

Song Cycles

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Preface

‘People sometimes criticise Aboriginals and their culture saying, “You’re not very political. You’re not strong in a white culture way.” But the white way has made our culture very political and it is so strong. Especially in the way we express ourselves through our arts. We never did write our stories in books; we told them, sang them, painted them and danced them. The white fellas sold them or put it all in their museums: ours is a living culture that’s still practised and maintained today, but in a black contemporary way.’

David Page

This is the first research project of its kind undertaken into Indigenous music and Indigenous music artists in Australia.

We congratulate the Australia Council for the Arts in commissioning this study and are grateful for the opportunity to participate in the collection, analysis and interpretation of information gathered from many willing participants. Our research work took us far and wide, geographically, emotionally and intellectually.

The initial brief for the study was to incorporate a statistical analysis of certain aspects of the project content. That direction soon changed following the expert input from our colleagues from the National Centre for Culture and Recreation Statistics (NCCRS) of the Australian Bureau of Statistics (ABS). In particular, we would like to thank Jenny Dobak. Much of the content of this report is based on qualitative measures, rather than quantitative, due largely to issues of access and, ultimately, sample size.

The views expressed in this report are those of the authors and do not necessarily reflect the views of the Australia Council, the ABS or any other organisation or individual associated with this project.

We thank staff of the Australia Council and the Australia Council Aboriginal and Torres Strait Islander Arts Board for their faith, trust and guidance.

Thank you to Anthea Sarris, Jane Cunningham, Gus Jansen and Lucia Doll.

Sally Howland
Director Member Services
APRA | AMCOS

Executive summary

The purpose of this study was to collect, analyse and interpret a range of statistical and qualitative information about Indigenous music in Australia. The study was designed to assist the Australian Council for the Arts' Aboriginal and Torres Strait Islander Arts Board of the Australia Council for the Arts, and other government and industry agencies, with policy development, funding programs and other strategic initiatives. It complements the Australia Council's survey of practising professional artists and endeavours to reflect the current state of infrastructure support for Indigenous music.

For many Indigenous music artists, basic rights issues that non-Indigenous people assume daily, present untold challenges. The fundamental issue of social disadvantage which the vast majority of Indigenous Australians face is, regrettably, ever present in the lives of Indigenous music artists.

Health and education cannot be assumed, certainly not to the extent that non-Indigenous Australians enjoy. The impact of this deep-seated disadvantage cannot be overstated. In fundamental ways it permeates the lives of Indigenous artists on a daily basis. For example, if English is your second language, how can you complete a funding application? For that matter, how would you know that funding and other similar resources are available?

Barriers to market entry exist at practically every level. At times, funding programs designed to assist artists have had the opposite effect, in some cases alienating Indigenous artists through language and, on occasion, discriminatory practices.

Generally, the working life of a musician is not an easy one; Indigenous or not. There is rarely the security of a regular income or any of the standard employer or union-sponsored benefits derived from being a salaried worker. This brings into sharp focus the incontrovertible importance that copyright plays in delivering economic benefits to music artists; be they composers, songwriters or performing artists.

Indigenous arts practices and culture make an essential contribution to Indigenous people's social health, wellbeing, education and identity. That identity often reveals itself in the potent political content of song lyrics—perhaps sufficiently contentious to compromise the ability of that artist to reach a wider audience via mainstream radio or television.

Indigenous music has a unique voice and place in Australian arts and culture. This study confirms its struggle to assert itself through accepted mainstream media outlets.

This study examines the support and infrastructure for Indigenous music across five areas:

1. Live Performance
2. Recordings
3. Broadcasting
4. Education and Training
5. Public Funding

Quantitative information was obtained from a wide range of agencies and funding bodies to understand the nature and extent of support.

In addition, a series of one-on-one interviews and focus group sessions were held to supplement the data with qualitative information about the experience of Indigenous artists.

The focus sessions were attended by Indigenous artists, composers, songwriters, arts administrators, managers, agents and promoters from all states and territories across Australia.

These sessions provided excellent insight into the constraints affecting their work as artists and opportunities for improving the viability and sustainability of their work.

Key findings

Live performance

For most musicians, performing live is their first engagement with an audience and the foundation upon which their fan base is formed. It will also provide the most stable source of income for most artists.

The Australian live music scene is regarded as the breeding ground for developing talent, honing musicianship, building reputation, developing a fan base and the springboard to wider audiences. Live performance has been described, fittingly, as an incubator for talent. Its role is critical to many artists aspiring to achieve commercial success.

This study found that a significant factor for Indigenous musicians living outside a capital city is distance, and the costs associated with bridging that distance, in order to reach a wider audience. Geographic dislocation and the inherent, restrictive travel costs associated with moving a band across vast distances naturally deny the artists of any real prospect of development. Consider this in the context of artists who are already resource poor, in terms of finance, skills or both.

Another factor found to be impeding career development is the absence of regular accessible touring circuits. This can deny the performing artist the opportunity to hone their skills and develop a fan base; both of which are critical for artistic and economic development.

The continuing development of community and regional festivals, together with the burgeoning national music festival sector is, however, creating opportunities for live performance nationally and presents considerable prospects through a national network.

Recordings

A recording of an artist's work is the product of many variables. At its heart it is the creation of the musical work by the songwriter or composer. To turn this creative work into a permanent record requires expertise from musicianship, to arrangement, engineering and production. Add to this the necessary equipment including musical instruments, recording studio facilities and software and you will have some sense of the scope of components required to produce a musical 'product'.

Further to this often complex production process, the commercial viability of a recording rests with its ability to connect with the consumer market. Channels for making this connection include radio, the internet, retail outlets, live performances and selling CDs at gigs. Inevitably, the product and the distribution channel must work together for a recording to maximise its market returns.

A lack of investment in and access to appropriate technical and production skills in the recording process can produce a poor quality recording. The ability of recorded Indigenous product to reach a wider audience is often further compromised due to the absence of sufficient investment in marketing and promotion.

Digital services and new technologies offer affordability and opportunities for Indigenous artists, outside of the traditional music business model. However, access to such opportunities is inevitably compromised because of a lack of skills in this area.

The value of the wholesale recorded music market in Australia

in 2008 was \$425,638,000. Physical product comprised \$371,448,000 and digital \$54,190,000. On a per annum basis, commercial releases of Indigenous recordings constitute less than 1 per cent of the overall commercial recording market.

According to the Australian Chart Book, during the period 1993 – 2005, 6,256 unique songs entered the Australian charts. Of those songs, 34 (0.5 per cent) were composed or performed by Indigenous artists.

Broadcasting

The Australian radio industry is essentially made up of four different sectors:

The national broadcaster—the Australian Broadcasting Corporation (ABC) broadcasts throughout Australia on 51 regional stations and nine metropolitan stations, four national networks (ABC Classic FM, Radio National, ABC News Radio and the youth network, Triple J) and three internet-based music services, *dig*, *dig jazz* and *dig country*. The radio networks, *dig* and *dig jazz* are available as audio services on digital satellite subscription services and *dig* and *dig jazz* are available on digital free-to-air television.

Australian commercial radio—there are 259 stations across Australia of which 110 have an AM license and 150 have an FM license. These stations are owned by over 30 operators, with 80 per cent of the stations formed into 12 networks.

Community broadcasters consisting of 350 community stations, 199 high-power narrowcast stations and over 1,755 low-power narrowcasters.

In 2008, the percentage of Indigenous music performances broadcast to total music broadcast was: 0.14 per cent on commercial radio and 1.37 per cent on the ABC. On community radio Indigenous music accounted for 4% of total on air hours across all community stations.

This study demonstrates that the community broadcasting sector plays an important role in supporting the broadcast of Indigenous music. Notwithstanding this, the very nature of community radio is such that this sector does not deliver meaningful economic benefits by way of broadcast royalties to music artists. It can however be a meaningful platform for building an audience.

The nature of commercial radio is such that any prospect of genuine growth in on-air time for Indigenous music is ambitious. Any potential for development in this area must rely on quality Indigenous product being able to compete in a highly commercial market.

Education

Education and training opportunities for Indigenous music artists operate across a number of levels. These include the traditional tertiary mix of accredited courses delivered via conventional educational institutions such as university and TAFE; the increasingly flexible models adopted from the Vocational Education and Training (VET) system; and the less formal industry initiatives often operated in partnership between communities and industry enterprises.

For some Indigenous people, participation in education may be

Key findings (continued)

affected by economic disadvantage, social marginalisation, health problems and geographical isolation.

Flexible Vocational Education and Training (VET) models for the Indigenous contemporary music sector deliver training in remote communities. These successful models are being held up as possible future models for training in other Indigenous art forms. There remains, however, a lack of suitable employment pathways.

Literacy issues compromise Indigenous music artist's awareness and capacity to access resources.

Public funding

For many music artists, receiving a grant to realise a creative project will be the catalyst to bring their work to a wider audience or to gain critical acclaim, or both. It can also serve as a stepping stone to enable an artist to achieve some degree of career sustainability by providing a form of regular income through sales or touring. At the very least, it provides an opportunity that would otherwise not exist or may take longer to develop. For many, there is no question that public funding plays a critical role in advancing and developing an artist's career.

For those in remote communities, English is often their second language. Issues around access can be improved by funding agencies in order to adequately meet the needs of those they are aiming to assist.

Opportunities exist to deliver greater benefits and improve outcomes by undertaking a more holistic approach to funding options. Measures which focus on sustainability would provide pathways for career development and cultivate opportunities for economic growth for artists.

Funding regimes have been found to focus on creative activities but creative output inevitably requires a business framework to support its activities. There is a compelling argument for investment in sustainable enterprise development programs.

Looking forward

It is hoped that the outcome of this study will be a platform to develop practical policy measures and tangible infrastructure that can deliver meaningful outcomes for Indigenous music artists. At the very least this research affirms that policy and strategic decisions should focus on the following outcomes:

- respect for Indigenous music and music creators
- an environment that fosters cultural and artistic development
- economic benefit by way of fair compensation to composers, songwriters and musicians for their creativity
- more flexible arrangements for access to funding programs
- improved access to mainstream markets
- a festival network that builds on the existing infrastructure provided by community, regional and national festivals to provide a performing pathway for artists
- creation of opportunities for creative and professional development
- creation of opportunities for enterprise development which would provide a business framework to support creative activities
- vehicles to promote musical works to a wider audience
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1 Introduction

It is important to understand the unique impact, role, influence and use of music in Indigenous society: How music is used, when and by whom. This cultural backdrop is fundamental when considering and understanding music in the Indigenous context and something that is, at best, misunderstood by non-Indigenous people and, at worst, grossly ignored.

This report does not explore the use of Indigenous music in ceremonial or customary contexts. Rather it is an exploration of Indigenous music in the contemporary musical landscape. It is an analysis of the impediments facing aspiring and professional, practising Indigenous music artists. This report is also a study of the opportunities already present and those which can be created.

One of the acknowledged shortcomings of the music industry is the absence of any centralised repository or body responsible for the coordination of statistics. Currently, the Australian music industry struggles to accurately quantify its domestic and export value, its employment capability, and which sectors are enjoying growth and which are in decline.

A statistical information database would play a critical role in strategic planning and business development. Of course, particular sectors of the music industry can provide figures for their specialist business units, for example the broadcast industry or those sourced from the Australasian Performing Right Association (APRA). However, such figures in isolation and without context fail to provide the ability for any rigorous cross examination of the performance of the industry as a whole. This is particularly the case when talking about Indigenous music or music by Indigenous artists. Readers of this report should bear this in mind.

Some preliminary work has been undertaken by the Cultural Ministers Statistical Working Group to set up a statistical framework for the music industry. It is hoped that such a framework is realised. There is no question that industry, arts practitioners and government will be well-served by the establishment of a centralised statistical database.

Additionally, it must be noted that although this is the first report of its kind undertaken on a national level, there exists a surprising number of reports commissioned over the last 20 years at a state and territory level, identifying the same barriers and reiterating the same issues. It has been difficult to ascertain what practical measures have derived from these previous studies.

Industry practitioners involved in Indigenous music would be acutely aware of the limitations affecting real sustained growth and development. It is hoped that this report helps to distil these issues in order that solid infrastructure and resources are developed in sustainable ways to address the issues identified in this report.

Terms of reference

The purpose of this project was to collect, analyse and interpret a range of statistical and other information to assist the Australia Council's Aboriginal and Torres Strait Islander Arts Board and other government and industry agencies with their policy development and grant programs. It complements the Australia Council's survey of practising professional artists.

The study involved the following tasks:

- an examination of the opportunities and constraints for live performances for Indigenous music artists, including where they take place, how many, with what audiences, in what kinds of venues, with what marketing, with what technical support
- an examination of the nature and extent of recording of Indigenous music, including how many music artists, how many recordings, what types, by whom, at what cost, with what marketing support, with what outcomes
- an examination of the constraints on the recording of Indigenous music
- an examination of training patterns and opportunities for Indigenous music artists, and the provision of training in formal and non-formal circumstances, and related matters
- an examination of the nature and extent of the broadcasting of Indigenous music in Australia
- a listing and analysis of public funding for Indigenous music in Australia, including the extent of the funding, by what agencies, with what conditions, to how many recipients and to how many different recipients.

What we know of the Indigenous music artist population

According to census data, at 30 June 2006 the estimated resident Indigenous population of Australia was 517,043 or 2.5 per cent of the total estimated resident population of Australia.

In that same survey, the number of Indigenous persons aged 15 years and over who indicated that their main job was as *Musicians and Related Music Professionals*, was 63 nationwide, or 0.01 per cent of the Indigenous population.

In contrast, the Indigenous membership of APRA at September 2009 was 711. APRA represents the copyright interests in musical works on behalf of songwriters and composers, most of whom are also music artists. APRA also represents music publishers.

Entitlements under copyright law

Australian copyright law makes songwriters and composers the exclusive owners of their original music and lyrics. Nobody else can use their work without getting their permission first, and if necessary, paying a royalty for that use. This is where APRA steps in. APRA is a non-profit organisation that collects royalties on behalf of 60,000 + members, and by agreement, for all the copyright owners around the world.

Whenever music is performed in public, communicated or reproduced the songwriter may be entitled to a payment or royalty. This is because the *Australian Copyright Act* gives writers 'economic rights' which cover certain uses of their music. By licensing and allowing the public performance, communication or reproduction of their music, songwriters may generate income known as royalties.

APRA membership is determined by a person being a copyright owner (composer, songwriter or author, publisher) in a musical work, and the public performance of a musical work or works.

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Members are not required to renew their membership at any time and, in practice, would generally remain members for life. For more information, see the section on Copyright, in this chapter.

Estimated size of the Indigenous music artist population

Determining a reasonable estimate of the size of the Indigenous music population is difficult. The difference between the ABS figures (63) and the APRA figures (711) can be readily explained by the fact that the ABS figures are conditional upon music being the principal form of occupation. In practice, the overriding majority of music creators would be reliant upon alternative means of employment. The APRA figures therefore provide a more accurate picture of the number of practicing Indigenous musicians and

composers. Even then, the APRA membership figures relate to a relatively formalised section of the population of Indigenous musicians. Estimates provided by the Australia Council suggest that the number of Indigenous people annually receiving some payment for work as a musician could be between 1,000 and 2,000 people.

Remoteness Areas

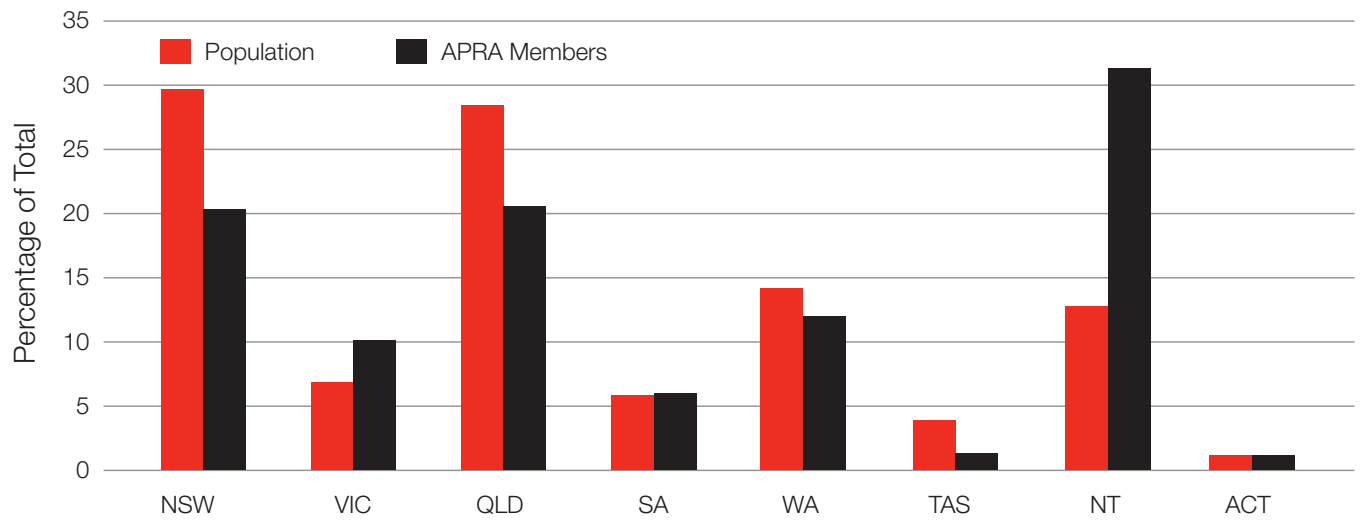
At 30 June 2006, around one-third of all Indigenous Australians lived in Major Cities of Australia (32% or 165,800 people). A further 21% (110,600 people) lived in Inner Regional Australia and 22% (113,300 people) in Outer Regional Australia. The remainder lived in Remote Australia (9% or 47,900 people) or Very Remote Australia (15% or 79,500 people).

Table 1 Indigenous music artist population by state and territory

State and territory	Indigenous population(a)	% of population	Indigenous APRA writer members(b)	% of APRA writer members
New South Wales	152,685	29.5	143	20.1
Victoria	33,517	6.5	69	9.7
Queensland	144,885	28.0	144	20.3
South Australia	28,055	5.4	40	5.6
Western Australia	70,966	13.7	83	11.7
Tasmania	18,415	3.6	6	0.8
Northern Territory	64,005	12.4	220	30.9
Australian Capital Territory	4,282	0.8	6	0.8
Total	517,043^		711	

(a) ABS 2006 Census of Population and Housing. (b) At September 2009. Does not include members with no known address.
^ includes Other Territories

Figure 1 Comparison of Indigenous population to APRA writer members by state and territory



1 Introduction

The Indigenous population

To better understand the issues facing Indigenous music artists, it is useful to consider some general socioeconomic characteristics of Australia's Indigenous population. The following information is taken from the ABS 2001 Census of Aboriginal and Torres Strait Islander Australians and the National Aboriginal and Torres Strait Islander Social Survey 2002.

- over one quarter (27 per cent) of the Indigenous population lived in remote or very remote parts of Australia, compared with 2 per cent of non-Indigenous Australians
- more than half (55 per cent) of Indigenous Australians living in very remote areas spoke an Indigenous language at home, compared with 1 per cent in major cities and inner regional areas
- almost 40 per cent of the Indigenous population was under the age of 15 years, compared with 20 per cent for the non-Indigenous population
- Indigenous Australians aged 15 years and over who had left school were half as likely (18 per cent) as non-Indigenous Australians (41 per cent) to have completed year 12 of high school
- among people aged 15–17 years, a higher proportion of Indigenous than non-Indigenous persons were attending Technical and Further Education (TAFE) (7 per cent and 5 per cent, respectively) while the reverse was true for persons aged 18–24 years (8 per cent and 11 per cent, respectively).

The music industry—the effect of new technologies

The music industry is a strange beast. Depending on your point of view, it is a varying mix of art, entertainment, commerce and, often, celebrity. Preferences reflect many influences.

Some would argue that commercial radio in this country still holds the key as the vehicle for commercial success. There are, however, signs that the landscape is changing. That change has come in the form of technology and the internet.

More recently, new technologies including the internet and mobile devices have liberated music artists from traditional business models which have dominated the music industry for decades. No longer necessarily reliant on investment from recording and publishing companies, today's music artists have at their disposal more opportunities than ever before to access affordable recording equipment and distribution across the globe to reach their audience at minimal cost.

The content delivery opportunities presented by the internet have challenged the value of recorded music. For a time, demand was met with free illegal supply in the absence of legitimate business models to sell music. A generation of music consumers have experienced the supply of free music and now expect it. The turn of the new millennium was marked by the levels of piracy that significantly impacted on composers, artists, music publishers and record companies' income. According to a study undertaken by Quantum Market Research on behalf of the Australian

Record Industry Association in 2003 file-sharing and CD burning contributes to results in a loss of income to a) the artist who performed the music b) the songwriter who originally penned the works c) the music company which invested both time and money in bringing the product to market and d) the retailer. Quantum Market research found that:

- Around 3.6 million Australians illegally burnt a music CD in the 6 month period prior to the research
- Around 3.4 million Australians illegally downloaded music files via file sharing services (1.8 million of these have used file sharing services in the one month period prior to the research)
- File-sharing and CD burning is sharply higher in the age groups under 25:

CD burning: 22% over last six months (general population) vs. 40% (under 25's)

File sharing: 11% in last month (general population) vs. 26% (under 25's)

- Illegitimate channels account for 10.7% of all music acquired by the general population:
- 31% of all music acquired by those 17 and under; 21% for 18-24's
- 40% of the general population have at some stage received a burnt CD (69% in the 18-24 age group)
- Specifically in relation to file sharing:

Among file sharers, the average volume downloaded in the last month was 19.6 files (32.4 files in the 18-24 age group)

21% are using a broadband connection (ie. significantly over-represented relative to the general population)

Over 50% of file sharers then burn their music files to CD or transfer to MP3 player.

