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To Whom It May Concern,

Thank you for the opportunity to comment on the *Inquiry into the challenges and opportunities within the Australian live music industry*.

The Australian Music Association is the industry body representing wholesalers, importers, manufacturers, retailers, and associated businesses for music products in Australia. Established in 1977, the AMA has a strong history of supporting and advocating for the music products industry and contributing to the development of musical life in Australia.

The AMA produces an annual Market Report and quarterly reports analysing imports of music products, contributes to the NAMM Global Report for the music products industry, produces Melbourne Guitar Show, coordinates the Make Music Day campaign in Australia, and works to advance the industry in various ways through advocacy and other projects. We are the leading voice on several particular issues that our industry faces and we collaborate with national partners to advocate for small business (COSBOA) and music education (Music Education Right From The Start), and with international partners to advocate for more music making (NAMM, Make Music Alliance).

We represent the music products industry, which in 2022 imported \$575 million worth of music products (import valueⁱ), an estimated *retail value* including domestic manufacturing of well over \$1 billion. The music products industry includes businesses that develop, make, distribute, sell and repair musical instruments, professional audio equipment, accessories, print music and related products. The UK Music report 'This Is Music', a significant economic study of the music industry which appears to be a model for Australia's forthcoming study, includes the Music Retail industry as a sub-sector of the 'Core Music Industry' alongside Music Creators, Live Music, Music Publishing, and so on.ⁱⁱ

The AMA and our members are not typically supported by government funding. We are not focusing on particular funding initiatives that would flow to our organisation or our members, although certain kinds of government investment in the arts interact with our industry. Funding for schools to properly resource music education programs, and funding for live music venues and productions to improve their infrastructure, are examples of government investment that benefits cultural institutions, participants (in these examples, students, teachers, audiences, musicians), and our members.

There is much to say about the challenges and opportunities for live music in Australia, of which there are many, that this submission is not attempting to cover. This submission focuses on several of the terms of reference with corresponding proposals.

Regards,

Alex Masso
Executive Officer
Australian Music Association

Terms of Reference	Issues	Recommendation
sustainability and growth of the industry	More music makers ('More to start, fewer to quit')	Provide universal access to music education through systemic improvements to, at least, meet the requirements of the Australian Curriculum: The Arts
audience development and consumer behaviours		Support initiatives that facilitate and promote participation in music, including adults and children, professional and non-professional settings.
suitability and location of venues for organisers, participants, and attendees	Live music resources	Provide grants for live music resources
grant and support programs		
(additional)	Spectrum	Guarantee radiofrequency spectrum for cultural use, particularly in the 600 MHz band

More to Start, Fewer to Quit

Proposals: (1) Provide universal access to music education through systemic improvements to, at least, meet the requirements of the Australian Curriculum: The Arts; (2) Support initiatives that facilitate and promote participation in music, including adults and children, professional and non-professional settings.

Quality music education is not universal in Australia. Although progress has been made, including through initiatives such as the National Music Teacher Mentoring Programⁱⁱⁱ and the South Australian Music Education Strategy^{iv}, we don't really know the extent to which students are receiving an arts education at all, the depth and quality of their arts education experience, or the resources available (and required) to deliver the curriculum.

The AMA is a member of the *Music Education: Right From The Start* Advisory Group^v. This initiative, led by Alberts Music, is a major development in the work that needs to be done: the strategic and targeted improvement of systems. For example, the system of Initial Teacher Education is vital to the delivery of the curriculum, a recent study of ITE found that primary school teaching graduates receive less preparation to teach music than equivalent graduates 15 years ago, on average.^{vi} This period of decline coincides with the implementation of the Australian Curriculum: The Arts.

Education is often considered to be a separate issue (or set of issues) to contemporary music. In our industry, which sells over \$1bn worth of music products to Australians each year and employs thousands of people in good jobs, one of the few areas of the music sector where precarious work is the exception rather than the norm, music education is seen as absolutely foundational to the industry's success.

Music education and live music are also mutually beneficial systems, with many musicians working across both areas. A guitar or trombone teacher in a private studio, music store, tutoring in a school environment or at a Regional Conservatorium may be playing gigs, which informs their teaching and gives students direct access to a working professional musician, while also teaching students, which provides income to supplement their performing career. The extent to which education systems and institutions provide a quality music education to children directly affects the nature, extent, and quality of this work, which directly supports those working in the live music industry.

