

Adelaide's live music movement



The Future of Live Music in South Australia

Live Music Thinker: Martin Elbourne

THE DON DUNSTAN FOUNDATION

PROJECT PARTNERS

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Government of South Australia
Department of Planning,
Transport and Infrastructure



Government of South Australia
Arts SA



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About the Residency

The project has encompassed the work of the Thinker in Residence, Martin Elbourne, and was at the outset titled 'Reverb', a name denoting its topic and one of its major objectives which is to create movement and reverberation across the contemporary music community in Adelaide. Its intended outcome is to create collaboration and unified action for a healthy, more sustainable music scene.

Over two periods of residency, Martin has worked and consulted with venue owners, training organisations, musicians, regulators, councils, government departments and Ministers, and organisations to devise strategies to strengthen the live music scene.

The residency has been supported by its partners the Adelaide City Council, the Department of Planning, Transport and Infrastructure, Arts SA, Department of the Premier and Cabinet, Renewal SA, and Regional Development Australia Barossa. All partners contributed financially and the project would not have been possible without this. They also contributed their skills and knowledge.

The thinker's residency program was designed by the State Government to bring world experts into direct contact with South Australia's decision makers. Leaders in their field commit to periods of residency in Adelaide in order to work with the community and government in developing ideas and approaches that can potentially be applied to the local context. Each 'thinker' is engaged to provide a set of recommendations to the Premier at the end of their residency. These recommendations are then considered by Cabinet for possible implementation directly or through assistance by the government. In some cases partial implementation may occur prior to this depending on the parties involved in the venture.

Project management and administrative support for the residency of a thinker had previously resided in a government unit dedicated to this work. The Don Dunstan Foundation is the first non-government organisation to have provided this support and has been delighted to house the Live Music Residency of Thinker, Martin Elbourne.



About Martin Elbourne

Martin Elbourne first started promoting bands in the late seventies while at Bristol University and he founded the Bristol Recorder (label magazine). In 1982 he co-promoted and co-founded the first WOMAD festival with Peter Gabriel. In 1983 he moved to London, worked for the Rough Trade booking agency looking after acts including The Smiths and New Order and began his long involvement with Glastonbury Festival. During the 1990's he managed bands, continued working with New Order and increased his Glastonbury involvement to become the main booker. In the last fifteen years his primary focus has been on festivals. Initially, this involved outdoor summer festivals but increasingly Martin's activities extended to urban based venue indoor events.

Martin has advised and helped book numerous festivals in the UK including Lovebox, Jersey Live and Guilfest. He is creative director and co-founder of the Great Escape in Brighton (Europe's leading music showcase) co-founder of 'M' for Montreal one of the main Canadian showcase festivals), co-founder and promoter of 'NH7' festivals held in Pune, Delhi, Bangalore and Kolkata which are the leading contemporary music festivals in India.

Martin is currently helping to launch two new urban festivals in Prague and Illeida (Spain) and advising the Bayimba organisation in Uganda. He also acts as occasional unpaid advisor to the British Council, PRS foundation and UK Department of Trade and Industry.

Martin's strong background in working with communities around the world to build environments in which live music can thrive and be sustained over time has been pivotal in his work in Adelaide.



Overview

The Live Music Residency was established at the request of the Premier of South Australia, the Hon Jay Weatherill MP. I became the ‘Thinker’ and the project became known as ‘Reverb’. It has been housed and managed by the Don Dunstan Foundation. Its purpose was to seek out ideas and strategies that would assist the contemporary live music scene in both Adelaide and South Australia, and the longer term vision of the Government of South Australia for Adelaide to be a city with life and spirit that would attract and retain young people. Port Adelaide was also identified for specific attention to its revitalisation. I have had three visits to Adelaide over the course of the past year which built significantly on some previous brief visits. During this time I and the Reverb team have had around 150 meetings with stakeholders including musicians, venue owners, State Government and local council representatives, owners of rehearsal spaces and production studios, artist managers, music organisations and festival organisers. It also included visits to the regions of the Barossa Valley, Port Lincoln, Port Augusta, Whyalla, and McLaren Vale. I am grateful to everyone who gave their time freely to provide information and their ideas to the project.