However, recent figures published by the Australian Record Industry Association (ARIA) for the calendar year 2008 indicate a dramatic increase in wholesale digital music sales up by more than 270 per cent on the preceding year. Digital music now accounts for 12 per cent of total music sales by value, up from 1.5 per cent at the end of 2005. ARIA puts the value of wholesale digital sales at \$54.2 million at the end of 2008.

The music market

Although it is difficult to obtain current comprehensive figures on the size of the Australian music industry, the ABS produces some key data on the consumption of music. In addition, the Cultural Ministers Council published a report entitled *Music in Australia—A Statistical Overview*. The following table from that report reveals that Australian households on average spent approximately \$6.97 a week on music, less than 1 per cent of their total household weekly expenditure (\$892.83).

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Table 2 Household expenditure on music, 2003–04

Music expenditures	Average amount spent per household per week (\$)	Total spent per year (\$m) in Australia
Media		
• Pre-recorded compact discs and records (audio)	1.60	645
• Audio cassettes and tapes	0.05	20
Other recreational equipment		
• Musical instruments and accessories	*0.67	*270
Audio equipment		
• CD players	0.36	145
• Radios	0.07	28
• Integrated sound systems	0.25	101
• Other audio equipment	*0.58	*234
• Amplifiers and tuners	*0.24	*97
• Speakers	*0.28	*113
• Audio equipment(a)	*0.06	*24
• Home entertainment systems	1.33	536
• Audio visual equipment(b)	0.22	89
Services		
• Music concert fees	0.72	290
• Dance and nightclub fees	0.54	218
Total expenditure on music	6.97	2,811
Total expenditure on goods and services	892.83	360,118

* Estimate has a relative standard error of 25–50 per cent. (a) Not elsewhere classified. (b) Includes set top boxes and video equipment n.e.c. (c) Rounded Out. Source: ABS, Household Expenditure Survey, Australia 2003–04, in *Music in Australia—a statistical overview*.

Music Value Chain and copyright

The Music Value Chain (Figure 2) shows the life of a musical work from its creation, to the end user—the consumer. The value chain indicates the breadth of how music is commonly used in a developed society and the diversity of that use, all giving rise to opportunities for economic development. Underlying the life cycle of a musical work is copyright. Copyright delivers economic benefits to the music artist, be it a composer, songwriter or performing artist.

In April 2005, the Statistics Working Group (SWG) of the Cultural Ministers Council, published an important modelling document, *A Statistical Framework for the Music Sector*, in which it presented a range of generic value chains which give a comprehensive technological and commercial context to the Australian music industry.

Copyright

Copyright is the bedrock of the music industry and it is copyright and its associated mechanisms that provide the intellectual property owner with a raft of protections over their property and the means by which they can derive economic benefit from it. Copyright enables artists to sustain a career through their creativity.

Given the authority of copyright, it is important to understand its application in the musical landscape and how it delivers economic benefit to music artists.

Copyright owners have the following rights to:

- reproduce the work—this includes recording the music or lyrics onto a CD, a film soundtrack, or onto a computer disk. It also includes reproducing the music or lyrics as sheet music

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- publish the work—this means making the work available to the public for the first time
- perform the work in public—this includes playing the work live at a venue, playing a recording of the work in a venue, business or work place, and showing a film containing the work
- communicate the work to the public—this includes communicating the work over the internet, via a music on-hold system or by television or radio broadcasting
- make an adaptation of the work—this includes arranging or transcribing music, or translating lyrics
- rent a recording of the music—this is the right to control the rental of recordings (e.g. on CD) of the work.

In the music industry, these rights are usually grouped in the following four categories:

- performing right—this is the right to perform a work in public or to communicate a work to the public and is administered by APRA
- mechanical right—this is the right to record a work on record, cassette or CD. This is usually administered by either the Australasian Mechanical Copyright Owners Society (AMCOS) or by music publishers. Since 1997, APRA has managed the operations of AMCOS
- synchronisation right—this is the right to use music on the soundtrack of a film or video and is usually administered in the same way as the mechanical right
- moral right—moral rights belong to the creators of a work regardless of whether they own copyright in the work, and includes the right of attribution, the right not to be falsely attributed and the right not to have material treated in a derogatory manner.

There is a separate copyright in the sound recording of a musical work (with or without lyrics). The person or company that owns the rights in the recording owns the right to copy it, record it, perform it, communicate it to the public or rent it out. This right is administered by the Phonographic Performance Company of Australia (PPCA).

Indigenous arts and copyright

Indigenous musicians face a number of issues relating to copyright. Despite the protections offered under the Copyright Act and the passing of the *Copyright Amendment Bill 2006*, which addressed space shifting, fair use conditions, enforcement, technological protection mechanisms and treatment of parody and satire, interviews undertaken in this study suggest that a number of problems remain. Addressing these problems is of particular importance given the uniqueness of Australia's Indigenous cultural heritage and the need to safeguard the integrity of works which include traditional community knowledge and wisdom and customary law.

On 3 April 2009 the Australian Government announced that it would become a signatory to the United Nations Declaration on the Rights of Indigenous Peoples.

This document recognises the importance of respect for Indigenous knowledge, cultures and traditional practices and that Indigenous people have individual and collective rights.

The Declaration sets important international principles for signatory nations. Australia as a signatory nation can implement the provisions of the Declaration in legislative and or administrative measures.

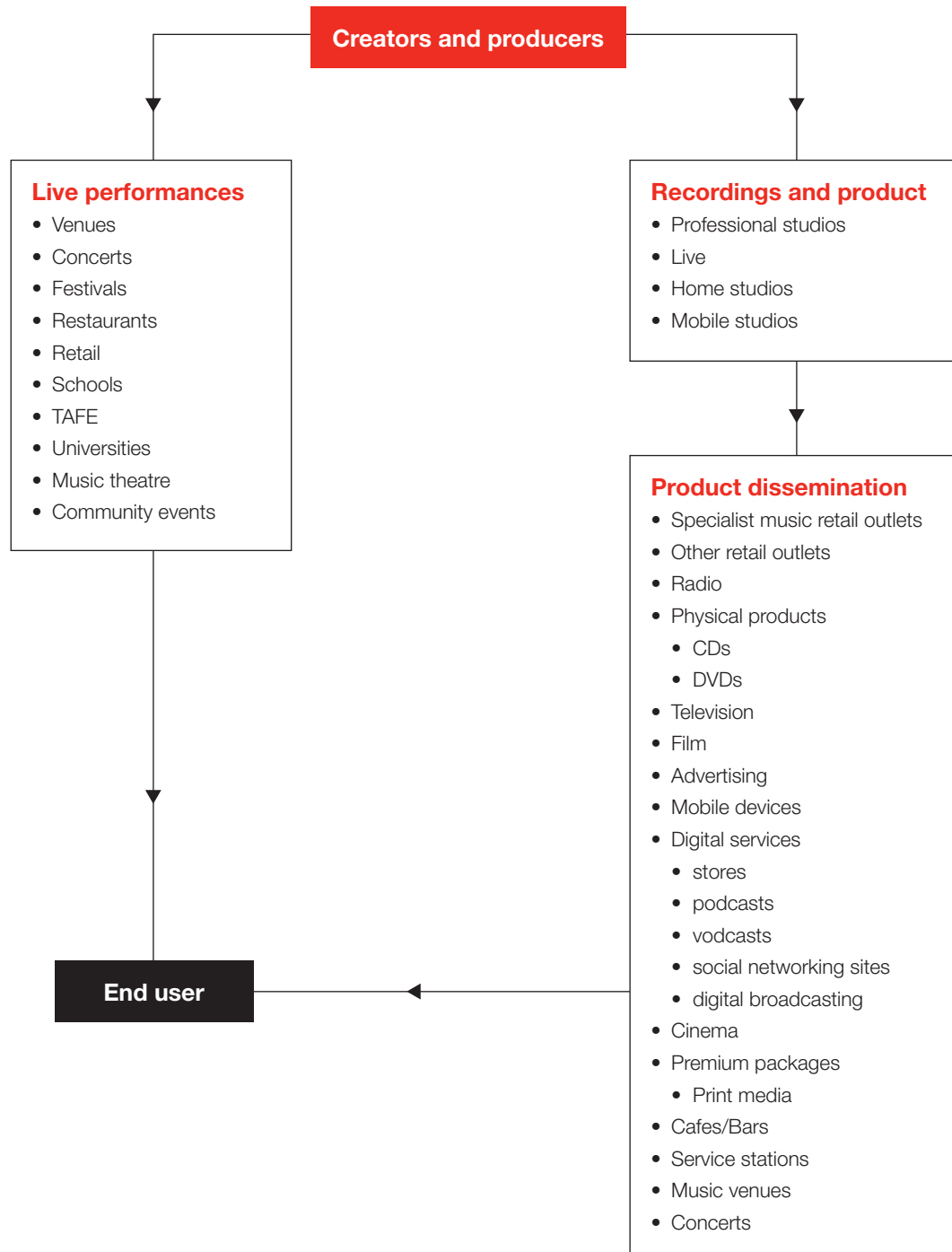
The Declaration addresses effective mechanisms with respect to cultural, intellectual, religious and spiritual property. Article 11 of the Declaration sets out that Indigenous peoples have the right to practise and revitalise their cultural traditions and customs including music.

The Declaration (Article 31) notes that Indigenous peoples have the right to maintain, control, protect and develop their cultural heritage, traditional knowledge and traditional cultural expressions, as well as the manifestations of their cultures, including knowledge and music. The Declaration notes that Indigenous people have the right to maintain, control, protect and develop their intellectual property over such cultural heritage, traditional knowledge, and traditional cultural expressions. It calls on signatory states to take effective measures to recognize and protect the exercise of these rights.

The interviews undertaken for this research suggest that it is vital that such rights are embodied in future legislation to protect the integrity of Indigenous culture.

1 Introduction

Figure 2 Music value chain



2 Methodology

The methodology adopted for this study included:

- analysis of available data on the nature and extent of support for Indigenous music performance, recording and broadcasting in Australia.
- interviews and focus sessions with a range of representations from the Indigenous music sector to better understand the experience of artists accessing available support.
- identification of the implications for policy and future research opportunities.

Initially, the intended approach to collecting data for this project was to rely on a combination of sample surveys and data extracts from available industry sources. Following an initial meeting with the National Centre for Culture and Recreation Statistics (NCCRS) of the Australian Bureau of Statistics, it became clear that a tailored sample survey would not be possible, as the size of the Indigenous population is simply too small for developing robust data from an affordable sample survey.

It was agreed that the study would centre on one-on-one interviews and focus group sessions. Some interviews were conducted by telephone. Where statistical information was readily available and

appropriate, for example, from APRA's systems and the Community Broadcasting Association of Australia (CBAA), it has been included. For the most part, certainly in the areas covering live performance and recording, the views expressed in this report have been derived from interviews with artists, composers, songwriters, arts administrators, managers, agents and promoters.

In determining the list of music artists to interview, we relied on APRA's database of composer and songwriter members. In December 2006, APRA's songwriter membership consisted of 46,345 people. Of these, 489 were identified as Aboriginal or Torres Strait Islander people.

The facilitator discussion guide is included at Appendix A.

APRA Indigenous composer members by state and territory

The below table shows the number of APRA Indigenous composer members by state and territory and the proportion of those who have generated royalty income.

Breakdown of APRA composers by location

The below table shows a breakdown of APRA composer members by region.

Table 3 Number of Indigenous composers generating royalty income

State and territory	Indigenous composers	Indigenous composers generating royalties	% of Indigenous composers generating royalties
New South Wales	73	38	52
Victoria	39	29	74
Queensland	70	24	34
South Australia	29	12	41
Western Australia	45	26	58
Tasmania	4	-	-
Northern Territory	135	79	59
Australian Capital Territory	3	3	100
Unknown	91	n/a	n/a
Total	489	211	43

Source: APRA membership and distribution records. 2006

2 Methodology

Table 4 APRA composer members by region

State and territory	Remote	% of total	Regional	% of total	Metropolitan	% of total	Total
New South Wales	5	6.9	29	39.7	39	53.4	73
Victoria	2	5.1	12	30.8	25	64.1	39
Queensland	-	-	51	72.9	19	27.1	70
South Australia	3	10.3	8	27.6	18	62.1	29
Western Australia	7	15.6	20	44.4	18	40.0	45
Tasmania	-	-	-	-	4	100.0	4
Northern Territory	90	66.7	24	17.8	21	15.6	135
Australian Capital Territory	-	-	-	-	3	100.0	3
Unknown	-	-	-	-	-	-	91
Total	107		144		147		489

Source: APRA membership records. 2006

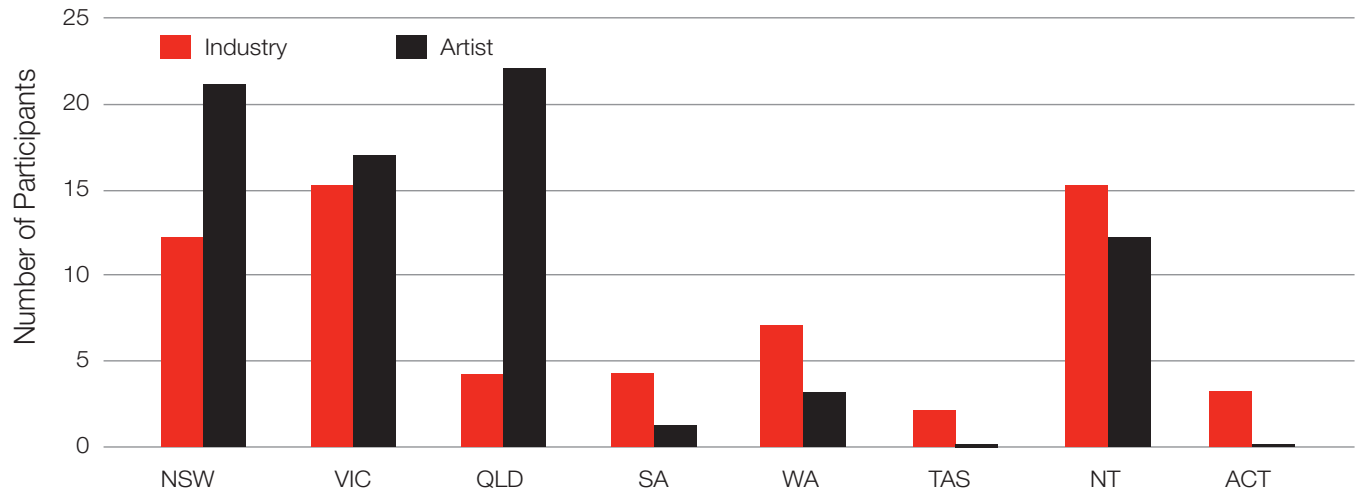
Interview participants by state and territory

Table 5 Interview participants by state and territory

State and territory	Industry	Artist	Total	% of participants by state and territory
New South Wales	12	21	33	24
Victoria	15	17	32	23
Queensland	4	22	26	19
South Australia	4	1	5	4
Western Australia	7	3	10	7
Tasmania	2	0	2	1
Northern Territory	15	12	27	20
Australian Capital Territory	3	0	3	2
Total	62	76	138	100

Reference: Focus group sessions facilitator’s guide and discussion guide (see Appendix A). 2006. Industry; a person whose principle activity is to provide business infrastructure to support creative endeavours and Output. i.e. artist managers, publishers, record labels, government arts agencies. Artist: a person who is skilled and engaged in creative activity. i.e. songwriter

Figure 3 Interview participants by state and territory



Reference: Focus group sessions facilitator’s guide and discussion guide (see Appendix A). 2006

3 Live performance

This chapter examines the nature and extent of live Indigenous music performance.

Introduction

For most musicians, performing live is their first engagement with an audience and the foundation upon which their fan base is formed. It will also provide the most stable source of income for most artists.

The Australian live music scene is regarded as the breeding ground for developing talent, honing musicianship and the springboard to wider audiences. Live performance has been described, fittingly, as an incubator for talent. Its role is critical to any artist who aspires to achieve commercial success.

According to the ABS, in 2002 about 40 per cent of the Australian population attended music events at least once over a 12 month period; about 3.8 million adults attended popular music concerts, 2.7 million attended musicals and operas and 1.3 million attended classical music concerts. The majority of those who went to popular and classical music performances attended more than once over the 12 month period. This data provides an indication of the size of the live music audience.

Live performance—the limitations

Our interviews and focus groups suggest that it is rare for an Indigenous act to achieve any form of commercial radio airplay or to sell enough CDs to earn a living. Often, the only form of income is from performing live. To achieve this however, requires good management and planning; resources which are not readily available to the majority of Indigenous music artists.

In seeking to identify the issues that can be described as constraints or limitations that prevent Indigenous music artists from developing a sustainable career in live performance, it is not surprising that similar themes and concerns were voiced repeatedly by interviewees and in focus groups. This indicates that there is consistent understanding of the issues at play. Some key issues are outlined below.

Summary—live performance constraints

We asked interview participants: What makes it hard for you to work as a musician? Following is a summary of the constraints identified which are areas for further development:

- lack of skilled managers; often this role is undertaken by a school teacher, friend or relative of the band
- lack of knowledge amongst artists themselves about the role of a manager and industry, generally leaving artists vulnerable to deception and poor decision making
- education and literacy issues preventing access to funding programs; for many, English is a second language
- ineffective communication of funding programs and initiatives
- lack of infrastructure and resources for touring circuits, recording and equipment
- travel costs

- sustainability
- lack of networking opportunities
- general access to mainstream music market
- lack of suitable venues for Indigenous music artists and their audiences
- lack of enterprise development.

Remoteness of some communities

Many of the limitations identified by those interviewed apply equally to remote, regional and metropolitan circumstances. But they appear to be pronounced for musicians in remote areas. The principal issue identified for artists living in remote communities is the obvious one of geographic dislocation and the inherent, restrictive travel costs associated with moving a band across vast distances. Consider this in the context of artists who are already resource-poor, in terms of finance, skills or both.

Q: What sort of barriers and opportunities do you face in getting live gigs?

A: I mean there's only a couple of venues in Tennant Creek and you can't play every single week in Tennant Creek because people would say oh they play every week. It's probably the isolation more than anything. It is a very far distance, like where I originally come from, the Sunshine Coast, a tour would be down to Byron which is only 400 k's and then you go back up through Brisbane and back to the coast.

You travel that distance like 500 k's or like yesterday 700 k's just to get here, you spend just a day travelling and then food. If we were funding it ourselves it probably could have blown out because you have to be really careful with your dollars. You can't stay in the area for so long. Like you might go up to Borroloola you might only have enough money to go up there play one night and then drive straight back rather than spending a couple of days working with the other bands. Because we went up to Borroloola and we got paid for one gig up there and we put two community gigs on because we came up there with all the gear and those guys don't have all the gear either so it's good to help out all our brothers in the barn.

Building a reputation as a live performer

Interviewees and focus group participants highlighted the difficulties that musicians have in generating sustainable incomes at the beginning of their careers due to a lack of reputation. Reasonable remuneration from performing live generally depends highly on reputation. Reputation is developed through good, consistent work which often may take years to develop and will be equally dependent upon opportunities, either created or accessed, and support. Reputation, again, is developed via an artist's fan base and building an audience. This starts with live performance.

3 Live performance

Q: How do you promote your performances?

A: The house mob usually look after that.

Financial limitations

Interview respondents and focus groups participants reinforced the findings of research that musicians seek other employment outside of their artform in order to address the financial limitations of working as a musician. However, the compromise is that performing artists then have little time to develop their craft. Access to other employment for Indigenous artists is compromised due to well-documented issues of social disadvantage (ABS 2001 Census). That disadvantage is compounded further for artists in remote communities.

Q: Do you get paid well for your performances?

A: We did get paid. We usually get paid a fee from Artback for the tour and the venues also pay us. I mean every tour we've done so far this year has actually broken even with our grant money. But in a way if you look at it if we wanted to go on tour ourselves we could do it self funded now.

Resources and infrastructure

According to our research, the overarching factor that denies Indigenous music artists the opportunity to develop sustainable careers is the absence of resources and infrastructure. Those two elements take on many guises, as outlined in the section Summary—live performance constraints. In particular, the lack of skilled managers and the absence of regular accessible touring circuits have a profound effect on the capacity for the artistic development of Indigenous musicians.

Q: Do you have a booking agent?

A: No. We have had several booking agents, but booking agents really only want to work with you when they can score you a gig and venues are only interested if they know you're going to bring numbers so we've had a bit of problem with that especially when we parted ways with our record company, so then after a while we were better off just not having a booking agent and trying to do it ourselves. So we're just trying to go through other channels now. Like you don't need a booking agent to go play communities.

Other factors

Over the course of this research, it was repeated to us that often 'family business' took precedence over touring commitments. In practice, many Indigenous artists don't like travelling far from family, and despite commercial imperatives for performance there were frequent stories of gigs having to be cancelled due to family or cultural reasons. There are many factors in this. Communities understand the reality and are forgiving. Respondents find, however, that a promoter in a major regional centre or city who has invested in marketing, venue hire, and other associated costs may not be so sympathetic. The reputation of Indigenous musicians among non-Indigenous people in the industry suffers, and so too does the reputation of those that follow.

There are also practical issues that compromise the earning capacity of artists. Several music artists lamented the fact that they had to pay for extra security due to issues associated with alcohol abuse. Additional security costs are usually met by musicians and not the venue. Further, door lists are often long, as families have an expectation of getting into a gig for free. On door deals, the more free tickets, the less money for the band.

Discrimination by venues

Some artists commented on the fact that certain venues won't book Indigenous bands. One artist revealed to us that he turned up for a gig to be told by the venue operator that if he had known he was Aboriginal he wouldn't have booked him. As is the case with the broader music industry, many venues will only book cover bands.

