial management and tax*, followed by digital technology and software with 14.29% and *music production and engineering* skills with 11.33%. The top 5 learning needs were also examined for demographic differences. However, no significant associations were found for career stage, genre, region or gender.

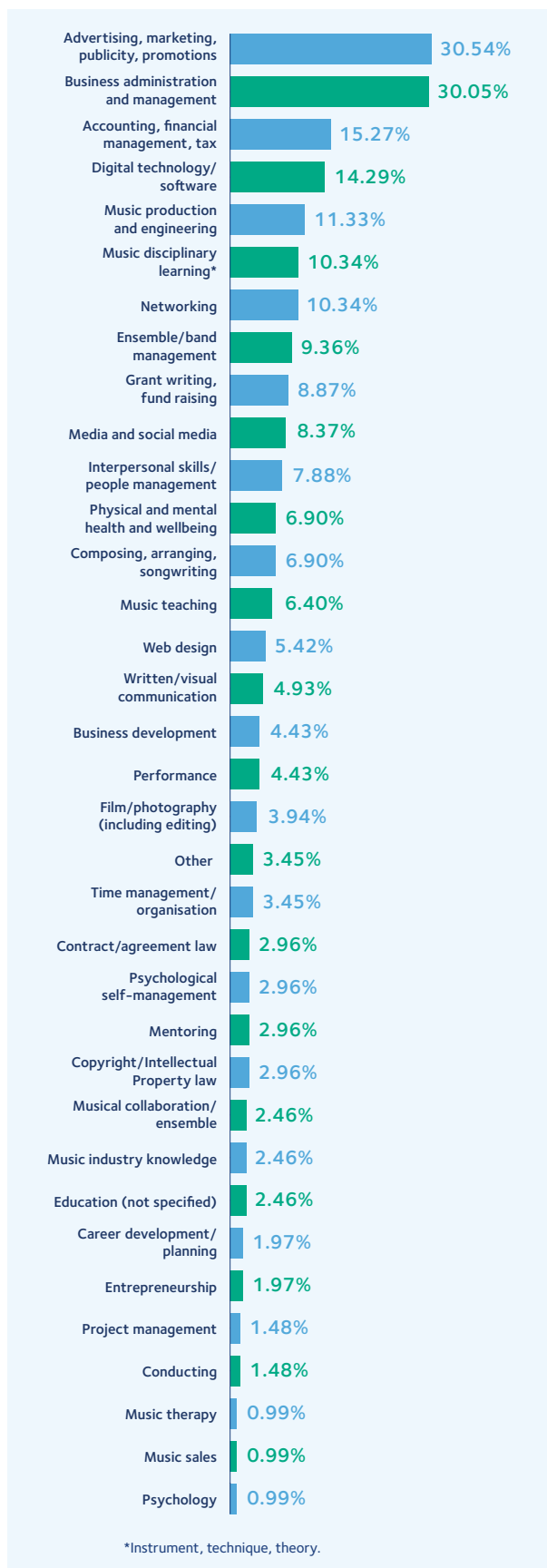


Figure 45. Participants who indicated a professional learning need. n = 203.

Professional learning strategies and activities

Seven in ten musicians (69.37%) reported that they had engaged in some type of music or music-related professional development or training during the previous 12 months. The survey participants then provided details of up to five professional development or training activities they had undertaken in the previous twelve months, including the type of learning activity, and its topic or theme. On average, participants who reported having undertaken professional development reported 2.51 activities each.

The most common type of professional learning activity reported was *workshop* (20.89% of all learning activities), followed by *conferences* (14.55%) *instrumental and vocal lessons* (14.32%) and *masterclasses* (11.74%) (see Figure 46).

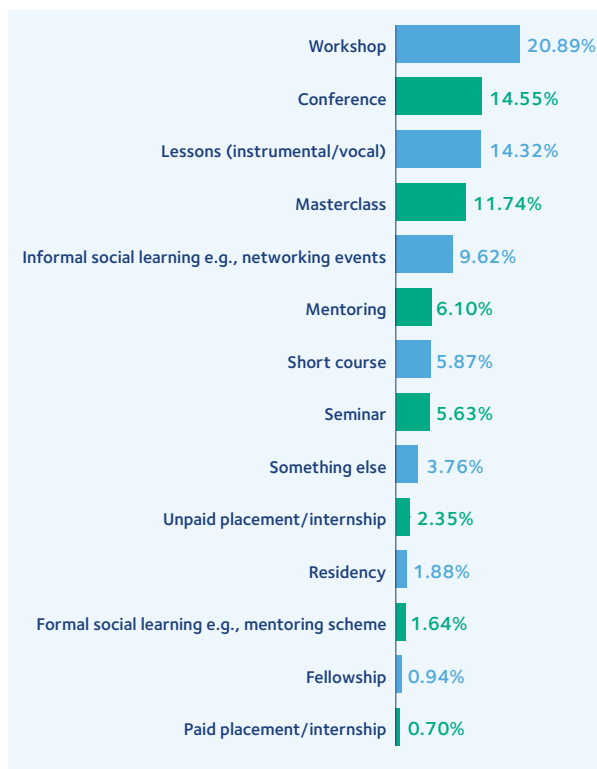


Figure 46. Learning activity types. N = 426.

The open-ended learning activity topics provided by the musicians were coded thematically, using the same categories as the learning needs wherever possible. The responses provided by the musicians about their learning activities were more specific than the responses about their learning needs, but a high level of overall concordance was able to be reached.

As shown in Figure 47, of the 359 responses to the question relating to professional learning activities undertaken, 348 were able to be coded, with a total of 1.05 themes on average per codable response. The most common topic theme was *music disciplinary learning (instrument, technique, theory)*, provided by 64.14% of participants. *Music teaching* topics were mentioned by 30.34% of participants, and 23.45% had undertaken professional learning relating to *composing, arranging, song writing*. *Business administration and management* professional learning had been undertaken by 17.24% of participants.

Broad comparisons between the musicians' identified professional learning needs and their professional learning activities in Figures 48 and 49 may indicate broad topic areas where they perceive there are opportunities for augmentation and strengthening of professional learning provision. Significant differences between needs and activities may be because learning opportunities are not available, because musicians are not aware of them, or because musicians have chosen not to engage or are unable to engage with learning opportunities; this relates to both formal and informal learning opportunities.

Topics identified by a high proportion of participants as being areas of need, where musicians also report they are not currently engaging in much professional development include:

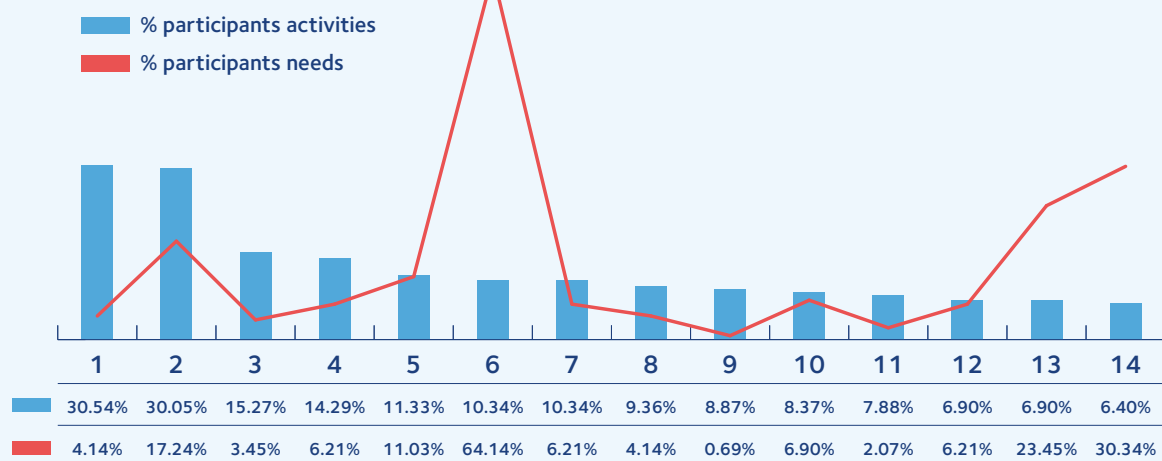
- advertising, marketing, publicity and promotions
- business administration and management
- accounting, financial management and tax
- networking
- digital technology and software – particularly non music-related software for business administration, marketing and social media (music-related software was well represented)
- ensemble and band management

Conversely, professional learning topic areas with strong engagement in professional engagement vs need include:

- music disciplinary learning (instrument, technique, theory)
- music teaching
- performance
- voice / vocal production
- composing, arranging and song writing
- music production and engineering

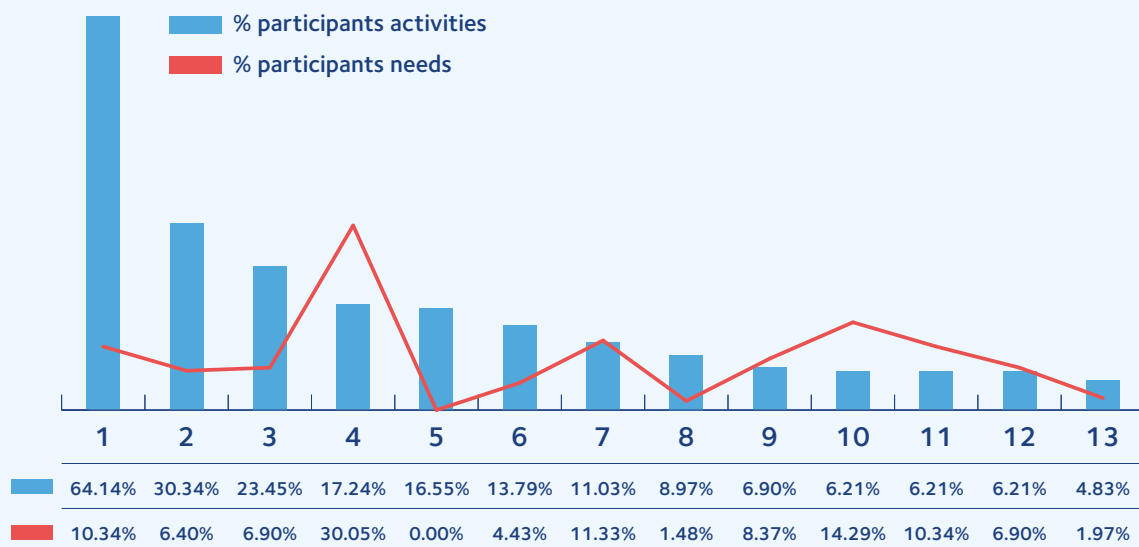


Figure 47. Professional learning topics undertaken. N = 145 participants.



1	Music disciplinary learning (instrument, technique, theory)	8	Conducting
2	Music teaching	9	Media and social media
3	Composing, arranging, song writing	10	Digital technology / software
4	Business administration and management	11	Networking
5	Voice / vocal production	12	Physical and mental health and wellbeing
6	Performance	13	Career development / planning
7	Music production and engineering	14	Music teaching

Figure 48. Comparison of most commonly reported professional development needs vs activities. N = 145-203.



1	Music disciplinary learning (instrument, technique, theory)	8	Conducting
2	Music teaching	9	Media and social media
3	Composing, arranging, song writing	10	Digital technology / software
4	Business administration and management	11	Networking
5	Voice / vocal production	12	Physical and mental health and wellbeing
6	Performance	13	Career development / planning
7	Music production and engineering		

Figure 49. Comparison of most commonly reported professional development activities vs needs. N = 145-203.

Professional memberships

Survey participants were asked which of a pre-populated list of professional memberships they held. Overall, 79.23% of the musicians held at least one professional membership. As shown in Figure 50, APRA AMCOS was by far the most commonly held professional membership, with 61.35% of participants indicating that they were members, followed by the Australian Music Centre, at 12.06%. Participants were also permitted to enter an open-ended response if their memberships were not part of the pre-populated list. Their responses revealed a wide variety of professional memberships (Appendix E).

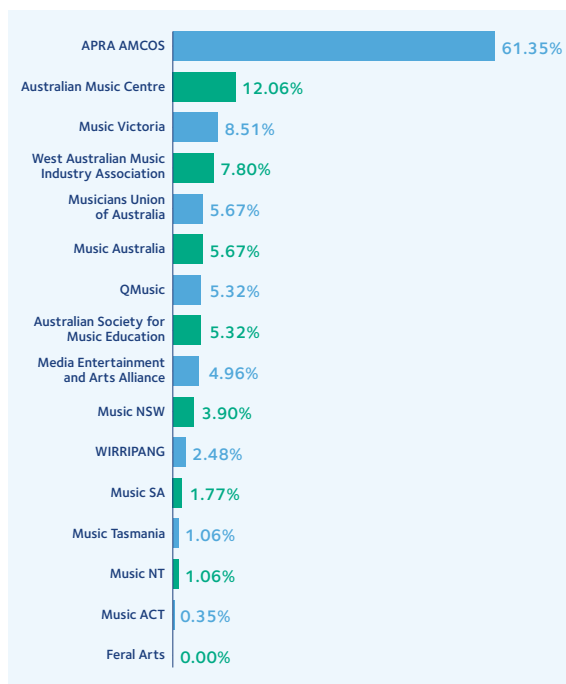


Figure 50. Survey participants' professional memberships. N = 284.

Investment in professional learning

Survey participants indicated how much they had spent on music or music-related education, training or professional development in the last 12 months. The 154 responses ranged from \$0–20,000. Over 80% of the musicians reported spending under \$5,000. The median spend was \$600, with a mean of \$2,434.63 (SD = \$4,043.23).

Significant differences were found in professional learning investment for gender [$t(151) = -2.84, p = .005$], with females spending more ($M = \$3,294.76, SD = \531.29) than males ($M = \$1,468.49, SD = \315.81). No differences were found for region of residence or career stage.

Links with *Making Art Work*

The methodological and sampling approaches were somewhat different between Throsby's studies and this one. For instance, *Making Art Work* (Throsby & Petetskaya, 2017) used telephone surveys, whereas this survey was almost entirely online and self-report. In *Making Art Work*, lists of potential participants were entirely compiled from the membership lists of professional arts organisations, whereas our participants were drawn from a wider pool through advertising on relevant social media, as well as a proportion from membership databases. *Making Art Work* contained specific screening questions relating to professional practice, whereas our survey asked participants to self-identify whether they were musicians. We had a different balance of musician types in our study, with a rather greater proportion of instrumental musicians and singers and rather fewer composers and songwriters.

Despite these differences, and also specific differences relating to individual questions asked, this study broadly corroborates and expands upon many of the issues highlighted in *Making Art Work*. The studies both indicate that musicians tend to be located in urban areas, they tend to be highly educated and qualified, and are less culturally diverse than the wider population, with the most common non-performance job role being teaching. Musicians tend to maintain multiple employment arrangements, with self-employment being common. There are slightly more male musicians than female ones. In contrast to the *Making Art Work* findings, we did not find a gender difference in terms of overall income, and this might be because of the somewhat different survey samples between the two studies.

Summary

These survey findings create a comprehensive and detailed picture of the working lives, career trajectories, economic circumstances, and creative motivations of portfolio musicians in Australia. The data in this chapter shows compelling evidence of the diversity in music practices and careers in Australia, and the ways in which musicians have different career support and development needs. The findings also show the diversity of musicians' work practices and career configurations, sources of income, and unpaid work and outline the strategies that musicians in different contexts and specialisations use to find, acquire, and/or create work and build a career in music.



CHAPTER 5: INTERVIEW FINDINGS

Complementing the insights and findings of the *Making Music Work* national survey, this chapter reports on the findings from interviews with eleven diverse Australian musicians who are navigating portfolio careers (their profiles are included in Appendix A). These interviews have provided a qualitative and nuanced understanding of how musicians are individually structuring their careers, and negotiating the challenges and benefits of configuring one's career in this manner. The musicians included:

1. Danielle Bentley: Cellist and festival curator (QLD)
2. Paddy Mann: Indie musician (VIC)
3. Russell Morris: Guitarist and singer-songwriter (QLD by way of VIC)
4. Rob Nassif: Drummer, rehearsal studio owner and band manager (New York by way of WA)
5. Emily Smart: Singer-songwriter and musician (SA)
6. Aaron Wyatt: Violist, conductor and academic (VIC by way of Western Australia)
7. Rhonda Davidson-Irwin: Teacher, choir director, composer for television, flautist, and former music CEO (QLD)
8. Sandy Evans: Saxophonist, composer and teacher (NSW)
9. Nicholas Ng: Performer and composer (NSW)
10. Veronique Serret: Violinist (NSW)
11. Lisa Young: Vocalist, composer and performer (VIC)

The criteria used to select these participants and the resulting approach is outlined in Chapter 3. All musicians navigated a range of roles and income sources. At the time of the interviews in 2016–2018, they held a range of music and music-related roles including: academic, artist management, band leader, Chief Executive Officer (CEO), choir director, composer, festival director rehearsal studio owner, and teacher. Each has a performance dimension to their work while also undertaking a range of arranging, composing/writing and/or commissioning duties, as well as performing, rehearsing and touring. Interviews covered a wide range of topics including: their background, education, career development and notions of success, networks of support and broader observations of the sector's development and changes over time (see Appendix C). By covering this wide range of topics, from the micro to the macro level, participants were encouraged to give detailed reflections on the ways in which they have developed and sustained their careers over time. More broadly, this also facilitated a rich conversation on the ways in which Australian musicians more generally can be supported to develop similar longevity in their careers. In the following sections, this chapter provides an analysis of the collective themes to emerge across the interviews conducted in this phase of the research.

Building and sustaining a music career

Each of the eleven musicians interviewed outlined a range of push and pull factors that have influenced the ways in which they have entered into, maintained, and navigated their careers. These factors were primarily connected to finding a balance between creative and financial concerns: musical dreams and financial realities. Significantly, the following factors were found to be critical in how these musicians have sustained their careers:

- peer networks and networking;
- education, training, and a commitment to lifelong learning and professional development;
- maintaining physical and mental health;
- life-work balance; and
- navigating the multiple dimensions of a portfolio career (including income and finances, risk taking, digitisation and digital technologies, and entrepreneurship).

The following sections unpack data from the interview participants in relation to these critical factors.

Peer networks and the importance of networking

Peer networks and the ability to network have been vital to the ways in which all eleven musicians have developed and maintained their portfolio careers. These peers and networks have been key to musicians feeling supported in their careers, influenced their collaborative processes, impacted upon their ability to generate work, and the ways in which they learn new, or build upon existing skills.

Not surprisingly developing a strong network of peers – inclusive of fans, band mates, colleagues, and industry professionals – was elemental to the sustainability of all interviewed musicians' careers. Peer networks serve as both a safe environment in which to develop and share ideas as well as a way to generate new work opportunities. Maintaining these strong relationships came across as an underlying driver in sustaining a music career. Veronique Serret suggested that peer relationships not only provide musicians with a source of emotional support and encouragement throughout their careers, but also influence their experiences of creating music:

[It's about] building relationships with people over a long period of time. So, it's not just a work relationship when it's music related, because there's a lot of time and touring with people and all those kinds of things. There's people that you just connect with and you get on with and you want to work with more. A lot of them have become my friends.

For Lisa Young her closest connections in the music industry have come in the form of collaborators. As she explained:

Those connections are deep and rewarding, because if you play music with someone over a long time, you write for them and you know their voice. Those relationships are very special, it's really great playing music with people you have a friendship with.

Young has an especially positive view of collaborating, which is shared by other musicians such as Sandy Evans. Evans, a saxophonist, credited her experiences of intercultural collaboration with Indian classical musicians as being a particularly formative career event:

It's very practical, it's very engaged and it's also very holistic in terms of [the other musicians] being concerned about your whole being. I think that meant a lot to me as a teacher and as a player.

Collaborating and building a network of peers has been a central tenant to the ways in which musicians obtain work. As a musician with a non-western background, Nicholas Ng reflected:

I find that one project leads to another often. For me, I don't know if it's the same for other artists, but I've had these long-term partners in certain disciplines, like in the theatre/dance world. It's the same people. And then with composition. And also, because I work in Chinese music it's always the same people here [...]. I find that, once you do a certain project, you're often working with the same or similar people, and that really helps for getting other work, because they will keep you in mind for a future project.



One reason which can account for the importance musicians place on their peer networks is their heavy reliance on contract-based work arrangements. Insights from existing literature (Bennett, 2008; Hracs, 2010; Throsby 2008), concur on this: all eleven musicians are predominantly engaged in contract-based work, which includes being contracted by organisations for purposes such as performing (one-off or as part of a performance season), composing, ensemble/orchestral conducting and workshop facilitation, or are involved in establishing their own businesses in order to provide a service (such as one-on-one music teaching), or a resource (such as a rehearsal space). In addition, within the performance space, several musicians have contracted others for the purposes of performing as part of an ensemble or at a festival.

As outlined in literature examining the role of social networks and the associated capital in the creative and cultural industries (Ballico, 2015; Coulson, 2012; Dowd & Pinheiro, 2013; Farr-Wharton et al., 2015), these working arrangements have been underwritten by both a well-established peer referral process and the recognition that a positive reputation – encompassing one's musical skills, ability and work ethic – is central to the likelihood of whether or not musicians will continue to be approached for future work. As Aaron Wyatt explained, in relation to his experiences of working on a contractual basis as a classical musician in Perth:

Being a musician in Perth, where it really is quite small place and a very tight music scene, you get known pretty quickly whether you can play or what you can't play and so I've been lucky that I haven't had to go really looking for work so much.