Adelaide City has a number of obvious assets that can be leveraged for enlivening and sustaining the music scene. It has many quality entertainment and cultural venues along with restaurants and accommodation, within a short distance from each other. The weather is good which makes walking to destinations possible. It would be easy to promote it as a walkable city and with the provision of good information about what is available in the city it is possible that visitors will stay longer in the city and seek out options for live music. The small size of the city also means that the many festivals and events can quite quickly create a festive and lively feel in the streets.

The Barossa Valley and Port Adelaide are relatively free of many of the issues that have created conflict in the city of Adelaide. They have fewer constraints that arise from the competing needs of venues and residents. There are a great many opportunities to be realised in both locations.

There is much passion and energy within the contemporary music community of South Australia. It appears, however, that it has not always been able to be channelled into a positive, forward direction that maximises outcomes for all involved. Fostering a collaborative approach to the industry, one in which partnerships can be formed for mutual benefit, is critical for breathing life and energy into the environment. Over the past year I have seen people who have never met before coming together and through their own efforts forming new associations and ventures. They have only required the opportunity and the common view that the issues for music are being taken seriously. An optimistic, positive approach can be further developed and enhanced through the formation of an independent, representative body that provides advice to government, and to the music industry and community, as well as acts to champion and protect the interests of South Australian music now and into the future. It would provide a strong foundation for the interests of everyone in the music industry to be considered, and with reporting responsibilities to the Premier, this body would be a strong indication of the faith the government has in the future of the music industry in South Australia.

A strong theme in this report is the need for a focus on the broader music industry and providing an infrastructure for its growth. This generally means providing the means for the development of various vocations and businesses. There are many possible pathways to working in a music profession or vocation in South Australia but parts of the pathway are not readily available or always obvious. Specifically artists and music industry professionals who are in the mid stage of their careers do not necessarily have access to guidance and support that is required for them to move to the next step in their careers. Providing access to mentoring and to promotion of music products in national and international markets is likely to facilitate the advancement and growth of artists and other music careers alike. The development of skills and fostering creativity in future artists from an early age and ongoing is important to the state's capacity to produce successful artists as well as audiences on an ongoing basis.

There is a distinct lack of research, information and data on the music industry in South Australia. Readily available information about the experience and success of local artists and bands assists in increasing the likelihood that they will be booked by a venue or festival. There is little data collected that allows an assessment of the economic value of the local music industry, such as the frequency of live performances, the number of patrons, and the number of people working in music vocations. In addition social research that allows decision makers to understand the characteristics of venues and the environments around them that create harmonious conditions or, in contrast, anti-social behaviour and alcohol abuse will assist in finding solutions. Market research that identifies the needs and interests of the potential audience for live music will also assist in growing the live music scene.

Implementation of the many recommendations contained in this report will of course take time. Growth and development of the live music scene and the music industry generally will also require time. Removal of barriers and some proactive initiatives however will see benefits for the city and the state.

Martin Elbourne
Live Music Thinker



Context

The South Australian live music ecology does not exist in isolation. In order to understand the challenges faced by, and opportunities available to, the State it is important to understand the global and national context within which South Australia is located. There are worldwide trends to which all music environments are subject and to which they may respond in a similar manner or in some cases use the opportunity to find new and different pathways. It is without doubt one of the most complex eras for music whether it be live or recorded, and right at this moment it is in transition. Clear pathways into the future are yet to be defined. The live music scene when viewed on its own fares better when it comes to planning for its future. There are givens in what is required for it to maintain a presence. For example, venues and live audiences are required. In contrast the recorded music industry continues to change due to new technologies that vary the method of recording and its distribution.