Live performance—opportunities for Indigenous artists

Despite a range of difficulties on the career path for Indigenous music artists, our study did reveal some positive aspects.

Summary—live performance opportunities

Following is a summary of live performance opportunities available to Indigenous music artists. They represent opportunities for further development:

- there are respected music programs in schools in the Northern Territory producing good results
- a healthy nationwide festival scene offers performance opportunities
- creative collaborations with non-Indigenous music artists are delivering success; there are opportunities to expand this model
- there is an opportunity to develop bush touring circuits, based on a performance and instructional model which can deliver economies of scale
- regional and community-based touring circuits present opportunities for live performance
- community festivals present opportunities for live performance.

Northern Territory schools program

The Northern Territory enjoys a reputation for the strength of its music in schools programs, both in the primary and secondary school sector. It is acknowledged that such initiatives are producing excellent levels of musicianship. However, there appears to be a lack of continuity once schooling finishes. Projects operated by MusicNT and the Yothu Yindi Foundation such as the Garma Festival include songwriting and technical workshops and recording opportunities. Respondents noted that these initiatives are valuable but, again raised the issue of continuity with these annual events.

Demand for performances

We heard many times in our interviews, mostly from music industry workers in remote communities such as managers, industry associations and music record labels, that there is a real desire in the communities to hear more Indigenous live music. Additionally,

our research suggests that some communities are prepared to pay artists for their gigs, in some cases up to \$2,000 to 3,000 per gig. So we know that there is an audience and we know that in some cases there is a means of remuneration for the artist. However, there still exists the very real and obvious impediment of getting the artists to the remote communities in a cost-effective way.

Q: Where do you perform most?

A: It's always varied. You know it used to be in the cities we'd take our music to the cities because we weren't just interested in trying to be local we're trying to get on things like Triple J. We wanted a record contract and we wanted to play the festivals because we had big dreams of being rock stars but we'd always come across obstacles and then we'd have to try another path.

Q: And what sort of obstacles would you say they would be ...

A: Ah, public perception you know, you can't say part of it isn't racism, because there's definitely some racism out there, but that's probably only a small percentage of it cause ah ... also musical obstacles how we created our own obstacles because sometimes we were crap and just you know your writing depends on how well you write. If your songs go for too long and they're too self indulgent no-one's going to really get into it and also your marketing, management, all that kind of stuff ...travelling especially from the centre is a big one ... you've got to decide how you're going to do it , you know, fly. If you fly you've got to pay a lot of money for excess luggage and depends on what you take and who you take. And driving, if you break down or whatever, we've done all that stuff everything you could possibly imagine could happen to a band, we've done. And then you know we took our music overseas and we're doing that you could have said last two years before this one you could have said we were mostly playing overseas and hardly ever in Australia well that's kind of we don't have enough money for that anymore, so now we're back playing at home and we never used to play at home in Alice Springs, but that's probably where we've played most this year. And now we're back playing communities so we're really getting back down to the roots of it.

Workshops by touring artists

We did hear of some wonderful stories of performers (including non-Indigenous artists) visiting communities and engaging children and aspiring music artists in songwriting and music classes as part of their visit. It would seem that this performance/instructional model had been adopted by a number of visiting artists with profoundly positive outcomes, not only for the youth in the communities, but equally for the visiting artists. The challenge in identifying a positive and productive model is to address issues of workable sustainability. We found that there is a degree of cynicism in communities with regard to one-off programs that provide no legacy infrastructure or resources for ongoing development opportunities.

Music festivals

Moving beyond performance issues relating to communities, it is interesting to note the growth of the music festival scene around the country. This includes the introduction of specialist Indigenous festivals such as The Dreaming, the Alice Springs Desert Festival and the Tennant Creek Desert Harmony Festival. The growth in music festivals brings with it increased opportunities for public performance and the prospect of reaching a wider audience.

Increasingly, Indigenous acts are finding their way onto more mainstream festival stages such as The East Coast Blues and Roots Festival, held in Byron Bay, New South Wales and Nepean, Victoria, and The West Coast Blues and Roots Festival held in Fremantle, Western Australia.

There is currently strong public demand for live music in outdoor settings offering a diverse range of musical styles. The current festival environment presents some significant performance opportunities for Indigenous artists and at the same time helps build audiences.

Table 6 Music festivals 2002–03

Number of festivals	91
Average duration	5 days
Performances by:	
Australian acts	15,184
Overseas acts	1,130
Total	16,314
Attendances:	
Paid	341,000
Free	407,000
Total	748,000

Source: ABS, Performing Arts Australia 2002–03.

Collaborations with non-Indigenous Artists

Our research also found that creative collaborations with non-Indigenous music artists appear to deliver greater opportunities for live performance, or recording success for Indigenous artists. This may be because non-Indigenous artists may have:

- greater access to mainstream markets; this could be as a result of industry support via a publishing or recording deal
- better understanding and knowledge of how the industry operates
- generally greater access for networking opportunities—there exists very real opportunities to leverage collaborative initiatives between Indigenous and non-Indigenous artists.

3 Live performance

Touring in remote areas

In our research, industry professionals suggested that funding programs dedicated to touring initiatives are generally more beneficial than funding aimed at assisting recording projects. They believed that funding for recording is never enough and, inevitably, a sub-standard product is produced. They said that the compromised quality of many Indigenous recordings is well recognised, and this is not something of which the industry should be proud.

Q: What about technical support?

A: Well it's not that hard to get gear out here, getting the gear is not that much of a problem, it takes a week. You can get anything you want in a week, anything. It's not the getting of the gear that the hard part, you can bust strings & have no strings & someone's gotta go somewhere to get them, that part the day to day thing. If you plan ahead you can solve all those problems there no reason why things have to be a handicap those things can be easily sorted.

But it takes drive to do that.

Touring initiatives work by expanding audiences. This is a matter of access to market, rather than access to product.

Many artists and industry professionals spoke of the possibility of establishing sustainable bush touring circuits. This follows on from comments reported earlier regarding demand for more music in remote communities. Estimates are that putting a band (nine-piece band with roadies, etc.) on the road to tour communities costs in the region of \$20,000 per week.

Q: Would you say having a better touring circuit up here would benefit a lot of the local bands and give em opportunities to get to the levels that you guys have had and give em the success that you guys have had?

A: Yeah, probably but we don't know what's in place there you know how well it works or whatever. Some things it works really well and other things you rock up and they say ... "oh do you guys need a PA? Oh didn't know that. Yeah, do you guys need electricity?"

I don't know how it is up here but in Alice Springs I've seen young bands they play a few songs, maybe their song writing's ok, maybe their musicianship is alright but when they have nowhere to play they don't see any reason to go on so talking about having a touring circuit you know we do have quite a lot of distance involved so then that incurs a cost but I think that for music industry to develop in the Territory there's got to be not only support from Government and venues but there's got to be support from ... the industry ... people. You know, people actually have to go to these things. I don't know if that's because there's no chance to gain momentum. If people know that once a month there's a gig at a major center, be it a community or town ... that would pick up a following ... yeah I'm sure it would so but I think support needs to come from both sides not only funding wise but people wise and as musicians we should all be out there trying to talk it up.

It seems that traditional touring business models used in metropolitan areas do not necessarily work in geographically dislocated regions. Respondents suggested that touring concepts that work on the east coast are often applied to the Northern Territory, but they do not work, even from a purely financial perspective. It appears that new models need to be developed to suit circumstances in more remote areas.

Respondents suggest that economies of scale could be produced by centralising infrastructure and resources to support the fundamentals required for bush touring, such as access to equipment, vehicle hire, production and technical support and community liaison, thereby removing the financial impediment on individual artists.

Interviewees and focus group participants reinforced the importance of touring in career development. If bands can't tour, they can't improve their playing skills, nor build their confidence, nor have the opportunity to develop an audience.

There is little doubt that regional and urban based Indigenous artists have more live performance opportunities than their counterparts in remote areas. Regional and metropolitan centres are better resourced, both in terms of available skills and infrastructure.

For artists in remote areas seeking to develop a career, it is inevitable that they spend time away from their communities.

In the Northern Territory there has been an increase in the number of artists moving from their remote homes to small regional centres to work or study. Some interviewees forecasted that in 10 years many of the regional centres will see increases by up to 20 per cent in the Indigenous population, as many will be forced to find work under government plans to change Community Development Employment Project (CDEP) eligibility.

Value of the live music market

The scope of this study did not permit a comprehensive detailed analysis of the value of the live music market or the Indigenous music elements of the market. To do this, extensive surveys would be required of artists, venue operators, promoters and artist managers in relation to fees, expenditure and other socio-economic factors.

It is worth noting the findings of *Vanishing Acts* (2003), a report by Bruce Johnson and Dr Shane Homan and jointly funded by the Australia Council and Arts New South Wales. The survey's principal motive was to examine the live music sector in New South Wales. It proves a useful reference point when considering the overall landscape of the live music sector.

This report presents limited national information from APRA on mainstream live music venues across the country, and the extent to which Indigenous music artists are performing at those venues. Table 7 shows the number of venues by state and territory that are licensed for live music, and the corresponding gross value of their licence fees. The live music licences are issued by APRA, which, in accordance with provisions under the Copyright Act, administers the public performance and communication right in musical works on behalf of composers, songwriters and publishers.

3 Live performance

Q: Does your income from performing vary or do you have a set fee?

A: Well it all depends on the situation .. sometimes you might do a gig because it's promotional so you might get offered a big support ... you've got to be prepared to lose money to do a gig ... if it's worth it... because it might be on TV or it might look good in your bio ... so yeah, you gotta be prepared to lose, to outlay ... and if there's any precious belongings you have that you take on the road, it will be lost or stolen ... so be prepared to give it all up for Rock and Roll.

Licensed live music venues

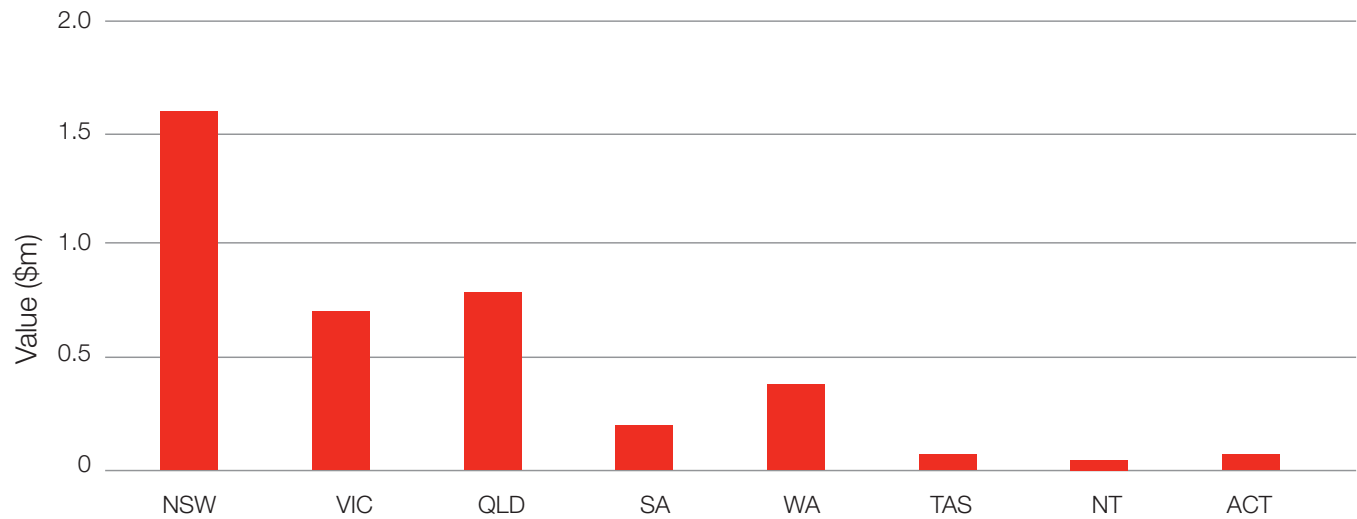
The following table shows the number and dollar value of licensed live music venues in 2006, by state and territory.

Table 7 Value of licensed live music venues by state and territory

State and territory	Value of licence fee (Gross \$)	Number of venues
New South Wales	1,599,962	1,435
Victoria	696,955	998
Queensland	795,657	1,162
South Australia	173,213	389
Western Australia	360,132	438
Tasmania	56,115	83
Northern Territory	41,466	54
Australian Capital Territory	50,600	51
Total	3,774,100	4,610

Source: APRA July 2009.

Figure 4 Value of licensed live music venues by state and territory



Source: APRA July 2009.

3 Live performance

APRA's live licence revenue is calculated in one of the following ways: by a charge of 2 per cent on expenditure paid to the performing artist, or where a door deal is in place, 1.5 per cent of gross admission receipts.

Across the range of premises in which live music occurs, including bars, sporting clubs, community centres, hotels and registered clubs, APRA data suggests that the majority is occurring in hotels and registered clubs. On a national level, 65 per cent of revenue is attributed to hotels and clubs.

APRA royalties to Indigenous composers for live performances

Composer and songwriter members of APRA are able to claim public performance royalties from APRA for their live performances. The information required in order to make a valid claim includes the following:

- title of the musical work
- composers
- performance venue
- date of the performance.

In determining the types of venues where Indigenous music artists perform, an analysis was undertaken of the APRA returns submitted by Indigenous artists over the 2004–05 financial year. The following table shows the percentage breakdown by venue category.

Table 8 Indigenous live performances by venue type

Venue type	% of Indigenous live performances
Hotels and clubs	29
Community groups	17
Schools, education institutions	17
Festivals and parks	17
Civic centres, theatres and town halls	20

Source: APRA July 2004–June 05, live performance returns from Indigenous APRA members.

It should be noted that the above breakdown is unlikely to include performances by Indigenous music artists in remote communities, as most of these performances would have been in unlicensed venues and many of the performers will not be APRA members.

The following table shows the states and territories where Indigenous artists have performed over the three-year period 2004–06, based on APRA returns.

Table 9 Indigenous live performances by state and territory

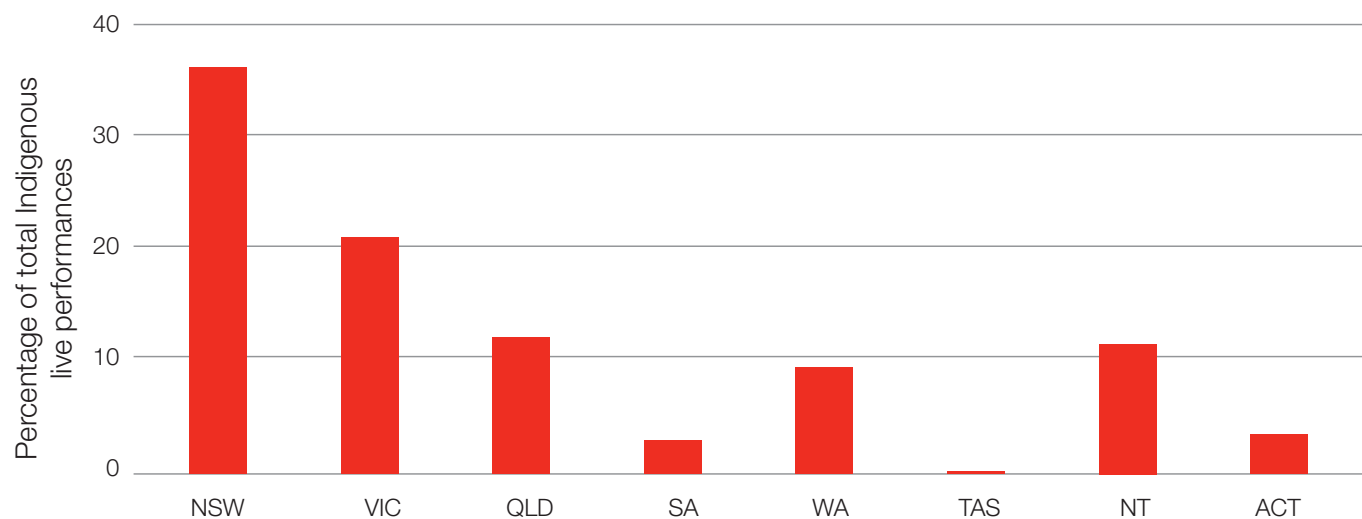
State and territory	% of Indigenous live performances
New South Wales	37
Victoria	20
Queensland	13
South Australia	3
Western Australia	10
Tasmania	0.03
Northern Territory	12
Australia Capital Territory	4

Source: APRA July 2004–June 06, live performance returns from Indigenous APRA members.

Table 10 shows a breakdown of the public performance royalties paid to Indigenous composers and songwriters, by state and territory, over the two-year period July 2004–June 06, based on APRA returns, and a geographic breakdown of the current Indigenous APRA membership.

3 Live performance

Figure 5 Indigenous live performances by state and territory



Source: APRA July 2004–June 2006, live performance returns from Indigenous APRA members.

Table 10 Public performance royalties and APRA membership of Indigenous composers and songwriters, by state and territory, July 2004– June 06

State and territory	\$ Value of Indigenous royalties paid	% of Indigenous royalties paid by state and territory	\$ Value of all royalties paid	% of all royalties paid	Membership by state and territory
New South Wales	50,468	23.1	27,705,761	56.2	15.7
Victoria	23,021	10.5	12,714,275	25.8	8.6
Queensland	62,698	28.7	4,672,836	9.5	17.1
South Australia	21,197	9.7	1,721,354	3.5	6.0
Western Australia	20,870	9.6	2,028,727	4.1	9.5
Tasmania	-	-	204,482	0.4	0.8
Northern Territory	38,124	17.4	101,936	0.2	27.6
Australian Capital Territory	2,178	1.0	149,865	0.3	0.6
Other^	-	-	-	-	14
Total	218,556		49,299,236	100	

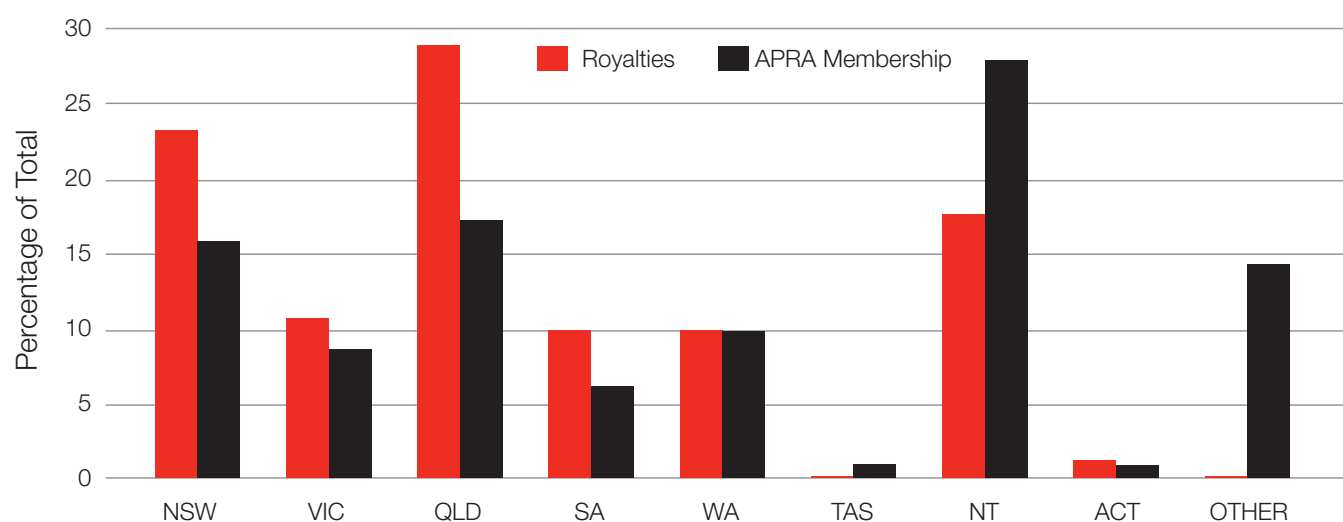
Source: APRA July 2004–June 06, ^ 'Other' indicates members residing overseas or have no current known address

Notes: Figures have been rounded to 1 decimal place. The public performance right that arises in 'works' is treated separately in the legislation from the copyright which arises in a 'sound recording'. The public performance right is the right to perform the work – or cause a sound recording to be heard – in public. 'Performance' is defined in the Copyright Act to include 'any mode of visual or aural presentation, whether the presentation is by the operation of wireless telegraphy apparatus, by the exhibition of a cinematograph film, by the use of a record or by any other means'. If performance occurs in the presence of more than one person other than in private or domestic circumstances, it is likely that it will constitute a public performance. Factors involved include:

1. Whether the performance is taking place in a domestic and private setting
2. Whether the performance occurs as an adjunct to a commercial activity and
3. Whether the audience forms part of the copyright owner's public.

3 Live performance

Figure 6 Percentage of public performance royalties and APRA membership of Indigenous composers and songwriters, by state and territory, 2004-06



Source: APRA July 2004–June 06, returns.

While the number of New South Wales based Indigenous composers comprises only 16 per cent of all Indigenous composers, they receive just under one-quarter of the revenue attributable for live performance. Conversely, Indigenous composers, based in the Northern Territory (just under 28 percent of members), receive only 17 per cent of revenue.

The following table shows the amount of royalties paid annually to Indigenous APRA members for their live performances and the total paid to all APRA members.

Despite an increase in distributable revenue for live performances, the share attributable to Indigenous composers has declined over the four-year period.