The ability for musicians to develop, nurture and leverage these networks is inherently tied to their ability to network. Networking is recognised as being a critical skill in career development; however, it was acknowledged that it is not a skill that comes easy to all, as Emily Smart reflected:

Without connections you're on your own. There's no-one really thinking about hiring you or getting you involved in their projects, so it's pretty pivotal to expand your creative reach. If you're not actively getting involved with the industry, or getting out there and talking to people, then most people won't know about what you do or how you do it, and it's less likely that you're going to get the opportunities that you need to help you generate more work and sustain what you're doing.

Another barrier to building enduring networks is the transient nature of music scenes, as Rob Nassif explained:

It's always changing because music is such a transient game. So people that are in it now will probably not be in it in five years' time. You see it here all the time, like the young dude that's been slogging away from like 18 to 24 and then he goes on a gap year trip to London and never comes back. That's fine. But the network thing is great and really important; I've leaned on it heavily.

Underpinning all of the musicians' engagement with their peers has also been their role in supporting the learning and development of new skills. This ranges from cases such as Rob Nassif, a drummer, who learnt to play the drums from one of his bandmates, to Emily Smart, who engaged in a range of mentor-mentee relationships to further her knowledge, as she explained:

I've had a few people that have taken the time out to answer questions for me whenever I had them or just have a coffee with me and go over stuff. [I have established relationships with] mentors that know things that I can't possibly know, that have had the experiences that I don't have. I think that has been really important. I'm lucky to have a few people in those areas that have helped me along the way.

Reflecting a similarly positive stance on mentoring, while also acknowledging its limitations, Rhonda Davidson-Irwin explained that when she transitioned into the CEO role of a national music advocacy organisation, she highly valued the opportunity to be mentored:

Mentoring I think is also tremendous as well, particularly when you're getting into a role, like I am as the CEO, I think mentoring is incredibly important, and being able to learn from others and to seek advice. I think you need really good information to be able to then make a good decision, and your decision can only be as good as the information that you're given at the time.

It is clear that networking requires gatherings of artists, and potentially spaces and places for these gatherings to take place. Networking is as much about rehearsing, performing, jamming, listening, attending gigs, as it is about more formal performing arts markets. The health of the live music scene therefore impacts directly on the ability for musicians to engage with peer-to-peer networking. So too the health of the arts funding sector, and the ability to actualise new collaborations affects the peer-to-peer networking opportunities as will be further explored later in this chapter.

This notion of mentoring and networking also extended to considerations of supporting and educating the 'next generation' of musicians through teaching opportunities, and working within community music contexts, such as running community choirs and conducting community orchestras. Six of the interviewed musicians were engaged in teaching at the time of this research. This included one-on-one music tuition in private and high school settings, musical instruction in universities and TAFEs, and in primary school classrooms. In addition to this, two spoke of workshop facilitation.

Across these experiences was a strong theme of teaching being a way through which one can connect with, and also give back to the music community. As Aaron Wyatt reflects: "I think most important for a musician, if they can teach, should teach, just because it gives so much back to the next generation

of musicians and I think it's a very important role to have." Reflecting a similar stance, Nicholas Ng explained:

The teaching I love because it's a way of making sure that the music will continue, I guess. Who knows what will happen later on, but the fact that there are people interested in learning my instrument means a lot to me. It's also my contribution to the promotion of multiculturalism.

These insights from the interviewed musicians highlight the level of reciprocity required for peer networks to flourish. All musicians spoke positively about the ways in which they themselves assist others in their careers, and in turn, benefit from others' assistance in their own.

Education, training, and a commitment to lifelong learning and professional development

The eleven interviewed musicians held formal qualifications. Four had completed doctoral degrees, with another underway. An additional two had completed, or partially completed a music or music related Masters' level degree, while two more held bachelor-level degrees, one in music and another in commerce. Of those who held PhDs, two had articulated into such degrees without undergraduate music training, instead gaining direct access to a Masters' degree by way of decades of professional music experience. The remaining two had engaged in formal post-secondary level education: one had studied audio engineering at a private registered training organisation, and another had studied economics and accounting at a Diploma level. In addition to this, ten of the musicians had engaged in some form of ongoing formal musical instruction during their childhood and/or adolescence, be it private one-on-one instrumental and/or voice tuition or as a part of a high school-based music program.

Reflective of existing criticisms in the literature of university-based music training replicating "knowledge based teaching" and placing a significant focus on the mechanics of performing and composing (Rowley et al., 2015, p. 1), a number of the interviewed musicians did not feel adequately prepared for how to navigate their day-to-day career post-degree. While they recognised that their training supported them in developing their capacities in listening and performance skills, which they utilise on a daily basis, particular reference was made to how higher education curricula prepared them in aspects such as business administration, promotion and publicity. As Paddy Mann reflected:

It was a really, really great music course in terms of repertoire. Of course, I learnt how to write music and read music [... however] even though it was a focus on classical music and composing, it didn't train you in that aspect of trying to 'make it' as a composer.

Aaron Wyatt similarly reflected that his degree did not train him in how to navigate his career from a business administration perspective, explaining learning those skills "was very much a learning-while doing, a baptism of fire." Nicholas Ng commented on the impact of funding on his ability to engage with one-on-one tuition during his degree, though recognised this helped to develop his autonomous learning:

We had all those funding cuts from the time I started my Bachelor of Music at Sydney University in 1998. With this memory, I often don't feel very qualified as a composer since various courses were removed—I only had half an hour of tuition a week with Ross Edwards. So I had to engage in self-learning, you know, self-teaching. I sometimes wonder if I'd write better music if I had more training.

Given the prevalence of Australian musicians engaging in the portfolio careers, and more often than not being required to undertake a range of management, business administration and promotional and publicity duties, these insights have highlighted the importance of integrating these facets of training in curriculum development. The question of balancing the curriculum with repertoire, contextual and entrepreneurial skills is worthy of further investigation. Recent research on graduate outcomes for higher degree candidates might inform this work (see Draper & Harrison, 2013, 2018; Harrison & Grant, 2016).





Beyond formal learning, musicians interviewed noted that ongoing learning and professional development opportunities played a vital role in their ability to expand the breadth of work they could undertake. Ongoing learning experiences broadly encompassed those which would enhance an existing or develop a new musical skill, or those which would develop ancillary skills that would more broadly support their careers. Musicians would engage in learning opportunities through one-on-one musical tuition, or a short course on business-related matters – or through mentoring or self-directed learning. In addition, some of those who worked within the higher education sector were required to engage in workplace health and safety and/or teacher training as a part of their conditions of employment. Moreover, those who were research active academics engaged in a range of conference opportunities.

In contrast, Russell Morris and Rob Nassif are largely self-taught musicians. Both have drawn on the expertise of peers when learning how to play the guitar and drums respectively. Nassif also values a ‘learning by doing’ approach and has sought out professional lessons on two occasions to support specific projects. As he explained:

Before the second album I did get ten drum lessons with a great drum teacher. That was really helpful because I’d sort of got to a point and I thought it would be good to actually learn. So I did ten lessons with [one teacher] and then for the fourth album I did another ten lessons with a different drum teacher. But really, what you find is, the way you learn as a musician is that, when you’re touring and you’re playing every night, you learn off the other musicians. We did an eight-week tour with The Living End, you see the professionalism that they bring to the stage and what they’re doing and you mimic that. So, the best way to learn is through doing, and playing shows is really the best way. I tell all the bands [at my rehearsal studios]: it’s great that you rehearse, and you need to rehearse, but one show is equal to ten rehearsals, really.

Reflecting a similar approach to learning, Morris says: “I like to keep my explorer shoes on. I like to be the type of person that continues on to discover new things and discover new things musically and record new albums.” This approach to self-directed learning has similarly supported learning ancillary skills which can more broadly support career development. For example, Emily Smart engages a range of approaches to her learning processes, as she explained:

In terms of new things, I probably would now just research online and teach myself. I mean, if it was something really specific I wanted to learn then I’d probably find a course or something to do it, which could be online or could be somewhere I would attempt, but usually it would just be short courses or a mentorship of some kind.

Lisa Young and Rhonda Davidson-Irwin both engaged in learning through a combination of conferences and formal music lessons. As Young reflected:

I’ll present at a conference and also enjoy engaging with other presentations on offer, for example if it was a choral conference. I did a week of professional development at the end of last year in vocal mechanics. It was fantastic! I had a lesson on my *aslatuas* (Ghanaian hand percussion) last year. If my voice teacher was still around, I probably would still go for lessons, but unfortunately she passed away. But it’s lovely to have someone to work on your voice with another set of ears, and to keep exploring and learning. Probably what I would like to do next is a bit more percussion training.

Davidson-Irwin places a high level of importance of continuing to learning, and reflected on how this supports a range of roles she engages in.

I try and attend as many conferences as I can, that’s feasible in the time. I think that’s really important to open your eyes and ears to a huge amount of conversations. And I think that’s what’s been very interesting for me because I suppose I’m more aware, from a state-wide base, because I’m from Queensland, learning the national perspective of where things are in regards to music education, contemporary music, policy on a national level, has been challenging, and therefore the only way I’m able to get an understanding on a state-wide basis is to attend roundtables, discussion groups, talk to people, go to professional development where I can to hear what conversations are happening at the time.

As Davidson-Irwin notes, time constraints can impact upon musicians’ abilities to engage in ongoing learning opportunities, particularly in formalised settings. As Sandy Evans reflected:

I think it would only be the normal barrier that occurs with most things which is just the lack of time of trying to do many, many things. For example, one thing I would really quite like to do is undertake some training in conducting. I just don’t feel I’ve got time to do that at the moment.

These musicians are all developing their individual approaches to learning and then accessing a bespoke suite of activities that suits their needs inclusive of on-the-job training, specialised courses, accessing more experienced mentors, inter-generational learning and undertaking formal tertiary training. Teaching too forms part of this ongoing developing, with the unpacking of the physical and technical demands of playing, alongside the sharing of career development, part of the cyclical nature of a musician's career.

Maintaining physical and mental health

A number of the musicians interviewed talked about the importance of maintaining their physical and mental health as they traversed such precarious, and oftentimes physically and emotionally demanding, working conditions. Their strategies ranged from engaging in day-to-day activities to support their own health and wellbeing, such as engaging in non-musical hobbies, as well as committing to regular exercise and healthy eating and sleeping habits.

As contract-based portfolio musicians, each individual is responsible for maintaining the necessary levels of physical and mental health required to undertake the diversity of activities required. Here, the push/pull factors are between giving of one's time and creative energy, and carving out a place for self-care. Rhonda Davidson-Irwin explained the importance of self-care for portfolio musicians:

People are always wanting part of you and you're always giving so much to so many, it's crucial that you try to look after yourself as well, and that can be a challenge, to have the time to nurture your own soul, to nurture your own [professional development], and to keep up the enormous workload where you are affecting so many people and so many organisations.



The interviewed musicians spoke of ensuring they worked out regularly, meditated, or participated in activities such as Buddhist chanting, or in hobbies such as making tapestries, and singing for pleasure. In addition, prioritising eating healthily, minimising alcohol intake, and sleeping well were also noted as being vitally important, particularly during particularly busy work periods. As Aaron Wyatt explained:

There are times when it does get a bit much, especially when there's major productions. It's just a lot of hours and I guess you just have to make sure that you still remember to schedule time for actually things like getting dinner or sleeping, those small essentials, which I mostly manage to do.

Reflecting a similar importance of being mindful of one's drug and alcohol intake, Rob Nassif explained:

I can only speak for myself but I made a commitment, as a teenager really, that I would never do drugs [...] It's just about trying to find a balance in your life. It is tough, though. I think about the early days of touring, I was drinking like a champion. After doing that for a couple of years you go like, well, I'm not feeling so great. So, then I actually stopped drinking before I played; that became like my new rule on tour. Before I play a show, I wouldn't drink. Then after I play, I would have a drink or two. It's just finding a routine that works for you.

Nearly all of the interviewees mentioned the positive emotions they feel when they connect with the audience or have what they feel is a good performance. Danielle Bentley, for example, noted that a challenging experience at university, which initially led to performance nerves, actually resulted in her learning how to "toughen up", while Paddy Mann explained that while he can "be quite melancholy," "it helps with the music as well."

This notion that these challenges can also deepen and enhance one's performance, and emotional connection with audiences was highlighted by Rhonda Davidson-Irwin. Conversely, she also mentioned how this sense of connection can then in turn enhance a musicians' wellbeing: "Sometimes when you're bogged down with the day-to-day of huge difficulties, you go, wow, that was extraordinary, people really connected to that performance, and what a privilege it is that I'm able to do that; and that does sustain me as well in my emotional health."

Three of the eleven interviewees reflected that at times they felt depressed or anxious, however none disclosed that they had received a mental health diagnosis. One, such as Paddy Mann, who did not experience such health issues himself recognised that musicians he works with do seem to suffer from such conditions. At the time of his interview (November 2016), he reflected that he did not know of any available resources for musicians to assist with these challenges, and that "if you can't afford counselling, then you're kind of on your own."

It is worth noting that organisations such as Support Act, which provides a range of financial and counselling resources to assist musicians and industry workers in times of need,

have been in place since 1997, but only in recent years has their prominence in the sector increased, culminating with the launch of a 24 hour health and wellbeing helpline in 2018. In its first year of operation, the free, confidential phone counselling service has been used by 150 artists, road crew and music workers from all genres to talk about any aspect of their mental health or wellbeing. They utilised close to 400 counselling hours, according to Support Act. The breakdown by sector is 74% artists, 14% music workers and 12% crew. 54% of helpline users were aged under 35 years and just over half are female.

Nicholas Ng and Rhonda Davidson-Irwin explained that they experienced feelings of anxiety, social isolation and stress as the result of being performing musicians, with Ng reflecting “I sometimes wonder why I still perform because I get so anxious, but then I still enjoy performing.” In comparison, when discussing her feelings of isolation and stress, Davidson-Irwin explains: “You feel that you are quite isolated [in a music career] because there’s so much of it that does happen independently yourself” and that “You are as good as your last performance, and that is incredibly stressful and incredibly challenging.” Reflecting on the broad challenges associated with pursuing a music career, Russell Morris explained:

It’s a very rocky road sometimes. Like at one stage I lost my house and lost everything and that can be quite traumatic, but I’m usually quite resilient. I do suffer swings in emotion almost like manic swings, but not so bad that I can’t dig myself out of a hole.

The interviewed musicians also expressed that they experienced the resilience required when navigating a range of emotional, physical and financial struggles resulting from a range of music activities such as late nights, and extensive time spent rehearsing and touring. As Rob Nassif reflects, “you have to spend years touring in a van, long hours, it’s really tough.” Poor lifestyles, such as excessive drinking, smoking and exposure to noise pollution were also seen as negative contributors to health and wellbeing (see also Dobson, 2010). A lack of time was also credited with being the primary reason for many of the musicians not engaging in formalised professional development opportunities. Engaging in these opportunities has the potential to support a wider breadth of activities undertaken by the musicians, potentially supporting a diversification of income streams and therefore more financial security and a greater sense of work-life balance.

Two interviewees, in particular, explicitly talked at length about their experiences of burnout and exhaustion. One of these musicians revealed that she would go through periods where she would get sick too often, typically during intense periods where she was “performing in the festivals, as well as coordinating and looking after all these different aspects of stuff.” Similarly, and as we discuss on in greater detail below, another reflected that he would find himself having to “waste otherwise productive time” chasing the payment of invoices, reflecting “it’s little things like that that could cause burn out in the freelance world.”

Further impacting this, is the need to work through periods of illness as a result of the nature of the contract-based work which the musicians relied upon. While all musicians had stability in regards to being able to regularly acquire work, and the ability to draw an income through the music-related businesses they had established or their non-music work, some still experienced negative impacts on their mental health and wellbeing as a result of the realities of a portfolio career structure.

Life-work balance

Several interviewees revealed that they have felt overwhelmed, disheartened, and that they sometimes did not receive adequate recognition (or attention) for their work. Likewise, some frequently worried that something could go wrong. Many commented on the significant pressure they faced in order to turn creative work into money, and that it could, at times, be mentally and emotionally straining. Numerous participants expressed feeling the negative effects of ‘burnout’ and exhaustion due to a lack of breaks from touring and performance work, as well as being self-managed or working on a freelance basis, and therefore having to take on a range of business and administrative tasks which they may not be adequately trained for. Feelings of burnout and exhaustion persisted despite the musicians being able to be selective about the jobs they would engage in from a financial standpoint.



Related to the challenges associated with one's health and wellbeing has been musicians' ability to establish work-life balance in their careers. Being able to manage their time in order to avoid negative health and wellbeing repercussions, and maintain healthy relationships and a life outside of music emerged as significant considerations for the interviewed musicians. For the musicians interviewed, their work-life balance was strongly linked to issues surrounding time management. This was revealed to be one of the most significant challenges they face when navigating their portfolio careers. Time management issues were experienced as a result of the fluctuations of engaging in particular forms of music work such as performing which was heavily concentrated on weekends and weeknights. The seasonal nature of music work and the need to juggle multiple projects with different timeframes created time pressures for the musicians interviewed. Likewise, the time investments associated with touring and how this impacts other life commitments, irregular working hours, and the impact of having a lack of personal time due to a range of business and administration duties, all caused work-life pressures for the musicians interviewed.

Two musicians, Paddy Mann and Rhonda Davidson-Irwin, reflected on the impact their careers have had on their ability to spend time with their families. Mann explained that having a child and being a musician meant having to find a new sense of "balance", as parenting is so all-encompassing and it just changes your brain or something." Likewise, Davidson-Irwin reflected that the performance aspect of her career has required a greater deal of flexibility and understanding from her family:

My children at times only ever saw me wearing black because I would be going out the door and they would cry when I wore black because they knew I would be going out to perform. So there's challenges with family life and I wanted a family; that was important to me. So they've had to be flexible in knowing that you may not see me for two or three weeks but you'll see me a lot in the next week or so.

All the musicians interviewed placed a strong focus on performance, and therefore resulted in a sizeable amount of their work taking place on weekends and at night time. Many described the negative impact this has had on their work-life balance in relation to interpersonal relationships. For example, while Veronique Serret reflected that many of her collaborations and work opportunities were facilitated through colleagues who had become friends, she explained that a career built on weekend and night time work presented challenges. As she described, explaining that "fitting in friends [is hard], but important things, like friends' birthdays and weddings and stuff like that, often you're away and people stop making the effort." Echoing a similar sentiment, Russell Morris explained:

My partner, she's not real happy when I'm away all the time, because sometimes I'll have to go on the road for six days, and then I come back and I'm back for three days and then I'm gone for three. That gets to be annoying for her, but it's also annoying for me.

The ways in which musicians' work-life balance has been negatively impacted by the portfolio career structure is inherently tied to the ways in which they generate their incomes and are able to manage their careers from a financial standpoint.

Navigating the multiple dimensions of a portfolio career

As noted earlier in the report, the circumstances and pressures of this precarious career configuration can have a direct impact upon musicians' lives and experiences. The push/pull factors of creative freedom/financial income are challenges that include time management issues, as well as those pertaining to finances and income.

Income and finances

Challenges relating to the generation of income, and the managing of finances were a central theme to emerge in the interviews. These included difficulties in being able to generate a liveable wage, a lack of paid, or appropriately paid, job opportunities as well as the highly competitive and continually tightening Federal and State Government grants schemes. Societal attitudes relating to the value of music and toward music as a viable career option also influenced musicians' attitudes toward their income and finances. Financial stresses were further impacted by the need to avoid over-exposure and 'over-gigging', thus reducing the amount of income generated by performances, in order to develop a long-term sustainable career. As argued by Bennett et al. (2014, p. 170), work as a musician involves complex, overlapping relationships between commercial, not-for-profit, public and informal community sectors, and between specialist, support, embedded and non-arts ("non-creative") work. As such, "the scope for innovation and enriched creative practice exists in the relationships between this work across and outside the Creative Industries. This goes beyond the ability to be more innovative or less market oriented by offsetting the precariousness of specialist Cultural Production work with the certainty of embedded or non-creative work".

The literature suggests that most musicians work in a highly diversified set of roles, often concurrently, and frequently as a result of the contract-based working arrangements discussed earlier with regard to the importance of networks to the development and sustain of careers (Bennett & Burnard, 2016; Farr-Wharton et al., 2015; Le et al., 2013; Menger, 1999; Throsby, 2010; Baumol & Throsby, 2012; Tolmie, 2017). An examination of the decision-making processes involved in the traversing of a range of roles reveals that a balance is sought between financial stability and creative fulfilment.

All interviewed musicians generated an income from their music and music-related roles. None had a sole source of

income, and in one case the amount generated was only enough to cover their costs. Income was derived from a range of sources such as: performance fees, the sale and commission of compositions, teaching and workshop facilitation fees, song-writing royalties, song licensing payments, the sale of publishing rights and the obtaining of state and federal government grants and fellowships. In addition, two of the musicians ran for-hire music rehearsal studios which provided them an additional source of income, with one of these musicians also receiving an income from their role on arts' organisation boards and another generating an income from their position as the CEO of a national music advocacy organisation. Additional income was derived from a range of non-music sources, and influenced by their ability to provide financial stability and the flexibility to continue pursuing music. Emily Smart for example runs a real estate property management business, affording her a combination of financial security and the flexibility to continue pursuing a range of music and music-related roles. Such financial security is vital, as the interviewed musicians often found themselves having to invest their own money into their careers, such as paying for studio time, covering the costs of event publicity, topping up the salaries of co-performers, and providing the financial capital in order to establish new businesses. As Smart explained:

The income that musicians make now in a lower tier [career] is not on par with the amount they have to put in to generate that income, particularly with recording and releasing music. You know, spending thousands of dollars potentially just to put out some songs which you're going to make a dollar, that you sell online or just get downloaded for free by people, or Spotify make less than a cent. So it's become even harder for the smaller acts to make money in that way.