It is quite difficult to gain a clear picture of the music industry both here and around the world due to a lack of facts and figures especially those that are comparable across states and nations. Generally the researcher must piece together disparate facts with anecdotal evidence or their own sense of what is occurring. This report has had to rely largely on observations and information provided by local people familiar with the music sector in South Australia along with research conducted mostly at the national level. The reader will therefore need to accept that not every statement made has a ready set of facts to back it up.

Defining Live Music

‘Live music’, for the purpose of this report, refers to two or more participants (made up of artist and audience) gathering to listen and react to music in real time. The ‘live’ aspect of music refers to the social participation in consuming music which includes DJs and other forms of electronic music. Note that this definition requires people gathering in a specified locale. This means the element *of place* is an inextricable part of live music.¹

¹ Webster, Emma, *Promoting live music in the UK: A behind-the-scenes ethnography*, (Glasgow: The University of Glasgow, 2011) available at: http://www.academia.edu/1403481/Promoting_live_music_a_behind-the-scenes_ethnography

Defining a Live Music Ecology

Live music does not exist in a vacuum but is part of a complex ecosystem consisting of many interdependent elements in the local, national and international contexts. The elements of the ecology include physical spaces in which to produce and record music, networks of people, social groups and the physical, social, cultural, political, educational, industrial and economic environment.² The interdependence of these elements means that all areas of the music environment are in some way connected. Emerging, professional or community artists are connected to a broad set of music vocations as well as industry businesses.

These interactions mean that it is not advisable or really possible to examine live music in isolation. The broader ecology must be examined and understood for the development of strategies that are effective in growing, protecting or sustaining live music activity.

In the context of this report the term ‘live music ecology’ generally refers to the local context (i.e. Adelaide context) although the wider ecology is discussed when the external factors directly or indirectly influence the local context.

² Banks, Mark. Lovatt, Andy., O'Connor, Justin., Raffo, Carlo. "Risk and trust in the cultural industries" *Geoforum*, 31 (2000), pp. 453-464.

Global context

What exactly is the music industry?

The three core components of the music industry are live, recorded music and publishing. The process starts with songwriters, composers and musicians.

The artists are backed up by physical assets (recording studios, venues, rehearsal spaces and music retail) and by music industry businesses and professionals (managers, agents, record labels, publishing companies, music supervisors, promoters, bookers, publicists, radio pluggers, lawyers, accountants, producers, sound engineers, crew, event producers).

Music Industry Trends

Live versus Recorded Music

Globalisation and the technology revolution have had profound impacts on all industries including the music industry. Globalisation by its very nature means that trends are very far reaching. These trends have included markets, technological innovation, pirating and informal economic activities.³ The nature of the organisations involved has also changed with large companies taking over many different aspects of the industry under one umbrella alongside small independent organisations taking up niche markets.

The recorded music industry has altered significantly over the past decade or more largely due to a series of rapid changes in technology. This has been in music file formats and music delivery systems. The ease of transferring or downloading digital music files with or without approval from the rights' holder has transformed the landscape of the industry. In the USA there was a peak in recorded sales in 1999 but by 2009 this had halved (US\$14.6 billion to US\$6.3 billion). The global market for the recorded music sector was dominated by six companies in 1998 but after mergers three major companies now dominate globally: Universal, Sony and Warners. This year, 2013, is the first time since 1999 that there has been a slight increase in global music sales although the majority of the increase was in digital sales and assisted by new, emerging markets.

³ Ambert, Cecile. *Promoting the Culture Sector through Job Creation and Small Enterprise Development in SADC Countries: The Music Industry*, (Geneva: International Labour Organisation, 2003) available at: http://www.ilo.org/wcmsp5/groups/public/@ed_emp/@emp_ent/@ifp_seed/documents/publication/wcms_117682.pdf

Traditionally, major recording companies have been those that have owned their own global distribution and publishing channels. Independent, or indie labels, however, tend to work with other smaller companies for their distribution and publishing, although some indie labels do pay for the distribution services that major labels have to offer. The distinction between major and independent recording companies is becoming less clear and therefore it is difficult to calculate the exact percentage of each in the market. Suffice to say that today a growing share of musical output is being produced by small firms or individuals with a much greater diversity in styles, quality, and business models.