Table 11 Live performance royalties paid to Indigenous APRA members and all APRA members

Year	Amount paid to Indigenous APRA members (\$)	Amount paid to all APRA members (\$)	% paid to Indigenous APRA members
2003	20,000	1,839,336	1.08
2004	14,274	1,843,506	0.77
2005	18,893	1,904,541	0.99
2006	12,881	1,997,983	0.94

Source: APRA 2003–06, live performance returns from APRA members.

4 Recordings

This chapter examines the nature and extent of recording of Indigenous music.

Introduction

A recording of an artist's work is the product of many variables. At its heart it is the creation of the musical work by the songwriter or composer. To turn this creative work into a permanent record requires specialist expertise from musicianship, to arrangement, engineering and production. Add to this the necessary equipment including musical instruments, recording studio facilities and software and you will have some sense of the scope of components required to produce a musical 'product'.

Further to this often complex production process, the commercial viability of a recording rests with its ability to connect with the consumer market. Channels for making this connection include radio, the internet, retail outlets, live performances and selling CDs at gigs. Inevitably, the product and the distribution channel must work together for a recording to maximise its market returns.

Much has already been written in mainstream media and government reports about the impact of technology on the music industry, specifically the opportunities and threats posed by the internet. The opportunities presented to artists by an online presence are unprecedented and have revolutionised the industry. There are now viable alternatives to the traditional music business model of 20 years ago.

No longer do artists have to rely on investment from record companies to get their product to a market. The internet serves both as a means of distributing product, and a marketing and promotional tool. Of course, it is not as simple as establishing an internet presence, sitting back and expecting to sell your recordings. Like any business, planning is required in order to find a market and fan base, promote a product and provide a selling point.

Number of businesses

According to the ABS Business Register, in 2004 there were 1,123 businesses involved in the recorded media and publishing industry and a further 1,259 operating as recording studios. New South Wales had more businesses involved in each of these industries than any other state.

Record industry bodies

Australian Record Industry Association

The Australian Record Industry Association (ARIA) is a national industry association representing the interests of its members. At September 2006, ARIA's membership consisted of 100 record companies, ranging from small boutique style operations, to the four major international record companies: EMI Music Australia, SONY/BMG, Universal and Warner Music Australia. ARIA compiles and collates wholesale sales statistics (shipments to retailers) based on the submission of eight wholesale members. It is estimated that this represents 95 per cent of the physical product sale market.

The following tables provided by ARIA give a numerical overview of trends in unit sales the value of the recorded music market. The figures indicate the following:

- 82 per cent decline in the wholesale value of CD singles between 2005 and 2008
- 27 per cent decline in the wholesale value of CD albums between 2005 and 2008
- 82 per cent decline in the number of unit sales of CD singles between 2005 and 2008
- 16 per cent decline in the number of unit sales of CD albums between 2005 and 2008.

Table 12 Businesses involved in the music recording business by state and territory

State and territory	Recorded media manufacturing and publishing	Recorded music retailing	Sound recording studios	Total
New South Wales	438	501	508	1,447
Victoria	315	341	378	1,034
Queensland	162	191	197	550
South Australia	75	101	61	237
Western Australia	104	129	89	322
Tasmania	n/a	24	11	n/a
Australian Capital Territory	n/a	21	n/a	n/a
Northern Territory	n/a	15	n/a	n/a
Total	1,123	1,323	1,259	3,705

Note: n/a: Not available for publication but included in totals. Source: ABS, Business Register, Counts of Business by ANZSIC, 2004

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Table 13 Australian Wholesale Sales by Value*

	2005 [^]	2006	2007	2008
Physical				
CD Singles	20,353	12,002	6,712	3,570
Vinyl Albums	346	256	199	392
Cassette Albums	421	181	54	8
CD Albums	444,729	421,941	362,061	323,800
Music Video/DVD	53,699	49,192	53,030	43,576
Other #	719	343	192	102
Total	520,267	483,915	422,248	371,448
Digital				
Digital Track	2,471	11,560	18,695	26,735
Digital Album	940	4,149	6,778	13,502
Mobile Master Ringtones	3,729	10,280	13,502	8,249
Digital Other ##	767	1,868	4,515	5,704
Total	7,907	27,857	39,964	54,190
Grand Total	528,174	511,772	462,212	425,638

* These figures are based on submissions from reporting ARIA members, estimated to represent approximately 95% of the local website market. 2009. [^] Please note that, from 2005 onwards, value figures have been calculated after the application of any volume or other rebates. # "Other" includes sales from Vinyl Singles, DVD Singles, DVD Albums, Mini Disks and SACD. ## "Digital Other" includes sales of Digital Music Video, Mobile Ringback Tunes, Streams and Subscriptions

Table 14 Australian Wholesale Sales by Unit*

	2005 [^]	2006	2007	2008
Physical				
CD Singles	7,394	4,331	2,497	1,315
Vinyl Albums	27	23	18	29
Cassette Albums	100	41	11	4
CD Albums	46,174	49,818	44,045	38,659
Music Video/DVD	4,427	5,159	5,276	4,421
Other #	77	31	20	11
Total	58,199	59,403	51,867	44,439
Digital				
Digital Track	2,393	11,023	17,647	23,465
Digital Album	91	418	788	2,853
Mobile Master Ringtones	1,981	5,749	5,606	4,733
Digital Other ##	501	3,725	23,226	97,481
Total	4,966	20,915	47,267	128,532
Grand Total	63,165	80,318	99,134	172,971

* These figures are based on submissions from reporting ARIA members, estimated to represent approximately 95% of the local website market. 2009. [^] Please note that, from 2005 onwards, value figures have been calculated after the application of any volume or other rebates. # "Other" includes sales from Vinyl Singles, DVD Singles, DVD Albums, Mini Disks and SACD. ## "Digital Other" includes sales of Digital Music Video, Mobile Ringback Tunes, Streams and Subscriptions.

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Table 15 Australian Wholesale Sales By Unit (Physical Product only)*

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Singles										
7&12" Vinyl	15,000	18,000	9,000	8,000	12,000	7,000	4,000	3,000	3,000	3,000
CD's	11,290,000	11,099,000	12,367,000	11,343,000	9,464,000	9,286,000	7,394,000	4,331,000	2,498,000	1,315,000
Cassettes	-	9,000	-	-	-	-	-	-	-	-
DVD/Other			4,000	-	-	3,000	13,000	11,000	9,000	4,000
Total	11,305,000	12,380,000	12,380,000	11,351,000	9,476,000	9,296,000	7,411,000	4,345,000	2,510,000	1,322,000
Albums										
12" Vinyl	30,000	37,000	31,000	32,000	43,000	30,000	27,000	23,000	18,000	29,000
CD's	42,672,000	43,917,000	49,670,000	46,954,000	50,640,000	48,234,000	46,174,000	49,818,000	44,045,000	38,659,000
Cassettes	909,000	949,000	811,000	595,000	360,000	194,000	100,000	42,000	11,000	4,000
DVD/Other		5,000	10,000	107,000	180,000	143,000	60,000	16,000	7,000	4,000
Total	43,611,000	44,908,000	50,522,000	47,691,000	51,223,000	48,601,000	43,361,000	49,899,000	44,081,000	38,696,000
Audio Visual										
Video	562,000	345,000	193,000	197,000	109,000	27,000	1,000	-	1,000	47,000
DVD		232,000	762,000	2,256,000	4,814,000	5,213,000	4,426,000	5,159,000	5,275,000	4,374,000
Total	562,000	577,000	955,000	2,453,000	4,923,000	5,240,000	4,427,000	5,159,000	5,276,000	4,421,000
Grand Total	55,476,000	56,611,000	63,857,000	61,495,000	65,622,000	63,137,000	58,199,000	59,403,000	51,867,000	44,439,000

* These figures are based on submissions from ARIA members, estimated to represent approximately 95% of the wholesale market. 2009

Table 16 Australian Sales by Wholesale Value (Physical Product)*

	1999	2000	2001	2002	2003	2004	2005 ^	2006	2007	2008
Singles										
7&12" Vinyl	118,000	93,000	70,000	67,000	98,000	61,000	35,000	23,000	23,000	24,000
Cd's	53,373,000	44,571,000	46,659,000	37,460,000	28,509,000	26,670,000	20,353,000	12,002,000	6,711,000	3,570,000
Cassettes	4,000	-	1,000	-	-	1,000	-	-	-	-
DVD/Other			52,000	4,000	1,000	13,000	55,000	101,000	70,000	27,000
Total	53,487,000	44,664,000	46,782,000	67,523,000	28,606,000	26,745,000	20,443,000	12,126,000	6,804,000	3,621,000
Albums										
12" Vinyl	342,000	336,000	394,000	426,000	525,000	385,000	346,000	256,000	199,000	392,000
CD's	524,994,000	531,972,000	576,484,000	528,401,000	539,609,000	509,807,000	444,729,000	421,941,000	362,061,000	323,800,000
Cassettes	6,283,000	6,063,000	4,739,000	4,317,000	942,000	942,000	421,000	181,000	54,000	8,000
DVD/Other		89,000	226,000	1,938,000	2,179,000	2,179,000	629,000	219,000	99,000	51,000
Total	531,619,000	538,460,000	581,843,000	535,082,000	544,603,000	513,313,000	446,125,000	422,597,000	362,413,000	324,251,000
Audio Visual										
Video	9,162,000	5,319,000	2,414,000	2,149,000	1,260,000	306,000	16,000	6,000	10,000	537,000
DVD		5,291,000	16,581,000	34,780,000	71,533,000	66,606,000	53,683,000	49,198,000	53,020,000	43,039,000
Total	9,162,000	10,610,000	18,995,000	36,929,000	72,793,000	66,912,000	53,699,000	49,192,000	53,030,000	43,576,000
Grand Total	594,268,000	593,734,000	647,620,000	609,534,000	646,002,000	606,970,000	520,267,000	483,915,000	422,247,000	371,448,000

* These figures are based on submissions from ARIA members, estimated to represent approximately 95% of the wholesale market. 2009

^ Please note that, from 2005 onwards, value figures have been calculated after the application of any volume or other rebates.

Association of Independent Record labels

The Association of Independent Record labels (AIR) represents the interests of 350 independent record companies by delivering a range of services nationally and internationally, aimed at supporting and promoting Australian independent music product.

Australasian Mechanical Copyright Owners Society

Figures in relation to record releases were sourced from the Australasian Mechanical Copyright Owners Society (AMCOS). AMCOS operates a system known as the Clearance Facility which was launched in 2001 in consultation with representatives from the recording and publishing industries. It is a centralised computer system that record companies use to lodge details of forthcoming record releases. This then enables the mechanical copyright owner

(the publisher) to ensure that proper ownership credits appear on the recording, make a claim for payment and so ensure the correct flow of mechanical royalties.

We were able to extract all Australian record releases for the years 2004, 2005 and 2006, and then researched all entries to determine which were by Indigenous music artists. Particular attention was paid to ensure that known record labels that carried Indigenous content were included, such as Skinnyfish Music, Central Australian Aboriginal Media Association (CAAMA) and Mushroom Music.

These figures relate to commercial releases and may not necessarily include self-made recordings which do not use a recognised means of distribution.

Table 17 Number of non-Indigenous and Indigenous commercial record releases, 2004–06

Year	Non-Indigenous record releases	Indigenous record releases	% of total	Total
2004	1,106	19	1.72	1,125
2005	1,348	7	0.52	1,355
2006	1,035	9	0.87	1,044

Source: APRA/AMCOS clearance facility system 2004-2006

Central Australian Aboriginal Media Association

The following information was sourced from the Central Australian Aboriginal Media Association (CAAMA) website www.caama.com.au.

CAAMA was established in 1980 through the collaboration of a group of Indigenous and non-Indigenous Australians. The Aboriginal people of Central Australia own CAAMA, and its objectives focus on the social, cultural and economic advancement of Aboriginal peoples.

CAAMA has a mandate to promote Aboriginal culture, language, dance, and music while generating economic benefits from training, employment and income generation. CAAMA produces media products that engender pride in Aboriginal culture, and informs and educates the wider community of the richness and diversity of the Aboriginal peoples of Australia.

CAAMA Music manages a record label and a recording studio offering digital, analogue and mobile recording facilities. The various operational arms of CAAMA, including CAAMA Radio, CAAMA Productions and CAAMA Music all work together to provide recording, broadcasting and distribution opportunities for Aboriginal and Torres Strait Islander artists.

CAAMA Music encourages artists to record songs in their own language to help preserve their cultural identity. The styles of music recorded by CAAMA Music are as diverse as the communities from which they stem. They are dedicated to the development of Indigenous artists and taking their music to Australian and overseas markets.

The music recorded by CAAMA Music is 99 per cent original material, written and performed by Aboriginal and Torres Strait Islander artists, recorded and produced by predominantly Indigenous technicians and engineers. Approximately 80 per cent of the songs and music recorded and broadcast are in native Indigenous language.

Skinnyfish Music

The following information was sourced from the Skinnyfish Music website www.skinnyfish.com.au.

Skinnyfish Music is a Darwin-based record label whose primary aim is to record and promote the music of Indigenous Australians; be it traditional or contemporary or a fusion of both.

Skinnyfish is a private commercial company and does not receive funding to support its operations. It offers a range of services including: recording facilities, music distribution, music publishing, video and multimedia production, and artist support.

Skinnyfish has, to date, released 12 recordings (10 albums and two DVDs) with a further 10 albums in various stages of production. Skinnyfish represents 20 recording artists and its publishing arm, Skinnyfish Music Publishing, represents 38 songwriters.

Collectively, Skinnyfish record releases have sold in excess of 200,000 units. Prior to the release of Gurrumul (Geoffrey Gurrumul Yunupingu) in early 2008, unit sales stood at approximately 54,000.

Indigenous artists in Australia's national record charts

Since the inception of popular music, some form of chart has been maintained and published to indicate the level of success of commercial recordings, as determined by the number of physical units sold (sales of singles and albums). Not surprisingly, the form of these charts has changed considerably since their introduction in 1940.

ARIA and AIR publish weekly charts across a range of genres covering mainstream, alternate and independent record releases. David Kent has published three *Australian Chart Books*, 1940–69, 1970–92 and 1993–2005, documenting the history of recordings in Australia in respect of foreign and domestic repertoire.

The *Australian Chart Book 1993–2005*, reveals that during the period 1993–2005, 6,256 unique songs entered the Australian charts. Of those songs, 34 (0.5 per cent) were composed and/or performed by eight Indigenous music artists: Christine Anu, Casey Donovan, Anthony Mundine, Troy Cassar-Daley, Archie Roach, Shakaya, Tiddas and Yothu Yindi.

Constraints on the recording of Indigenous music

We asked focus session participants and interviewers about difficulties they face in recording their music. The following sections outline some of the key constraints identified.

Costs and access

The recording process often represents the single largest investment that recording artists ever make. Unsigned artists wishing to record either have to self fund or seek funding from alternative sources such as government or philanthropic organisations. As will be seen later in this section, it is a flawed assumption to consider the recording process in isolation from, say, touring initiatives.

Q: Do you have your own technical support and equipment?

A: We're supported by Barkly Regional Arts and also these guys are instrumental in making a new Indigenous men's music centre in Tennant Creek. I've been working with Barkly Arts, I've fixed all their equipment. Being out in a remote area it's really hard to get equipment fixed, so I've fixed everything myself so all the bands in the area have got equipment and now we're

A cont: getting a full recording studio in Tennant Creek where we can mix, master, film editing facilities. Like the whole lots going to be there so the resources are starting to actually pick up.

For artists living in metropolitan areas, our research suggests that issues of restricted access appear to be less of an issue. All capital cities house a variety of studios offering a range of facilities and services. For those in remote and regional areas, travel and associated costs become a significant issue. For remote communities, positive change has come recently with the advent of mobile recording facilities, removing additional travel costs and importantly, given cultural imperatives, enabling artists to remain in their communities.

Q: How far do you have to travel to get to your nearest good facility?

A: Probably 500 k's to CAAMA (Alice Springs). I'm not sure if there's one in Katherine at all. There'd be one in Darwin.

Q: What about the cost factor, is that the main obstacle?

A: Just for the travel up there, you'd have to stay somewhere. Where they've got this music centre now they can come in and learn how to run the recording software because they'll have the two project offices, so it's all there. Once it's all set up properly it can all get set up as a pod and we can drive it out to Borroloola, we can go anywhere, it's letting the mountain come to them.

Table 18 Typical recording costs for an album

Cost centre	Minimum (\$)	Maximum (\$)	Time and volume	Total range (\$)
Studio hire per day	400	1,500	10 days	4,000–15,000
Mixing	400	n/a	10 days	At least 4,000
Mastering	200	n/a	n/a	At least 2,000
Duplication, print, packaging per unit	1.80	n/a	1,000	At least 1,800

Source: Based on quotes received from metropolitan and regional recording studios. 2009

Industry sources advise that the minimum costs to produce a full-length album would be in the order of \$10,000. Note that the Australia Council provides grants of up to \$7,500 to assist with production and recording costs.

Quality

Our interviews and focus groups revealed an unfortunate reality that Indigenous recorded product suffers from a stigma of second-rate quality. Participants reported that this stigma is so deeply entrenched that consumers have come to expect poor quality recordings. The majority of our interviewees, including artists and industry workers, found this lamentable.

Our interviews revealed that the reputation for low quality recordings can be attributed to two key issues: lack of appropriate skills (for engineers, producers and artists); and lack of finance to invest in the recording process or appropriate personnel.

Often there are insufficient financial resources to engage a producer. This role is then assumed by the engineer. Often an inexperienced artist will not know the difference between the two skill sets and simply engage one and not the other. Additionally, and not surprisingly, outside of metropolitan regions there is a genuine lack of skilled producers. Therefore, shortcuts are often employed. Generally, it is both financially and culturally unrealistic to expect a band to travel long distances to a city centre to access the range of expertise required.

The creative collaborative process between Indigenous artists and non-Indigenous producers was also highlighted as problematic. The best creative results come about from mutual respect, trust, discipline and mutual creative direction. A positive artistic collaboration relies heavily on empathy between the collaborators, who ultimately must have a mutual appreciation of their artistic direction. This reciprocity and empathy must be present irrespective of ethnicity.

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Interviews also revealed that there is a perception in the industry that if a recording has been funded by a government arts agency (apparent by the presence of the funding body's logo on the recording), then by virtue of that financial assistance, the recording is regarded as second rate. This perception prevails in the marketplace and can adversely impact the commercial viability of the product.

Promotion and marketing

Interviewees suggested that a lack of investment and planning in promoting is a significant barrier to extending the reach of Indigenous music to a wider audience. More often than not, they said, the sole focus for artists is the process of recording their work, but this is only one part of the equation.

Some interviewees questioned the wisdom of government arts agencies investing in recordings without also assisting with getting the product to market. A musical recording, whether it be a physical copy (CD) or in digital audio format (MP3), requires a means of distribution in order to get it to market, and a promotion and marketing campaign to maximise the recording's market potential.

Recording + Marketing + Distribution → Consumer

In most cases, these three elements must work together for recorded music product to have any prospect of reaching a wider audience. Our interviews revealed that for the majority of Indigenous music artists there was a real disconnect between the finished recorded product and any subsequent activity to 'work' the product. Often there was a complete absence of marketing initiatives or means of distribution which, ultimately, compromises the investment in the recording in the first place.

Q: What sort of marketing materials would mostly be commonly used out this way & how would they market themselves?

A: None, there's very little

The CD's leak out, they're fractional amounts of airplay, or someone records it on a cassette then you have a fifth generation of a cassette & it finds a way the music finds a way. It's a great thing & that's the community support that ya have. That side of it has never changed, that side of it from where I sit has never changed. The scene has always been ready for something to happen, what's changed is the players all have various motivations for doing it. CAAMA music was an add on to CAAMA radio & when it first started & they had the money they had all the support from ATSIC, they had a real passionate embrace of this scene.

A cont.: Then things got a little harder & it turned into o gee we have to actually operate like an independent label & we have to diligently push & promote these things not on a short term basis where well we got funding for 12 weeks & then after that we will drop them & go into our next funded project for the next 12 weeks & our next & our next.

But what happens is you have all these one off hits that don't have any longevity to them. There is no real artist development. That's what I've seen & it's a shame cause all these groups I mean some of them, not all of them really want to make it work but they just don't have the longevity or the means to do it.

Summary—recording constraints for Indigenous musicians

Following is a summary of the key issues and constraints impeding recording for Indigenous musicians. These also suggest areas for further development:

- inadequate investment in the promotion and marketing of recorded product
- poor quality recordings
- although new technologies offer more economical means of access to the recording process, costs associated with traditional studio recordings are often unaffordable
- practical access to funding programs for recordings
- lack of access to technical, production and engineering skills.

5 Broadcasting

This chapter examines the nature and extent of the broadcasting of Indigenous music in Australia.

Overview of radio broadcasters

As the world entered the twentieth century it witnessed the birth of wireless transmission, and the invention of the household radio. Radio has since moved beyond the four walls of the family home into the car and workplace. Through the invention of mobile devices, radio can travel anywhere with the listener.

Radio continues to keep pace with the latest technology in the twenty-first century. Many Australian radio stations are broadcasting live on the internet and digital audio broadcasting has just been introduced.

There are over 37 million radio sets in Australia¹. Radio is the medium with the highest penetration into Australian households. Consider these statistics from the *All Australian Listening Report 2000*:

- ninety-nine per cent of cars in Australia have a radio
- all homes in Australia have at least one radio
- there is an average of five radios per home
- forty-four per cent of homes have between one and four radios
- fifty-six per cent of homes have five or more radios.

The effectiveness of radio and the extent upon which it is relied, particularly in remote communities, was emphasised to us repeatedly in our interview sessions. Whilst the radio industry consists of four different sectors, as shown below, it can also be differentiated by its commercial or non-commercial nature.