All musicians reflected that the pursuit of their music careers involved some degree of financial risk taking. None expected to become wealthy from music, a perspective they often explained shifted over the course of their careers. This shift in perspective was often in line with a shift in their self-perceived notions of success. Over the course of their careers, success evolved to include: being able to 'give back' to the music community, being able to support other musicians, and deriving sense of creative satisfaction and cultural impact through their work. Certainly, being paid for their music was viewed as being a formative event, but once they had started generating an income, it was not the prime motivator for continuing to pursue a career.

In relation to the topic of motivation, Paddy Mann reflected:

When you're young you kind of think success means making money from album sales and travelling the world playing gigs wherever you want or whatever. And you quickly realise that that's very, very difficult [to achieve].



Mann believes that these challenges are due in part to the need to invest "the same if not more energy" on the business components of a music career in order to succeed at a higher level. The administration associated with a self-managed music career – which related to all but two of the musicians – was revealed to be a cause of particular financial and professional stress, while also requiring an investment of time which ultimately took away from creating. It was also recognised that not all musicians were comfortable with discussions regarding how much they wish to be paid for the services. One musician reflected on this, explaining that their fees were often determined by the budget of contracting organisations, rather than how they would have liked to be paid. Several musicians lamented not only on the challenges of having to undertake such administrative duties themselves, but that it was a skill they were not trained in, including those who had studied music at university. To this end, this research reflects an acknowledged need for musicians to be able to access additional support to further develop their entrepreneurial abilities and associated administrative skills (Bridgstock, 2013; Hracs, 2010; Tolmie, 2017; Toscher, 2020).

Further complicating the ability for musicians to manage their income and finances are the challenges associated with navigating periods of no income, either through a lack of paid work, or through the slow payment of invoices. Aaron Wyatt has spent much of his career engaging in contract-based performance opportunities which reduce significantly in the Summer months. As he reflects: "There's always that build-up to just try and save as much as possible knowing that you need to survive for a few months without necessarily much of an income."

Wyatt explains that the need to spend considerable time pursuing the payment of invoices ultimately takes away from one's ability to engage in more productive aspects of music such as its creation, and views this as being a contributing

factor to 'burn out' in the freelance music sector. At the time of this interview, Wyatt had recently accepted an offer to take up a full time academic post in Melbourne. A combination of financial security was particularly appealing to him in his new role.

The breadth of roles undertaken by the musicians were ultimately influenced by their need for balance between financial stability and creative fulfilment. All felt they were in a position to be able to be selective in the work they engaged, however, they recognised that being able to do so was the result of feeling established enough in one's career to be able to say 'no' while also requiring the self-belief and confidence that opportunities would continue to present themselves into the future.

Linking back to the earlier discussion regarding the importance of peer networks, it was also recognised that a strong network of peers on whom one could rely for repeat work assisted in alleviating the stress associated with continuing to seek new opportunities. For example, Veronique Serret has worked across a range of settings in the classical and contemporary music sectors. Initially taking up a full time orchestral role Serret decided to move into contract-based engagements with a range of orchestras and opera companies, as well as studio sessions and live performances for contemporary musicians. A well-established network of peers coupled with a strong reputation has resulted in Serret no longer having to seek out work opportunities, while also being afforded autonomy as to what she chooses to take on. She reflected:

When I decided I wanted to go a different path from just classical work, it's taken a bit to get to the point that I feel like there's a lot of things I can say 'no' to now, and also, when I get work offers, sometimes I might know that that's not something I want to do, or yes, that's something I'd like to do.

While the musicians are able to be selective, and are able to leverage a range of networks and reputation capital, many reflected on how they had experienced challenges getting to such a point. This would result in the structure and breadth of their careers being more strongly dictated by an inability, as opposed to ability, to generate a liveable income. Reflecting on a particularly difficult period in his career, Russell Morris explained:

For a while there, I couldn't make any money. I would probably do 15 shows a year at the most, and the rest of the time I was trying to write television ads, commercials and things to make money so I could survive, and that was really, really hard. I ended up losing my house and it got really, really difficult.

The diversification of musicians' roles not only involved an engagement across a range of roles, but also an engagement of similar kinds of work across a range of settings and different formats. For example, it was not uncommon for those who engaged in teaching to undertake a range of one-on-one tuition or studio-based teaching as well as workshop

facilitation. Similarly, all musicians engaged in live performance to sustain their individual practice and to assist in generating an income. This included as a soloist or solo artist, as part of a band or ensemble, or in an orchestra. Some would traverse a range of these structures, and perform across a range of artistic and non-artistic settings within the performance field, demonstrating a nexus between the artistic and service field which music can occupy.

For example, both Lisa Young and Danielle Bentley have undertaken 'standards' or 'background' performances in order to make money. In such instances, they performed work composed by others, in settings where music was provided as an ancillary entertainment option to an event such as corporate function. Young no longer engages in such work, however, recognises that they provide a crucial learning opportunity for emerging artists, while Bentley explains they remain a regular source of income: "It's bread-and-butter; a lot of people do it [...] It's just something that we do as part of how we earn money."

Bentley's skills in being able to engage in this kind of work, and her willingness to do so, has afforded her the financial stability to engage in other kinds of work. Bentley is the only musician interviewed who does not write or compose music, instead performing that written by others, including in a range of opportunities to commission others to write music for her. As such, Bentley's financial stability through these kinds of performances not only allows her to diversify the kinds of roles she engages – such as the establishment of a festival and the development of a 'house concert' series – but also to engage others through such endeavours. As discussed above, engaging others forms a vital component to the establishing and maintaining of networks, ultimately leading to a continued stream of work opportunities.

Performing live was a central experience across all the interviewed musicians' careers. The role performance played in one's overall career trajectory influenced their frequency, size and scale. Reflective of existing literature (Ballico, 2013), musicians who engage in performances of a particular scale and/or who schedule performances largely based around the promotion of recorded music, are particularly vulnerable to over-exposure. The resulting limitations on how many performances can be undertaken ultimately impacts musicians' ability to make money. Russell Morris' main source of income, for example, comes from performing live. He undertakes a range of tours, stand-alone performances and festival engagements, and as he explained, he must find a balance between ensuring he can generate enough of an income for himself and for his band, while not becoming over-exposed:

I've spoken to my manager about this. Of course your manager always wants you to keep working. My problem is also the band; I need to keep them eating. So I'm trying to propose a way this year to chop it up, so I'll say to the band, right, this month is off completely; so what you do is you take this month and you work with some other people, which they can do but they need to have plenty of notice.

The financial cost associated with performing live represents another challenge for musicians. In some instances, poor rates for performance fees resulted in one interviewed musician supplementing the income of their bandmates with their own money. Broadly the costs associated with touring have influenced their scale and duration. A recognition of needing to balance the financial risk and associated losses has impacted the ways in which they are able to occur. For example, as Paddy Mann described:

I'm very careful. When I tour, for instance, I'll play shows in Melbourne, like 20 people, on stage, and then I'll go and do a solo gig in Brisbane because I know that, you know, I could get ten people to the gig and I'm not going to spend a zillion dollars on flights. I'm not crazy or just silly like I think some musicians are. They try and they do this, and they just think that if they do it it'll work out or something. I mean, I know people who do that that are inspiring but other people who do that, who are just, you think, oh God, what a hopeless lifestyle, and it really disheartens you, and you feel pity, and it's just not very nice. So I've always been really careful.

In other cases, the recognition of the role touring plays in being able to develop audiences in new markets – which is particularly pertinent to the contemporary music sector (Ballico, 2013) – has seen musicians incur the financial losses associated with doing so. For example, Rob Nassif explains that it took more than a decade for him and his bandmates to begin to draw a regular salary from their music, despite having sold their publishing rights to their music and the fact that they were touring Australia regularly. He would initially subsidise his income working in a casual customer service role, and then through part-time employment at the rehearsal space he would eventually purchase and rebrand in 2010. A combination of an album generating particularly high sales, which in turn supported significant touring around the country, including a high-profile national touring festival slot, meant that after

more than a decade together the band were able to begin to draw a salary. Reflecting on what it was like for him in the years leading up to this he said:

The challenges of making it as a musician really, you don't see those challenges when you're young because you're at the start of your journey as an adult. You feel those challenges when you get to your mid-20s and you're like 25, you're 26 and that first bunch of friends—your mate that pursued his plumbing [certification], he's now a plumber and he's earning 80 grand a year, and he's now got the nice car and he's bought a house with his missus—that's when you start to feel it, because you're still living in your three-bedroom share house and there's four people living there, and there's two people sharing the master bedroom, and you're still driving the same car that you got when you were 18. So that's why, when you get to 25, 26, you start to think, yes, it's good, I'm having fun, but I've also now toured the country seven times; we still make no money. You start to worry about your future a little bit.

Societal and family pressures and expectations to earn a particular threshold of income or to work in a particular profession, have been identified as having a significant impact on whether or not aspiring musicians will enter into or continue pursuing a music career. For example, reflecting on the career pathways undertaken by those he studied music with during his undergraduate degree, Nicholas Ng said:

In the end, reality strikes and they realise that they need to earn money and possibly even retrain in another profession in order to make ends meet. So I have friends working for a bank, or running companies that are very successful. But if everyone did that, there wouldn't be much in the way of good music.

Ways in which musicians have been able to financially support themselves have become increasingly complex due to tightened arts budgets at State and Federal government levels. The musicians interviewed suggested that this tightening has negatively impacted their ability to fund their activities and, in turn, support themselves financially. As Nicholas Ng suggests: "I think the situation would be so much easier for musicians in Australia if there were more funds available and more jobs in music."

Nine of the musicians discussed the role of grants in the development of their careers and the careers of other musicians. Grants have supported a range of activities, such as the commissioning of new works, the recording of albums, national and international touring opportunities and career development Fellowships. Evidence of the competitive nature of grant programs, not all of the nine musicians had applied themselves for grants, instead factoring into future career development plans, or reflecting on their importance to the sector as a whole. Trepidation around applying for grants is further impacted by the investment of time required to do so, further compounding the time management challenges experienced by the musicians.



Risk taking

Navigating a portfolio music career requires musicians to manage and mitigate a range of risk. In doing so, musicians undertake a range of entrepreneurial duties in order to develop new job opportunities, to expand the ways in which they can generate an income and/or be creatively fulfilled. All the musicians interviewed recognised that taking risks were an inherent component of navigating a music career and reflected on the ways in which the music industry's digitisation and digitalisation have impacted how they can navigate their careers. As Rob Nassif reflected:

I bought RNR Rehearsal Studios, which was the rehearsal studio that Gyroscope wrote all our albums in. I'd spent the previous ten years rehearsing there and the previous seven working part-time for the previous owner, so I really understood this business. That was a huge moment because I basically invested all my savings, I had to take a personal loan at the bank because I couldn't get a business loan because I didn't have a credit history, and I put a lot on the line to buy the first studio. Thankfully it did really well. Without this business I can't pursue management with the energy that I pursue it with because, when you're managing a young band and developing a young band, you don't earn any income. The income only comes later. ...

In line with findings in Throsby and Petetskaya's report (2017), participants communicated the need to be careful when taking risks in order to manage the financial risks associated with pursuing creative freedom. As Emily Smart explained:

You just have to really love what you're doing. So when things frustrate you or you know you put in money into things and you can see it not getting the return that you would like in your music, you have to love what you're doing to be able to put up with that and not get completely disheartened.

This is reflected in the literature. For example, Harrison and Grant (2016) find that "rapidly changing career opportunities makes workplace readiness a moving target."

Digitisation and digital technologies

All the musicians interviewed recognised that the digitisation of the music industry has changed the ways in which they have been able to develop and sustain their careers. Positively, the sectors' digitisation has facilitated new approaches to creative collaboration, created easier pathways for booking jobs (such as performances), and created the ability to work in new ways. On the other hand, the musicians interviewed reported that it has become more difficult to have "cut through" in the music market. In addition, the ability for sale of recordings to support artists' live-gig incomes has now almost disappeared with minimal change in gig fees.

Notwithstanding the challenges, the musicians interviewed observed how digital technologies have aided in the process of music collaboration. Paddy Mann explained the situation from his perspective:

It's helped a lot in terms of being able to just zip your music wherever you want without having to put it in a post box... So you can work with people as well, that you would never have been able to have worked with. I've mixed my album via Berlin, and we were just transferring songs and ideas. That would have been crazy, thinking of doing that back in 1999.

Likewise, Emily Smart observed how communication relating to booking gigs, as well as marketing and advertising is all done online.

I don't remember having to call up and ask for a gig in the last ten years. It's all [done via] emails and online and [is] based on your social presence [...] The social media and the options online now to promote yourselves and to get in contact with people are a lot easier than they were a long time ago.

Another musician noted the adverse effects of the digital world, and streaming services:

We've kind of given into it now but we get no money for our product; it's ridiculous... you get this pittance, this pathetic little crumb [streaming services] flick at you and then just take most of the profits. It's so crazy. And that's supposed to be the saviour. It's crazy.

Similarly, Rhonda Davidson-Irwin observed:

There's a lot of challenges when it comes to copyright, when it comes to performance, and to creating music, and people are finding that difficult to navigate, and they're also finding it difficult to make money from it. How do you value a song? And what does that song cost? With downloads and copyright and people being able to instantly get music without paying for it, it goes back to valuing what we do.

Likewise, Rob Nassif observed, that while these new platforms provide greater exposure than ever before, musicians still need to find ways of connecting with audiences and marketing themselves so that people do listen to their music on the likes of Spotify. As Rob Nassif explained:

Spotify, you put it up there and anyone in the world can listen to it. That's great about the distribution. It's flat, it's easy, it's out there. But then no-one is going to listen to it because they don't know who you are. The way a lot of people, still to this day, get heard is through radio. I still think that it's still a very effective method of distribution, but it's very challenging because radio programming just gets narrower and narrower.

Sandy Evans made a similar observation:

They're generally not finding out who's on it [Internet], any sort of historical or social context [...] It's actually important to know Simon Barker was influenced by Greg Sheehan [who] was influenced by Mark Simmonds. Those kinds of lineages, which for people in my generation, we might have found out through liner notes on LPs [...] So we're having to train people in the importance of that kind of thing.

Entrepreneurship

All interview participants worked across a range of roles at any given point in time. The factors impacting on the entrepreneurial nature of their careers proved telling. These factors included a combination of the need for financial (push) and creative (pull) fulfilment, and led to musicians using their music skills and leveraging their networks in innovative and entrepreneurial ways. The examples they gave ranged from entering into fields of work such as festival and orchestra booking and programming, to engaging across a range of teaching contexts.

Danielle Bentley utilised her entrepreneurial skills to develop and commence concert series on a small scale, having done larger festivals. Out of that a new musical group has developed, highlighting how taking risks can pay off. As she described:

I've just started a new house concert series. So I guess I'm quite entrepreneurial. In August I did what might be my last Restrung ... it's the fifth festival I've put on and the third Restrung. I decided after that I wanted to concentrate on something smaller and more regular, so I started a house concert series. The first one was in January. Out of that's come the birth of a new string quartet. We're doing a concert in April.

Since her interview, Bentley's house concert series was put on hold due to her recruitment into a position at Queensland Music Festival (QMF) for 18 months. Since finishing at QMF she has established a new concert series in partnership with Woolloongabba Art Gallery (however, their first concert was postponed due to the COVID-19 virus in 2020). She is currently in talks with Noosa Alive, Noosa Regional Gallery, and Phillips Gallery at Noosa to have a sister series on the Sunshine Coast as well.

Rob Nassif established rehearsal spaces for musicians:

Owning this business, I would never have owned a rehearsal studio if I hadn't been in a band. I would not now be managing *The Faim* if it wasn't for the rehearsal studio. So everything I've done as an adult is a direct result of playing drums.

As Nassif reflected, the success of this new enterprise arose from his professional connections as a drummer.

I'd been in the Perth music scene for ten years, longer, 12, 13 years; I knew everybody. So I literally messaged everyone and I said, 'Hey, come and rehearse and hang out with me.' So we were able to go from a really low number of bands a week, in the space of six months to tripling the number of bands; [to] quadrupling.

Other times this entrepreneurial work has involved television, as Rhonda Davidson-Irwin reflected:

Writing for children's television meant that I could influence even more kids with quality music and songs to sing, because sometimes it's the only way that, with the national landscape in regards to music education – and only 30 per cent of schools in the country have music teachers – one source of getting good quality songs, and traditional songs, was television.

Summary

As these insights have shown portfolio musicians are exceptionally adaptable. In other words, they get-on-with, make-do, self-prioritise their work. Musicians are able to adapt to changing funding environments, family circumstances, changes in digitisation, and are strategic about making money. Musicians consciously work to balance an emotionally, creatively and financially satisfying career. Likewise, they are deeply committed to being an artist and advocate for the role of the arts in the broader community, they build strong communities of peers, enjoy mentoring/enjoy being mentored, and also feel the need to participate and give-back to the community.

These strengths can be observed against the backdrop of significant challenges relating to the somewhat unstable funding environment, which some might argue is reducing risk taking – a core component of musicians' development. Musicians need increasing time to work on physical and mental health, and have a lack of a safety net when things go wrong. As the data has revealed, musicians are also struggling to find venues that support smaller, non-commercial, community building ventures. As the commercial music sector declines, money needs to be sourced from less relevant fields, and as such, the administrative load can be overwhelming and undesirable.

The qualitative findings outlined in this chapter reveal that musicians place a strong importance on developing a network of peers to support them in their careers. Likewise, their peer networks play a vital role in the generation of new work opportunities as well as learning opportunities. The musicians interviewed spoke about how much they value the opportunity to give back to their communities and support others to develop their careers. All are engaged in ongoing learning and development opportunities, but their busy schedules impact their ability to do so. All the musicians interviewed are able to navigate a career which is diverse, generates an income and, broadly, creatively fulfils them. However, as the musicians interviewed explained, the portfolio music career structure continues to challenge them in relation to their health and wellbeing as well as their life-work balance.



CHAPTER 6: CONCLUSIONS & RECOMMENDATIONS

As this report has outlined, Australian musicians navigate a highly complex landscape when sustaining their portfolio careers. Factors impacting upon musicians' careers include government policy relating to precarious work and workers, licensing agreements and live music legislation, qualifications needed for teaching music, copyright law and royalties, radio play and royalties, issues of equality, the provision and structure of initial and ongoing education and professional learning, and the changing role of stakeholders including managers. As we have shown in this report, Australian musicians need to possess diverse skill sets that enable them to engage across a variety of markets, genres, and performance sites including online, digital, community and educational settings. These issues affect the structure and function of the music sector, and also influence decisions made by musicians when negotiating their career and its ongoing development. In this concluding chapter, we reflect on some of the key findings from both the survey and interviews and make a series of concrete recommendations of strategies, measures and considerations that can be taken into account by key cultural organisations, education institutions, government departments and funding bodies working to support and enhance the livelihoods of Australian portfolio musicians.

Both the survey and interview data have revealed individual and collective stories about the lived experiences of Australian musicians, inclusive of their career highs and lows, their intersections with education, industry and the profession, and the impacts of physical and mental health in their ongoing work-life balance. The rich and detailed nature of this data means that it is not possible, nor desirable, to extract a simple map or model to inform musicians entering the field. The lived experiences of musicians are too diverse and fluid to accommodate this. Rather, this research reveals the multifarious ways in which Australian musicians carve out

their professional lives, against a backdrop of considerable challenges. Across the survey and interview findings we have seen musicians negotiating pragmatically how to live as a musician, and finding the balance between making money and making art. As the *Making Music Work* data has shown, some use the commercial music world to bring in the money to support their own artistic path, others use academic jobs, music teaching jobs more generally, as well as non-music related jobs.

Notwithstanding the complex landscape, this research has revealed that musicians generally have a positive outlook on survival – they get-on-with, make-do, self-prioritise their music work. As the survey revealed, Australian musicians revealed their top reasons for staying in the field related to a love and passion for music, the centrality of music to their identities, along with development of individual skills and capabilities. In contrast, a sense of security and stability was the weakest career motivator. This suggests that the pendulum is always in motion, meaning that musicians always have to adjust their decisions to keep things in balance against the changing tides of funding, digitisation, and the challenges of sustaining a work-life balance. These subtle shifts are testament to how adept musicians are at surviving emotionally, creatively and financially; they are always negotiating with their futures, trying to make music work.

The project's findings show how important music is to each individual, and the sacrifices they are willing to make to have a sense of balance and potential. While this study has focused on the portfolio career realities, and the external landscape affecting musicians, there are equally important considerations of creativity and the musicians' personal voices. In other words, as our findings have shown, a portfolio career is not only about using different modes of music making to "add-

up” to a *financially* satisfying career in music, but also about “adding-up” to a *creatively* satisfying career in music. Through this research we have observed a real pragmatism in the field, where musicians appear to be using skills to make money, and using time to make art. This has required musicians to feel confident not only in their abilities, but also in being able to take calculated risks. The data compellingly revealed the idea of seeding projects – for example, using the better financial times to begin a new project, whether it be band, idea, series, and taking a risk without guaranteed support. We observed a flow of developing projects, ongoing projects, ‘money projects’, ‘friend projects’, all underpinned by a strong sense of creativity.