There were large shifts in the proportion of revenue raised through the different segments of the industry with a significant increase in the revenue gained from both downloading and streaming while at the same time the physical sales of CDs dropped. Digital media has made it possible for artists to forge their own careers but it is still generally the case that most require the assistance of record labels through which they can broaden their opportunities. Record labels play an important role in the development and nurturing of new talent. They invest in creating new markets for their music and, in turn, new talent is essential to their own financial success.

The revenue from live music, which includes live bands and festivals, has been the highest seen in some time and overtaken recorded music as a higher source of income for musicians. In the UK, festivals and stadium concerts accounted for 25% of the live market in 2011 and had the most significant revenue in the live music sector. The busiest venue type however was the club (venues catering for less than 1,000 people).⁴

Only a small percentage of the average musician's income comes from the revenue raised from recorded music. The copyright laws mostly affect the income of the already established artists. There is debate in some quarters about whether the sharing of files on-line has had a negative or positive effect on the profits made by individual artists. Some studies have found that sharing reduces album sales but increases live performance revenues for small artists, perhaps through increased awareness. The impact on live performance revenues for large, well-known artists is negligible.⁵

4 *Adding up the UK music industry 2011*, (London: PRS for Music, 2011) Available at: <http://www.prsformusic.com/aboutus/corporateresources/reportsandpublications/addinguptheindustry2011/Documents/Economic%20Insight%2011%20Dec.pdf>

5 Mortimer, Julie Holland., Nosko, Chris., Sorenson, Alan., "Supply Responses to Digital Distribution: Recorded Music and Live Performances", *Information Economics and Policy*, 24 (2012), pp 3-4. Available at: https://www2.bc.edu/julie-mortimer-2/concerts_01oct2010.pdf

Formats for Consumption

CD album sales, where major record labels have traditionally made the bulk of their profit, continue to fall. In 2012 the market value of digital music in the USA was far bigger than physical music sales. The situation was almost the same in Australia and the UK was also moving toward this position.

Vinyl recording is making a small comeback, and is keeping the remaining independent record stores in business. The increase in downloads and streaming has not only led to a decline in physical album sales but in albums themselves. Consumers now seek individual tracks and therefore the market for individual tracks and streams is booming. The traditional business model for record labels and artists has broken down. While we can see some signs of future business models emerging they are not fully developed at this stage.

Sync income⁶ appears to be declining. Overall, however, publishing income (royalties due to copyright, via the collection societies), is increasing. The methods for collecting this income are gradually becoming more efficient both with reference to new markets and new income streams. EMI's Global Consumer Insight indicates however that two-thirds of music revenue worldwide is still based on physical sales. It also indicates that terrestrial radio is still the way in which the vast majority of people discover new music as well as being the most common listening format. This was followed by CD, video sites like YouTube, MP3s, live concerts and festivals, music videos on TV, streaming services and finally social networks.⁷

Artists can connect directly with fans

Numerous sites enable artists to deal directly with their fans and to measure how many people are listening to their music and watching their clips. They can also use this technology to see where their audiences are geographically located and whether they are planning to attend their gigs. Online media has been critical for a number of artists breaking into the commercial industry. An interesting clip with a good song can be viewed by several million people around the world. It is possible for a clip to be produced in bedrooms or garages using laptops and iPhones. Not that long ago being able to create something cheaply at home which could be seen by millions of people was unthinkable.

⁶ The income derived from music being placed in television programs, movies, video games, advertising, etc

⁷ "Consumer Data Shows Old Ways Still Most Profitable, SXSW Panel Says" last modified March 14, 2013, available at: <http://www.billboard.com/biz/articles/news/1552283/consumer-data-shows-old-ways-still-most-profitable-sxsw-panel-says>

What do these changes mean for artists?