The Australian radio industry is essentially made up of four different sectors:

- national broadcaster—the Australian Broadcasting Corporation (ABC) broadcasts throughout Australia on 51 regional stations and nine metropolitan stations, four national networks (ABC Classic FM, Radio National, ABC News Radio and the youth network,

Triple J) and three internet-based music services, *dig*, *dig jazz* and *dig country*. The radio networks, *dig* and *dig jazz* are available as audio services on digital satellite subscription services and *dig* and *dig jazz* are available on digital free-to-air television

- Australian commercial radio—there are 259 stations across Australia of which 110 have an AM license and 150 have an FM license. These stations are owned by over 30 operators, with 80 per cent of the stations formed into 12 networks
- community broadcasters consisting of 359 community stations
- narrowcasters²—199 high-power narrowcast stations and over 1,755 low-power narrowcasters.

This chapter examines the commercial, community and national broadcasting, the regulatory environment under which they operate and the extent to which Indigenous music is broadcast on each.

Australian commercial radio—the regulatory environment

Commercial radio stations are subject to the *Commercial Radio Codes of Practice*. The Code of Practice is a document of self-regulation that relates to programming and operational standards for all stations in the sector. Of relevance to this report is one aspect of the Code of Practice, known as the Australian Music Performance Code.

The purpose of this Performance Code is to promote the role of broadcasting services in developing and reflecting a sense of Australian identity, character and cultural diversity by prescribing minimum content levels of Australian music, in line with the objectives of the *Broadcasting Services Act 1992* (BSA).

The BSA does not require radio broadcasters to provide minimum content levels of Australian music. However, the codes of practice for both commercial and community radio broadcasters contain requirements for the broadcasting of Australian music content. As a result, quotas have been adapted by the commercial radio industry, setting out the minimum level of music performed by Australians that is to be broadcast.

Table 19 Broadcasting Services Act format categories and Australian content levels

Category	Format of service	Applicable content proportion
A	Mainstream rock; Album-orientated rock; Contemporary hits; Top 40; Alternative	Not less than 25 per cent
B	Hot/mainstream adult contemporary; Country; Classic rock	Not less than 20 per cent
C	Soft adult contemporary; Hits and memories; Gold—encompassing classic hits; News talk/sports talk	Not less than 15 per cent
D	Oldies; Easy listening; Easy gold; Country gold	Not less than 10 per cent
E	Nostalgia; Jazz; NAC (smooth jazz)	Not less than 10 per cent

Source: AMPCOM annual report 2006–07.

¹ Commercial Radio Australia, *Commercial Radio—a Snapshot*, August 2005.

² A narrowcast is the dissemination of information (usually by radio or television) to a narrow audience. Some forms of narrowcasting involve directional signals or use of encryption. An example is a broadcasting package via a retail outlet.

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The Australian content requirements are based on five categories. There are different music formats under each category. Typically, stations that play the most popular music such as mainstream rock and contemporary hits are found in Category A (see Table 19), and these have the highest quota at 25 per cent.

The Australian Music Performance Code further provides for minimum content levels relating to new Australian performances as a proportion of total Australian performances for radio services within Categories A, B or C. Those quotas are shown in Table 20.

Table 20 Broadcasting Services Act minimum new Australian performances

Category	New Australian performances as a proportion of total Australian performances
A	Not less than 25 per cent
B	Not less than 20 per cent
C	Not less than 15 per cent

Source: AMPCOM annual report 2004–05.

Of the 259 commercial radio stations in Australia, there are none which are Indigenous specific.

Yamatji radio (6LN/6CAR) operated up until about 2007 with Indigenous music programming making up approximately 15 – 20 percent of on-air time. The station has since changed operators and now broadcasts under a “Hits Radio” format.

Australian Music Performance Committee

The principal objective of the Australian Music Performance Committee (AMPCOM) is to monitor compliance with the Australian Music Performance Code, to ensure commercial radio broadcasters fulfil their role in developing and reflecting a sense of Australian identity, character and cultural diversity.

The 2004–05 AMPCOM annual report does not classify Indigenous music as a genre. There continue to be arguments for and against the value of categorising Indigenous music as a separate genre. However, given the objectives of the Australian Music Performance Code—to develop and reflect a sense of Australian identity, character and cultural diversity—there is a clear case for advocating the introduction of an Indigenous music genre.

Community broadcasting sector—the regulatory environment

Community broadcasting is the third tier of broadcasting in Australia. Operating in tandem with commercial and national broadcasters, community broadcasting depends largely on volunteers. Community stations vary enormously, depending on the community they service, whether it is Indigenous, youth, ethnic, religion-based, classical music, or gay and lesbian.

The community broadcasting sector is bound in the same way as the commercial radio industry, by legislative requirements under the BSA. Similarly, community radio has also developed a code of practice governing programming and operational standards.

Part three of this code deals with Australian music content, not dissimilar to the code adopted by the commercial radio industry. However, the community sector refers specifically to Indigenous music and so it is worth including in this publication. Another distinguishing feature between the adopted codes is the inclusion of Australian music composition, not merely performance, in the community broadcasting code.

The following is an extract from Part 3 of the Community Broadcasting Code of Practice, dealing with Australian music content:

‘Australian Music is defined as any music composed or performed by a citizen or ordinary resident of Australia.

This Code reinforces the community broadcasting sector’s reputation as a medium committed to developing and recognising Australian composers and/or performers by providing opportunities to have their material broadcast on a regular basis.

The BSA does not require community broadcasters to maintain minimum content levels of Australian music. However, given the nature of the community broadcasting sector and its commitment to reflecting the diversity of Australian culture and the interests of local communities, it is crucial for a significant proportion of local and Australian music, including Indigenous Australian music, to continue to be broadcast by community stations.

In selecting Australian musical items, community broadcasting stations should have regard for the make up of the community served by the licensee.

3.1 Community broadcasters will ensure a proportion of the total number of musical items broadcast consist of:

- a. not less than 25 per cent Australian music items for all community broadcasting licensees except ethnic and classical stations as cited Clause 3.1 b) below
- b. not less than 10 per cent Australian musical items for ethnic and classical stations

a) and b) to be determined over one month

3.2 The music requirements cited (3.1 above) exclude the use of music in sponsorship announcements and program or station promotions.

Guidance Note: In the interests of best practice stations endeavour to play more Australian Music than the minimum requirements outlined in Category 3 in Table 20.’

Indigenous community broadcasters

The following table shows the number of community broadcasters across various categories in Australia from 2002–08.

Table 21 Number of community broadcasting stations in Australia, 2002–08

Category	2002	2003	2004	2008
Fully licensed community radio stations	337	341	359	350
Groups holding temporary or seeking temporary community radio licences	50	54	40	61
Community television stations	5	6	6	5
Indigenous broadcasting stations:				
Remote Indigenous community television licences	76	76	80	78
Indigenous community broadcasters	20	21	21	20
Remote Indigenous broadcasting services	80	80	80	80
Sub total Indigenous broadcasting stations	176	177	181	178
Grand total	568	578	586	594

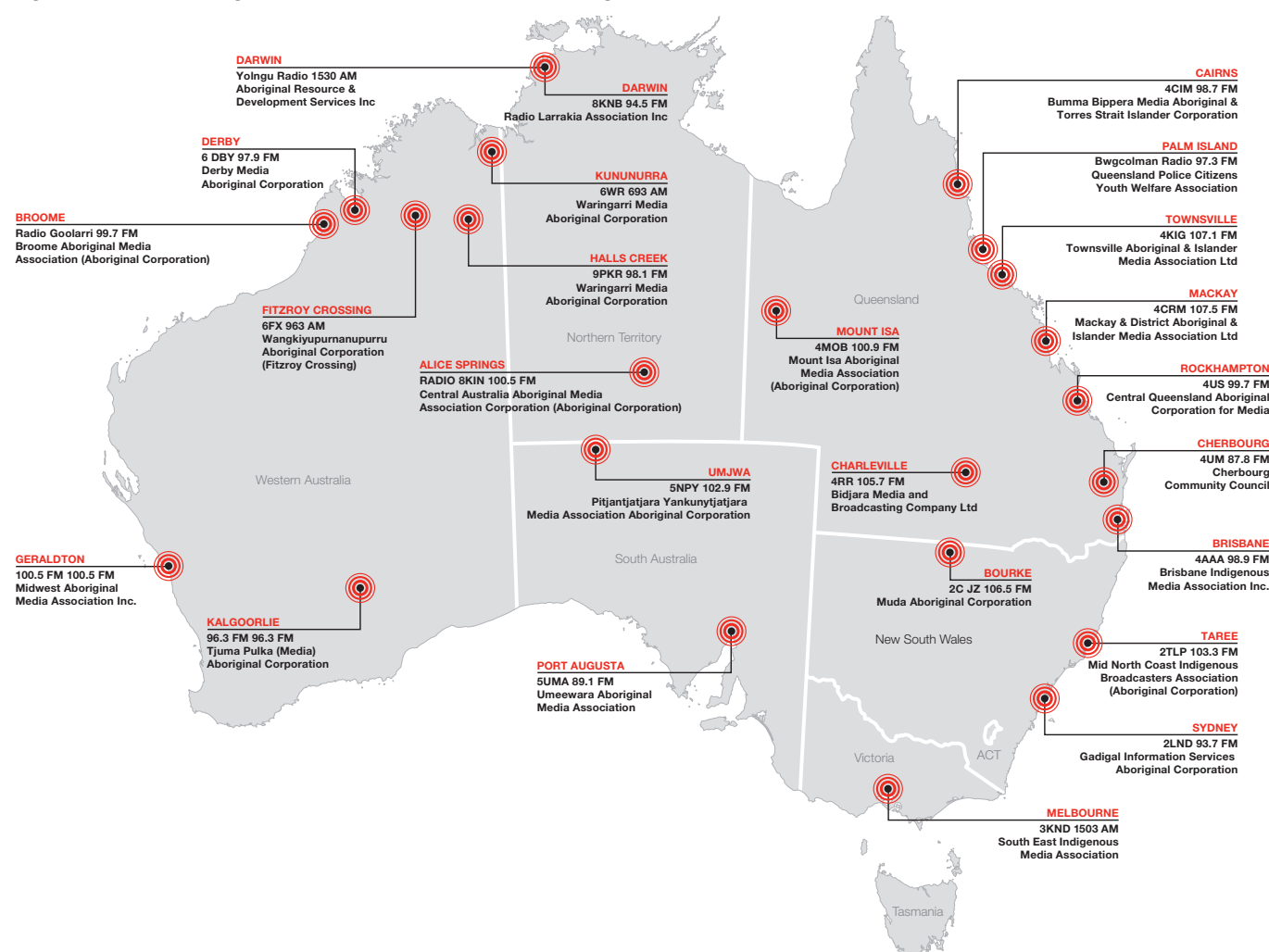
Source: Community Broadcasting Association of Australia. 2002-08

Between 2002 and 2008 the number of non-Indigenous community broadcasters grew by just over 6 per cent (24 new broadcasters). The number of Indigenous broadcasters increased by 2 broadcasters (or by just over 1 percent), both new licences being in remote Indigenous community television.

A footprint of remote Indigenous community broadcasters

Figure 7 shows the geographic location and call signs of licensed Indigenous broadcasters, according to the Community Broadcasting Association of Australia (CBA).

Figure 7 Licensed Indigenous broadcasters and their call signs



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Community Broadcasting Association of Australia statistics on Indigenous radio content

Information on Indigenous content is available from the Community Broadcasting Association of Australia (CBAA). The CBAA data on the content of Indigenous stations represents only the 20 fully licensed stations that serve Indigenous communities in metropolitan and regional areas. The Indigenous community broadcasting sector also encompasses the activities of 80 Remote Indigenous Broadcasting Service (RIBS, formerly the Broadcasting for Remote Aboriginal Communities Scheme) community radio stations.

The CBOOnline Project collects information on the activities of these diverse and dynamic stations, helping inform the public about the role they play in communities and encouraging the exchange of information within the sector itself. CBOOnline is currently working towards a separate data collection for these stations.

Content ratios on community radio

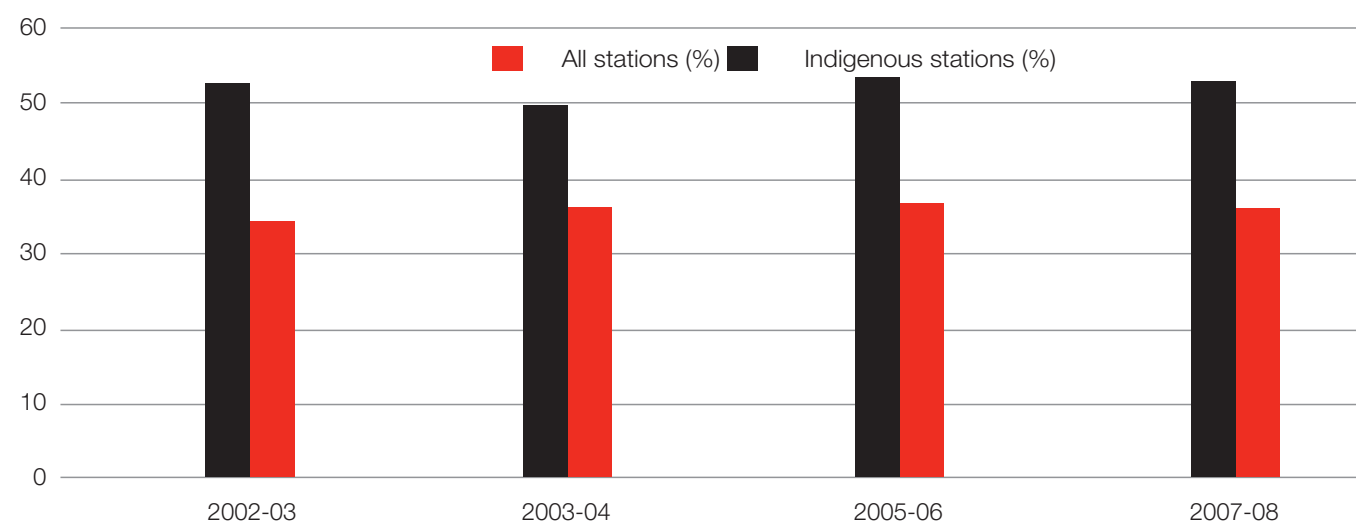
Table 22 shows the percentage of Australian music to total music hours played on community radio.

Table 22 Percentage of Australian music to total music hours

Year	All stations (%)	Indigenous stations (%)
2002-03	32	51
2003-04	35	49
2005-06	36	53
2007-08	36	53

Source: Community Broadcasting Association of Australia. 2002-08

Figure 8 Percentage of Australian music to total music hours



Source: Community Broadcasting Association of Australia. 2002-08

The following table shows the percentage of Indigenous music to total music hours.

Table 23 Percentage of Indigenous music to total music hours

Year	All stations (%)	Indigenous stations (%)
2002-03	4	31
2003-04	4	34
2005-06	3	35
2007-08	4	35

Source: Community Broadcasting Association of Australia. 2002-08

The table below shows the percentage of Indigenous music to total Australian music hours.

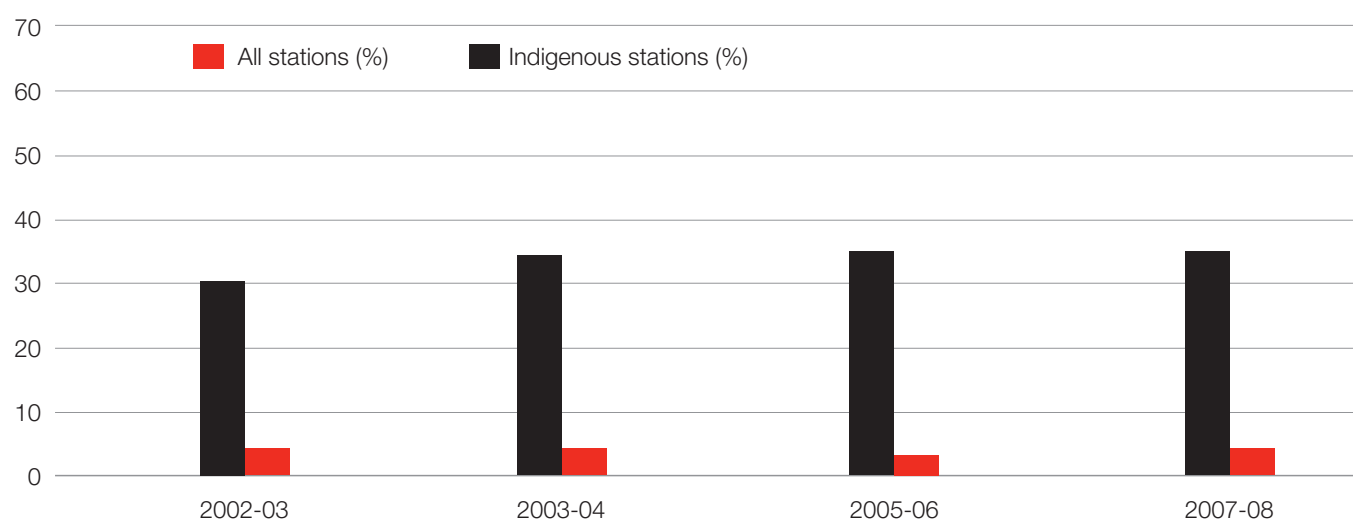
Table 24 Percentage of Indigenous music to Australian music

Year	All stations (%)	Indigenous stations (%)
2002-03	12	61
2003-04	11	68
2005-06	9	67
2007-08	11	66

Source: Community Broadcasting Association of Australia. 2002-08

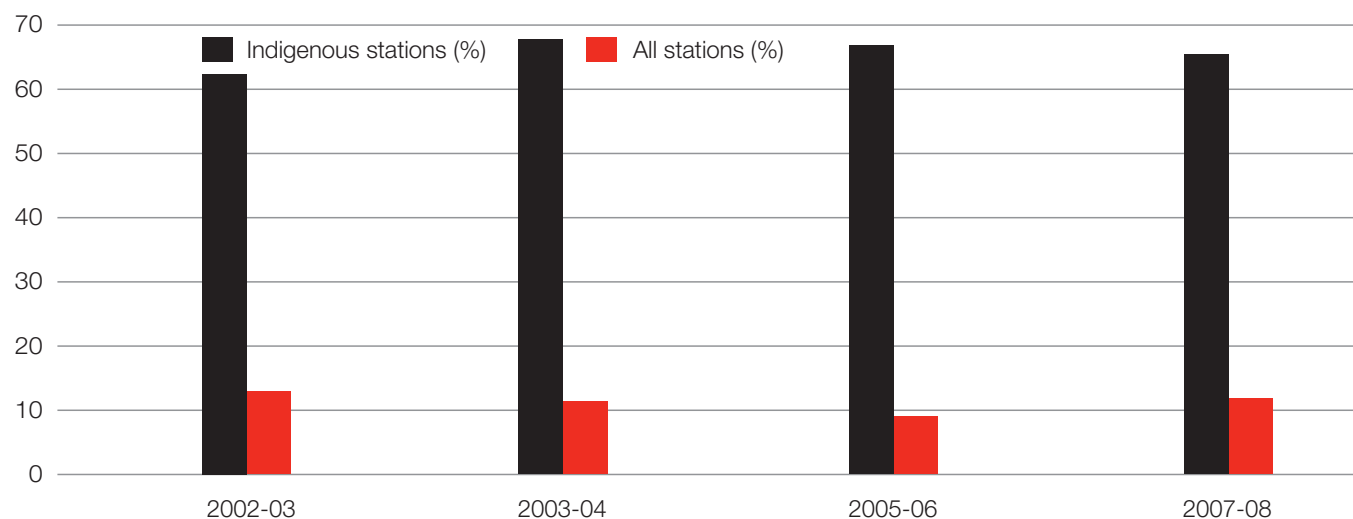
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Figure 9 Percentage of Indigenous music to total music hours



Source: Community Broadcasting Association of Australia. 2002-08

Figure 10 Percentage of Indigenous music to Australian music



Source: Community Broadcasting Association of Australia. 2002-08

In 2007-08 Indigenous stations played 53 per cent Australian music, of which 66 per cent was Indigenous. Indigenous music represented 35 per cent of all music content on Indigenous stations, an increase of 4 percentage points on 2002-03.

As table 25 indicates, the weekly hours of Indigenous programming declined for both Indigenous community stations and all community stations between 2002-03 and 2007-08.

Table 25 Stations that broadcast Indigenous programming

Year	All Stations		Indigenous Stations	
	Avg hours/week	Total hours/week	Avg hours/week	Total hours/week
2002-03	17	1,602	69	1,416
2003-04	15	1,563	72	1,396
2005-06	12	1,423	64	1,222
2007-08	13	1,392	58	1,164

Source: Community Broadcasting Association of Australia. 2002-08

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Community radio stations may be licensed to serve a particular community (e.g. Indigenous, ethnic, print disabled or religious) or they may provide programming for an array of interest groups. A station need not have a dedicated Indigenous focus to broadcast Indigenous programming. The following figures are for all types of stations.

The table below shows the number of hours and percentage of special interest programming targeted at Indigenous audiences by all community radio stations from 2001-02 to 2003-04.

Table 26 Number of hours of special interest programs for Indigenous audiences

Year	Hours per week of special interest programming(a)	% of Indigenous music to other special interest programming
2001-02	1,100	16
2002-03	1,601	18
2003-04	1,563	23

(a) Programming hours were spread across 103 of the 267 stations surveyed (38.7 per cent).

Source: Community Broadcasting Association of Australia. 2001-04

Australian Music Radio Airplay Project

Australian Music Radio Airplay Project (AMRAP) is a community radio initiative that works with music artists and community broadcasters to create increased radio airplay opportunities for contemporary Australian music, almost exclusively on behalf of the independent music sector.

Established in 2001, AMRAP has been funded by the Australian Government through the Community Broadcasting Foundation, the national funding agency for community broadcasting. The project is managed by the Community Broadcasting Association of Australia.