The findings highlight the prevalence of self-employment in the Australian music industry, with the most common types of music work activities involving music teaching, composition, performing, producing, instrumental music, and vocal music. Musicians most often hold either one or two current roles, and one in five hold either three, four or five current roles. Musicians’ incomes were drawn from a range of sources including: performance fees, the sale and commission of compositions, teaching and workshop facilitation fees, song writing royalties, song licensing payments, the sale of publishing rights and the obtaining of state and federal government grants and fellowships. Many of the musicians spoke of the ways in which grants and fellowships could be used to generate new ideas, go beyond the everyday, spark a new direction and fundamentally as a financial support structure for a period of time. Not all had applied for grants, however, reasoning that the time commitment associated with doing so, and not having undertaken a project for which they could apply for funding. Overall, it was widely recognised that they were an important, and highly valued source of income which could be used strategically as professional development, or to enter a new scene. As a result, several spoke of their plans to apply for grants in the future.

Unsurprisingly, the most common sources of career difficulty were financial difficulty, lack of job security, and lack of opportunities. Challenges relating to the generation of income, and the managing of finances were also a central theme to emerge in the survey and interviews. While the musicians had established their careers to the point of being able to financially sustain themselves, they still experienced challenges in being able to financially sustain oneself across intense work periods and those in which there is little work. This is further complicated by musicians’ working in predominantly self-managed contract-based arrangements in which they are responsible for a range of business administration duties for which they were not always adequately trained. Overall, these experiences contributed to varying levels of stress.

The digitalisation and digitisation of the music industry has facilitated a new paradigm in which musicians can navigate their careers. All the musicians interviewed recognised that the digitisation of the music industry has changed the ways in which they have been able to develop and sustain their careers. This has ranged from lowering the barrier to entry to creative activities such as recording, to changing the ways in which musicians can collaborate with one another. Musicians are also able to more easily and readily engage in a range of business activities such as booking live performances and tours and

selling their music (including compositions) online. Questions remain, however, around how musicians are able to generate an income from streaming services as a result of the levelling of the playing field, as well as adequate remuneration.

Given the complex landscape of the music industry, this research has revealed how critical career development strategies are for the survival of musicians both creatively and financially. As the findings have revealed, the most popular career strategies used by Australian musicians are establishing or continuing an enterprise, band or ensemble, and using informal social networks. These networks, in particular, were found to be crucial for musicians feeling supported in their careers. These networks were also vital for providing collaborative opportunities, generating work, and learning new, or building upon existing skills. Informal gatherings of musicians, comfortable meeting places, and generosity of established musicians have been shown to be vital components of the ecosystem. While networks are highly valued, it is recognised that networking is a skill to be learned.

Added to these more informal networking activities, the musicians in this study have also shown a strong commitment to engaging in ongoing learning opportunities in order to enhance an existing or learn a new skill. Both the survey and interview findings indicate that by-and-large Australian musicians are well educated. Nine in ten survey participants had completed formal education beyond secondary school, and seven in ten held tertiary qualifications in music. Likewise, the eleven interviewed musicians were also highly educated, with four holding doctoral-level music qualifications, two having undertaken Masters’ level study, and two more holding bachelor’s level qualifications. This research has also revealed that musicians are engaging in learning opportunities in an ongoing manner, through either formal means – such as one-on-one musical tuition, or a short course on public relations or marketing – or through self-directed learning. The most common professional learning topics related to instrumental and vocal performance skills, music theory,





and music teaching. In addition, those who worked within the higher education sector, were required to engage in workplace health and safety and/or teacher training as a part of their conditions of employment. Moreover, those who were research active academics engaged in a range of conference opportunities. Related to this, the report also identifies some of the gaps in current portfolio musicians' skills development and career support, informing insights and recommendations for developing these skills in professional education and training and as a part of life-long learning trajectories. The top professional learning needs identified by both the surveyed and interviewed musicians were advertising, marketing, publicity, promotions and business administration and management.

Given the somewhat gruelling work environment musicians often operate in, a number of the surveyed and interviewed musicians talked about the importance of maintaining their physical and mental health. Most musicians interviewed in this project had a physical health routine, and recognised the importance of prioritising their health and wellbeing. This ranged from engaging in day to day activities to support this, such as engaging in non-musical hobbies, committing to regular exercise and healthy eating and sleeping habits. This was particularly important due to time pressures and the need to make money, and how these stressors can easily throw routines out the window, putting the individual in vulnerable situations. The lack of a safety net in the form of sick pay is an ongoing issue for all in the contract-based workforce in which many of the interviewed musicians engaged.

In summary, the survey and interview results have shown compelling evidence of the diversity in music practices and career configurations in Australia, and the different ways in which musicians are negotiating their career support and developmental needs. The findings of this research are significant and applicable to almost all Australian musicians, given the increasing prevalence of portfolio, and self-managed careers in music. This study has brought more detailed and granular evidence to this phenomena, in the hope that it will help strengthen how we educate, equip, and support Australian musicians to build careers into the future. In light of the findings outlined in this report, the following section outlines a succinct list of concrete recommendations that are designed to create a sustainable environment for portfolio musicians to flourish in Australia now and into the future.

Recommendations

R1. State and Territory-based music organisations should collaborate on professional learning (PL) programs relating to small business management and networked forms of work, collaboration and learning.

Particular areas of need include aspects of business administration such as banking, taxation and invoicing. Organisations might also create and curate targeted PL in network creation, access, curation and equity. Funding limitations might be overcome through the creation or expansion of PL initiatives delivered in partnership and across multiple arts practices; through facilitated PL networks; and through the support of musician-led mentorship and PL.

R2. Multiple agencies should collaborate to build collective agency and maximise capacity by maximising the visibility of, and access to, collaborative professional learning programs across jurisdictions.

Increased collaboration across jurisdictions might facilitate increased access to, and the visibility of, professional learning opportunities. A shared online portal containing current PL opportunities would yield both practical benefits and a visual, united "voice" for PL needs across the sector; it would also enhance the visibility of existing initiatives. We recommend a particular emphasis on online and non-synchronous PL due to its availability. Musicians seeking PL opportunities in aspects such as small business management might be directed towards the VET sector whilst other, bespoke PL might be delivered within the sector and recorded or created in interactive forms to enable multiple iterations. It is vital that feedback from funding recipients and PL participants be secured and utilised to inform future priorities.

R3. Post-secondary educational institutions should utilise the evidence from research, industry and alumni partnerships and secondary datasets to engage in evidence-based curricular reform. This should both include broad career development learning, small business management and inclusive notions of career "success" in music.

Post-secondary institutions should continue to develop curriculum and pedagogy which addresses the realities of musicians' careers. Career development learning should be a core part of curriculum. This will include but not be limited to self-regulated learning, networking, small business management, ethical practice, awareness of self, community and industry, and health and wellbeing. We note that ongoing professional and career development needs extend to both students and staff. Mutually beneficial partnerships with alumni and industry will enable access to resources including space, expertise, curricular review, industry experience and mentoring relationships.

R4. Post-secondary educational institutions should take collective action to reduce the prevalence and impact of mental and physical health conditions among Australia's music workforce.

Post-secondary institutions should give serious consideration to the prominent mental health considerations identified in this report. This includes in relation to curriculum, pastoral care, and the wellbeing of staff and students. We acknowledge also the prevalence of physical injury among musicians and recommend the continued development of preventative education alongside access to physical therapies and a culture of disclosure.

R5. Post-secondary institutions should emphasise inclusion, diversity, equity and access in admissions, processes and public engagement.

Higher education is in a unique position in the life-cycle of a musician, training future professionals inclusive of performers, teachers, administrators, technologists etc. It follows that the access to this education should be open to the broadest range of musical styles and approaches, as should the content of the education being offered. Huge gains have been made in recent years with regard to the inclusion of female and non-binary voices in education, but these need to continue to be fundamentally embedded in curriculum alongside a diversification of musical approaches. Further, strong emphasis should be given to inclusion, diversity, equity and access in admissions, processes and public engagement in higher education.

R6. Providers of initial and ongoing professional learning should support and develop broad facets of musicians' careers, recognising that the administrative and career development learning aspects of a musician's practice often underpin the outputs and outcomes of their creative work.

We recommend that organisations in both the arts and education revise the definition of a "musician" to recognise the broad suite of overlapping roles and income sources which typify a musician's practice. A broader definition is critical to funding, policy and developmental strategies, which in the future might be determined according to the work's societal contribution and impact as much as to the "status" of the applicant. For example, diminishing numbers of small venues and decreasing expendable income impact new music and the viability of works not designed to "please an audience." Here, innovative funding streams might partner with young performers, encourage collaborations between composers and performers, address needs in mid- and late-career phases and transitions through a career, tackle issues of inequity, and stream performances to multiple small audiences.

R7. Aspiring musicians should be made aware of their ethical rights and responsibilities and associated support mechanisms and sources of advice.

Higher music education should develop aspiring musicians' understanding of music's societal and global relevance. Within this contextual understanding, aspiring musicians need to be made aware of their ethical and legal rights and responsibilities. Graduates should be aware of sources of help and advice such that they are able to assert ethical practices in their own work and the work of others.

R8. The music sector should increase the provision of specialist and peer support mental and physical health initiatives through further research and education and by informing the establishment of industry codes of practice and clearer identification and support pathways for those in distress.

Portfolio musicians report a high mental health risk in comparison to the general population and there is a critical need for more knowledge and action. This is a sector-wide issue which requires a coordinated response. The study findings indicate the need for the increased provision of specialist and peer support initiatives such as the Support Act Wellbeing Helpline. These initiatives might be developed and renewed through further research and research-informed education, industry codes of practice, and clearer identification and support pathways for those in distress. Collaborative work with the providers of initial education and training, and professional learning, may in time reduce the incidents of mental and physical distress and, in turn, the demand for support.

R9. The music sector should advocate for the revision of national data collections so that multiple and impermanent job-holdings can be recorded.

National collections in Australia including the National Census and Graduate Outcomes Surveys fail to capture the complexity of musicians' work. We recommend that the sector continues to lobby the Australian Bureau of Statistics and other agencies so that national measures capture, for example, second and third "occupations." This will make a significant contribution to the evidence base for government policy and related funding, to changes in financial and taxation practises for self-employed workers, to the structure and delivery of post-secondary education and training, and to the business intelligence available to organisations within and in support of the arts. In the current higher education context of performance-based funding, higher music education will also benefit from the ability to (re)define and demonstrate success in relation to graduate destinations.

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APPENDICES

Appendix A: Musician Profiles

The Appendix includes profiles on each of interviewees. These profiles provide a brief snapshot of the musicians' career trajectories, and are available on the project's website (see www.makingmusicwork.com.au/casestudies).

Danielle Bentley: Cellist and Festival Curator (Queensland)

"I just suddenly realised that's what I wanted to do. It was like a vocational awareness."



A cellist from the age of eight, and the daughter of a jazz musician, Brisbane's Danielle Bentley's music career is both diverse and innovative. Director of the Restrung Festival, Development Manager at Queensland Music Festival, a freelance performer, concert curator and philanthropy consultant, she reflects:

I've always had multiple interests including interests outside of music. I enjoy learning, I get bored if I'm doing the same thing every day... if it's not challenging me or inspiring me in some way. I've never wanted a full time job in an orchestra although I love performing orchestral music. I love the diversity and to be always learning.

Danielle credits the diversity of her roles with allowing her to continue pursuing that which she enjoys. However, being able to manage an ever-changing schedule, requires a high degree of discipline, as she explains:

Sometimes things clash, but sometimes there's nothing on at all, and then other times everything's happening at once. It's just [about] having the discipline, and making sure that you create your own structure so that things don't get too chaotic.

It is the combination of various roles, and her ability to be disciplined with her time, that Danielle credits with being able to remain productive. At the same time, however, she reflects that at times, her schedule can become overwhelming:

I've had a few periods of burnout, I'd have to say. Especially with the [Restrung] Festival... that can be really intense and often [I'm] performing in the festivals as well. So, you're as much co-ordinating and looking after all these aspects... as well as keeping up your personal practice and being able to get in the right headspace to perform; that can be tricky.

As she goes on to explain, prioritising her health, and taking time out when she needs to, are vital to being able to cope with stress and mental and physical exhaustion: "Meditation is great for calming down and being centred, and for being productive, I think. I also enjoy walking, running and cycling." Formally trained with an undergraduate Performance degree, a Masters in Creative Industries and a PhD, Danielle values the process of learning by doing, and recognises that failures can be opportunities for growth. She credits her father's time as a jazz musician as being highly influential to her musical

practice (“I’m not stuck in one genre, I enjoy listening to, and programming, and playing all different types of music”) and is committed to continually developing new skills, even engaging in cello lessons in the past year (“I think it’s important to keep refreshing and improving your skills”). For Danielle, listening is a key component of being a flexible musician, as she reflects

I do a lot of commercial gigs, and they put notes in front you, and they think ‘well you’re a classical musician, you can read the notes and it will sound perfect’. It doesn’t because there are different subtleties and ‘feels’ between the different genres. A lot of it is about listening and developing those skills and relaxing into that, and learning to improvise and being flexible in those ways.

Danielle has worked extensively with orchestras and major performing arts organisations – including the Queensland Symphony Orchestra Camerata of St John’s and Opera Australia. She has also worked with popular artists as diverse as Jimmy Barnes, Xavier Rudd, Megan Washington, Tommy Lee and Kanye West; and Jazz artists Diana Krall and Harry Connick Jr. Corporate performances have at various times provided a central income stream to Danielle, who explains that trusting relationships with agents have played a critical role obtaining such jobs. Outside of her music and related festival work and concert programming, she also subsidises her income by writing grants for other musicians and through generating an income by way of the sharing economy. The most recent addition to her portfolio of roles is a series of ‘house concerts’ – which she will curate and perform at:

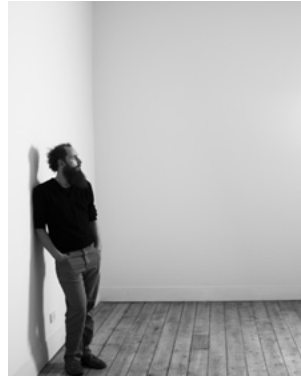
[These concerts are] a way to make money from playing music whilst providing creative freedom. House concerts are a really amazing way to present music. They provide an informal and warm environment conducive to open minded listening.

Danielle’s career is one ultimately characterised by diversity. At one point she even gave up studying music, re-entering the fold after receiving an invitation to perform with a community orchestra. The opportunity reminded her of why music is such a crucial aspect of her life. She was soon playing full time again and went on to establish her business, return to study, and progress through to a PhD.

Later this year she will go to New York to attend the experimental OMI Music Residency, with funding from the Australia Council for the Arts. Reflecting on the diversity of her roles, Danielle’s attitude toward her success similarly varies: risk taking brings great things but also involves the occasional disappointment. Danielle remains committed and passionate about being a musician: “I’ve survived as a musician and I love what I do; I’ve accomplished a lot of things and there is still so much more to come.”

Paddy Mann: Indie Folk Musician (Victoria)

“My life is just doing music and having a lot of strange part-time jobs to support the music because it doesn’t make enough money to do it by itself.”



Attending university to study an Arts degree before transferring to a Bachelor of Music, Victorian musician Paddy Mann spends his days juggling multiple part-time jobs in order to continue carving out time to pursue music. Reflecting on a 20 year career in music he says “I never thought I’d go this far without getting a proper job”.

For Paddy, it is his passion and ability to find a balance between his multiple day jobs and his musical pursuits that have allowed him to continue making music beyond a hobby. Reflecting on how he balances his time he says,

I try and keep at least one or two days a week clear to concentrate on the music. And since I’ve [become a parent], that’s been much harder to deal with than any part-time job I’ve had, because it’s so all-encompassing and it just changes your brain. I’ll organise it so that that makes enough money to pay my bills or whatever and get by. So even if there’s no music money coming in I can still chug along with the part-time job cash, and not feel pressure to get out there and do gigs if I don’t want to.

As a self-managed solo artist, he structures his musical pursuits around the recording and promotion of new music, explaining,

Everything else kind of falls around that. So when I think about live shows, I’ll think about, how am I going to launch this album? What am I going to do? I put a lot of effort into the album launches, around album release time, and then touring that for the period that the album’s released... Because I can play just solo, it’s quite easy for me to do supports, so I get asked to support bands or people a lot. It’s mostly just write, record, release an album, play a big show in Melbourne, Sydney, and try and do it elsewhere in the country as well, and then get onto the next album.

Paddy credits his music training with teaching him how to read and write music, while also deepening his musical appreciation. While being a largely self-taught guitarist, he recognises the limitations of formal music training in preparing him for high-flying music career (“it definitely didn’t help if I did want to make it big”). For Paddy, his idea of success is related to being able to produce the music he wishes.

Operating in the independent music market, without a manager or booking agent, means that Paddy strongly values

and relies upon the community of musicians to which he belongs (“there’s unquestionable support given all the time, where we play on each other’s records, we record each other, give each other contacts and advice”). Record labels that operate in indie contexts have also played a vital role in his career, despite the conjecture about their ongoing role in the industry (“labels are always very supportive on this level”).

Paddy credits the labels he has worked with in facilitating access to audiences and supporting his endeavours such as recording and touring music. He cites, for example, meeting and working Richard Andrew from Pharmacy Records and later Andrew Khedoori from Preservation as two of most significant events in his career to date. As Paddy explains, the support and encouragement he has received from these and other small-scale independent labels have been vital in his career. Operating on “nothing signed, hand shake, 50-50” arrangements with the labels, he reflects,

Everyone I’ve worked with knows what I’m like and what my music’s like and they know I’m not going to try and bust into America and everything, and they don’t expect me to sell lots of albums either.

Another vital source of support in Paddy’s career have been State and Federal government administered arts grants, which have provided vital financial assistance (“without them I wouldn’t have been able to produce the albums I have”). Operating within an alternate, independent, highly collaborative market provides Paddy with a unique perspective as to the changes which have occurred in the music industry in the last 20 years. Of particular note are the positive and negative impact of the sector’s digitisation on being able to discover music as a fan:

In terms of a listener, I don’t like it much. I mean I do and I don’t. There’s too much out there and there’s too much pressure to kind of subscribe to these taste-making websites that kind of all lack suggestions... I love the search; I always love to search and that’s easier but harder to do now.

From a collaborative perspective, Paddy sees significant advantages resulting from the sector’s digitisation:

It’s helped a lot in terms of being able to just zip your music wherever you want without having to put it in a post box... So you can work with people as well, that you would never have been able to have worked with. I’ve mixed my album via Berlin, and we were just transferring songs and ideas. That would have been crazy, thinking of doing that back in 1999.

The sector’s digitisation, however, has resulted in shifts to the ways in which musicians are able to generate an income, and Paddy sees being able to pay musicians as being one of the biggest challenges moving forward:

We’ve kind of given into it now but we get no money for our product; it’s ridiculous... you get this pittance, this pathetic little crumb [streaming services] flick at you and then just take most of the profits. It’s so crazy. And that’s supposed to be the saviour. It’s crazy.

Russell Morris: Guitarist and Singer-Songwriter (Queensland by way of Victoria)

“I tried for 30 years and nothing happened. I couldn’t get anything, any air play, and then all of a sudden, out of the blue I produced something which became bigger than all the earlier stuff.”



With a career spanning more than fifty years, singer/songwriter Russell Morris’ experience pursuing a career in music exemplifies the unpredictable nature of the industry, while also reinforcing the importance of remaining positive and motivated in one’s career, and the importance of building a strong network of industry contacts.

Singer of the original version of the Johnny Young-written and Ian “Molly” Meldrum-produced Australian rock classic, *The Real Thing*, Russell’s career is one which has experienced a range of highs and lows. *The Real Thing*, released in 1969 has been recognised as one of the top 30 Australian songs of all time. Despite experiencing such success, Russell has experienced hardship over the ensuing decades in being able to continue pursuing music. As he recalls,

For a while there, I couldn’t make any money. I would probably do 15 shows a year at the most, and the rest of the time I was trying to write television ads, commercials and things to make money so I could survive, and that was really, really hard.

While being recognised for his contribution to the Australian music landscape would see him be inducted into the ARIA [Australian Record Industry Association] Hall of Fame in 2008, it was a bittersweet moment for Russell, but also the catalyst for him to re-commit to music:

It was like, go and sit on the porch, you’ve done your bit, just move out the way, this is your contribution to music; now you’ve got it, there’s the door. So I thought, wow, is that it? That’s it; I’ve got my gold watch and I thought, damn it; so that’s when I started to galvanise myself and thought, right, I’m going to do another album.

A resurgence would occur for Russell in 2012 with the release of the ARIA Award winning album *Sharkmouth*:

ABC [radio] picked it up and the album just went straight through the roof. All the community [radio] stations picked it up as well. It was like a juggernaut. But that album, as I said, won an ARIA, it was a platinum album, it was top 10, it was the biggest Australian selling album of that year.

Russell credits his positivity and the strong support network of industry connections he has developed over the life of his career with being able to sustain himself through difficult periods. While he recognises that networking is a skill to learn (“some people are good at it and some people aren’t”), he says

Connections are really, really important. It becomes very important not to become a diva and not to treat people in a way that you think that you’re better than they are... You have to show respect for people and I think that helps your connections. Holding grudges doesn’t help either.