Fifteen years ago if you were a good act from Adelaide you hired a manager, went to Sydney or Melbourne to record and perform and hoped a talent scout from a major label was there to see and hear you. You signed with a major label and obtained funding to produce an album and to go on your first national tour. Then you prayed that someone internationally in the same major label wanted to release your album leading to a publishing deal, a local booking agent and eventually a UK or USA agent.

The odds were stacked against anyone from Adelaide breaking into international or even national markets. Even when artists had this type of commercial success, it was likely they would have to move interstate or overseas to sustain it.

Now it is a very different story. Artists can record one decent song, make a good quality video and put it online, and through this start collecting email addresses of their potential audience. They also will need to do as many live shows as possible. It is now a matter of find your audience and access them directly. In many ways it has never been easier to launch an artist from Adelaide.

Creative, Cultural and Commercial Value

Music is an art form and a form of personal and cultural expression that has a role in entertainment, the community, religious and social rites, political activism and lobbying, education and in supporting commercial interests. The value of art and expression is subjective and therefore attempts to attach a commercial value to music will never truly reflect the overall value of creating and consuming music. There is, however, a clear commercial value attached to music.

Local creative economies are generally not geared to creating commercial value but instead place value on the creative process and product alone. They do, however, foster the consumption of cultural products, provide employment and support other industries. The global music industry does not offer these opportunities to local artists, entrepreneurs and businesses.

While they will never reflect the full picture of any creative discipline, localised economies and industries that trade in culture bring opportunity, sustainability and vibrancy to places.

Australian context

The Australia Council for the Arts reported that Australia is the sixth largest recorded music market in the world. Concert ticket sales reached almost \$1 billion in 2011 with 11 million attendances nationally.⁸ In 2011 it was estimated that venues such as hotels, clubs, cafes, and restaurants generated around 42 million attendances and \$1.21 billion in revenue. Currently there are 15,000 jobs nationwide in the music industry and 6,300 gigs each week.⁹

Australians are also still consuming music and music products in large numbers. In 2009/10, each Australian household spent an estimated \$380 on music related goods and services, totalling over \$2 billion. That is more than was spent on internet charges, dental fees or domestic holiday airfares.¹⁰ Music Festivals also appear to be well supported in Australia but while some have grown others folded.

When viewed in the international context, however, Australia has a relatively small industry. Some of the music industry professions have traditionally been standalone professions such as managers and publishers, but such specific, single skill sets are no longer financially viable. Australian music industry professionals, unlike elsewhere, undertake a wider range of activities using broader skill sets, in order to create multiple income streams. This helps compensate for the smaller marketplace.

Most of the commercial music industry in Australia is based in Sydney. This includes major labels and radio stations. These organisations often previously had offices in some of the larger cities like Melbourne and Brisbane but there has been a trend toward downsizing by closing these satellite operations. Smaller cities and regional centres in Australia struggle to connect to the “national scene” located largely on the Eastern Coast.

Wherever they are based, Australian artists face logistical challenges due to the geographic isolation both within Australia and internationally. Touring is always challenging in Australia with few major cities and large distances between them. Some artists find success with regional shows but for many the time commitment and small audiences mean regional tours are not appealing. The high cost of international touring is also challenging for Australian artists and does not make it feasible in many cases.