In the period 2004-06, AMRAP distributed 1,055 CD titles of all genres, translating to a total of 71,188 individual units to community stations. Of these, 25 titles were Indigenous (2.4 per cent of the total) with 2,329 individual units distributed (3.3 per cent of all units).

The 25 titles included nine compilations. On average, a compilation disc has 10 featured artists. It can therefore be estimated that between 90 and 106 Indigenous artists have been distributed through this scheme.

In May 2008, the Department for Broadband, Communications and the Digital Economy announced a further funding package of \$2.4 million over the next four years in the 2008-09 Federal Budget. Commencing in 2008-09, the commitment is providing \$0.6 million per annum over four years.

Indigenous Broadcasting Program

The Indigenous Broadcasting Program (IBP) is an Australian Government program, administered by the Department of the Environment, Water, Heritage, and the Arts (formerly the Department of Communications, Information Technology and the Arts). The program aims to contribute to the revival, rebuilding and maintenance of Indigenous cultural identity by assisting Indigenous Australians to access broadcasting services similar to those available to the wider Australian community.

The program aims to:

- support the operation of Indigenous owned and controlled community radio broadcasting services, including Remote Indigenous Broadcasting Services (RIBS)
- develop and broadcast programming that focuses on the promotion of local Indigenous language
- enhance Indigenous broadcasting services by supporting a national body that serves and develops the sector it represents
- provide a network able to inform and educate Indigenous Australians on accessing the range of health, legal, education and housing services available to them
- develop an Indigenous broadcasting sector that meets all governance requirements.

The IBP currently supports 89 Indigenous organisations. These include:

- Remote Indigenous Broadcasting Services (RIBS) and their associated coordinating/hub organisations
- urban and capital city based Indigenous broadcasters
- a national remote broadcasting coordination body
- a national Indigenous media body
- the National Indigenous Radio News Services
- training for Indigenous broadcasters
- broadcasting engineering activities to support radio and television broadcast transmission.

Central Australian Aboriginal Media Association

The Central Australian Aboriginal Media Association (CAAMA) operates 8KIN FM and is broadcast via over 30 frequencies covering a vast expanse of the continent. Figure 11 specifies the townships carrying the CAAMA signal. CAAMA's radio broadcasts are picked up within the footprint area via the Imparja television satellite transponder. Broadcasts can also be picked up outside of the footprint area if communities and stations have their own retransmission sites.

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Figure 11 Australian townships carrying the CAAMA signal

Ali Curong	Groote Eylandt	Papunya
Alice Springs	Hermannsburg	Penong
Alpururulam	Kalkaringi	Santa Teresa
Amilatwatja	Katherine	Tarcoola
Batchelor	Kintore	Tennant Creek
Bathurst Island	Lajamanu	Titjikala
Ceduna	Maningrida	Utopia
Coober Pedy	Mataranka	Willowra
Daly River	Mount Todd	Yuendumu
Ernabella	Ngukurr	Yular
Finke	Oak Valley	

Source: Central Australian Aboriginal Media Association website www.caama.com.au 2009

Australian Broadcasting Corporation—the National Broadcaster

The place of the Australian Broadcasting Corporation (ABC) in the media industry is distinctive. The *Australian Broadcasting Corporation Act 1983*, gives the ABC particular responsibilities and the ABC charter sets out its functions. The ABC has also developed its own Code of Practice which summarises the major principles guiding ABC programming. There is however no reference in the Code of Practice pertaining to local music content nor specifically to Indigenous content. However, the ABC's annual

report for 2005–06 states that 'all radio networks that broadcast music have a strong commitment to Australian music and have set targets which are consistently met or exceeded'.

Table 27 shows Australian music targets set by the various ABC radio networks, and their outputs.

ABC radio targets

Whilst the ABC's Australian music content achievements are admirable, it is impossible to gauge within those achievements the extent of Indigenous music content.

Table 27 ABC radio stations' Australian music targets and airplay, 2004–08

Network	Target (%)	2004–05 (%) Actual	2005–06 (%) Actual	2006–07 (%) Actual	2007–08 (%) Actual
Radio National	25	29.6	35.3	33.9	30.2
Local radio	25	31.5	31.0	30.8	31.5
ABC Classic FM	30	32.6	36.0	34.8	34.6
Triple J	40	41.9	41.7	39.6	41.1
dig	40	41.6	40.5	42.2	40.5
dig jazz	25	25.7	27.0	25.3	24.9
dig country	25	26.2	27.0	25.9	25.6

Source: ABC annual reports 2004–2008.

Indigenous programming

The following table, also taken from the ABC's annual reports, indicates Radio Australia's programming output by genre. Indigenous programming is identified separately, as is music.

It is unknown the extent to which Indigenous music is included in Indigenous programming and, similarly, the extent to which Indigenous music is included in music programming.

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Table 28 Radio Australia indicative output by genre 2004-05 to 2005-06

Genre	2004-05 (hours per week)(a)	2005-06 (hours per week)(a)
News	39.3	34.1
Current affairs	92.4	89.9
Arts and culture	3.8	1.8
Business and finance	0.5	1.0
Children	-	-
Comedy	-	-
Drama	0.3	0.3
Education	11.8	13.2
Contemporary lifestyle	1.3	2.7
Health	4.2	3.9
Indigenous	1.3	1.3
Law, consumer affairs and media	2.9	4.4
Special events	-	-
Topical radio	25.1	45.8
History	0.4	2.6
Light entertainment	9.5	8.0
Music	12.7	10.6
Religion and ethics	3.3	3.0
Regional and rural	6.1	4.9
Science, technology, environment and natural history	8.9	7.1
Sport	17.3	20.4
Total	241	255

(a) Radio Australia's figures represent duplicated transmission to Asia and the Pacific. This breakdown is across programming in six languages. Source: ABC annual report 2005-06. 2006-07, 2007-08 figures not published.

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Australian Broadcasting Corporation—the National Broadcaster

Table 29 Genre diversity: ABC1 – Hours Broadcast by Genre, 24 Hours

	Australian			Overseas			Total			% Total		
	2005-06	2006-07	2007-08	2005-06	2006-07	2007-08	2005-06	2006-07	2007-08	2005-06	2006-07	2007-08
Arts and Culture	155	209	197	99	107	149	254	316	346	2.9	3.6	3.9
Children's	578	508	530	1,455	1,432	1,426	2,033	1,940	1,956	23.2	22.2	22.3
Comedy	34	21	14	115	118	113	149	139	127	1.7	1.6	1.4
Current Affairs	895	1,094	1,093	-	1	1	895	1,095	1,094	10.2	12.5	12.5
Documentary	141	177	183	335	411	389	476	588	572	5.4	6.7	6.5
Drama	127	46	56	715	651	676	842	697	732	9.6	8.0	8.3
Education	154	132	134	87	67	66	241	199	200	2.6	2.3	2.3
Entertainment	1,124	1,169	1,122	48	151	111	1,172	1,320	1,233	13.4	15.1	14.0
Factual	215	323	332	117	62	65	332	385	397	3.8	4.4	4.5
Indigenous	66	62	65	-	-	-	66	62	65	0.8	0.7	0.7
Movies	14	5	4	1,048	762	934	1,062	767	938	12.1	8.8	10.7
Natural History and Environment	20	15	20	68	87	81	88	102	101	1.0	1.2	1.1
News	358	365	366	-	-	-	358	365	366	4.1	4.2	4.2
Religion and Ethics	30	28	34	71	84	60	101	112	94	1.1	1.3	1.1
Science and Technology	34	37	34	4	4	4	38	41	38	0.4	0.5	0.4
Sport	284	371	314	20	13	-	304	384	314	3.5	4.4	3.6
Total Program Hours	4,229	4,562	4,498	4,182	3,950	4,075	8,410	8,516	8,573			
% of Total Program Hours	50.3	53.6	52.5	49.7	46.4	47.5	100	100	100	95.8	97.5	97.5
Other*	349	244	211	-	-	-	349	244	211	4.2	2.5	2.5
Total Hours	4,578	4,806	4,709	4,182	3,950	4,075	8,759	8,760	8,784			
% of Total Hours	52.3	54.9	53.4	47.8	45.1	46.2	100	100	100			

*Other includes interstitial material, program announcements and community service announcements

Source: ABC annual reports 2004-08

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Table 30 Genre diversity: ABC2 – Hours Broadcast by Genre, 24 Hours

	Australian			Overseas			Total			% Total		
	2005-06	2006-07	2007-08	2005-06	2006-07	2007-08	2005-06	2006-07	2007-08	2005-06	2006-07	2007-08
Arts and Culture	161	137	163	240	204	131	401	341	294	7.5	5.0	4.5
Business	-	11	-	-	-	-	-	11	-	-	0.2	-
Children's	257	184	187	1,409	1,537	1,621	1,666	1,721	1,808	26.5	25.2	27.4
Comedy	2	4	4	-	19	192	2	23	196	-	0.3	3.0
Current Affairs	1,454	1,373	969	-	-	-	1,454	1,373	969	24.5	20.1	14.7
Documentary	163	294	180	49	65	323	212	359	503	3.6	5.3	7.6
Drama	-	-	67	-	-	77	-	-	144	-	-	2.2
Education	56	34	23	-	-	-	56	34	23	0.9	0.5	0.3
Entertainment	303	461	465	-	229	318	303	690	783	4.7	10.1	11.9
Factual	697	616	521	70	46	100	767	662	621	12.1	9.7	9.4
Features	-	72	39	-	-	-	-	72	39	-	1.1	0.6
Indigenous	47	48	34	-	-	-	47	48	34	0.7	0.7	0.5
Movies	-	2	14	-	56	168	-	58	182	-	0.8	2.8
Natural History and Environment	13	23	22	5	3	3	18	26	25	0.3	0.4	0.4
News	67	144	195	20	-	-	87	144	195	1.4	2.1	3.0
Religion and Ethics	76	55	42	-	-	-	76	55	42	1.2	0.8	0.6
Science and Technology	82	94	74	-	24	2	82	118	76	1.3	1.7	1.2
Sport	853	1,000	248	-	7	-	853	1,007	248	13.2	14.8	3.8
Total Program Hours	4,231	4,550	3,247	1,793	2,189	2,935	6,024	6,739	6,182			
% of Total Program Hours	67	67.5	52.5	28	32.5	47.5	95	100	100			
Other*	133	84	409	11	-	-	144	84	409	2.2	1.2	6.2
Total Hours	4,364	4,634	3,656	1,804	2,189	2,935	6,168	6,824	6,591			
% of Total Hours	68	67.9	55.5	28	32.1	44.5	96	100	100			

*Other includes interstitial material, program announcements and community service announcements.

Source: ABC annual reports 2004-08

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Table 31 New Media output by genre, 2005-06 to 2007-08

ABC Online	2005-06		2006-07		2007-08	
Genre	Number of pages	%	Number of pages	%	Number of pages	%
Arts and Culture	23,181	1.0	24,777	0.6	24,242	0.6
Children's*	50,883	2.2	66,455	1.7	81,256	1.9
Current Affairs	98,362	4.3	121,430	3.1	144,257	3.3
Education	29,258	1.3	30,498	0.8	7,293	0.2
Indigenous	11,024	0.5	13,826	0.4	16,580	0.4
Music	20,855	0.9	26,237	0.7	31,764	0.7
Natural History and Environment	10,256	0.5	13,065	0.3	16,622	0.4
News	758,676	33.5	1,846,380	47.7	2,141,840	49.8
Religion and Ethics	2,479	0.1	2,868	0.1	2,071	0.1
Regional and Rural	640,872	28.3	419,521	10.8	491,596	11.4
Science and Technology	45,700	2.0	54,038	1.4	77,059	1.8
Sport	85,722	3.8	116,591	3.0	122,492	2.8
Youth	44,161	1.9	50,437	1.3	55,863	1.3
Other*	446,476	19.7	1 087,865	28.1	1,087,083	25.3
Total	2,267,905	100	3,873,988	100	4,300,018	100

*The ABC Online "Other" category includes the Television Guide, ABC Broadband, About ABC Online, Radio Australia, ABC Radio National, ABC corporate information, Australia Network and functional pages such as forum user registration and search, which cannot be classified in a genre.

Source: ABC annual reports 2004-08

Broadcasting Indigenous music—an analysis

Tables 32-33 are derived from data supplied by APRA and provide an analysis of the extent of Indigenous music (based on copyright ownership in musical works) broadcast nationally across the public and commercial radio sectors. APRA authorises the broadcast of all works in their repertoire by way of licence agreements with the broadcasters. In return for the licence, broadcasters pay a licence fee and in most cases provide APRA with music returns containing details of the music they have broadcast.

It is hard to tell any overall trends from the data due to high variability between years. There is some suggestion in the data that the number of Indigenous musical performances broadcast by the ABC declined between 2000 and 2008, while the number of Indigenous musical works broadcast by the ABC was higher in 2007 and 2008 than previous years.

Methodology

In the case of commercial radio, approximately 2.3 million hours of data is reported to APRA per annum, detailing 100 per cent of all musical works broadcast on a quarterly basis. That data includes the title of the musical work, the composers, the performer, the

record label, the duration of the performance and the number of performances aggregated across the three-month period. This information is provided electronically.

For the ABC, approximately 40,000 hours of broadcast data is received in respect of the five national networks. This represents approximately 95 per cent of all music broadcast on the ABC. The nature of the data provided is the same as that for the commercial sector. This information is provided electronically.

The community radio sector does not enjoy the level of access to technological resources available to the ABC or commercial radio stations. Therefore their ability to provide APRA with electronic reporting is limited. Consequently, only a sample of broadcast information is provided. The majority of reporting is still by paper resulting in approximately 17,700 hours of broadcast data provided across all community stations. Again, the nature of the data provided is the same as that for the ABC and commercial radio. Due to the limited nature of the sample, figures from community broadcasters have not been included in this analysis. Rather, please refer to the figures in the section on Community broadcasting, above.

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To determine if a broadcasted work was by an Indigenous composer or artist, APRA relied on the information contained in its membership and musical works databases. A condition of APRA membership is that all members must provide, for administrative purposes, details of all musical works in which they have an interest. This then constitutes APRA's database of musical works.

APRA's system contains copyright details on over 4.66 million musical works: 3.42 million foreign works and 1.23 million local originated copyrights. Information carried on each work includes: the name of the composer/songwriter, any publisher information and each owner's respective percentage interest in the work. The entry on the system is additionally labelled according to its origin, be it foreign or local.

APRA also maintains a database of information pertaining to over 60,000 members. Within this system, an ethnicity code is recorded for each composer/songwriter member comprising the following categories: Indigenous, Torres Strait Islander, Maori, Pacific Islander, Cook Islander or Fijian.

The results shown in Tables 28–31 were attained using the following information extraction process:

- extract broadcast data by type—ABC or commercial
- identify source of broadcaster by state and territory
- identify musical work by origin—foreign or local
- for all local works identified, reference the membership database to determine composer/artist ethnicity.

Table 32 shows the total number of musical performances broadcast annually on the ABC and Australian commercial radio stations, together with the number of Indigenous performances.

Table 33 shows the total number of musical works broadcast annually on the ABC and Australian commercial radio stations, together with the number of Indigenous musical works broadcast.

Table 32 Number of musical performances and Indigenous performances broadcast annually, 2000 to 2008

Year	ABC			Commercial		
	All	Indigenous	%	All	Indigenous	%
2000	438,575	6,705	1.53	19,963,914	14,650	0.07
2001	446,040	7,146	1.60	20,504,741	24,442	0.12
2002	411,419	5,544	1.35	21,424,331	55,421	0.26
2003	336,237	3,259	0.97	21,589,321	17,979	0.08
2004	290,827	3,501	1.20	21,764,840	12,300	0.06
2005	341,195	2,797	0.82	21,669,612	11,736	0.05
2006	283,328	2,275	0.80	20,846,945	14,650	0.07
2007	299,335	4,047	1.35	21,810,775	19,248	0.09
2008	307,071	4,199	1.37	22,140,752	31,177	0.14

Source: APRA. 2009

Table 33 Number of musical works and Indigenous works broadcast annually, 2000–2008

Year	ABC			Commercial		
	All	Indigenous	%	All	Indigenous	%
2000	28,772	828	2.88	24,129	107	0.44
2001	28,696	915	3.19	23,697	109	0.46
2002	27,334	842	3.08	25,687	121	0.47
2003	28,517	614	2.15	26,306	81	0.31
2004	31,367	995	3.17	28,290	74	0.26
2005	33,898	726	2.14	29,984	148	0.49
2006	35,061	663	1.89	31,412	106	0.34
2007	37,355	1,083	2.90	32,657	104	0.32
2008	38,661	1,318	3.40	34,804	120	0.35

Source: APRA. 2009

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Table 34 shows a state and territory breakdown of the proportion of Indigenous musical performances on Australian commercial radio and ABC from 2003–2008.

Table 35 shows the value of broadcast royalties paid to Indigenous APRA members per annum. The table shows a 32 per cent increase in broadcast royalty payments made to Indigenous composers for the period 2003 to 2008.

Table 34 Percentage of Indigenous performances broadcast on Australian commercial radio and ABC by state and territory, 2003–08

State and Territory	2003 Total	2003 Indigenous performances	%	2004 Total	2004 Indigenous performances	%	2005 Total	2005 Indigenous performances	%
NSW	7,282,508	5,916	0.08	7,234,952	5,134	0.07	7,064,095	3,891	0.06
VIC	3,471,108	2,120	0.06	3,522,163	717	0.02	3,571,074	1,081	0.03
QLD	5,928,641	7,030	0.12	5,963,197	5,207	0.09	5,966,367	4,768	0.08
SA	1,459,547	1,376	0.09	1,596,336	722	0.05	1,587,382	374	0.02
WA	2,275,278	2,285	0.10	2,275,691	1,582	0.07	2,287,974	3,333	0.15
TAS	920,470	1,043	0.11	875,239	883	0.10	962,159	451	0.05
NT	438,730	627	0.14	438,544	882	0.20	428,658	267	0.06
ACT	105,558	14	0.01	107,460	7	0.01	102,331	-	-
Total	21,881,840	20,411	0.09	22,013,582	15,134	0.07	21,970,040	14,165	0.06

State and Territory	2006 Total	2006 Indigenous performances	%	2007 Total	2007 Indigenous performances	%	2008 Total	2008 Indigenous performances	%
NSW	6,771,549	8,224	0.12	6,920,934	10,213	0.15	6,845,516	13,511	0.20
VIC	3,636,150	1,177	0.03	3,647,424	1,740	0.05	3,703,342	4,835	0.13
QLD	5,548,173	5,087	0.10	5,764,132	5,834	0.10	5,919,288	9,108	0.15
SA	1,788,013	269	0.02	1,802,587	669	0.04	1,819,489	2,076	0.11
WA	2,018,761	898	0.04	2,281,421	2,913	0.13	2,442,012	3,062	0.13
TAS	740,055	357	0.05	1,020,068	443	0.04	1,026,962	1,026	0.10
NT	488,176	563	0.12	533,897	980	0.18	549,359	1,121	0.20
ACT	100,903	-	-	102,190	72	0.07	104,109	4	-
Total	21,091,780	16,575	0.08	22,072,653	22,864	0.10	22,410,077	34,743	0.16

Source: APRA. 2009

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Table 35 Broadcast royalties paid to Indigenous APRA members, 2003–08

Year	Radio (\$)	Television/film/cinema/pay television (\$)	Total (\$)
2003	27,105	16,076	43,181
2004	23,440	12,085	35,525
2005	20,095	12,302	32,397
2006	27,289	23,562	50,851
2007	33,874	11,263	45,137
2008	45,762	11,263	57,025

Source: APRA. 2009

New media and digital services

As with the record industry, technological innovation is fundamentally changing the way in which traditional media markets operate and how content is consumed. The extension of broadband services, mobile devices, wireless platforms, podcasts, vodcasts, on-demand services and user generated content (UGC) sites represent fundamental changes to mass media markets.

The content delivery opportunities for artists have never been greater. Artists will need to position themselves adequately in order to take best advantage of these opportunities. As ever, however, quality is likely to remain the key driver of success.

Key statistics on broadcasting

Following are some key statistics on ABC and commercial broadcasting:

- ABC—45 per cent decline in the actual number of broadcast performances of Indigenous musical works from 2004–06
- Commercial—15 per cent decline in actual number of broadcast performances of Indigenous musical works from 2004–06, whilst ratio of Indigenous to non-Indigenous songs remained steady at 0.05 per cent
- ABC—7 per cent decline in the actual number of Indigenous works broadcast from 2004–06

- Commercial—52 per cent increase in the actual number of Indigenous works broadcast from 2004–06
- With the exception of Western Australia, every state and territory indicated a decline in the actual number of Indigenous performances on Australian commercial radio for the period under review.

In Summary—key issues on broadcasting Indigenous music

The nature of commercial radio is such that any prospect of genuine growth in on-air time for Indigenous music is ambitious. Any potential for development in this area must rely on quality Indigenous product being able to compete in a highly commercial market.

Following are several other key issues:

- new media and digital services represent new opportunities for Indigenous music content delivery
- community radio plays an important role in supporting the work of Indigenous music artists.

6 Education and training

This chapter examines the training opportunities for Indigenous music artists.

Introduction

Education and training opportunities for Indigenous music artists operate across a number of levels. These include the traditional tertiary mix of accredited courses delivered via conventional educational institutions such as university and TAFE; the increasingly flexible models adopted from the Vocational Education and Training (VET) system; and the less formal industry initiatives often operated in partnership between communities and industry enterprises.

For some Indigenous people, participation in education may be affected by economic disadvantage, social marginalisation, health problems and geographical isolation.