Valuing the contribution of his backing band, one of the key challenges Russell experiences is being able to have a regular stream of live performances in place so as to support the members financially. Being able to do this, however, is impacted by the relatively small music market in Australia (“you can’t work every single week”). Making his living primarily from live performances means that Russell spends considerable time traveling, and therefore is often away from home. He recognises that while he is fortunate – and enjoys traveling – this can take its toll, particularly when performing in regional areas of the country.

Despite these challenges, Russell continues to find passion in music, by discovering new ways of playing the guitar. A commitment to learning (“I’m always challenging myself, trying to find a new mountain to climb”), is what continues to sustain Russell:

I like to keep my explorer shoes on. I like to be the type of person that continues to discover new things and discover new things musically, and record new albums... I try to discover new things, and I try to surprise the people that have been so generous to buy my records.

Rob Nassif: Drummer, Rehearsal Studio Owner, and Band Manager (New York by way of Western Australia)

View online at: www.makingmusicwork.com.au/casestudies/robnassif

“Career? I can’t even really use the word ‘career’. It doesn’t feel like a career to me. It just feels like pursuing what I’ve been passionate about.”



Twenty-plus years as the drummer for punk-rock band Gyroscope, has afforded Rob Nassif the opportunity to develop a dynamic career portfolio as a musician, rehearsal studio owner and band manager. Aside from being the group’s drummer, he owns The Hen House Rehearsal Studios in Perth, and manages Perth band, The Faim, all from his base in New York.

Growing up in Perth, Rob began playing in the band in his mid-teens. Passionate and determined, the band prioritised rehearsing and performing from day one.

Gyroscope pursued it like raging animals. Our first year out of high school we played 110 shows just in Perth. I still, to this day, don’t know another band that’s done that. It’s hard to actually play that many shows in Perth... So we were actually playing twice a week, rehearsing twice a week; four out of seven days a week we were pursuing it.

While the band has achieved considerable success and recognition in Australia, having toured the country extensively, been signed to a range of large scale independent and major labels, while also being nominated for several Australian Record Industry Association (ARIA) Awards, winning numerous WA Music Industry (WAMI) Awards, a J Award and Channel V Award, it took the band over a decade to become established and for the members to earn a liveable wage.

It was during this time that Rob studied a Commerce degree at university (“the marketing and advertising has helped”), and financially supported himself by working in retail and at RNR Rehearsal Studios which he would later purchase and rebrand as the Hen House. It was 2008 before the band were able to draw a liveable salary, which was a “huge moment” for Rob who had begun questioning his decision to pursue music a few years earlier.

When you get to 25, 26, you start to think, ‘yes, it’s good, I’m having fun, but I’ve also now toured the country seven times; [but] still make no money.’ You start to worry about your future a little bit. So that’s where the challenges come as you get older, and that’s where you have to keep the steely nerve that this is worth pursuing and what you’re passionate about.

The band’s 2008 release, *Breed Obsession* was their most successful to date, reaching number one on the ARIA Charts, and achieving Gold [35,000 units] sales, while facilitating significant opportunities to undertake headline tours of Australia and as a part of national touring festivals. The album was originally intended to be the band’s last, but as Rob explains, “It all changed. *Breed Obsession* did great for us; *Cohesion* [released in 2010] did great for us; then the rehearsal studio and then the second rehearsal studio. It’s been charmed; really it’s been great.”

The challenges of sticking it out in the early days of a music career have provided Rob with a great deal of insight as he moves forward into other realms of the music industry. In 2010 he established the Hen House and started managing Perth band The Faim in 2015. With new opportunities come new challenges, as he reflects, “By the time I had this space I really had accomplished being a musician and I was on a salary... It was challenging because I was still touring with the band, so it forced me to have to trust staff, create systems to run the business.”

A strong support network has been vital to the development and sustaining of Rob’s career. As a musician, strong management and supportive record label employees have

supported a positive career trajectory for the band, while the network of local musicians in Perth has supported the Hen House, as he explains:

I'd been in the Perth music scene for ten years, longer, 12, 13 years; I knew everybody. So I literally messaged everyone and I said, "Hey, come and rehearse and hang out with me." So we were able to go from a really low number of bands a week, in the space of six months to tripling the number of bands; [to] quadrupling.

Being based in Perth, the need to overcome long distances and in order to reach audiences on the east coast of the country, and to take advantage of opportunities such as performing as part of the annual South by Southwest Festival in Austin, Texas, have seen Rob utilise a range of competitive grants schemes. He recognises their vital importance in supporting these endeavours, explaining,

[Grants] can be the difference between a band succeeding and not succeeding; that's the reality of it. It sounds like pretty heavy stuff. It never comes down to just that; no band is going to succeed just because they got grants, of course not; but it can be the difference in giving bands a bit more time and opportunity.

Rob continues to draw on his experiences in the day to day pursuit of his career, places a high value on learning through doing, as he explains, "I tell all the bands here: 'it's great that you rehearse, and you need to rehearse, but one show is equal to ten rehearsals, really.' That's my motto."

Having lived through the upheavals of a shift toward, and then away from, the major label system, the digitisation of the sector ("[2010's *Cohesion*] made us more money than *Breed Obsession* from a touring perspective, but we sold less albums"), Rob sees distribution as one of the biggest challenges to the sector. Reflecting on this and the ongoing importance of radio,

Spotify, you put it up there and anyone in the world can listen to it. That's great about the distribution. It's flat, it's easy, it's out there. But then no-one is going to listen to it because they don't know who you are. The way a lot of people, still to this day, get heard is through radio. I still think that it's still a very effective method of distribution, but it's very challenging because radio programming just gets narrower and narrower."

However, with digitisation comes great opportunities, as Rob explains,

If you can be really unique and if you can be great and you can create an amazing piece of content or crazy, amazing song, it can spread quicker than ever before. If it's legitimately awesome.

Emily Smart: Singer-Songwriter and Musician (South Australia)

"There was definitely a point that I had to accept not letting failures or my interpretations of failures affect me."



South Australian pop vocalist Emily Smart has carved out a multifaceted music career which encompasses performance, song writing, grant writing, rehearsal studio management and voice over work, while also developing her own business. As she explains: "There's always something different going on... It all sort of feeds into each other but there's a lot of random things." Recognising the need to be dynamic in her approach to making a living, Emily also balances

her musical endeavours with her own small business in real estate property management which affords her financial sustainability and flexibility to continue pursuing music. Despite this flexibility, Emily explains that working across so many music roles, as well as combining music and non-music work is quite a juggle ("organisation is key for me, and lots of planning"). This is further impacted by perceptions around how seemingly unrelated fields can work together and ensuing attitudes around her as a professional: "If I was to introduce myself as a property manager and also a singer or something like that, it would be a bit strange; people don't really correlate the two as something that could go together."

Musically speaking, Emily works across a variety of roles out of a combination of needing to generate a liveable wage, as well as desire to continue to be creatively inspired ("there's not one thing that's sustainable enough"). The main source of income she derives from her music work is through a rehearsal space she manages with her partner, with additional money generated through paid performances, song writing royalties, music synching, sitting on peer assessment boards, and hosting music based workshops. Networks have been crucial to Emily being able to work across so many roles, and in her ability to obtain work, as she reflects:

Without connections you're on your own. There's no-one really thinking about hiring you or getting you involved in their projects, so it's pretty pivotal to expand your creative reach. If you're not actively getting involved with the industry, or getting out there and talking to people, then most people won't know about what you do or how you do it, and it's less likely that you're going to get the opportunities that you need to help you generate more work and sustain what you're doing.

While networks are critical to the sustaining of Emily's career, she recognises that networking is a skill in of itself, and doesn't always come easily,

I was always quite a shy person and not necessarily very outgoing to talk to people, but I have found that it is really important to make the effort [...] And also, for you to have interest in others' work too. You just don't know where anything can lead. One conversation can lead you to writing a song with someone, it can be as small as a conversation to generate something amazing or create work.

Having played music since she was a child, and identifying as a musician from age 16, a combination of having studied music at high school through until Year 12, piano, bass, guitar and vocal lessons, formal audio engineering training, as well as a Bachelor of Dramatic Arts and Master of Marketing, have been vital to how Emily has learned how to be a musician and, in turn, how she navigates her career. She says, however, that she highly values learning by doing ("I think it is a personal learning curve for everyone to try and to piece together their unique spot.") and relies on the Internet to learn and teach herself new skills. She similarly sees that the emergence of a range of new digital technologies and social media platforms has changed the ways in which she is able to navigate the day-to-day practices of her music career:

I don't remember having to call up and ask for a gig in the last ten years. It's all [done via] emails and online and [is] based on your social presence [...] The social media and the options online now to promote yourselves and to get in contact with people are a lot easier than they were a long time ago.

It is well understood that the digitisation of the music industry has seen a shift in the ways in which profits are generated, and have created a new set of financial challenges for musicians in being able to financially sustain themselves. This challenge has had the biggest impact on Emily's career, influencing her diversification across roles ("it's become even harder for the smaller acts to make money"). She explains that the reward of creative expression outweighs the financial loss associated with pursuing her career, however, "I think it's just a matter of how long you take it for or keep kind of putting in and hoping that it reaped the rewards; that it's worth the time and that's what you put in."

For Emily, focusing on the small wins has helped her maintain a sense of success as she has navigated her career. She explains that a key aspect of this has been being happy for other musicians along the way:

A lot of people feel that it's hard to be happy for the other people around you doing well because, if you're not doing well at that time, and you're sitting there wondering 'Why? I'm making just as great music as they are?' you've got to at some point realise that's not healthy —but not comparing yourself to everyone else is just really hard to do, because you know you're working just as hard and it's just the way the industry is [...] It's

something that I also had to learn, to not compare what I was doing to anybody else and to actually make myself happy for anyone I saw doing well, and not make that part of my journey. And I think it's important to be happy for people because it all feeds into the industry, it all helps everybody really, for people to do well.

Aaron Wyatt: Viola Performer, Conductor and Academic (Victoria by way of Western Australia)

"It's just been a far more varied career than I thought it would be, which is good because it keeps things fresh and interesting."



Perth-raised and now Melbourne based viola player, Aaron Wyatt has worked across a variety of roles for over a decade in the music industry. Undertaking a range of teaching, casual orchestral work, and conducting community ensembles roles has seen this Indigenous musician develop a unique perspective of working across the classical, chamber and new music sectors.

Having begun playing the violin at age five, and undertaken private music lessons and appreciation courses through his childhood, Aaron initially studied science and engineering at university, before switching to music at the end of his first year, "I couldn't imagine not being involved in orchestras and ensembles [...] I just couldn't see music not being a fairly major part of my life."

Conducting work, particularly that which engages with community orchestras, has grown to become a central, but unexpected, component of Aaron's work ("there's been a lot more in the conducting side of things that I never would have expected to have happened"). As Aaron explains, his teaching work is one role which he particularly values, explaining, "I think most important for a musician, if they can teach, should teach, just because it gives so much back to the next generation of musicians and I think it's a very important role to have."

With over a decade's experience in teaching and casual performance engagements, Aaron explains that one of the biggest challenges he has faced has been balancing his schedule, and in ensuring he can financially sustain himself during periods of little work:

There's always those times where there's really not a lot to do comparatively, so there's always that build-up to just try and save as much as possible knowing that you need to survive for a few months without necessarily much of an income; and there are other times when all the work seems to come at once.

With such a diverse portfolio of roles, and a particularly strong engagement with freelance-based engagements, Aaron explains that making time for self-care is vital: “There are times where it does get a bit much, especially when there’s major productions, [you need to] make sure you still remember to schedule time for things like getting dinner, or sleeping, those small essentials.”

With so many things on the go – and a particularly high reliance on contract-based work – Aaron explains that he has found himself having to spend considerably large amounts of time on administration, which can become particularly frustrating: “When a whole bunch of people just haven’t gotten around to paying that becomes annoying then having to waste otherwise productive time chasing people up [...] It’s little things like that could cause burnout in the freelance world.”

Having studied a Bachelor of Music, an Honours degree, and being part way through a PhD, Aaron says that administration skills were one aspect missing from his training:

In terms of working out all the admin side of stuff or working out what you have to do for invoicing and tax purposes and all that kind of thing, that was a very much learning-while-doing, a baptism of fire [...] I suddenly found myself struggling with [that].

The structure of Aaron’s day-to-day music career, being based around performances, and contract work, has meant that he has worked through sickness, which has seen him also need to be flexible in making up time taken off, “I’ve never taken a call off [...] I’ve just kept going. And teaching, because I only teach a day or two a week, if I’ve been sick, I’ve at least had the flexibility of just be able to shift my teaching day.”

Reflecting on his time within Perth’s music community, Aaron explains that one of the biggest challenges he experienced was being able to access professional development opportunities due to the city’s isolation. Of particular interest have been conductor training programs (“the biggest problem with conducting is that the only way to get better is to do it”), as he explains.

There used to be a program for conductors around the country to actually get podium time with professional orchestras, but now it kind of doesn’t exist [...] state orchestras run their own programs and often there haven’t really been programs in place to take over from that.

Aaron expects that a recent relocation to Melbourne in order to take up a full time academic post will afford him an ease of access to undertake further professional development opportunities, while also affording him sick and holiday leave entitlements as well as a regular salary.

I’m looking forward to that as a nice change and not having to worry about any invoices, and not having to worry about having money that regularly appears. Actually, the biggest things are things like just having sick leave and all those sorts of benefits that you don’t get as a casual.

Rhonda Davidson-Irwin: Teacher, choir director, composer for television, flautist, and former Music Australia CEO (QLD)

“There was a time when I woke up in the morning and went ‘this is the direction for me’”



Brisbane-based teacher, choir director, composer for television, flautist, and former Music Australia CEO, Rhonda Davidson-Irwin works across a range of music settings in a career which has allowed her to have a significant influence on the shape of the Australian musical landscape.

Raised in a musical family (“folk culture was ingrained in me at a young age”), Rhonda

has always loved to perform. She holds an AMusA in flute and piano, as well as a Bachelor of Arts in Music Education, and a Masters. Music education has been a constant of her career. Not only is she herself a music teacher, but she has also developed music programs for cruise ships, music curriculums for primary schools across Queensland, and training programs for music teachers. She explains, “The power of education has come through as one of the major reasons I’m still in that field today and will continue to be.”

For Rhonda, working across such a variety of educational settings is important to her. She reflects that while she could have been very happy working full time as a classroom music teacher and conducting children’s choirs, she came to realise that by working across so many facets she could, “influence more people and that people needed repertoire, needed skills, needed core toolkits to be able to implement music, particularly with limited musical skills.”

Rhonda credits her communications skills as playing a vital role in her success as a teacher and, more broadly, her ability to work with children (“I’m able to nurture the best results from children.”) She explains her communication skills have been particularly useful in nurturing children’s love of music: “With children that I’ve taught and with children that I’m still teaching, I can see huge benefits in their lives, and that music will always be an important part of their lives into the future.”

Over the past 20 years, Rhonda’s compositions have been featured daily on Australian television. She has composed for a range of children’s television shows, a facet of activity she did not expect to engage in, but is one she finds to be incredibly rewarding:

Writing for children’s television meant that I could influence even more kids with quality music and songs to sing. With the national landscape in regards to music education, and only 30 per cent of schools in the country having music teachers, television is one source of getting good quality songs, and traditional songs to children.

Recent pushes to do away with mandates requiring Australian free-to-air stations to air a certain amount of children's programming are concerning to Rhonda, as she explains:

I think it's important that we acknowledge that everyone in Australia who's grown up in Australia, has grown up with Australian kids' stories and kids' songs, and that may not be in the future; as part of their licensing agreement they don't have to make kids' TV. However, we know that kids TV is a great platform to move into careers – music careers and television careers – as well as the fact that we have to acknowledge that, even though fewer people are watching television, it's still a very important medium for families and lower socioeconomic families who can't have a music teacher but they can hear some great songs.

Another way through which Rhonda has been able to advocate for the future of music in Australia is in her role as the former CEO of Music Australia (a position she took on at the start of 2018 and concluded in 2019), as she reflects: "That [was] a big role. It is looking at ways of improving music in all its facets across the Australian landscape, which is a big ask; however, it's something that I'm very passionate about to try to keep music alive, from government right to hands-on [sector activity]."

Working across not only a variety of roles, but also across teaching, community and music advocacy sectors can lead to an overwhelming workload. Rhonda explains that while she doesn't normally suffer from stress, maintaining a good sense of emotional health is vital as, "I'm really no use to anyone if I don't look after myself [...] I think the difficulty is to switch the mind off because there are so many aspects of my job that need continual thought and need consideration."

The ability to generate an income solely from music is rare, however, Rhonda has been able to do this for the entirety of her career, getting a job as a classroom music teacher at the completion of her undergraduate degree. She recognises that this is not the case for many musicians, and a lack of understanding around career dynamics impacts negatively on the legitimacy of music as a career and the need to pay musicians,

It's so important because without the finance behind it, you can't do anything [...] I think the difficulty is that people sometimes do see music not as a career path; they see it as something that you just do on the side, and that's always been the challenge for professional musicians. I think we have to value what we pay musicians.

The digitisation of the music industry has presented one of the biggest challenges for not only Rhonda's career, but the sector as a whole as she reflects,

There's a lot of challenges when it comes to copyright, when it comes to performance, and to creating music, and people are finding that difficult to navigate, and they're also finding it difficult to make money from it. How do you value a song? And what does that song cost? With downloads

and copyright and people being able to instantly get music without paying for it, it goes back to valuing what we do.

For Rhonda recognising the value of music – both financially and culturally – is critical to supporting the industry into the future,

People go to concerts, they don't think about how it happens. They have no understanding. They go to a film, they hear this great music, and they watch this great film. I think that awareness of music and what musicians do, and those aspects of the music industry are important.

Sandy Evans: Saxophonist, composer and teacher (New South Wales)

"I realised that I was, by nature, more of an improviser and more wanting a path where I could express my individuality"



Sydney-based saxophonist, band leader, composer and teacher, Sandy Evans has carved out a dynamic career over the past 30 years which has seen her perform around the world and across genres. Having first learned the piano from her mother at age three, Sandy would eventually move to recorder in primary school ("I'm a terrible piano player"), then flute and finally saxophone as a teenager. She

has identified as a musician as a child, "I just knew I was really interested in [music] from a young age. I started doing gigs as a teenager when I finished my last two years of school in Singapore, and that's where I started working professionally as a musician."

Sandy was greatly inspired by a jazz music teacher at primary school, however would first train as a classical flautist before deciding that jazz was the pathway for her. She had no preconceptions as to what such a career might entail: "For somebody to become a jazz musician, especially a white Australian woman, there was no pathway."

After finishing high school, and returning to Sydney, Sandy initially enrolled in a Bachelor of Arts degree, studying music. She left her studies to begin making films through the Sydney Uni film society and then under her own steam in Australia and India. A change of institutions would see her enrol in an Associate Diploma in Jazz. Nearly 20 years later, around 2010, would see Sandy return to study a Research Masters, which would be upgraded to a PhD,

I'm always learning. It's interesting that sort of big gap where I was nowhere near universities. I felt like I was constantly learning from all the musicians I work with all the time, and also my own study of music I was interested in.

Nowadays, Sandy works across a range of teaching, composing and performance commitments in commissioned, freelance and part-time arrangements, while also holding an Australian

Council for the Arts Fellowship. Working on a part-time basis is a new arrangement for Sandy, as she reflects:

For the first time in my life, I have a continuing position as teacher at UNSW [University of New South Wales]. Prior to that I'd always been casual [...] At the moment I'm probably as fortunate as a musician could get.

Having the stability of a salary has allowed Sandy to put her Fellowship funding toward developing new projects ("allowing me, in a sense, to get great value out of it"). More broadly she sees that university-based employment is beginning to play a key role in the make up of musicians' careers, particularly in Sydney where performance fees – particularly for jazz musicians – continue to reduce.

My reading of the situation is that to some extent, the opportunities that universities are offering are replacing, or have replaced some of the professional opportunities, particularly in Sydney [...] Making money from doing gigs in Sydney is, for a jazz musician, very rarely likely to translate into much money in the bank at all.

Sydney's cost of living – particularly that of housing – have caused significant hurdles for musicians in being able to remain in the city, which in turn impacts upon the ways in which they can navigate their careers. As Sandy explains:

The two musicians in my trio have both had to move out of Sydney [...] because they can't afford to live in the city. It makes organising rehearsals a nightmare because it's a huge drive for us to meet anywhere; nowhere is convenient.

Another challenge Sandy experiences in being able to sustain her career is the need to undertake significant administrative duties ("I would be very happy to never have to do any more admin."), including developing grant applications, organising rehearsals and publicising shows. She explains that she has noticed an increasing trend toward musicians being required to undertake the majority of promoting of their shows, which while not only taking time away from other activities, also cuts into their bottom line: "So you're often spending money on that, and certainly time. I'm okay because I'm sort of established in my career, but I think for younger people it's really tough."

Sandy goes on to explain that the Internet and social media have opened up new opportunities for young musicians, such as her students ("I think they have to be very smart about how they think about things"), however digital distribution models and services do not provide musicians and music fans with an ease of access to information.

They're generally not finding out who's on it, any sort of historical or social context [...] It's actually important to know Simon Barker was influenced by Greg Sheehan [who] was influenced by Mark Simmonds. Those kinds of lineages, which for people in my generation, we might have found out through liner notes on LPs [...] So we're having to train people in the importance of that kind of thing.