8 “Artfacts: Australia Council for the Arts” Accessed July 11, 2013, available at <http://artfacts.australiacouncil.gov.au/>

9 *ibid*

10 *ibid*

The Australian music industry is facing similar issues to the rest of the world in terms of navigating the landscape of the ‘new music industry’ predominantly due to developments in technology. Recent changes to the way music is produced, distributed and consumed, however, means that in many ways there has never been a better time for Australian artists hoping to forge professional careers. Australia is amongst the leading international digital music markets. In terms of digital consumption, Australia was the first market in the world where growth in digital outpaced the fall in physical sales, even prior to the uptake of the music streaming subscription services Spotify and Rdio. IFPI estimated the digital music market accounted for 47% of Australia’s recorded music sales in 2012 (up from 38% in 2011), making Australia the fifth leading market in terms of digital uptake.¹¹

In recent years there has been an explosion of international Australian success stories, with some of them being from Adelaide. The world is becoming more connected and with the mass transition to online consumption, there is no longer such a ‘tyranny of distance’.

The growing tension between the needs of live music venues and increasing numbers of residential properties in city centres is consistently reported around the country, and the world. An increasingly common response in trying to resolve these tensions in Australia, the USA and Canada, is the setting up of bodies consisting of representatives of stakeholders to undertake an advisory role on music issues.

¹¹ ibid

Adelaide and the South Australian context

Greater Adelaide has a population of 1.2 million people but only 22,000 people live in the city of Adelaide.¹² The city itself covers an area of 15.57 square kilometres and more than 50% of Adelaide is made up of Parklands.

The future of Adelaide is being guided by a number of government policies and strategies. *The 30 Year Plan for Greater Adelaide* which plans for accommodating the projected changes in the city's population, environment and economy has the longest time horizon. It assumes a population growth of 560,000 people over this period of time and looks to significant economic growth and revitalisation of the city. The state government and local councils are also developing and actioning projects that are likely to have a more immediate impact on the live music environment and the music industry generally.

It is estimated that approximately 118,000 people work in the city and an average of 28,000 people stay in the city overnight each night including 6,000 tourists, business travellers and visitors.

South Australia's Strategic Plan identifies the Government's priorities for South Australia. It has been created with the aim of guiding individuals, community organisations, governments and businesses in securing the wellbeing of all South Australians. It is designed to reflect our community's visions and goals, with 100 measurable targets reflecting the priorities.

There are two targets to achieve greater involvement in cultural activities and vibrancy and these are linked to goals associated with attendance at major events and institutions and further development of the film industry. Meeting these targets will, however, have only a flow on effect to the music industry. Real growth in this area will require direct and focused energy.

¹² Adelaide City Council Annual Report 2011-12,
Available at: http://www.adelaidecitycouncil.com/assets/acc/Council/annual-reports/docs/annual_report_2011-12-Part1.pdf

Extract from South Australia's Strategic Plan

Goal: *We are The Festival State; our festivals, cultural venues and events create a vibrant and energetic atmosphere, generating excitement!*

Target 3: Cultural vibrancy – arts activities

Increase the vibrancy of the South Australian arts industry by increasing attendance at selected arts activities by 150% by 2020 (baseline: 2002-03)

Goal: *We value and promote artistic vibrancy and excellence and celebrate community expressions through the arts.*

Target 99: Cultural engagement – institutions

Increase the number of attendances at South Australia's cultural institutions by 20% by 2014 and maintain or improve thereafter (baseline: 2003-04)

Target 100: Screen industry

Increase South Australia's share of Australian film and screen production to 6% by 2020 (baseline: 2009-10).

In addition to South Australia's Strategic Plan the State Government has created seven strategic priorities. One of these has a direct bearing on the future of live music in Adelaide - Creating a Vibrant City - This strategy supports the vision of Adelaide becoming one of the 'great small cities' in the world. In terms of the music industry, this vision also includes the city being the centre of culture and renowned for its festivals with the city squares and laneways "*alive with people of all ages, enjoying public art, live music and an exciting choice of outdoor dining venues*".

Some of the specific activities linked to this strategic priority include:

- Getting more people living in the city;
- Encouraging more people to work in the city, for example, by making it easier to get in and out;
- Getting more investment in the city by making it easier for businesses to set up and grow;
- Having more people visiting and spending time in the city by giving them great things to do all year round.