The AMA is focused on participation in music making in the community, in the music industry, and in schools. We want to see *more to start, fewer to quit*, meaning that we want children to have opportunities to participate in music making through a quality music education and begin their musical journey, and also to encourage adults to continue or begin making music, including through community-based music making opportunities. Playing music brings great joy, creative expression, health benefits, brings people together, and certainly from our point of view music plays an important role in the music industries, including our area of music products.

Australia is the world's 12th largest economy^{vii} and 10th largest consumer of recorded music^{viii} but the 6th largest consumer of music products^{ix}. Australians value music making and there are economic benefits to participation in music for our industry and the live music industry. We would welcome further analysis of these economic benefits through the commissioning of research.

The AMA coordinates Make Music Day in Australia, part of an international effort to celebrate, promote and encourage music making everywhere^x. The principles of Make Music Day are that access to performances should be free (although many performances involve paid musicians), it is held on a particular day (21st June), and that beginners to professional musicians, children and adults, highly experienced musicians and non-musicians, are encouraged to participate.

Live music is the basic premise of Make Music Day, which which originated in France in 1972 as *Fete de la Musique*, but we see this as more than a day of musical performances. It is a campaign to celebrate the value and benefits of music making in all its forms, for all people who choose to participate.

There are several ways in which the Federal Government and its agencies can support a movement in the right direction, to support the live music industry through creating more music makers.

- Improve the provision of music in Initial Teacher Education, including both teaching and learning in tertiary institutions and observation of best practice music teaching during practical placements.
- Measure the provision of music (and other artform) education across Australia, participation in music, and reporting on it at regular intervals such as the forthcoming State of Culture report.
- Encourage the Department of Education, and the Minister for Education, to turn their attention and resources specifically to the provision of music education.
- Support initiatives to promote music making, such as Make Music Day.

Live Music Resources

Proposal: Maintain grants for live music infrastructure, including sound and lighting equipment, 'backline' instruments and equipment, and associated production resources. Include large instruments, such as pianos, in the eligibility criteria.

A positive development in recent years has been grant funding available to venues for the purpose of refitting or upgrading sound and lighting systems, production equipment, and musical instruments. Good production equipment benefits venues, audiences and musicians, increasing the production values for live performance and in many cases reducing expenses such as PA hire, additional work such as loading in equipment, and in particular supporting touring artists who cannot travel with a lot of equipment. The benefits of this investment may be experienced for many years, over the life of the equipment, facilities or resources that were provided.

An example of this is the Live Music Australia funding, Round 3 (2021)^{xi}, which provided such grant funding as:

- \$23882 for *Installation of AV system and sound attenuation for Gang Gang Cafe and Bar to increase its capacity to facilitate original Australian live music;*
- \$36000 for *A new audio package for the University of Canberra's Refectory and Hub;*
- \$15296 for *Upgrade of lighting, PA and outdoor stage to support live music at Hardy's Bay RSL & Citizen's Club;*
- \$21480 for *Installation of PA and lighting system, support for artists, improved accessibility at Finding Fillmores, Kiama;*
- \$24435 for *Brunswick Ballroom's overhaul of its sound, lighting and production values;*
- \$4100 for *Upgrade of the existing PA system and backline at The Ellington for the benefit of local and national original artists and the listening audience alike.*

This short list includes venues in small regional communities and leading small to medium metropolitan venues, which are still benefiting from this funding several years on.

In NSW, cultural infrastructure grants have been used to purchase grand pianos, another important part of musical performance and a great asset to venues and communities.^{xii} Good quality pianos have a particularly long lifespan and represent a worthwhile investment for suitable venues, but one that is simply beyond the capacity of many venues to purchase.

Radiofrequency Spectrum

Proposal: Guarantee radiofrequency spectrum for cultural use, particularly in the 600 MHz band

Wireless audio devices are now an integral part of live music and other applications such as conferences, churches, other public events, and so on. UHF (470-698 MHz) is the primary band for wireless microphone operation and there is cause for concern about the future of this band.

The demand for wireless audio devices, and the necessary spectrum to operate them, is *increasing* as the technology improves and productions become more reliant on it. This interacts with the experience of audiences, performers, production crew, festivals, theatre producers, live music venues, and many others.