Digitisation aside, one of the biggest challenges Sandy sees for the sector in Australia is a lack of recognition and support for its value and contribution. As she reflects,

I'm actually quite troubled by the lack of interest in the media and in government sectors I think as well as in the arts and creative life. I feel in Australia it's undervalued greatly. It would be fantastic to feel that politicians, CEOs of big organisations, educational institutions, the media, that they could place a much higher value on music and creative work in general [...] I mean it's one of the most precious activities of human life.

Nicholas Ng: Performer and Composer (New South Wales)

"I think of composition as this ongoing project. ... There's always more to write."



Sydney-based erhu composer, performer and tertiary teacher Nicholas Ng has developed career which allows him to work across a range of settings across film, live theatre and traditional performance. Family pressure initially prompted Nicholas to consider pursuing medicine or law ("the usual professional career"). As he explains, "I did actually consider enrolling in a law degree

at university. In the end, I just dropped that and focussed on music, and I thought I'd just do an arts degree so that I can also specialise in a language to go with the music. But in the end, I just dropped that as well."

Nicholas graduated with an undergraduate degree (with Honours) in Western Composition before completing his PhD. Reflecting on his undergraduate experience, Nicholas explains that university funding cuts limited the amount of one-on-one tuition he was able to receive each week. Almost 20 years later, he believes that this deficit still influences the ways in which he perceives his artistic practice and abilities. He also reflects that reduced tuition opportunities meant that he has had to learn as he goes:

We had all those funding cuts from the time I started my Bachelor of Music at Sydney University in 1998. With this memory, I often don't feel very qualified as a composer since I had various courses removed—and then I only received half an hour of tuition a week with Ross Edwards. So I had to engage in self-learning, you know, self-teaching. I sometimes wonder if I'd write better music if I had more training.

Despite these concerns, composition remains at the heart of Nicholas' music career ("I'll never finish composing"). He reflects on the strong community and legacy values which drive his compositional practice, "For me it's a way of giving back to the community, because I hope to leave some music behind that someone might play one day, and it might actually sound quite decent."

Nicholas' passion for ensuring that the music of the erhu lives on also drives his desire to teach. For him, teaching provides a vital income stream ("I can't earn a living just composing") and also a way to share the tradition of erhu playing and traditional music.

The teaching I love because it's a way of making sure that the music will continue, I guess. Who knows what will happen later on, but the fact that there are people interested in learning my instrument means a lot to me. It's also my contribution to the promotion of multiculturalism.

A 20-year music career has seen Nicholas navigate a range of teaching, performing and composition work including engagement with higher education as a research fellow and music-making and composition in the film and live theatre sectors. He explains that navigating a combination of part-time teaching commitments and commissioned and project-based work, as well as a young family, requires a great deal of careful scheduling and planning. He continues to ensure he exercises in order to maintain his physical and mental health, commenting that "it's nowhere near as much as what I used to do, but, I think it's very important". However Nicholas explains that he is time poor and that this results in an inability to practice as much as he would like. One of the challenges he encounters when balancing his schedule is that project timelines can become drawn out. Reflecting on the experience of working on a particular commission, he comments: "... the deadline just keeps moving and then they change the scenes, and then the music doesn't fit. I'm not complaining but it means that then I have to spend even more unpaid time [on the music]; and I'm getting to a point where I don't know if I can sustain that kind of work."

Personal and professional networks have played a vital role in sustaining Nicholas' career. Time spent living in Brisbane, Canberra, Perth and now Sydney have changed the nature of how he can, and does, work with colleagues and particular organisations as a result of not being in the same city as key organisations. Nicholas often secures work with previous clients or through a process of referral. He comments that "it's nice that people remember what you've done in the past and think of you."

Having undertaken his first professional commission in 1999 – an accomplishment which encouraged Nicholas to begin formally identifying himself as a musician – one of the key changes he has witnessed has been the use of digital technologies. Although digital technologies are a great asset for a composer, they can also be cause for concern.

I was trained to write with a pen and paper. In first-year university, all my harmony assignments had to be written with a calligraphy pen dipped in ink. And then came Finale! ... I can see how digitisation really helps everyone in a way, but it does change the way you write music, because with those programs there's a tendency to copy and paste. It's far too easy to copy entire chunks of material and to be used again in other sections of work.

Veronique Serret: Violinist (New South Wales)

"I don't think I thought it would be this good."



Sydney-based violinist Veronique Serret has carved out a dynamic career working across classical, chamber and contemporary musical genres. With her sights originally set on becoming a diplomat, Veronique studied law before switching to a Bachelor of Music degree. Reflecting on the initial decision-making process:

"Everyone was, like, 'you're going to play the violin', which was super annoying! I just wanted to do something else."

Veronique has found that the time she spent in youth orchestras and in the youth development programs offered by the Australian Youth Orchestra and the Australian National Academy of Music assisted in the development of her dynamic career in music. This is a career in which she has been able to work across classical, chamber and contemporary music and genres. Explaining her practice she says:

I used to only play classical violin. I still do some of that [...] I've still tried to keep that because for me, it keeps my chops up, and it's also a different kind of accuracy and some of that music I still really enjoy. But for me, it came to a point where I needed to be creative as well.

Having initially performed predominantly in orchestras, which she did for 15 years, Veronique's career is now largely made up of performing on a sessional basis in both recorded and live music settings. Reflecting on the shift in focus she explains,

As amazing as any orchestral job is, and a lot safer in terms of just being able to survive, I just felt like I needed to do other things – and also just work with people on my terms, which is not how it really works in an orchestra.

Networks have played a critical role in the development and sustainability of Veronique's career as she has continued to diversify—"I think my career's developed only through that" use of networks—while also allowing her to contract other musicians for recording- and performance-specific orchestras.

Having carved out a unique niche for herself, Veronique is confident in taking creative risks, and trusted to do so by those she works with. As she reflects,

If you work slightly outside the box, people expect you to be taking creative risks, and so, even though it might be frowned upon at first [...] I feel like a lot of things I do, people expect that. So I just more push it until I'm told not to, 'cos otherwise why do it? That's what people want.

Veronique admits that it can be difficult to balance her myriad engagements and also maintain friendships ("important things, like friends' birthdays and weddings and stuff like that, often you're away and people stop making the effort"); however, she now ensures that she takes time off. While initially slow to take time away from her work, she explains that time away also provides her with the opportunity to get away from the city.

Until about five years ago I never took chunks of time off, and I think that's a very violin thing, where you just think, "Oh, I'm not going to be able to play if I take like a month off", or something. But now, if I can afford to, I try and do it every year. Also, for me, playing music is just like a city activity and it's just like so important to get out into the bush [the countryside]....] At the end of last year I took six weeks off, and it was fine. And I started doing—I like doing treks. I do things where you can't take your violin anyway.

Working across genres in venues and recording spaces of varying size, scope and capacity, has provided Veronique with a unique perspective of the challenges which exist for Sydney's local music sector. She identifies the closure of recording studios and small-to-medium sized venues as being of particular concern: "... when you do small ensemble work, or small band things, that's more interesting to me ... I feel you can touch people more that way, and so many of those venues are just getting lost."

Making a living as a musician in Sydney is a particular challenge due to the high cost of living, which continues to rise and ultimately impacts the viability of careers in much the same way a reduction in recording and performance spaces limits affordable opportunities. Veronique reflects,

I just hope that some musicians can continue to live in Sydney. ... For classical musicians that actually have jobs, it's okay; but for anyone that's not doing that, it's actually becoming really, really quite difficult. A lot of people are starting to move out or looking for that possibility. It just would be such a shame.



Lisa Young: Jazz vocalist, composer and performer (Victoria)

"I'm so happy to be leaving a legacy of choral music that is being performed. That's a really good feeling"



Melbourne based Jazz vocalist, composer and performer, Lisa Young has developed a career which allows her to work across a range of settings including performance, composition, teaching and workshop facilitation. A professional performer by age 20, with regular gigs across various venues in Melbourne's acoustic music scene, she reflects:

The opportunity to gig regularly and be paid and also appreciated in this way was the beginning of the professional performance work, and I was composing as well, this has always been a part of my life with music. At around age 25 I was given a teaching position at a secondary school. This really worked well with my gigging life and I could then make a living.

Lisa presently works with two main ensembles – the vocal ensemble Coco's Lunch and the Jazz/ World music quartet the Lisa Young Quartet, both of these groups integrate Indian and African elements in their Jazz/ World music art songs ("the South Indian art form of konnakkol has really influenced my body of work and is a big part of who I am as a musician"). She also teaches in vocational and workshop settings, and composes for a range of choirs. She holds a PhD as well as a Masters. She remains committed to professional development such as vocal training ("it's lovely to have someone to work on your voice with another set of ears"), and will pursue other opportunities when she can ("I had lesson on my asaltuas – Ghanaian hand percussion – last year"). Her continued commitment to learning influences her approach when facilitating undergraduate vocal training ("I really enjoy trying to make undergrad a rich and valuable experience").

Teaching has played a vital role for the duration of Lisa's career. She held a lecturing position at Box Hill Institute 2014–2019, and has run bespoke workshops and master classes for universities ("I adore taking workshops with a vocal ensemble and helping them find a pathway with improvisation"). The financial security of regular teaching work has afforded Lisa the freedom to explore a range of creative work, outside the restraints of needing to take on roles purely for financial gain. Another constant facet of activity across her career has been composition work. Selling her choral repertoire online ("that's really taken off") provides Lisa not only with an income source, but is also a way through which she can engage with choirs all around the world. As she explains:

Over recent years I've done some choral commissions for Gondwana and the Australian Voices. I'm finishing one at the moment for Young Adelaide Voices, and will also be creating a work for Grand Rapids Women's Chorus in the US.

While Lisa is wholly financially sustained through her musical work, she explains that State and Federal Government funding, as well as university research stipends have played a critical role in the ways in which she has been able to develop as an artist, reflecting:

Over 30 years I've been fortunate to receive fellowships, grant support – all my albums have had funding support [... The] support to study, including artistic development scholarships to study in India have really shaped my career.

Finding balance across her multitude of engagements can be tricky. Restricting her lecturing to three days a week ("I was working four") allows her to invest time in her other endeavours. Lisa explains that she would always love more time in her studio, and tries to ensure that she doesn't overload herself ("I try to occasionally say 'no' things when I need more time just for myself"). Doing so, while also keeping physically active by walking and practising yoga regularly, helps Lisa maintain her physical and mental wellbeing. She recognises, however, that managing one's health and wellbeing while working in the sector can be a challenge and the inability to do so is a serious issue, explaining,

You watch musicians and artists get to 50 and you really hope that they've got somewhere to live, good support and a bit of financial stability. Most people in the arts live on or below the

poverty line. That can be okay in your life for a short period of time, but if you do it for decades, it can have a cost, particularly if you're trying to have a family as well. I don't want being a musician to feel like a struggle; you want to feel like it's a celebration, your life's work.

While Lisa's career has been well supported through a range of grants, she recognises that the funding opportunities are limited, and heavily weighted toward the classical sector. She says one way to overcome this, and support more musicians would be to provide tax breaks.

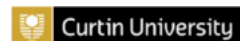
The disproportionate amount that goes to classical music, the institution of classical music, compared to contemporary and world music is outrageous really. I would love to see the arts be a tax break for everyone [...] If you support creativity by commissioning a work or by putting on a concert, giving somebody a performance opportunity, it should be a tax deduction.

More broadly, Lisa reflects that there are significant challenges for musicians being able to make money ("people don't buy CDs anymore [and...] the recompense for artists is nowhere near high enough from streaming."). She explains:

My wish would be that music would be seen as a very, very valuable part of our community and our wellbeing and would be funded from every direction [...] To have choirs everywhere so more people sang, to have percussion workshops – things that develop a sense of musicianship within a community. Then lots of money should also be thrown at developing musical excellence.



Appendix B: Making Music Work Survey



You are invited to participate in a research project investigating the careers of musicians and music professionals. This survey will ask you questions about your work history, and how your music and non-music activities contribute to your life. You can also choose to be involved in our detailed case studies if you so wish. Responses are anonymous, and you are not required to answer all questions. You can answer with specifics or more generally. This survey will take approximately 40 minutes to complete. Upon completion of the survey, you may choose to enter a prize draw for an iPad valued at \$709. Thank you for participating in our survey, and helping further research into musical careers.

Who is conducting the research?

Professor Brydie Leigh Bartleet (Griffith University), Professor Dawn Bennett (Curtin University), Professor Ruth Bridgstock (University of South Australia), Professor Scott Harrison (Griffith University), Professor Paul Draper (Griffith University) A/ Prof Vanessa Tomlinson (Griffith University), Dr Christina Ballico (Griffith University)

Contact Phone: 07 3735 6335

Contact Email: qcrc@griffith.edu.au

Why is the research being conducted?

While many emerging Australian musicians dream of stardom and riches, the reality is that most carve out a viable living by undertaking a range of paid and unpaid, predominantly part-time and freelance music-related work, sometimes supplemented by “day jobs” in unrelated fields. Despite the prevalence of these portfolio careers in Australia, there are major gaps in our understandings of how they operate due to their multifaceted nature and, in turn, how they contribute toward the country’s economy, social and cultural fabric and national identity. In a strong and highly relevant partnership with the Australia Council for the Arts, three State Art Authorities and the charitable Music Trust, Making Music Work aims to make substantial inroads towards addressing gaps in our understanding of how portfolio careers operate in the Australian music ecosystem. With diverse cultural and geographical case studies across the Australian cultural landscape, the project will map the creative, social, cultural and economical realities of this type of music career as it gains more and more prominence, and deliver strategies to address the new realities it presents for Australian musicians.

What you will be asked to do

In this survey we will ask you questions about how you organise your professional life, what aspects of musical and non-musical activities contribute to your fulfilment, your reputation, and your income. You are free to refuse to answer any of these questions, be specific or generalise, and your identity will be kept anonymous. You will have an option to leave your details for the research team to contact you for further information (but this is entirely optional). If you would like to go into the draw for a 32G iPad, you will also have the option of adding your details to enter this draw at the end of the survey. This will be drawn at the conclusion of the survey and the winning participant will be notified via email. The terms and conditions of this prize draw are at the end of this letter.

To read more about participant screening, research benefits and your privacy, please [click here](#).

If completing this survey triggers feelings of anxiety or distress, you can access support 24/7 over the phone with Beyond Blue (1300 22 4636) and Lifeline (13 11 14).

Remember, you can withdraw your participation from this study at any time, without explanation or penalty.

If you complete the survey you will be deemed to have given your consent to participate in this study.

This section of the survey explores your music practice.

Please describe what you do in your music/music related work (i.e. I am a musician, a composer, a producer, a music teacher, a music therapist, an artist manager, venue booker).

If applicable, in which genre/s of music do you practice (e.g. contemporary, classical, experimental, jazz, noise)?

Do you share your music work with people outside your family and friends?

☐ Yes ☐ No

At what age did you begin engaging in or creating music (either your own or learning other people's music)?

- ☐ Under 12 years old
☐ 12–17 years old
☐ 18–24 years old
☐ 25–34 years old
☐ 35–44 years old
☐ 45–54 years old
☐ 55–64 years old
☐ 65–74 years old
☐ 75 years or older

For how long in total (not including career breaks and time out of the workforce) have you been working within the music industry?

- ☐ Less than 1 year
☐ 1–5 years
☐ 6–10 years
☐ 10–15 years
☐ 16–20 years
☐ More than 20 years

For how long in total have you earned an income from your work within the music industry?

- ☐ Less than 1 year
☐ 1–5 years
☐ 6–10 years
☐ 10–15 years
☐ 16–20 years
☐ More than 20 years

To what extent do each of the following motivate you in your music career?					
	Not at all	Very little	To some extent	To a moderate extent	To a great extent
Financial rewards	☐	☐	☐	☐	☐
Security and stability	☐	☐	☐	☐	☐
Being enterprising and entrepreneurial	☐	☐	☐	☐	☐
Being independent and having control over my career	☐	☐	☐	☐	☐
Maintaining a balanced lifestyle	☐	☐	☐	☐	☐
Employment of music/doing what I love	☐	☐	☐	☐	☐
Developing my music skills and capabilities	☐	☐	☐	☐	☐
Meeting difficult or complex challenges	☐	☐	☐	☐	☐
Seeking audience recognition	☐	☐	☐	☐	☐
Seeking critical recognition	☐	☐	☐	☐	☐
Seeking peer recognition	☐	☐	☐	☐	☐
Contributing to my community/culture	☐	☐	☐	☐	☐
Contributing to my artform	☐	☐	☐	☐	☐
Developing the skills and capabilities of others	☐	☐	☐	☐	☐
Helping others	☐	☐	☐	☐	☐
Collaborating with others	☐	☐	☐	☐	☐
Other (specify below)	☐	☐	☐	☐	☐
If you selected 'other', please tell us more					

To what extent do you agree with each of the following with respect to your music career?					
	Not at all	Very little	To some extent	To a moderate extent	To a great extent
My future career is bright	☐	☐	☐	☐	☐
I think that my career could change at any point in my life	☐	☐	☐	☐	☐
I am flexible about considering multiple career options rather than pursuing only one career path	☐	☐	☐	☐	☐
I keep going my way even if I encounter challenges in my career	☐	☐	☐	☐	☐
I will pursue this career path I have chosen even if the outcomes are not guaranteed	☐	☐	☐	☐	☐
When things don't turn out as I'd hoped, I bounce back well	☐	☐	☐	☐	☐
I have a positive view of my future career	☐	☐	☐	☐	☐
I think that careers can change at any time	☐	☐	☐	☐	☐
When exploring the next steps in my career, I persist in my activities even if I experience difficulties	☐	☐	☐	☐	☐
I am interested in new industry trends and possibilities in my career	☐	☐	☐	☐	☐
I am willing to take some risks in pursuing my career	☐	☐	☐	☐	☐
When things don't go according to plan, I can adapt and find new possibilities to meet my career needs	☐	☐	☐	☐	☐
I think my career is full of possibilities	☐	☐	☐	☐	☐
I am intrigued by the idea of an occasional opportunity that leads to a whole new career experience	☐	☐	☐	☐	☐
I persist in my career efforts despite unexpected barriers and obstacles	☐	☐	☐	☐	☐
I am interested in new activities that might be helpful in making career decisions	☐	☐	☐	☐	☐
Even though there is no guarantee of job success, I will still take on challenges	☐	☐	☐	☐	☐
I can always find or make new options if something doesn't work out	☐	☐	☐	☐	☐

Thinking back in time, what are the three most formative events in your music career?

1.

2.

3.



Starting with your most recent/current roles and working backwards, please give details of your five most recent roles. Please include paid roles, volunteer and unpaid roles, music, music-related and non-music roles, roles for which you were an employee, and for which you were self-employed, e.g. 'session musician', 'graphic designer', 'arts administrator', 'instrumental music teacher', 'scientist'.

Role 1 (most recent role)	Role title	Sector	Start month	Start year			
		☐ Commercial ☐ Not for profit ☐ Community	☐ January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July ☐ August ☐ September ☐ October ☐ November ☐ December	☐ 2017 ☐ 2016 ☐ 2015 ☐ 2014 ☐ 2013 ☐ 2012 ☐ 2011 ☐ 2010 ☐ 2009 ☐ 2008 ☐ 2007 ☐ 2006	☐ 2005 ☐ 2004 ☐ 2003 ☐ 2002 ☐ 2001 ☐ 2000 ☐ 1999 ☐ 1998 ☐ 1997 ☐ 1996 ☐ 1995 ☐ 1994	☐ 1993 ☐ 1992 ☐ 1991 ☐ 1990 ☐ 1989 ☐ 1988 ☐ 1987 ☐ 1986 ☐ 1983 ☐ 1982 ☐ 1981 ☐ 1980	☐ 1979 ☐ 1978 ☐ 1977 ☐ 1976 ☐ 1975 ☐ 1974 ☐ 1973 ☐ 1972 ☐ 1971 ☐ 1970 ☐ 1985 ☐ 1984

Role 1	Finish	Start year					Employment type
	☐ I am still in this role ☐ January ☐ February ☐ March ☐ April ☐ May ☐ June ☐ July ☐ August ☐ September ☐ October ☐ November ☐ December	☐ 2017 ☐ 2016 ☐ 2015 ☐ 2014 ☐ 2013 ☐ 2012 ☐ 2011 ☐ 2010 ☐ 2009 ☐ 2008 ☐ 2007 ☐ 2006	☐ 2005 ☐ 2004 ☐ 2003 ☐ 2002 ☐ 2001 ☐ 2000 ☐ 1999 ☐ 1998 ☐ 1997 ☐ 1996 ☐ 1995 ☐ 1994	☐ 1993 ☐ 1992 ☐ 1991 ☐ 1990 ☐ 1989 ☐ 1988 ☐ 1987 ☐ 1986 ☐ 1983 ☐ 1982 ☐ 1981 ☐ 1980	☐ 1979 ☐ 1978 ☐ 1977 ☐ 1976 ☐ 1975 ☐ 1974 ☐ 1973 ☐ 1972 ☐ 1971 ☐ 1970 ☐ 1985 ☐ 1984	☐ Self employed ☐ Casual employee ☐ Contract/sessional - part-time ☐ Contract/sessional - full time ☐ Continuing/tenured - part-time ☐ Continuing/tenured - full time ☐ Volunteer/unpaid	

Role 1	Finish	Income (in dollars)	Average paid hours worked per week	Average unpaid hours worked per week	Frequency of payment
	☐ Paid a total rate for a body of work (e.g. per performance/contract) ☐ Paid on a continuing basis (e.g. salaried or tenured roles) ☐ Paid an hourly rate				

If you engaged in unpaid work, what were your main reasons for doing this? Please select all that apply.