Another of the seven strategic priorities that has an indirect bearing on the issue of live music is *Safe Communities, Healthy Neighbourhoods* in that it relates to the location or venue in which the music is performed. The strategy is aimed at creating neighbourhoods that are safe and welcoming where it is easy for people to:

- Exercise regularly and choose nutritious food;
- Walk or cycle to local services, and take buses, trains or trams to larger centres;
- Travel safely on our roads;
- Make friends and look out for each other;
- Feel safe and help prevent crime;
- Have a say in community life.

This strategy is critical to creating an environment in which all members of the public can safely and easily access music performances. It addresses the issues of drunk and disorderly behaviour that may be associated with licensed venues and around their general vicinity.

The value of having a vibrant and safe evening and night time environment has been recognised by state and local government policy makers. The Adelaide City Council is also implementing strategies such as 'Splash'. The Adelaide City Council works in partnership with the South Australian Government through the Adelaide Capital City Committee on the joint 'Good Evening Adelaide Strategy' which is aimed at developing the early and late night economy.

South Australia has a relatively small music industry when compared to other states and its geographical isolation is also greater. It regularly fails to attract the big acts that tour interstate. Despite these disadvantages it has in the past had a very successful live music scene along with some nationally recognised recording artists. Currently it has a strong community based music scene along with some very well supported genres of music, such as metal, dance and electronic music, across the metropolitan area. A few individual artists and bands from South Australia have risen to national or international fame both through recorded and live performances. There is no single path that these artists have taken to meet with this kind of success. There is also very little infrastructure that underpins the ongoing development of talent and the establishment of careers in music. Adelaide has the opportunity to create this infrastructure in such a way that it can have a flexible and agile response to opportunities.

The rest of this report proposes strategies designed to overcome barriers and insufficiencies in the current music environment.

PRINCIPLES UNDERPINNING THIS REPORT'S RECOMMENDATIONS

The principles stated below underpin the recommendations that follow. Wherever possible, the recommendations reflect these principles and their associated values.

High level collaborative leadership and development of the music industry from a cross-sectoral perspective in keeping with conceptualising the music industry as more than the 'arts'

Formal industry leadership to lead and advocate for industry related issues. The local music industry needs a united and powerful voice to represent the views of the industry members fairly and accurately

Focus on **developing the private sector of the music industry** to become more sustainable and self reliant. Developing incomes streams will help the industry grow and make it more sustainable

Identify and **build on existing assets** where possible, nurturing existing cultural, social and creative assets and providing the scope and support for things to develop organically

Foster collaborative endeavours within the music industry and across the arts

Encourage artistic, organisational and governance partnerships to build opportunity, understanding, skills and creativity

Look outward to build national and international opportunities, networks and collaboration



Adelaide Festival, Elder Park: Tony Lewis



Governance and Leadership

Sound leadership is essential for the music industry to develop beyond its current state and into a more sustainable industry in South Australia. This requires both leadership at the decision-making levels of music industry organisations, and leadership at the “coalface”, that is, from the people directly involved with artists and their performance. In addition the State Government and the private sector will need to develop an understanding of music as a product that can be exported in a way similar to commodities. Currently, South Australia lacks some of the essential components of the industry and consequently also lacks the opportunity for leadership. It has also not had a body that fully represents the interests of the industry by assuming leadership and strategic planning on behalf of the industry as a whole. The State will therefore at least initially need to create the foundation from which a fully-fledged industry may emerge. It is coming from a low base level of music industry activity unlike other successful music cities in the world such as Austin, Texas.

Linking the music industry to economic development, and inevitably the global market, in South Australia, should not diminish the importance or role of the local music culture. The local culture can offer a unique approach to the creative process and contribute to an outcome that is embraced by the local community. Moreover, the local music culture can contribute directly to economic and social strategies, as well as be a catalyst for urban development. It is common now to read about music and other arts being the economic engine of local communities. In addition, music has a role to play in society as a means of connecting people and especially in engaging youth who are socially isolated or involved in anti-social behaviour.