The information in this section regarding particular institutions and programs specifically designed for Indigenous music students is by no means nationally comprehensive. It does however represent many of the training initiatives and opportunities which are currently available to Indigenous music artists across the education spectrum.

The flexible VET modules being conducted in remote communities have been identified as possible models in delivering training for other Indigenous artforms. The 2004 *Scoping the Future* report, commissioned for the Northern Territory Government states:

'The delivery of VET courses has changed substantially in recent years and is no longer restricted to the classroom-style delivery often associated with TAFE institutions of the past. As the Indigenous contemporary music sector has shown, it is possible to deliver performing arts training in remote locations, with the best trainers, in ways that suit the learning styles of Indigenous participants.'

Competency based music training has attracted significant funding and participation in recent years and has been delivered to over 500 participants in remote communities, regional centres, schools and mainstream campuses. Although outside the terms of reference for *Scoping the Future*, Indigenous contemporary music is one artform in which it is not necessary to travel interstate to gain formal training. The significant extent of music training, and its uptake by the Indigenous performers both young and mature, makes it an important example of how to create new, locally based starting points for Indigenous performers who want to develop their skills through training.

While it is useful to look at delivery of music training as an example of flexible delivery, the music model took some time to emerge and was extensively trialled before it became established. It is also important to recognise that some constraints exist in performing arts training, particularly dance, which do not exist for music.'

We begin this section by looking at the results of a 2004 survey conducted by the Australian Music Centre (AMC) which principally deals with the tertiary framework. The more flexible specialist programs being delivered to Indigenous music artists by a range of agencies and institutions is then explored and lastly, the increasingly important role played by state and territory music industry agencies is covered.

Australian Music Centre 2004 survey of post-secondary school education

In 2004 the AMC undertook a survey of all institutions offering awards (certificate, degree or diploma) in music at a post-secondary level. The edited results of that survey highlight some significant shifts in the music education sector including the placement of all conservatoriums inside the university sector, the concurrent expansion among private institutions now offering university awards and changes in the TAFE sector. Of particular note was the diverse range of options available for post-secondary school music education. A key aspect of that diversity has been the development of Vocational Education and Training (VET) packages in the TAFE sector; a framework of certificates and diplomas intending to facilitate mobility, with links directly to industry. Additionally, the flexibility of VET packages also offers the opportunity of study within a secondary school framework.

About the survey

The AMC invited 19 authors, each with special interest in a particular field, to submit questions to a wide-ranging survey that was distributed to 49 music institutions from the university, TAFE and private sectors.

Specialist institutions, including the Australian Film Television and Radio School (AFTRS) and Indigenous providers were included in the invitation. Among the 49 institutions surveyed, the distribution was 62 per cent to the university sector, 28 per cent to the TAFE sector and 10 per cent to the private sector.

The choice of institutions was based on those offering awards in music at post-secondary level. The survey contained 100 questions on a wide range of issues and achieved a significant response rate of 78 per cent.

For questions on Indigenous music, the only responses were from mainstream rather than specific Indigenous providers. The data therefore identifies only what is occurring in mainstream institutions, principally universities.

As seen later in this chapter, the benefits of mobility and flexibility which come with VET packages have been well adopted by the music industry, in relation to Indigenous music students.

Survey overview

Twenty-six per cent of survey institutions report having Indigenous students enrolled in their mainstream programs (comprising 46 per cent university respondents, 22 per cent TAFE respondents and 0 per cent private sector respondents).

No TAFE respondents reported offering specific Indigenous programs. The low TAFE figures revealed in the survey may not be indicative of the entire sector due to the fact that the data does not include responses from the targeted Indigenous-specific TAFE level providers. Such programs might be expected to have a higher percentage of Indigenous students.

Thirty-three per cent of private sector respondents reported that they offer Indigenous programs. None of these reported having Indigenous students enrolled in their mainstream programs.

Twelve per cent of all survey institutions and 21 per cent of university respondents reported offering some kind of Indigenous program. However, the survey did not reveal the exact nature of these programs.

6 Education and training

In relation to the specific teaching of traditional Aboriginal and Torres Strait Islander music, 67 per cent of private provider respondents, 11 per cent of TAFE sector respondents, and 8 per cent of university respondents indicated that students are taught to sing and perform traditional Aboriginal and Torres Strait Islander music and dance as part of the formal curriculum.

The survey results draw attention to the continuing low incidence of Indigenous students within post-secondary music institutions.

Northern Territory Music School

Through the Indigenous Music Program (IMP), operated by the Northern Territory Music School (NTMS), students are provided with access to professional music instruction. Programs offered include VET Certificates I and II in Music Industry, and Stage 1 and 2 Northern Territory Certificate of Education (NTCE) courses.

The usual platform for successful instruction is to assemble groups of students into one or other of the common formats of popular music bands (e.g. guitar, bass, keyboards, drums and vocals) and to provide individual and group tuition focused on specific performance targets. Another regular feature of the teaching/learning process is original composition in both English and Indigenous languages using popular song formats.

Participation and success rates vary from community to community, affected by remoteness, degrees of disadvantage and access to professional instructors. However, the overall positive outcomes of the IMP across the remote Northern Territory communities have been attested to by teachers, principals and community representatives, and are documented in student achievement records.

A critical ingredient in this success over the last four years, particularly for the most remote schools, such as those in Arnhem Land, has been participation in the Garma Festival Contemporary Music program (see below). Participation in the festival provides the opportunity to foster the cross fertilisation of ideas, to see and hear other bands performing, and the chance to work with professional sound production and recording technicians.

Transporting community bands and equipment to and from the Garma site and employing specialist technical personnel appear expensive if viewed as isolated activities related only to a single annual event. However, the benefits of this interaction for remote community students are enormous. The Garma experience provides a platform for improved performance skills and access to knowledge building, which in itself is sufficiently inspiring to motivate students to further pursue their musical studies.

Charles Darwin University Remote Music Training Workshops

Charles Darwin University (CDU) remote music courses run as part of the Garma Festival and operate on two fronts:

In the two weeks leading up to the Garma Festival a CDU music lecturer runs Certificate II and IV music modules for 15–120 local music artists from Yirrkala and Marnggar communities. Based at Yirringa Studio students are involved with recording and performance modules.

During Garma week, CDU arranges for students from other communities in the Northern Territory to follow up earlier training by attending the Festival. This experience will involve some follow

up training, networking with fellow music artists and technicians and performing on the main stage as part of the Garma concert series.

Garma Festival of Traditional Culture

The Garma Festival is held every year in East Arnhem Land on the Gulkula Peninsula by the Yolngu people and operated by the Yothu Yindi Foundation Aboriginal Corporation. The Garma Festival plays host to the Contemporary Music Indigenous Training Program and is presented by the Northern Territory Music School (see above).

The following table shows the number of students by community who participated in the Contemporary Music Program at Garma in 2006.

Table 36 Student participants in the Contemporary Music Program at Garma by community, 2006

Community	Male	Female	Total
Angurugu	6	-	6
Galiwinku	9	15	24
Gapuwiyak	8	10	18
Maningrida	7	13	20
Milingimbi	11	-	11
Numbulwar/Ngukurr	10	-	10
Umbakumba	10	-	10
Yirrkala	15	15	30
Total	76	53	129

Source: Garma Report 2006, Yothu Yindi Foundation.

Three full-time NTMS staff are involved in the delivery of the program along with three staff employed through the Indigenous Music Education Program. The music workshops are delivered and staffed by NTMS staff from Darwin and remote areas. The workshops deliver non-accredited training based on VET music competencies from the Music Industry Training Package.

NTMS is aiming to turn this program into accredited training which can go towards Certificates of Attainment for VET music and Stage 1 NTCE. This however requires greater investment in resources, infrastructure and staffing at the festival.

University of Adelaide Centre for Aboriginal Studies in Music

Aboriginal and Torres Strait Islander Access Scheme

This scheme, administered by Wilto Yerlo, offers Indigenous students an alternative means of direct entry to all University of Adelaide undergraduate programs. The scheme also offers entry to the humanities and social sciences foundation program as well as programs in the Centre for Aboriginal Studies in Music (CASM).

Wilto Yerlo offers ongoing academic and pastoral support, and study and other facilities to Indigenous students at the university. This includes an orientation program, learning support through the Aboriginal Tutorial Assistance Scheme (ATAS), and assistance with Abstudy, travel, accommodation and personal issues.

6 Education and training

CASM is the second entity within the Centre for Australian Indigenous Research and Studies and offers a unique program of music studies for Indigenous students. CASM offers a foundation year, a one-year advanced certificate, and a two-year associate diploma.

Courses include practical studies, performance, music theory, aural development, research studies, community and cultural studies, traditional studies, industry skills and a range of electives including dance.

Instruments taught include voice, guitar, bass, keyboard, drums and percussion, saxophone, flute and others by request. Styles presented are varied and range from traditional to contemporary.

The CASM Foundation Year provides students with an introduction to music studies in preparation for entry to the Associate Diploma. Selection is based on musical experience, ability and potential, motivation, education and/or work experience. Selection is assessed by interview, audition and testing. On average 30–35 students participate in the course annually. Literacy and numeracy modules are key to the course in its aim to prepare students for university entry level.

Associate Diploma in Aboriginal Studies in Music

The new Associate Diploma in Aboriginal Studies in Music provides a well-rounded curriculum of academic and practical courses which may be taken in either of two academic plans: Community Musician or Music Studies.

The Community Musician plan develops students' skills as music artists in performing, composing, arranging and recording music, and enables students to act as a resource person in the community. Music Studies develops these same skills, as well as preparing students for further tertiary study and professional activity.

Admission is normally through satisfactory completion of the Foundation Year, but previous academic study and musical experience is also considered.

Graduates may pursue successful professional careers in the music industry as performers, composers/arrangers, music teachers or work in community development, or pursue further studies leading to professional qualifications in areas such as arts administration, composing, performing, teaching, community and cultural development or sound engineering.

Eora College

Eora is a performing arts training centre for people of Aboriginal or Torres Strait Islander background and is based in Sydney. Courses have been specifically designed to meet the needs of Aboriginal students seeking access to higher education. Eora also provides vocational training for local high school students through the TVET Program. The college offers Certificate III and Diploma courses in Music (Contemporary), Music (Performance) and Music Industry (Technical Production).

Skinnyfish Music

Through Stringy Bark Training, a local registered training organisation (RTO), Skinnyfish Music delivers accredited training to remote communities across the Northern Territory. It is also involved in a school-based music video program that has been running for three years.

This training program involves sending highly skilled music artists to remote community schools who then work with the schools and

create songs and video clips that compliment its particular needs in relation to curriculum content. There have been some outstanding results from this project. Skinnyfish Music is the largest provider of accredited and non-accredited training to remote Indigenous communities in the Northern Territory. In 2006 Skinnyfish Music delivered programs to over 350 participants.

Abmusic—Aboriginal Corporation

Abmusic is an Aboriginal Corporation formed in 1986 to support and nurture Aboriginal music artists in Western Australia. Based in Waterford, its role is to offer a meeting and learning facility for Aboriginal music artists, groups and individuals.

Abmusic is an RTO delivering Certificates I through IV from the Music Industry Training Package in a program especially tailored for Australian Indigenous people. Abmusic facilities include fully equipped percussion and rehearsal studios, practice rooms, a MIDI (Musical Instrument Digital Interface) studio, and a Pro-Tools recording studio.

Services for Abmusic students are designed especially for the Indigenous community and include:

- the Food for Thought program
- a 'catch up' lecturer on hand to provide remedial teaching for students who have been unable to attend for reasons of sickness or family and cultural responsibility
- a student mentor to help students with cultural issues
- a student support officer
- an instrument subsidy program
- an opportunity for enrolled students to apply for individual tuition on their chosen instrument
- monthly performance opportunities during term time where students are able to practice their skills in performances for their peers, friends and family.

Goolarri Media Enterprises

Goolarri Media Enterprises, based in Broome in Western Australia, is an RTO delivering courses from the film, television, radio and multimedia industry training package, and the entertainment training package. Qualifications include Certificate II level through to Advanced Diploma level training such as VET courses and specialised training programs.

Tennant Creek and the Barkly region

A dedicated music centre opened in October 2006 under a shared responsibility agreement for Indigenous male music artists in Tennant Creek and the Barkly region. At the time of writing, training courses had not yet commenced. However, the centre is engaging 10 Community Development Employment Project (CDEP) participants as trainees. They will be training in the areas of sound engineering, skills development in instrumental music, administration and performance and event management. As the centre grows it is anticipated that courses will be offered to the wider Indigenous community in a variety of music and music-related areas. The centre has a fully equipped recording studio and has started recording Indigenous artists.

6 Education and training

State and territory music industry agencies

MusicNSW and Whichway

MusicNSW is a non-profit association set up to represent, promote and develop the contemporary music industry in New South Wales.

Since 2000, MusicNSW has operated the Whichway project which is the key music development program for the Aboriginal and Torres Strait Islander music industry in New South Wales. It is designed to increase the professionalism and career opportunities for Indigenous music artists and aims to:

- increase the profile of Indigenous music artists in New South Wales, Australia and internationally
- increase the career opportunities for Indigenous music artists
- increase the professionalism within the Indigenous music industry in New South Wales
- expand networks and contacts for Indigenous music artists and bands
- increase industry awareness and support for Indigenous music artists and bands.

The project is designed to provide aspiring Indigenous artists and bands in New South Wales with a week-long intensive workshop and recording process. This results in each participant having a set of marketing tools including a CD, a biography and professional photos, along with an individually tailored short to medium-term career strategy.

The workshop and seminar programs give Indigenous music artists information and skills that are necessary in order to develop and further their music careers. Whichway's focus is on artists that are already active within the industry or artists that are industry ready. The aims of the project are to increase the knowledge of the music industry and support organisations and to create links between industry professionals and support organisations.

The industry workshop is the most extensive music industry workshop program offered to Indigenous artists in New South Wales. There is a large pool of Indigenous talent that needs to be encouraged to develop not only their music but also the means to get this music to a wider audience as well as to develop a career.

Leading industry professionals from record companies, artists' managers, tour managers, music publicists and radio station managers give lectures. Representatives from leading industry and government support organisations such as the Australia Council, APRA, Artslaw, AMCOS, PPCA, AMRAP, ArtsNSW and MusicNSW also give lectures at the workshops.

MusicNT

MusicNT is the non-profit, membership-based contemporary music office for the Northern Territory, representing, developing and servicing the Northern Territory contemporary music industry, while establishing and maintaining links with peak industry bodies on a national level.

This is done by coordinating professional development opportunities and events throughout the year including the Northern Territory's contemporary music festival, facilitating a program of forums and workshops, offering information, advice and referral services to Northern Territory contemporary music artists.

While the MusicNT board and manager are based in Darwin, there is also a part-time Alice Springs manager servicing the needs of music artists in that region.

In 2004, Music NT established an annual awards night known as the Indigenous Music Awards.

Whilst our research did not reveal Indigenous specific programs being offered by MusicNT, the character of their workshop and seminar programs are naturally inclined toward delivering content relevant to Indigenous music artists.

QMusic

Qmusic is a non-profit association dedicated to developing, servicing and representing the Queensland music industry.

Annual awards QSong have an Indigenous Award category - the Mission Australia Indigenous Award.

The author's research did not reveal any specialised Indigenous education or training programs offered by Qmusic.

West Australian Music Industry Association Inc.

The West Australian Music Industry Association Inc., known as WAM, exists to develop the contemporary music industry in Western Australia. WAM is a non-profit membership-based association and the peak representative body for contemporary music in Western Australia.

WAM offers a number of education programs, including the Indigenous music program and the schools program. The Indigenous and regional components are aimed at providing resources where, historically, they have been lacking. WAM has a dedicated Indigenous officer and has partnered with Abmusic in the delivery of its schools program. There are a number of aspects to the program including live concert excursions, songwriting workshops, the WA Music Education Pack and professional development for teachers.

WAM also hold Indigenous Roundtable meetings and additional to their WAMi Indigenous Award also host the Too Solid Indigenous Music Awards.

Awesam—South Australian Music Industry Association Inc

The South Australian Music Industry Association Inc (Awesam), formerly SAMIA, is the non-profit membership-based music industry association representing the interests of South Australian music. It aims to:

- provide support for the development of the South Australian contemporary music industry
- encourage unity and coordination within the contemporary music industry
- research and identify needs connected with the contemporary music industry and develop strategies to address those needs
- assist the development of the quality of education and training programs which will provide the knowledge and skills to maximise success locally, nationally and globally
- promote the association as the advisory group to government or any other interested body on matters relating to the South Australian contemporary music industry

6 Education and training

- contribute to the coordination of the contemporary music industry at a national level through membership in the Australian Music Industry Network (AMIN).

The author's research did not reveal any specialised Indigenous education or workshop initiatives offered by Awesam.

Private institutions

JMC Academy

Founded in 1982 by John Martin Cass, the JMC Academy is located in Sydney and Melbourne offering Advanced Diplomas, Associate Degrees and Degrees. Specialised programs include audio engineering and sound production, digital animation, digital television production, music and entertainment business management and popular music performance.

JMC also offers practical, intensive one week introductory workshops at its Sydney and Melbourne campuses over a range of six study areas. Most relevant to this report are in the areas of Artist and Event Management, Audio Engineering, Popular Music and MIDI and Hard Disk Recording. These courses are designed with the aim of providing an appreciation of the many facets of the creative industries, whilst developing knowledge and skills.

School of Audio Engineering

The first School of Audio Engineering (SAE) was established in 1976 and now has six campuses across Australia; in Sydney, Byron Bay, Melbourne, Perth, Adelaide and Brisbane, offering certificate, diploma and degree courses. Specialised courses include audio engineering, electronic music production and music business.

From Outstation to Out There

The report *From Outstation to Out There* (Harrison 2004) describes the work of the band Nabarlek, which has delivered a long list of credits including tours and festival performances, several recordings and a number of awards. Nabarlek has developed a strong commercial focus and many important partnerships.

Nabarlek is a group of 12 Aboriginal music artists from the tiny outstation of Manmoyi, 215 kilometres from the remote community of Gunbalanya (Oenpelli) in western Arnhem Land. As well as Nabarlek, the partnership involves:

- the Charles Darwin University and Stringybark RTOs which have delivered music industry training
- Skinnyfish Music (record label and distributor) which is the industry partner
- Demed Outstation Resource Centre in Gunbalanya, the CDEP manager and community organisation.

The ongoing, equal and collaborative partnership has been central to the unique achievement of Nabarlek over a five-year period. As well as being a successful group of performing and recording artists who own their own recordings and equipment, Nabarlek has now established its own music enterprise called Manmoyi Music. According to the report:

'Nabarlek's long term aim is to control their own future, establishing their own small business to achieve economic independence. They are currently developing a business plan. Together with Skinnyfish, they have also developed a training plan as an essential support to meeting both their music performance and music industry business skills requirements.'

The band has targeted specific levels of turnover and profitability and in the early stages is reinvesting profits to build future capacity. Manmoyi Music is the clan/family business vehicle that will support the realisation of Nabarlek's commercial goals.

In Summary—key issues in education

Key issues in education which are also areas for potential development include:

- opportunities for the expansion of the flexible delivery VET model
- lack of employment pathways
- lack of educational infrastructure for learning traditional music, including broader social skills.

7 Public funding for Indigenous music in Australia

Introduction

For many music artists, receiving a grant to realise a creative project will be the catalyst to bring their work to a wider audience or to gain critical acclaim, or both. It can also serve as a stepping stone to enable an artist to achieve some degree of career sustainability by providing a form of regular income through sales or touring. At the very least, it provides an opportunity that would otherwise not exist or may take longer to develop. For many, there is no question that public funding plays a critical role in advancing and developing an artist's career.

This report does not aim to provide any form of detailed commentary on the issues surrounding grants programs, such as the extent of accessibility, measurable artistic or public benefit or an examination of the means by which public funding is allocated.

This study attempted to bring together a centralised schedule of all publicly available funding by federal, state, territory and local agencies. We have had mixed success. We wrote to 279 agencies that were identified as possibly having funding programs available. The majority of these were shire councils whom we assumed would have some form of local community funding initiatives. Our focus ultimately was to ensure that at least federal, state and territory arts bodies were included.

Our research suggests the single largest impediment for Indigenous artists accessing public funds is the kind of "functional literacy"¹ demanded of artists by government. Practical issues reported to us, include barriers presented by public programs that are accessible only to people with high levels of proficiency in text based English and programs that require substantial preparation time.

For many Indigenous music artists living in remote communities, English is their second language. More often than not, these artists are not even aware of the existence of funding programs. There are also questions of ability to access funds to assist in the development of their craft often leaving them at a distinct disadvantage.

This section provides data on selected sources of funding for Indigenous musicians. It covers federally-funded programs such as Indigenous Culture Support (ICS) operated by the Department of the Environment, Water, Heritage and the Arts (DEWHA), to the Aboriginal and Torres Strait Islander Arts Board of the Australia Council, to programs administered under state and territory jurisdictions. Data on funding specifically for Indigenous music is often difficult to identify separately from available data. Much of the data presented here relates to all art forms, not just music. In these cases, data is included to provide a backdrop to funding issues.

Federal funding

Department of the Environment, Water, Heritage and the Arts

The Department of the Environment, Water, Heritage and the Arts (formerly the Department of Communications, Information Technology and the Arts) operates two key programs aimed at supporting Indigenous cultural activities: the Indigenous Culture Support (ICS) program and the Maintenance of Indigenous Languages and Records (MILR) program.

The ICS budget for 2006–07 was \$6.826 million. This program supports cultural transmission in a range of forms including arts and craft and performing arts, to facilitate continued maintenance and development of Indigenous culture at a community level. The program supports an extremely varied range of projects and funding can range from less than \$3,000 for small cultural workshops to more than \$400,000 for large cultural centres.