- | | |
|--|--|
| ☐ Continuing to work on paid work outside of paid hours | ☐ Contributing to my discipline |
| ☐ Enjoyment | ☐ Expressing myself creatively |
| ☐ Career development/building career profile | ☐ Challenge |
| ☐ Using my skills | ☐ Don't know |
| ☐ Building/developing my skills | ☐ Other |

Have you had any other roles?

- ☐ Yes ☐ No

Role 2 (second most recent role)	Role title	Sector	Start month	Start year			
		☐ Commercial	☐ January	☐ 2017	☐ 2005	☐ 1993	☐ 1979
		☐ Not for profit	☐ February	☐ 2016	☐ 2004	☐ 1992	☐ 1978
		☐ Community	☐ March	☐ 2015	☐ 2003	☐ 1991	☐ 1977
			☐ April	☐ 2014	☐ 2002	☐ 1990	☐ 1976
			☐ May	☐ 2013	☐ 2001	☐ 1989	☐ 1975
			☐ June	☐ 2012	☐ 2000	☐ 1988	☐ 1974
			☐ July	☐ 2011	☐ 1999	☐ 1987	☐ 1973
			☐ August	☐ 2010	☐ 1998	☐ 1986	☐ 1972
			☐ September	☐ 2009	☐ 1997	☐ 1983	☐ 1971
			☐ October	☐ 2008	☐ 1996	☐ 1982	☐ 1970
			☐ November	☐ 2007	☐ 1995	☐ 1981	☐ 1985
			☐ December	☐ 2006	☐ 1994	☐ 1980	☐ 1984

Role 2	Finish	Start year				Employment type
	☐ I am still in this role					
	☐ January	☐ 2017	☐ 2005	☐ 1993	☐ 1979	☐ Self employed ☐ Casual employee ☐ Contract/sessional - part-time ☐ Contract/sessional - full time ☐ Continuing/tenured - part-time ☐ Continuing/tenured - full time ☐ Volunteer/unpaid
	☐ February	☐ 2016	☐ 2004	☐ 1992	☐ 1978	
	☐ March	☐ 2015	☐ 2003	☐ 1991	☐ 1977	
	☐ April	☐ 2014	☐ 2002	☐ 1990	☐ 1976	
	☐ May	☐ 2013	☐ 2001	☐ 1989	☐ 1975	
	☐ June	☐ 2012	☐ 2000	☐ 1988	☐ 1974	
	☐ July	☐ 2011	☐ 1999	☐ 1987	☐ 1973	
	☐ August	☐ 2010	☐ 1998	☐ 1986	☐ 1972	
	☐ September	☐ 2009	☐ 1997	☐ 1983	☐ 1971	
	☐ October	☐ 2008	☐ 1996	☐ 1982	☐ 1970	
	☐ November	☐ 2007	☐ 1995	☐ 1981	☐ 1985	
☐ December	☐ 2006	☐ 1994	☐ 1980	☐ 1984		

Role 2	Finish	Income (in dollars)	Average paid hours worked per week	Average unpaid hours worked per week	Frequency of payment
	☐ Paid a total rate for a body of work (e.g. per performance/contract) ☐ Paid on a continuing basis (e.g. salaried or tenured roles) ☐ Paid an hourly rate				☐ Project/Contract ☐ Hour ☐ Week ☐ Fortnight ☐ Month ☐ Year

If you engaged in unpaid work, what were your main reasons for doing this? Please select all that apply.

- | | |
|--|--|
| ☐ Continuing to work on paid work outside of paid hours | ☐ Contributing to my discipline |
| ☐ Enjoyment | ☐ Expressing myself creatively |
| ☐ Career development/building career profile | ☐ Challenge |
| ☐ Using my skills | ☐ Don't know |
| ☐ Building/developing my skills | ☐ Other |

Have you had any other roles?

- ☐ Yes ☐ No

Role 3 (third most recent role)	Role title	Sector	Start month	Start year			
		☐ Commercial	☐ January	☐ 2017	☐ 2005	☐ 1993	☐ 1979
		☐ Not for profit	☐ February	☐ 2016	☐ 2004	☐ 1992	☐ 1978
		☐ Community	☐ March	☐ 2015	☐ 2003	☐ 1991	☐ 1977
			☐ April	☐ 2014	☐ 2002	☐ 1990	☐ 1976
			☐ May	☐ 2013	☐ 2001	☐ 1989	☐ 1975
			☐ June	☐ 2012	☐ 2000	☐ 1988	☐ 1974
			☐ July	☐ 2011	☐ 1999	☐ 1987	☐ 1973
			☐ August	☐ 2010	☐ 1998	☐ 1986	☐ 1972
			☐ September	☐ 2009	☐ 1997	☐ 1983	☐ 1971
			☐ October	☐ 2008	☐ 1996	☐ 1982	☐ 1970
			☐ November	☐ 2007	☐ 1995	☐ 1981	☐ 1985
			☐ December	☐ 2006	☐ 1994	☐ 1980	☐ 1984

Role 3	Finish	Start year				Employment type
	☐ I am still in this role					
	☐ January	☐ 2017	☐ 2005	☐ 1993	☐ 1979	☐ Self employed ☐ Casual employee ☐ Contract/sessional - part-time ☐ Contract/sessional - full time ☐ Continuing/tenured - part-time ☐ Continuing/tenured - full time ☐ Volunteer/unpaid
	☐ February	☐ 2016	☐ 2004	☐ 1992	☐ 1978	
	☐ March	☐ 2015	☐ 2003	☐ 1991	☐ 1977	
	☐ April	☐ 2014	☐ 2002	☐ 1990	☐ 1976	
	☐ May	☐ 2013	☐ 2001	☐ 1989	☐ 1975	
	☐ June	☐ 2012	☐ 2000	☐ 1988	☐ 1974	
	☐ July	☐ 2011	☐ 1999	☐ 1987	☐ 1973	
	☐ August	☐ 2010	☐ 1998	☐ 1986	☐ 1972	
	☐ September	☐ 2009	☐ 1997	☐ 1983	☐ 1971	
	☐ October	☐ 2008	☐ 1996	☐ 1982	☐ 1970	
	☐ November	☐ 2007	☐ 1995	☐ 1981	☐ 1985	
☐ December	☐ 2006	☐ 1994	☐ 1980	☐ 1984		

Role 3	Finish	Income (in dollars)	Average paid hours worked per week	Average unpaid hours worked per week	Frequency of payment
	☐ Paid a total rate for a body of work (e.g. per performance/contract)				☐ Project/Contract ☐ Hour ☐ Week ☐ Fortnight ☐ Month ☐ Year
	☐ Paid on a continuing basis (e.g. salaried or tenured roles)				
	☐ Paid an hourly rate				

If you engaged in unpaid work, what were your main reasons for doing this? Please select all that apply.

- | | |
|--|--|
| ☐ Continuing to work on paid work outside of paid hours | ☐ Contributing to my discipline |
| ☐ Enjoyment | ☐ Expressing myself creatively |
| ☐ Career development/building career profile | ☐ Challenge |
| ☐ Using my skills | ☐ Don't know |
| ☐ Building/developing my skills | ☐ Other |

Have you had any other roles?

- ☐ Yes ☐ No

Role 5 (fifth most recent role)	Role title	Sector	Start month	Start year			
		☐ Commercial	☐ January	☐ 2017	☐ 2005	☐ 1993	☐ 1979
		☐ Not for profit	☐ February	☐ 2016	☐ 2004	☐ 1992	☐ 1978
		☐ Community	☐ March	☐ 2015	☐ 2003	☐ 1991	☐ 1977
			☐ April	☐ 2014	☐ 2002	☐ 1990	☐ 1976
			☐ May	☐ 2013	☐ 2001	☐ 1989	☐ 1975
			☐ June	☐ 2012	☐ 2000	☐ 1988	☐ 1974
			☐ July	☐ 2011	☐ 1999	☐ 1987	☐ 1973
			☐ August	☐ 2010	☐ 1998	☐ 1986	☐ 1972
			☐ September	☐ 2009	☐ 1997	☐ 1983	☐ 1971
			☐ October	☐ 2008	☐ 1996	☐ 1982	☐ 1970
			☐ November	☐ 2007	☐ 1995	☐ 1981	☐ 1985
			☐ December	☐ 2006	☐ 1994	☐ 1980	☐ 1984

Role 5	Finish	Start year				Employment type
	☐ I am still in this role					
	☐ January	☐ 2017	☐ 2005	☐ 1993	☐ 1979	☐ Self employed ☐ Casual employee ☐ Contract/sessional - part-time ☐ Contract/sessional - full time ☐ Continuing/tenured - part-time ☐ Continuing/tenured - full time ☐ Volunteer/unpaid
	☐ February	☐ 2016	☐ 2004	☐ 1992	☐ 1978	
	☐ March	☐ 2015	☐ 2003	☐ 1991	☐ 1977	
	☐ April	☐ 2014	☐ 2002	☐ 1990	☐ 1976	
	☐ May	☐ 2013	☐ 2001	☐ 1989	☐ 1975	
	☐ June	☐ 2012	☐ 2000	☐ 1988	☐ 1974	
	☐ July	☐ 2011	☐ 1999	☐ 1987	☐ 1973	
	☐ August	☐ 2010	☐ 1998	☐ 1986	☐ 1972	
	☐ September	☐ 2009	☐ 1997	☐ 1983	☐ 1971	
	☐ October	☐ 2008	☐ 1996	☐ 1982	☐ 1970	
	☐ November	☐ 2007	☐ 1995	☐ 1981	☐ 1985	
☐ December	☐ 2006	☐ 1994	☐ 1980	☐ 1984		

Role 5	Finish	Income (in dollars)	Average paid hours worked per week	Average unpaid hours worked per week	Frequency of payment
	☐ Paid a total rate for a body of work (e.g. per performance/contract)				☐ Project/Contract
	☐ Paid on a continuing basis (e.g. salaried or tenured roles)				☐ Hour
	☐ Paid an hourly rate				☐ Week
					☐ Fortnight
					☐ Month
					☐ Year

If you engaged in unpaid work, what were your main reasons for doing this? Please select all that apply.

- | | |
|--|--|
| ☐ Continuing to work on paid work outside of paid hours | ☐ Contributing to my discipline |
| ☐ Enjoyment | ☐ Expressing myself creatively |
| ☐ Career development/building career profile | ☐ Challenge |
| ☐ Using my skills | ☐ Don't know |
| ☐ Building/developing my skills | ☐ Other |

Have you had any other roles?

- ☐ Yes ☐ No

What are your principal sources of income, to the closest 10%?

Please be sure that your responses add up to 100%.

- % Non-music related income or employment
- % Ad revenue
- % Compositions and commissions
- % Crowdfunding (e.g. Kickstarter)
- % Grants
- % License fees (e.g. from TV, film or gaming)
- % Sale of merchandise
- % Sale of physical music (e.g. CD's)
- % Sale of digital music (e.g. streaming and downloads)
- % Subscription content revenue (e.g. Patreon)
- % Performance fees
- % Publishing and royalties
- % Radio broadcast
- % Music teaching
- % Other (specify below)

% Total

In the last two years, how many months have you spent outside the paid workforce because of:				
	Unemployment	Undertaking education or training	Caring responsibilities (including caring for young children)	Retirement
Months out of the workforce	☐ None	☐ None	☐ None	☐ None
	☐ Up to one month	☐ Up to one month	☐ Up to one month	☐ Up to one month
	☐ 1–3 months	☐ 1–3 months	☐ 1–3 months	☐ 1–3 months
	☐ 4–6 months	☐ 4–6 months	☐ 4–6 months	☐ 4–6 months
	☐ 7–9 months	☐ 7–9 months	☐ 7–9 months	☐ 7–9 months
	☐ 10–12 months	☐ 10–12 months	☐ 10–12 months	☐ 10–12 months
	☐ 13–15 months	☐ 13–15 months	☐ 13–15 months	☐ 13–15 months
	☐ 16–18 months	☐ 16–18 months	☐ 16–18 months	☐ 16–18 months
	☐ 19–21 months	☐ 19–21 months	☐ 19–21 months	☐ 19–21 months
	☐ 22–24 months	☐ 22–24 months	☐ 22–24 months	☐ 22–24 months
Months out of the workforce	Illness or disability	Travel	Undertaking internships/ placements /volunteering	Other (specify below)
	☐ None	☐ None	☐ None	☐ None
	☐ Up to one month	☐ Up to one month	☐ Up to one month	☐ Up to one month
	☐ 1–3 months	☐ 1–3 months	☐ 1–3 months	☐ 1–3 months
	☐ 4–6 months	☐ 4–6 months	☐ 4–6 months	☐ 4–6 months
	☐ 7–9 months	☐ 7–9 months	☐ 7–9 months	☐ 7–9 months
	☐ 10–12 months	☐ 10–12 months	☐ 10–12 months	☐ 10–12 months
	☐ 13–15 months	☐ 13–15 months	☐ 13–15 months	☐ 13–15 months
	☐ 16–18 months	☐ 16–18 months	☐ 16–18 months	☐ 16–18 months
	☐ 19–21 months	☐ 19–21 months	☐ 19–21 months	☐ 19–21 months
☐ 22–24 months	☐ 22–24 months	☐ 22–24 months	☐ 22–24 months	

If you selected 'other', please tell us more:

In the last two years, have you moved residence for the purposes of pursuing music or music related work (e.g. to seek employment, undertake a short-term contract, internship program)?

☐ Yes ☐ No

Please provide information on your most recent move. For example, you may have moved interstate for 6 months. If you are still at your new location, please count the time you have been in your new location up to this point.

	Type of move	Duration	Unit of time
Time 1 (most recent move)	☐ From a regional/rural area to an urban area		☐ Weeks
	☐ From an urban area to a regional/rural area		☐ Months
	☐ From an outer suburb to an inner suburb		☐ Years
	☐ Interstate		
	☐ Internationally		

What was the reason behind the move?

- | | |
|---|---|
| ☐ Residency/fellowship | ☐ Project work |
| ☐ Seek employment | ☐ Education/training |
| ☐ Fixed term contract | ☐ Internship program |

☐ Other (please specify your response):

Please provide information on your second-most recent move

	Type of move	Duration	Unit of time
Time 2 (second-most recent move)	☐ From a regional/rural area to an urban area		☐ Weeks
	☐ From an urban area to a regional/rural area		☐ Months
	☐ From an outer suburb to an inner suburb		☐ Years
	☐ Interstate		
	☐ Internationally		

What was the reason behind the move?

- | | |
|---|---|
| ☐ Residency/fellowship | ☐ Project work |
| ☐ Seek employment | ☐ Education/training |
| ☐ Fixed term contract | ☐ Internship program |

☐ Other (please specify your response):

Please provide information on your third-most recent move

	Type of move	Duration	Unit of time
Time 3 (third-most recent move)	☐ From a regional/rural area to an urban area		☐ Weeks
	☐ From an urban area to a regional/rural area		☐ Months
	☐ From an outer suburb to an inner suburb		☐ Years
	☐ Interstate		
	☐ Internationally		

What was the reason behind the move?

- | | |
|---|---|
| ☐ Residency/fellowship | ☐ Project work |
| ☐ Seek employment | ☐ Education/training |
| ☐ Fixed term contract | ☐ Internship program |

☐ Other (please specify your response):

Did you make a profit or a loss from your music and music related work in the last financial year?)

☐ Profit ☐ Loss

Approximately how much profit did you make (in dollars) in the last financial year?

Approximately how much of a loss did you make (in dollars) in the last financial year?

This section of the survey explores your feelings about your music career

How would you define career success in your music career?

Using your own personal definition of career success, how successful do you feel that you are in your career right now?

- ☐ Not at all successful
☐ A little successful
☐ Somewhat successful
☐ Moderately successful
☐ Very successful

How employable in music do you feel that you are right now? In giving your answer, think about your capabilities.

- ☐ Not at all employable
☐ A little employable
☐ Somewhat employable
☐ Moderately employable
☐ Very employable

How employable in general do you feel that you are right now?

- ☐ Not at all employable
☐ A little employable
☐ Somewhat employable
☐ Moderately employable
☐ Very employable

To what extent do you agree with the following statements:
I am satisfied with the progress I have made towards meeting my overall career goals.

- ☐ Strongly disagree
☐ Disagree
☐ Uncertain
☐ Agree
☐ Strongly agree

I am satisfied with the progress I have made towards meeting my goals for income.

- ☐ Strongly disagree
☐ Disagree
☐ Uncertain
☐ Agree
☐ Strongly agree

I am satisfied with the progress I have made towards meeting my artistic goals.

- ☐ Strongly disagree
☐ Disagree
☐ Uncertain
☐ Agree
☐ Strongly agree

I am satisfied with the progress I have made towards meeting my goals for advancement.

- ☐ Strongly disagree
☐ Disagree
☐ Uncertain
☐ Agree
☐ Strongly agree

I am satisfied with the progress I have made towards meeting my goals for the development of new skills.

- ☐ Strongly disagree
☐ Disagree
☐ Uncertain
☐ Agree
☐ Strongly agree

I am satisfied with my progress towards achieving a career balance.

- ☐ Strongly disagree
☐ Disagree
☐ Uncertain
☐ Agree
☐ Strongly agree

To what extent are you committed to continuing your career in music?

- ☐ Strongly disagree
☐ Disagree
☐ Uncertain
☐ Agree
☐ Strongly agree

Please explain your reasoning behind your level of commitment to continuing your career in music.

This section of the survey explores your social supports, stress, and work-life balance.

How would you define career success in your music career?

To what extent do you agree with the following statements:
My family is there to help me through career challenges.

- ☐ Strongly disagree
- ☐ Disagree
- ☐ Uncertain
- ☐ Agree
- ☐ Strongly agree

I receive all the encouragement I need from others to meet my career goals.

- ☐ Strongly disagree
- ☐ Disagree
- ☐ Uncertain
- ☐ Agree
- ☐ Strongly agree

Others in my life are very supportive of my career.

- ☐ Strongly disagree
- ☐ Disagree
- ☐ Uncertain
- ☐ Agree
- ☐ Strongly agree

To what extent do you agree with the following statements: Because of my music career, I:						
	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Prefer not to answer
Find it difficult to maintain my social life	☐	☐	☐	☐	☐	☐
Find it difficult to maintain contact with friends and family	☐	☐	☐	☐	☐	☐
Have problems finding time for family	☐	☐	☐	☐	☐	☐
Have problems finding time for myself	☐	☐	☐	☐	☐	☐
Have trouble maintaining a work-life balance	☐	☐	☐	☐	☐	☐
Feel stressed a significant proportion of the time	☐	☐	☐	☐	☐	☐
Experience sleep difficulties	☐	☐	☐	☐	☐	☐
Experience physical health problems	☐	☐	☐	☐	☐	☐
Experience anxiety	☐	☐	☐	☐	☐	☐
Experience depression	☐	☐	☐	☐	☐	☐

Have you ever been diagnosed with a mental illness?

- ☐ Yes
- ☐ No
- ☐ Prefer not to answer

What are the main sources of difficulty in your music career (please select all that apply)?

- ☐ Working too much / work overload
- ☐ Financial difficulty
- ☐ Poor working conditions
- ☐ Time pressures
- ☐ Conflict with others
- ☐ Lack of job security
- ☐ Lack of opportunities
- ☐ Lack of autonomy
- ☐ Other: _____

This section of the survey explores your strategies for finding, acquiring and creating music work.

In the last two years, what formal strategies have you used to find or acquire music or music related work?

- ☐ None
- ☐ Answered a call for work
- ☐ Answered tenders
- ☐ Attended an open call to audition or submit work
- ☐ Used a job search agency (such as Serena Russo)
- ☐ Searched music/arts specific job boards (such as ArtsHub, Grapevine Jobs, The Music Network, Australia Council Job Board)
- ☐ Advertised on music/arts specific job boards (such as ArtsHub, Grapevine Jobs, The Music Network, Australia Council for the Arts Job Board)
- ☐ Searched general job boards (such as SEEK, CareerOne)
- ☐ Advertised on general job boards (such as SEEK, CareerOne)
- ☐ Used an agent/manager
- ☐ Other: _____

In the last two years, what informal strategies have you used to find or acquire music or music related work?

- ☐ None
- ☐ Cold calling
- ☐ Paid work experience/internship
- ☐ Unpaid work experience/internship
- ☐ Informal online social networks (such as Facebook, LinkedIn, Twitter)
- ☐ Informal face-to-face social networks (such as networking, peer groups, industry events, word of mouth)
- ☐ Online portfolio/store/website/blog
- ☐ Other: _____

What roles have your informal social networks played in your finding and generating music work?

In the last two years, what strategies have you used to create music or music related work?

- ☐ None
- ☐ Apply for grants
- ☐ Establishing or continuing own enterprise (such as a band, ensemble, collective, business)
- ☐ Establishing or continuing own enterprise online (such as a Youtube channel, live streaming)
- ☐ Other: _____

What does your agent/manager do?

- ☐ Book shows / tours
- ☐ Coordinate PR / promotional strategies
- ☐ Coordinate / schedule recording sessions
- ☐ Manage finances/ taxes
- ☐ Negotiate contracts/ performance fees
- ☐ Provide strategic planning
- ☐ Source funding/ grants/ sponsorship
- ☐ Other: _____

Of the strategies you have used, how often have you used each, and how effective were they?