Free TV outlined the challenges for users these devices in a submission to the Media Reform Green Paper:^{xiii}

Most current equipment will lack the re-tuning capability to move into any remaining available spectrum, so must be replaced. This is particularly problematic given many users have only recently refreshed their equipment following the 700 MHz re-farming process.

Similarly, class licence users may be unknown to the regulator and unaware they are affected, so a suite of effective communications strategies will be required in order to clear any spectrum required in future for wireless broadband, or for TV broadcasting. The need for effective communication starts immediately, as equipment retailers and users face an immediate 'crisis of confidence' about which parts of the current broadcast spectrum bands will be available for low interference devices in future.

Re-farming of 600 MHz and re-tuning of TV into 500 MHz may result in much less, and/or noisier, 'white space' spectrum suitable for low interference device operation. Especially in highly congested areas, such as the Gold Coast, this may affect the feasibility of using UHF 'white space' at all, or the operating range (and therefore the utility) of wireless mics. In the US, the 600 MHz 'duplex gap' was identified for migration of some wireless mic services. Free TV understands there have been serious problems due to 'noise'; there is an opportunity for Australia to learn from US experiences here.

While there are other bands already available for wireless mics, notably 1785-1800 MHz, inferior propagation of 1800 MHz spectrum makes it unsuitable as a direct replacement for some UHF equipment.

See also our colleagues from ACETA, whose submission to the Five Year Spectrum Outlook addressed these issues.^{xiv}

ACMA has only said that it has 'no current plans' to re-farm 600MHz, without giving re-assurance about the impact on wireless audio device users.^{xv} We cannot take much comfort with this.

The live music industry needs certainty in the availability of spectrum for cultural purposes, including broadcasting and wireless audio devices. This is the domain of ACMA but the Parliamentary Inquiry could form a view on the importance of spectrum for the live music industry, the challenges this industry would face in the event of spectrum reallocation or uncertainty, and support a clear government policy in favour of maintaining radiofrequency spectrum.

- i Australian Music Association, Market Report 2023: Table 2a <https://www.datawrapper.de/ /027Cz/?v=4>
- ii UK Music: This Is Music – Methodology <https://www.ukmusic.org/wp-content/uploads/2023/11/This-Is-Music-2023-Methodology.pdf>
- iii Music in Me: National Music Teacher Mentoring Program <https://musicinme.au/>
- iv Department for Education, South Australia. Music Education Strategy (2019). <https://www.education.sa.gov.au/schools-and-educators/strategies-and-initiatives/music-education-strategy-and-innovation-fund/music-education-strategy-and-music-innovation-fund>
- v Music Education Right From The Start <https://www.musiceducation.com.au>
- vi Fading Notes: the state of music education for the next generation of primary school teachers <https://www.musiceducation.com.au/knowledge-hub/#our-publications>
- vii Australian Government: Australia is a Top 20 Country for Economy <https://www.dfat.gov.au/sites/default/files/australia-is-a-top-20-country-all-topics.pdf>
- viii IFPI Global Music Report <https://globalmusicreport.ifpi.org/>
- ix NAMM Global Report <https://www.namm.org/membership/industry-insights#reports>
- x Australian Music Association. *Make Music Day Australia*: <http://www.makemusicaustralia.org.au>
- xi Australian Government, Department for Infrastructure, Transport, Regional Development, Communications and the Arts: Live Music Australia Grant Recipients <https://www.arts.gov.au/funding-and-support/live-music-australia>
- xii New England Conservatorium of Music: Welcoming the Grands <https://necom.org.au/welcome-to-the-grands/>
- xiii Free TV, *Media Reform Green Paper Submission* (2021) <https://www.infrastructure.gov.au/sites/default/files/documents/mrgp-free-tv.pdf> (section 5.3.7)
- xiv ACETA. *Five Year Spectrum Outlook 2021-26 Submission* (2021). <https://www.aceta.org.au/five-year-spectrum-outlook-2021-2026.html>
- xv ACMA. *Draft Five-year spectrum outlook 2022–27 – consultation* (2022). <https://www.acma.gov.au/consultations/2022-03/draft-five-year-spectrum-outlook-2022-27-consultation-122022>