This program provides significant support for Indigenous music-related activity, however there are only a small number of activities that can be solely identified as music as a cultural transmission medium. Many activities will engage Indigenous music in some form as part of broader cultural activities. It is noted that ISC guidelines exclude musicians, singers and music groups carrying out their own projects with commercial intent.

The MILR budget for 2006–07 was \$8.683 million. This program supports the strengthening and revival of Indigenous languages at a community level, such as the funding of language centres, and recording and transcription.

This program has only a very small representation of funding for Indigenous music-related activity with only four activities identified in 2006–07 as related to music and only one activity solely related to music for recording in language. Given the low representation of music in the MILR program, no separate statistical analysis was undertaken.

At the time of research for this publication, the then Department of Communications, Information Technology and the Arts (DCITA) advised that they had not conducted research to compare funding allocations for Indigenous music-related activities between 2005–06 and 2006–07 but 'anticipate that demand and diversity of requests has increased'.

Methodology

In order for DEWHA to extract data from these two programs relevant to this study, keyword searches were included to find music-related activities and then allocated to an appropriate category.

Figure 12 shows the categories that were devised for the study. These are arranged according to relevant prominence. It is important to note that categories 2 and 3 include funding to art forms other than music.

¹ This means reading and writing skills that are inadequate to cope with the demands of everyday life. This is contrasted with illiteracy in the strict sense, meaning the inability to read or write simple sentences in any language.

7 Public funding for Indigenous music in Australia

Figure 12 Categories defined for music-related activities in DEWHA's ICS and MILR programs

Category 1	Activity solely intended for music as transmission medium. Keyword searches were music, song, singer, singing, concert, choir, and band.
Category 2 strong	Activity likely to include music as one component. Keyword searches were cultural officer, workshops, youth, and dance.
Category 2 medium	Activity likely to include music as one component. Keyword searches were cultural officer, workshops, youth, and dance.
Category 2 low	Activity likely to include music as a component. Keyword searches were performance.
Category 3	Activity funded supports participation in cultural exchange likely to involve music. Keyword search was festival.

Indigenous Culture Support (ICS). Maintenance of Indigenous Languages and Records (MILR).

Table 37 Summary of funding for ICS program

Category	Amount approved (\$)	Number of activities approved	% of ICS annual budget
Category 1	256,442	6	4
Category 2 strong	116,830	5	2
Total	373,272	11	6
Category 2 strong	116,830	5	2
Category 2 medium	61,500	4	1
Category 2 low	622,500	10	9
Total	800,830	19	12
Category 1	256,442	6	4
Category 2 strong	116,830	5	2
Category 2 medium	61,500	4	1
Category 2 low	622,500	10	9
Category 3	222,160	9	3
Total	1,279,432	34	19

Source: Australian Government Department Communication Information Technology and the Arts. Indigenous Culture Support (ICS)

7 Public funding for Indigenous music in Australia

Following are some key statistics for ICS program funding for Indigenous music:

- in 2006–07, ICS received a total of 260 funding submissions, totalling over \$25 million
- ICS funded six activities in Category 1, for a total of \$256,442. This represents 4 per cent of the total ICS budget and 5 per cent of total activities funded
- a strong representation of ICS funding of Indigenous music-related activities can be seen in combining Category 1 and Category 2 strong, with a total funding of \$373,272, which is 6 per cent of the total budget and 9 per cent of activities funded
- the total of all three categories shows expenditure of \$1,279,432 connected with Indigenous music-related activities, representing 19 per cent of the total annual budget. However, it should be noted that funding in Categories 2 and 3 will also be expended on other mediums and is therefore not a true representation in real terms.

Table 38 Demand for Indigenous music funding for ICS Program

Category	Amount requested (\$)	Number of activities submitted	Amount approved (\$)	Number of activities approved	Value of approved funding as proportion of amount requested (%)	% of ICS Indigenous music activities approved
Category 1	485,239	9	256,442	6	53	67
Category 2 strong	469,721	7	116,830	5	25	72
Total	954,960	16	373,272	11	39	69
Category 2 strong	469,721	7	116,830	5	25	71
Category 2 medium	170,900	6	61,500	4	36	67
Category 2 low	1,634,254	19	622,500	10	38	53
Total	2,274,875	32	800,830	19	35	59
Category 1	485,239	9	256,442	6	53	67
Category 2 strong	469,721	7	116,830	5	25	71
Category 2 medium	170,900	6	61,500	4	36	67
Category 2 low	1,634,254	19	622,500	10	38	53
Category 3	436,114	11	222,160	9	51	82
Total	3,196,228	52	1,279,432	34	40	65

Source: Australian Government Department of Communication Information Technology and the Arts. 2009
Indigenous Culture Support (ICS)

In general, in all categories, the majority of actual funding related to music—65 per cent of those who applied received funding. Category 1 received demand totalling \$485,239. Of nine submissions received, six were funded.

Australia Council

The Australia Council for the Arts is the Australian Government's arts funding and advisory body. It directly supports young, emerging and established artists, as well as new and established organisations. The Australia Council provides over 1,700 grants each year to artists and arts organisations across the country in the fields of Aboriginal and Torres Strait Islander arts, community cultural development, dance, literature, music, new media arts, theatre and visual arts and craft.

In addition, the Australia Council supports strategies to develop new audiences for the arts, as well as new markets in Australia and internationally.

Aboriginal and Torres Strait Islander arts board

The Aboriginal and Torres Strait Islander Arts Board assists Aboriginal and Torres Strait Islander people to claim, control and enhance their cultural inheritance. The board supports this right through its grant categories and through the implementation of the Australia Council's National Aboriginal and Torres Strait Islander Arts Policy (NATSIP).

The following table shows the value of grants made by the Aboriginal and Torres Strait Islander Arts Board across all artforms for the past four years. For comparative purposes, if the costs associated with the Australian Indigenous Arts Commission project undertaken during 2005–06 were excluded, the result would show an increase of approximately \$1 million dollars in allocations from the preceding financial year.

7 Public funding for Indigenous music in Australia

Table 39 Aboriginal and Torres Strait Islander Arts Board grant categories and financial allocations for all artforms, 2002–06

Grant category	2002–03 (\$)	2003–04 (\$)	2004–05 (\$)	2005–06 (\$)
New work	565,000	288,921	392,096	419,415
Presentation and promotion	631,000	562,173	478,507	640,661
Skills and arts development	379,408	374,465	274,304	383,114
Key organisations	877,124	1,089,001	979,798	2,303,833
Fellowships	340,625	84,300	160,000	160,000
Partnerships	123,000	30,000	-	-
Other board initiatives	877,146	1,029,435	1,262,233	614,467
Program grants	131,720	68,280	-	70,000
Special projects	256,235	96,762	72,319	72,759
Central programs	122,319	101,501	113,533	-
Australian Indigenous Arts Commission at the Musée du quai Branly	-	-	-	1,572,172
<i>Showcasing the Best</i> —Indigenous international arts strategy	-	-	-	127,380
Aboriginal and Torres Strait Islander Arts Board research strategy	-	-	-	16,000
Contributions to other boards	-	-	-	2,418
Total	4,303,577	3,724,838	3,732,790	6,382,219
Young and emerging artists initiative	201,273	159,430	135,057	-
Total	4,504,850	3,884,268	3,867,847	6,382,219

Source: Australia Council annual reports 2002–03 to 2005–06.

7 Public funding for Indigenous music in Australia

Table 40 Value of music grants as a proportion of all artform grants(a), 2002–06

Grant category	2002–03		2003–04		2004–05		2005–06	
	(\$)	(%)	(\$)	(%)	(\$)	(%)	(\$)	(%)
New work	91,690	16.2	29,400	10.2	42,283	10.8	31,293	7.5
Presentation and promotion	180,035	28.5	199,023	35.4	142,090	29.7	148,977	23.3
Skills and arts development	20,180	5.3	-	-	14,600	5.3	65,100	17.0
Key organisations	85,000	9.7	147,500	13.5	152,500	15.6	497,760	21.6
Fellowships	-	-	-	-	-	-	-	-
Partnerships	-	-	-	-	-	-	-	-
Other board initiatives	232,500	26.5	182,291	17.7	453,431	35.9	220,470	35.9
Program grants	-	-	-	-	-	-	-	-
Special projects	176,654	68.9	50,000	51.7	-	-	50,000	68.7
Central programs	-	-	-	-	-	-	-	-
Australian Indigenous arts commission at the Musée du quai Branly	-	-	-	-	-	-	-	-
Showcasing the best— Indigenous international arts strategy	-	-	-	-	-	-	-	-
Aboriginal and Torres Strait Islander arts board research strategy	-	-	-	-	-	-	-	-
Contributions to other boards	-	-	-	-	-	-	-	-
Young and emerging artists initiative	25,000	12.4	95,650	60	106,552	78.9	-	-
Total	811,059	18.0	703,864	18.1	911,456	23.6	1,013,600	15.8

(a) This table contains some estimates. Source: Australia Council annual reports 2002–03 to 2005–06.

Table 41 shows the distribution of Australia Council grants to Indigenous music between 2006–07 and 2008–09. Data is drawn directly from the Council's grants management system (GMS). The number of grants that relate to Indigenous music ranged from 49 to 59 grants per year, with a total annual value of between \$2.03 million and \$2.83 million. Not all grants relate entirely to Indigenous music – some, for example, include non-Indigenous artists and other art forms such as dance. The majority of grant records in the GMS provide a percent estimate of the grant's

Indigenous component, as well as the range of art forms covered by each grant. The adjusted totals in table 41 use a simple formula to account for the degree that each grant relates to Indigenous music. The resulting adjusted figures estimate that the Council's support to Indigenous music ranged from \$890,000 to \$1.53 million per year over the period. No adjustment was made in cases where the degree of Indigenous component was unknown, but as the data in table 41 indicate, these do not represent a substantial part of the total value of grants.

7 Public funding for Indigenous music in Australia

Table 41 Australia Council support for Indigenous music, 2006-07 to 2008-09

		2005-06	2006-07	2007-08	2008-09
Number of grants		49	59	48	56
Value of all grants with Indigenous music component	(\$m)	2.05	2.33	2.03	2.83
Adjusted for degree of Indigenous and music (a)	(\$m)	1.18	1.53	0.79	0.89
Grants where degree of Indigenous component is unknown					
Number of grants		11	2	4	7
Value of grants	(\$m)	0.22	0.02	0.09	0.10

Source: Australia Council for the Arts, unpublished. 2009

(a) Total grant amount adjusted by the degree of the activity that relates to Indigenous music. For example, if a \$10,000 grant involves 75% Indigenous artists and three art forms including music, the adjusted grant amount would be: \$10,000 x 0.75 x 0.33 = \$2,475

State and Territory funding

It is perhaps not surprising that the Northern Territory is the first jurisdiction in Australia to develop a comprehensive Indigenous arts strategy, given that 29 per cent of the Northern Territory's population is Indigenous and 72 per cent of these live on Aboriginal land. The Northern Territory Government's Building Strong Arts Business Strategy focuses programs and services to grow and strengthen the Northern Territory's Indigenous arts sector.

The six-year plan focuses on three key pathways: negotiation and partnerships, service delivery and showcasing opportunities across five artforms. These artforms are: visual arts and crafts, performing arts, music, film, and media and literature. It is clear from documents publicly available regarding the strategy that visual arts is the centrepiece of the program. No funding figures are available in relation to this strategy.

Table 42 shows the value of funding by state and territory government departments of the arts.

Table 42 State and territory government funding for the arts, 2002-09

State and territory	2002-03 (\$)	2003-04 (\$)	2004-05 (\$)	2005-06 (\$)	2006-07 (\$)	2007-08 (\$)	2008-09 (\$)
New South Wales	83,100	43,000	111,800	88,382	96,659	258,148	143,907
Victoria			25,700	53,000	119,000	100,320	
Queensland(a)		183,563	183,563	183,563	201,000	470,290	
Western Australia(b)	131,776	81,421	274,033	83,924	296,370	186,090	
Northern Territory	98,197	164,148	243,459	270,992	292,500	355,893	
South Australia(c)		12,870	12,870	12,870	44,000	27,500	
Tasmania(d)					1,292		
Australian Capital Territory(e)			72,642	59,160			

(a) Arts Queensland provided a total funding figure of \$550,690 over the three year period 2004-06. This has been averaged.

(b) For 2004-05 Arts WA gave a total of \$274,459 to Indigenous arts. The proportion given to music is unknown.

(c) Arts SA provided a total funding figure of \$38,615 over the three year period 2004-06. This has been averaged.

(d) No information was available from Arts Tasmania.

(e) No information was available for the ACT for 2002-04.

Source: state and territory government departments of the arts. 2002-09

7 Public funding for Indigenous music in Australia

Metropolitan funding via capital city councils

Some capital city councils offer funding programs for the support of Indigenous music initiatives. The City of Sydney has allocated \$25,000 annually over the last three years and the City of Melbourne has allocated \$57,200 annually over the last four years. We were unable to obtain funding information from other capital city councils.

APRA funding

Each year, APRA sets aside 1.25 per cent of distributable revenue to fund projects and organisations promoting the use and recognition of music by APRA members. This percentage will increase to 1.75 per cent in 2011, to be phased in as follows: July 2009 1.5 per cent, July 2010 1.625 percent, July 2011 1.75 per cent.

The following is a table indicating the amount paid to Indigenous specific events, projects or organisations over the last five years.

Table 43 APRA funding grants for Indigenous projects, 2005–09

Year	Grant value (\$)
2005	24,000
2006	27,000
2007	31,000
2008	57,000
2009	82,000

Source: APRA. 2005-09

In Summary—key issues in public funding

Following are some of the key issues to consider when analysing public funding for Indigenous music artists:

- access to funding programs, particularly for artists living in regional and remote communities
- literacy issues
- proof of Indigenous status
- absence of holistic approach to funding
- traditional funding models focus on project-related initiatives providing no form of sustainability
- opportunity to develop ‘income contingent’ loan model
- opportunity to explore partnership-based model.

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Appendix A

Australia Council Commissioned Indigenous Music Research

Facilitator's guide

APRA will conduct a series of face to face and phone interviews with up to 25 artists from each state. The face to face interviews may be conducted as focus groups in some states where the availability of artists makes this possible.

The aim of the research is to allow the artists to identify constraints/barriers that affect/limit their work as artists and opportunities for improving the viability and sustainability of their creative work.

Focus group participants

The focus groups will consist of between 8–10 participants each to allow maximum opportunity for discussion and sufficient time to explore issues in depth.

Each group discussion will last a maximum of 1 hour and 30 minutes.

Indigenous artists from various communities will be invited to participate. We are aiming to get a genuine grass-roots response that reflects the interests and concerns of the community as a whole, and not just the concerns of APRA members.

Structure of the discussion

Introduction	an overview of the goals of the discussion and introductions are made. (Approximately 10 minutes.)
Rapport building	easily answered questions are asked to encourage participants to begin talking and sharing. (Approximately 10 minutes.)
In-depth discussion	focusing on the main questions in this guide, encouraging conversation that reveals participants' feelings and thoughts. (Approximately 60 minutes.)
Closure	The moderator summarises the impressions or conclusions gathered and participants clarify, confirm or elaborate on the information. (Approximately 10 minutes.)

Discussion guide

Step 1 – Introduction

Introducing Ebony

Hello everyone. My name is Ebony Williams. I am the Indigenous Liaison Officer with APRA. APRA is the Australasian Performing Right Association. That is we are a non-profit company that is made up of songwriters and composers – artists like yourselves. Our job is to help music creators make money from their work.

The way it works is that APRA administers certain rights on your behalf. Those rights are known as the public performance and communication right. That is the right to;

- perform the work in public: including in hotels, bars, nightclubs, restaurants, cafes, retail shops, hairdressing salons, fitness centres, cinemas, concerts and events; and by any means including radio, television, film, CD player, DJ or live artist/performer

- communicate the work to the public by various means: including broadcast on radio or television, transmission by cable to subscribers (e.g. on pay television), over the internet or as music on hold.

As a songwriter or composer, every time your work is used publicly you are entitled to a royalty. This is what APRA administers on your behalf...

We do collectively what would otherwise be impossible for writers or music users (licensees) to do on an individual basis. If we didn't exist, then every composer and publisher would have to negotiate individually a separate fee and grant a licence every single time your works was broadcast or performed publicly. An impossible and expensive task for one person...

I have brought some handouts with me about APRA. So, please take one after our session...

Why we're here

We're here today to find out how we can better support Indigenous artists. We are here to learn from you. We want to know what you find hard to do as a musician, a songwriter. What frustrates you in your creative work? What do you wish was different? What do you think will make your life as an artist easier? In what ways can we help you.

APRA has also been commissioned by the Australia Council to do some research into the Indigenous music sector and today's discussion and your input will be used as part of that project. The Australia Council will use the results of our research to develop plans and provide ways to assist Indigenous music artists with their careers.

The answers you give us will help us to make things better for Indigenous artists across Australia – whether they are in cities, in towns or in the bush.

So, I want to begin by thanking you all for taking the time to be here today. We really value your participation. Your experience and the information you share with us today is very important to us. So, thank you.

Time

Today's discussion will last for about one and a half hours. It's now XX time. That means we should be finished by XX time.

Taping and confidentiality

I will be taping/filming our discussion to help me remember everything we talk about and to make sure I get it right. Everything you say here will be kept confidential. That is, it cannot be used by anyone against you.

Guidelines for our discussion

- only one person talks at a time
- feel free to say whatever you think – there are no right or wrong answers
- tell us both the good things and the bad things – don't hold back
- everyone's opinion matters.

Appendix A

Australia Council Commissioned Indigenous Music Research

Step 2—Rapport building (10 minutes)

Warm up by asking about current performance experiences

Let's begin by talking about what you are now doing as an artist.
Tell me a little about what you are doing with your music now.

Probe with:

- What sort of music do you play?
- Provide list of categories
- Are you solo or in a band?
- How long have you been performing?
- Where are you performing now? Where do you perform most of the time?
- What sort of places or events?
 - pub/club
 - radio/television
 - festival
 - community
 - cultural
 - theatre.

Step 3—In-depth discussion Current context (20 minutes)

Tell me more about how you find out about places to perform?

- do you have a manager?
- do you have a booking agent?
- if not, who organises this?

What are some of the difficulties in getting a gig?

- lack of suitable venues?
- lack of equipment?
- lack of audiences?
- costs?
- travel?
- is the lack of literacy and numeracy skills an issue?

Are there any issues with the venues/operators themselves?

- lack of technical facilities?
- any discrimination?
- payment issues?

How regularly do you perform?

- How many performances have you done in the last 12 months? (July 2004 to June 2005)?

Tell me about the income or money you earn from your performances:

- how do you decide how much you should be paid?
- do you always get paid?
- does everyone in the band get paid?

How do you manage your business / income as a musician?

- how do you keep records of your performances?
- what about a portfolio of your work, or a marketing document?
- band agreements?

How do you promote your performances/ spread the word about your performances?

- do you advertise in local press/magazines/Indigenous press?
- do you use street posters?
- radio?
- do you use email or websites for promotional purposes?
- do you use or have a mailing lists/fan base?

Have you ever received grants funding to assist with live performances or touring?

If so, where did the funding come from?

I want to know more about your audiences.

- how many people come to listen to you usually? How do you know that?
- how do they get to where you're performing?
- how do they find out about your performance?

Recordings

Lets talk a bit about your recordings.

- where do you usually record?
- what are some of the difficulties you face when you want to record in relation to travel; costs; access to professional studios and access to skilled musicians/engineers/producers?

Have you ever received grants funding to assist in the recording process?

If so, where did the funding come from?

Once you have a recording what do you do?

- how do you handle marketing and distribution?
- who do you rely on for support and advice?. Is this satisfactory?

What are some of the difficulties you face in distributing your record?

Appendix A

Australia Council Commissioned Indigenous Music Research

Ideally, what resources/support would you like to have available as part of the recording > distribution > marketing process?

How successful have you been in getting your recordings to radio?

- what are the difficulties here?

Constraints and barriers (20 minutes)

What makes it hard for you to work as a musician?

Give me an example of a time when you weren't able to do your work as an artist. What went wrong? What was the problem?

What prevents you from developing your career as a musician?

Probe with:

- how do you develop the skills you need? How do you learn to play your music?
- how/ where do you find your gear?
- how do you cover your costs?
- where can you get advice or help with marketing and promotion?

Opportunities/resources (20 minutes)

What do you think would make your work as an artist easier?

Do you think education and training would help? Creative or business skills development?

What do you wish you had as a musician?

What do you think would make your music even better, more satisfying?

What or who have you found really helpful in your work as a musician? How and why?

Tell me about a time when things went really well for your music. What was right? What made it work?

Probe with:

- how do you find out about places or people who can help you with your music?

- what do you read or use? Newspapers, magazines, the internet, community centres?

- what resources have been really helpful for you?

- how can venues and music events make it easier for you to participate?

- what do you need to have to take your music to the next level?

- where can you go to get more money for your music?

- what would be the best way for you to find out about places that can help your work?

- how would you like to learn how to make your music better?

Step 4—Closure

Okay, we're coming to the end of our time together today. I just want to make sure that I've heard everything you want to tell me. We've talked so far about what you're doing in music today and some of the things that are hard for you – like finding places to perform, getting paid for your work, telling people about your performances and so on. We've also talked about a few things that could make your life easier as a musician, and maybe even more successful – like learning more about the music business, or about music, getting more money for equipment and more opportunities to play.

Is there anything else you would like to share with me today?

(allow opportunity for last thoughts).

Thank you all very much for sharing so much important information with us today. It will really help APRA and the Australia Council come up with better ways of supporting your work. We hope it will make a real difference. If you'd like to discuss any of this with me again, you can reach me on (contact number).

Thank you again.

(Close the meeting).