	Answered a call for work	Answered tenders	Attended an open call to audition or submit work	Used a job search agency (such as Serena Russo)
Frequency of use	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week
Effectiveness	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective

	Searched music/arts specific job boards (such as ArtsHub, Grapevine Jobs, The Music Network, Australia Council Job Board)	Advertised on music/arts specific job boards (such as ArtsHub, Grapevine Jobs, The Music Network, Australia Council Job Board)	Searched general job boards (such as SEEK, CareerOne)	Advertised on general job boards (such as SEEK, CareerOne)
Frequency of use	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week
Effectiveness	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective

Of the strategies you have used, how often have you used each, and how effective were they?				
	Searched for or used an agent/manager	Cold calling	Paid work experience/ internship	Unpaid work experience/ internship
Frequency of use	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week
Effectiveness	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective

	Informal online social networks (such as Facebook, LinkedIn, Twitter)	Informal face-to-face social networks (such as networking, peer groups, industry events, word of mouth)	Online portfolio/store/ website/blog	Apply for grants
Frequency of use	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week
Effectiveness	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective

	Establishing or developing own enterprise (such as a band, ensemble, collective, business)	Establishing or developing own enterprise online (such as a Youtube channel, live streaming)
Frequency of use	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week	☐ Never ☐ Once a year ☐ Once every six months ☐ Once every 3 months ☐ Once a month ☐ Once a week ☐ More than once per week
Effectiveness	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective	☐ Not at all effective ☐ A little effective ☐ Somewhat effective ☐ Moderately effective ☐ Very effective

This section of the survey explores your education, training and professional learning.

Did you complete any formal education beyond Year 12?

☐ Yes ☐ No

Please give details of your music and non-music related education, where applicable.				
	Music related education - degree level	Music related education - field	Non-music related education - degree level	Non-music related education - field
1	☐ Certificate I - III ☐ Certificate IV, Diploma or Advanced Diploma ☐ Bachelor ☐ Honours ☐ Postgraduate Certificate or Diploma ☐ Masters (coursework) ☐ Masters (research) ☐ Doctorate (professional) ☐ Doctorate (PhD) ☐ Other	☐ Music performance - classical ☐ Musical performance - contemporary ☐ Music performance - jazz ☐ Music composition ☐ Music education ☐ Music research ☐ Music technology ☐ Music therapy ☐ Other	☐ Certificate I - III ☐ Certificate IV, Diploma or Advanced Diploma ☐ Bachelor ☐ Honours ☐ Postgraduate Certificate or Diploma ☐ Masters (coursework) ☐ Masters (research) ☐ Doctorate (professional) ☐ Doctorate (PhD) ☐ Other	☐ Business ☐ Creative fields: non-music ☐ Education ☐ Engineering ☐ Environment ☐ Health ☐ Humanities ☐ Science and Technology
2	☐ Certificate I - III ☐ Certificate IV, Diploma or Advanced Diploma ☐ Bachelor ☐ Honours ☐ Postgraduate Certificate or Diploma ☐ Masters (coursework) ☐ Masters (research) ☐ Doctorate (professional) ☐ Doctorate (PhD) ☐ Other	☐ Music performance - classical ☐ Musical performance - contemporary ☐ Music performance - jazz ☐ Music composition ☐ Music education ☐ Music research ☐ Music technology ☐ Music therapy ☐ Other	☐ Certificate I - III ☐ Certificate IV, Diploma or Advanced Diploma ☐ Bachelor ☐ Honours ☐ Postgraduate Certificate or Diploma ☐ Masters (coursework) ☐ Masters (research) ☐ Doctorate (professional) ☐ Doctorate (PhD) ☐ Other	☐ Business ☐ Creative fields: non-music ☐ Education ☐ Engineering ☐ Environment ☐ Health ☐ Humanities ☐ Science and Technology
3	☐ Certificate I - III ☐ Certificate IV, Diploma or Advanced Diploma ☐ Bachelor ☐ Honours ☐ Postgraduate Certificate or Diploma ☐ Masters (coursework) ☐ Masters (research) ☐ Doctorate (professional) ☐ Doctorate (PhD) ☐ Other	☐ Music performance - classical ☐ Musical performance - contemporary ☐ Music performance - jazz ☐ Music composition ☐ Music education ☐ Music research ☐ Music technology ☐ Music therapy ☐ Other	☐ Certificate I - III ☐ Certificate IV, Diploma or Advanced Diploma ☐ Bachelor ☐ Honours ☐ Postgraduate Certificate or Diploma ☐ Masters (coursework) ☐ Masters (research) ☐ Doctorate (professional) ☐ Doctorate (PhD) ☐ Other	☐ Business ☐ Creative fields: non-music ☐ Education ☐ Engineering ☐ Environment ☐ Health ☐ Humanities ☐ Science and Technology

To what extent do you feel that your post-secondary education has provided you with the required skills to develop your music career?

☐ Not at all
☐ A little
☐ To some extent
☐ To a moderate extend
☐ To a great extent

What other skills or areas of training do you need to support your music career?

1. _____
 2. _____
 3. _____

In the last 12 months, have you undertaken any other types of music or music related professional development or training? For example, workshops, fellowships, internships or networking events.

☐ Yes ☐ No

What types of professional development or training have you undertaken?		
	Type of education or training	What were the topics?
1	☐ Workshop ☐ Lessons (instrumental/vocal) ☐ Masterclass ☐ Short course ☐ Mentoring ☐ Conference ☐ Seminar	☐ Residency ☐ Fellowship ☐ Unpaid placement/internship ☐ Paid placement/internship ☐ Informal social learning e.g. networking events ☐ Formal social learning e.g. mentoring scheme ☐ Something else
2	☐ Workshop ☐ Lessons (instrumental/vocal) ☐ Masterclass ☐ Short course ☐ Mentoring ☐ Conference ☐ Seminar	☐ Residency ☐ Fellowship ☐ Unpaid placement/internship ☐ Paid placement/internship ☐ Informal social learning e.g. networking events ☐ Formal social learning e.g. mentoring scheme ☐ Something else
3	☐ Workshop ☐ Lessons (instrumental/vocal) ☐ Masterclass ☐ Short course ☐ Mentoring ☐ Conference ☐ Seminar	☐ Residency ☐ Fellowship ☐ Unpaid placement/internship ☐ Paid placement/internship ☐ Informal social learning e.g. networking events ☐ Formal social learning e.g. mentoring scheme ☐ Something else
4	☐ Workshop ☐ Lessons (instrumental/vocal) ☐ Masterclass ☐ Short course ☐ Mentoring ☐ Conference ☐ Seminar	☐ Residency ☐ Fellowship ☐ Unpaid placement/internship ☐ Paid placement/internship ☐ Informal social learning e.g. networking events ☐ Formal social learning e.g. mentoring scheme ☐ Something else
5	☐ Workshop ☐ Lessons (instrumental/vocal) ☐ Masterclass ☐ Short course ☐ Mentoring ☐ Conference ☐ Seminar	☐ Residency ☐ Fellowship ☐ Unpaid placement/internship ☐ Paid placement/internship ☐ Informal social learning e.g. networking events ☐ Formal social learning e.g. mentoring scheme ☐ Something else

Approximately how much did you spend on musical or music related education, training or professional development in the last 12 months? Please give your answer in Australian dollars.

In your current music role/s, do you have access to any of the following? Please select all that apply:

- ☐ Employer superannuation contributions
☐ Private health insurance or health plan
☐ Salary packaging
☐ Life/disability insurance plan (separate to what is provided through your superannuation)
☐ Other: _____

Which of the following professional memberships do you hold?

- ☐ Australian Music Centre
- ☐ AMCOS/APRA
- ☐ Australian Society for Music Education
- ☐ Feral Arts
- ☐ Media Entertainment and Arts Alliance
- ☐ Music ACT
- ☐ Music Australia
- ☐ Music NSW
- ☐ Music NT
- ☐ Music Tasmania
- ☐ Music Victoria
- ☐ Musicians Union of Australia
- ☐ QMusic
- ☐ West Australian Music Industry Association
- ☐ WIRRIPIANG
- ☐ Other: _____

This section of the survey asks you about your background and personal details.

With which gender do you identify?

- ☐ Male
- ☐ Female
- ☐ Transgender
- ☐ Intersex
- ☐ Non-binary
- ☐ Gender variant / nonconforming
- ☐ Other: _____

What is your age?

- ☐ 18–24 years old
- ☐ 25–34 years old
- ☐ 35–44 years old
- ☐ 45–54 years old
- ☐ 55–64 years old
- ☐ 65–74 years old
- ☐ 75 years or older

Do you live with a disability (a condition that has impacted your daily activities for 6 months or more) under one or more of the following categories?

- ☐ Immunological – the presence of organisms causing disease in the body
- ☐ Intellectual – affects a person's abilities to learn
- ☐ Learning disability
- ☐ Mental Illness – affects a person's thinking processes
- ☐ Neurological – affects the person's brain and central nervous system
- ☐ Physical – affects a person's mobility or dexterity
- ☐ Sensory – affects a person's ability to hear or see

What is your residential post code?

With which ethnicities do you identify?

- ☐ Aboriginal or Torres Strait Islander
- ☐ Australian
- ☐ African (e.g. Angolan, Ethiopian, Kenyan, Nigerian, Zimbabwean)
- ☐ British Isles (e.g. English, Irish, Welsh)
- ☐ Caribbean (e.g. Jamaican, Cuban, Haitian)
- ☐ East/ Southeast Asian (e.g. Chinese, Filipino, Japanese, Korean, Tibetan)
- ☐ Eastern Europe (e.g. Hungarian, Polish, Russian, Baltic countries, Czech)
- ☐ French (not including French-Canadian)
- ☐ Latin, Central and/or South American (e.g. Argentinean, Maya, Mexican, Venezuelan)
- ☐ Middle Eastern/ North African (e.g. Lebanese, Moroccan, Palestinian, Iraqi)
- ☐ North American (e.g. French Canadian, Anglo-Canadian, Acadian)
- ☐ Northern Europe (e.g. Danish, Finnish, Swedish)
- ☐ Oceanic other than Australian (e.g. Pacific Islanders)
- ☐ Other European (e.g. Basque, Sami, Roma)
- ☐ South Asian (e.g. Punjabi, Pakistani, Tamil, Gujarati)
- ☐ Southern Europe (e.g. Greek, Italian, Spanish, Portuguese, Balkan countries)
- ☐ West Asian (e.g. Afghan, Iranian, Israeli, Kurd, Turk, Assyrian)
- ☐ Western Europe (e.g. German, Austrian, Dutch, Swiss, Flemish)
- ☐ Other: _____

As part of our research, we are conducting in-depth case studies to further explore how artists undertaking music and music related work manage their careers. To protect your anonymity, you are able to participate in the case study while keeping your responses to this survey private from the case study team. If you would like to be contacted for our case study, please select the following option, and include your email address in the box below:

- ☐ I do not wish to participate in the case study
- ☐ I wish to participate in the case study and keep my responses to this survey private from the case study team
- ☐ I wish to participate in the case study and allow the case study team to see my responses to this survey

Please enter your email address for the case study

Appendix C: Interview Questions

Background

1. Why did you choose to pursue a career in music?
2. At what point in your life did you begin to identify as a musician?
3. How would you describe your current music work?
4. Do you also have any non-music roles?
 - a. How do you balance them?
 - b. Would you tell me about what each of your roles mean to you?
5. What would you consider to be the three most significant events in your career and how they led you to where you are today?
6. In what ways has your career differed from what you had imagined it to be?

Education:

7. How did you learn how to work as a musician?
8. How do you go about learning new things now?
9. Do you engage in any professional development, education or training now – such as attending workshops, sundowners, conferences or networking events or festivals?
 - a. What is their role in making connections and/or finding work?
 - b. What's missing in the professional development offered?
 - c. Have you encountered any barriers or challenges to accessing learning opportunities?

Career development and notions of success

10. How many years or attempts did it take to establish yourself as a musician?
11. How do you make money as a musician?
12. How do you get work?
 - a. Has that changed for you over the years?
13. To what extent is your income from music sufficient to sustain your lifestyle?
 - a. If no, how do you make enough income to sustain your lifestyle?
 - b. If yes, when did this happen?
 - c. Do you expect this always to be the case?
14. What challenges do you face in the day-to-day pursuit of your career?
15. How do you balance creative risks with the need for financial stability?
16. How do you define creative freedom?
 - a. Do you feel you have / need creative freedom?

Networks support mechanisms and success

17. So in terms of the people you and how they feel about your career as a musician?
18. Have their feelings changed over the years?
19. Do you feel that your friends and family are supportive of your career choice?
 - a. Has this always been the case?
20. What role have the connections you've made in the music industry played in your career development?
 - a. Has that changed over the years?
 - b. Does everyone benefit from networks and connections in the same way, do you think?
21. Are there any other sources of support and development that have been important to you in your music career, such as funding or professional support bodies?
22. How do you manage your health and wellbeing working in the music sector?
23. Do you feel successful?
 - a. Why? Has that changed over the span of your career?

Sector development and changes

Lastly, I would really like to ask your impressions of the music sector as a whole. What is your impression of the current state of the music sector, and how has it changed over time?

24. Broadly, how have you seen the music sector change during your time working in it?
25. How has the digitisation of the sector impacted your career?
26. What do you see is the biggest challenge to the music sector moving forward?
 - a. What can be done to mitigate or lessen the impact of that?
27. What do you see as the biggest opportunity moving forward?
28. Anything you would like to add?

Appendix D: ANZSCO codes of relevance by job category

ANZSCO code	Occupational role title
111111	Chief executive or managing director
134499	Education managers
139999	Specialist managers
211199	Actors, dancers and other entertainers
211211	Composer
211212	Music director
211213	Musician (instrumental)
211214	Singer
211299	Music professionals
212111	Artistic director
212112	Media producer (excluding video)
212499	Journalists and other writers
224611	Librarian
225113	Marketing specialist
232411	Graphic designer
241411	Secondary school teacher
242111	University lecturer
249214	Music teacher (private tuition)
249299	Private tutors and teachers nec
272611	Community arts worker
399516	Sound technician
511112	Program or project administrator
599999	Clerical and administrative workers
621111	Sales assistant (general)

Appendix F: Additional themes around sources of difficulty in music career

Minor themes for sources of difficulty in music career	Number of participants
Unpredictability of work	7
Ethical and legal issues	7
Balancing family and career	7
Lack of recognition	6
Age and career stage (too young / too old)	5
Self-doubt / motivation	5
Insufficient pay	4
Physical injuries / ill health	4
Social isolation	4
Lack of knowledge and expertise	3
Travel / distance	3
Lack of employment-related benefits	2
Managing portfolio career	2
Lack of time	2

Appendix E: Additional professional memberships held

Professional body	Number of participants
Folk Alliance	5
AUSTA	4
Music Teachers Association	4
PPCA	3
ANATS	2
Community Music Victoria	2
IMRO (Irish Musical Rights Organisation)	2
MTAQ	2
AAO	1
ABOTMA	1
AFM (US Musician's Union)	1
AHPRA	1
American Chamber of Commerce (AmCham)	1
Americana Music Association	1
ANCA	1
ANCOS	1
ASPAH	1
Association of Music Educators (aMuse)	1
AVA	1
Asia Pacific Band Directors Assn	1
Australian Band Directors Assn	1
Australian Folk Federation	1
Australian Ukulele Teachers and Leaders Association (AUTLA)	1
College of Music Educators	1
Independent Musicians Association	1
IAWM	1
IEU	1
Information Technology Professionals Association (ITPA)	1
Instrumental societies (2)	1
ISME	1
Mechanics Institute	1
Music & Entertainment Industry Educators Association	1
Musicological Society of Australia	1
New Music Network	1
PBS	1
PPL	1
PRS/MCPS	1
Qld Flute Guild	1
RRR	1
RSCM	1
VOSA	1

* Additional professional membership information is reported as provided via open-ended responses from participants

Appendix G: Ethics Informed Consent Documentation

Making Music Work: Understanding portfolio careers

INFORMATION SHEET FOR INTERVIEWS

Who is conducting the research?

Name(s): Professor Brydie Leigh Bartleet (Griffith University)
Professor Dawn Bennett (Curtin University)
Professor Ruth Bridgstock (Griffith University)
Professor Paul Draper (Griffith University)
Professor Scott Harrison (Griffith University)
A/ Professor Vanessa Tomlinson
Dr Christina Ballico (Griffith University)

Contact Phone: 07 3735 6335
Contact Email: qcrc@griffith.edu.au

Why is the research being conducted?

While many emerging Australian musicians dream of stardom and riches, the reality is that most carve out a viable living by undertaking a range of paid and unpaid, predominantly part-time and freelance music-related work, sometimes supplemented by “day jobs” in unrelated fields. Despite the prevalence of these portfolio careers in Australia, there are major gaps in our understandings of how they operate due to their multifaceted nature and, in turn, how they contribute toward the country’s economy, social and cultural fabric and national identity. In a strong and highly relevant partnership with the Australia Council for the Arts, three State Art Authorities and the charitable Music Trust, *Making Music Work* aims to make substantial inroads towards addressing gaps in our understanding of how portfolio careers operate in the Australian music ecosystem. With diverse cultural and geographical case studies across the Australian cultural landscape, the project will map the creative, social, cultural and economic realities of this type of music career as it gains more and more prominence, and deliver strategies to address the new realities it presents for Australian musicians.

What you will be asked to do

In this 1 – 2 hour interview we will ask you questions about how you organise your professional life, what aspects of musical and non-musical activities contribute to your fulfilment, your reputation, and your income. You are free to refuse to answer any of these questions, be specific or generalise, and your identity will be kept anonymous. The interview will be recorded and later transcribed by the research team.

The basis by which participants will be selected or screened

Participants for this phase of our research have been identified via the pool of survey respondents from Phase One of the project (where respondents will be given the option of providing the research team with their contact details and willingness to participate in Phase Two), as well as referrals from the proposed project’s Steering Committee, Reference Group, Partner Organisations, and other music institutions and organisations. For this part of the research project we are recruiting participants who self-identify as musicians, and who currently have portfolio careers.

The expected benefits of the research

Making Music Work will produce a number of significant outcomes, including important information for arts

organisations and educational institutions about the ongoing and long-term needs of portfolio musicians and a transferable research model to conduct similar research in other disciplines. The project’s alignment with other creative workforce studies will provide significant evidence for national and international debates about the future of the music industry. The project will also feed back important information to the higher education sector about skills requirements and career development needs in the music industry, thus facilitating a better alignment between the education and training of musicians and industry requirements. This transferrable knowledge will also inform future industry sector practices and cultural policy and support structures. For existing and emerging professional musicians, it will present alternative career trajectories and a skills development route to support a sustainable career within their chosen vocation.

The ethical conduct of this research

Griffith University conducts research in accordance with the *National Statement on Ethical Conduct in Human Research*. If potential participants have any concerns or complaints about the ethical conduct of the research project they should contact the Manager, Research Ethics on 3735 4375 or **research-ethics@griffith.edu.au**.

Your privacy

The conduct of this research involves the collection, access and/or use of your identified personal information. As outlined elsewhere in this information sheet, your identified personal information may appear in the publications/reports arising from this research. This is occurring with your consent. Any additional personal information collected is confidential and will not be disclosed to third parties without your consent, except to meet government, legal or other regulatory authority requirements. A de-identified copy of this data may be used for other research purposes. However, your anonymity will at all times be safeguarded, except where you have consented otherwise. For further information consult the University’s Privacy Plan at <http://www.griffith.edu.au/about-griffith/plans-publications/griffith-university-privacy-plan> or **telephone (07) 3735 4375**.

Participation/Confidentiality/Risks Feedback/Questions

Participation in the survey is entirely voluntary, and participants are free to withdraw from the study at any time. There are no risks in participating in this research. If you want to contribute information or opinions that by any stretch of the imagination may be harmful to you or offensive to others, you may do so anonymously, or at any time withdraw your statements. The rough research data will be kept safely for 5 years at the Queensland Conservatorium Research Centre Griffith University, and only the Chief Investigators of the project will have access to it. After 5 years will then be destroyed.

All participants who indicate interest in this will receive a digital copy of the final report. If participants have any questions about the project, they are invited to contact the team members mentioned above.

CONSENT FORM

Research Team

Professor Brydie Leigh Bartleet (Griffith University)

Professor Dawn Bennett (Curtin University)

Professor Ruth Bridgstock (Griffith University)

Professor Paul Draper (Griffith University)

Professor Scott Harrison (Griffith University)

A/ Professor Vanessa Tomlinson

Dr Christina Ballico (Griffith University)

Contact Phone: 07 3735 6335

Contact Email: qcrc@griffith.edu.au

By signing below, I confirm that I have read and understood the information package and in particular have noted that:

- I understand that my involvement in this research will include a 45 minute interview that will be recorded for transcription purposes;
- I have had any questions answered to my satisfaction;
- I understand the risks involved;
- I understand that there will be no direct benefit to me from my participation in this research;
- I understand that my participation in this research is voluntary and that I can choose what questions I respond to, and can refuse to answer questions;
- I understand that if I have any additional questions, I can contact the research team;
- I understand that I am free to withdraw at any time, without explanation or penalty;
- I understand that I can contact the Manager, Research Ethics, at Griffith University Human Research Ethics Committee on 3735 4375 (or research-ethics@griffith.edu.au) if I have any concerns about the ethical conduct of the project; and
- I agree to participate in the project.

☐ I would like to remain anonymous (please tick).

☐ I agree to inclusion of my personal information in publications or reporting of the results from this research (please tick).

☐ I agree to inclusion of my personal information in publications or reporting of the results from this research as well as the project's website (please tick).

Name	
Signature	
Date	