It has been evident throughout this project that there have been quite long standing divisions between the different sections of the music community. There appears to have been a great deal of competition for the limited opportunities that present in both the business and government sectors. The overall ‘pie’ which is the size and extent of the music industry has stayed small. Cohesive action over issues has been limited. Creative and business collaboration has been restricted to a small number of projects. Many look to government support long term as the only means they can see of advancing their careers. This may be due to a sense of helplessness over the lack of growth in the industry. Young musicians have not been attracted to existing bodies that may represent them.

This project has shown that there is a hunger for change and the diverse elements of the music community have relished the opportunity to come together. Many reported that they had not ever met before despite working in quite similar fields.

Recommendation 1

Create the South Australian Contemporary Music Advisory Council (SACMAC) to develop strategies for the economic development of the local music industry and to champion it.

The SACMAC will have the specific aim of increasing the size and value of the music industry in South Australia. The SACMAC will be an independent body, appointed by, and reporting directly to, the Premier. It will be an advisory body only. Potentially it could sit structurally within the existing Economic Development Board with which it would have regular communication. It is envisaged that the SACMAC will be made up of representatives from the private sector, state and local governments, and not for profit sector. It could consist of a core group of members with proven track records in leading development especially in creative and technological industries but also in the arts, economic or social sectors.

Included in this group could be a representative from an existing key music industry body in South Australia such as Music SA. Knowledge and skills in specific areas, such as community safety and venue licensing, can be obtained by co-opting members with such expertise, for short periods of time. In this way the SACMAC can be agile in its operations.

It should have strong links to the National Live Music Office, and its manager (the National Live Music Co-ordinator), both recently established and funded by the federal government, in order to capitalise on its knowledge base and emerging initiatives, as well as identifying potential funding opportunities. This will have particular relevance to revisions of legislation and regulations recommended under the 'Regulation' section of this report. The SACMAC would also have regular communications with the locally based Music Industry Development Initiative (MIDI) as per the recommendation in the 'Education and Creative Development for Artists' section of this report. The MIDI could house administrative support for the Council.

The fundamental principle and strategy at the core of the SACMAC's work will be the development of a collaborative and innovative culture in the building of the music industry. Energies and resources can be multiplied exponentially when the community looks to grow the environment in which they all operate and as individuals leverage value from this.

Its functions would include:

- Oversight of the implementation of the Live Music Thinker's recommendations over the long term to ensure a strong and viable industry is developed and maintained;
- Assisting government to fully appreciate the commercial value of the industry;
- Increasing co-operation and collaboration across the various parts of the music industry and other stakeholders, with the specific task of developing a communication network which ensures consistent communication with those whose main income is obtained as a musician;
- Identification of threats to the music industry, and live music in particular, as they arise and seeking to resolve or mitigate their impact; identification of opportunities and seeking to foster, and capitalise on, them;
- Creation of the conditions which would increase the range of paid occupations available in the music industry throughout the State ;
- Capitalising on the existing strengths, including skills and investment models, as for example demonstrated in the State's festivals and film industry, and also leveraging these for the music industry;
- Increasing opportunities for interdisciplinary creative endeavour through research and collaborative enterprise;
- Monitoring and where appropriate finding alternatives to publicly funded activities that may directly compete with the private sector, and facilitating greater involvement of the private sector to strengthen the industry;
- Assisting in the development of a centralised statistics data base and research capacity for South Australia to support ongoing analysis of the music industry.

The SACMAC would be responsible for, in the first instance, leading comprehensive research on matters relating to each of the recommendations and from this, establishing an action plan. It would also provide leadership to project teams in the implementation of strategies.

The SACMAC would liaise with and at times work with the task force teams that exist within the State Government that have been set up to create collaborative action on the Premier's seven strategic priorities. The task forces most relevant to this are 'Vibrant City' and 'Safe and Healthy Neighbourhoods'. It would also have ongoing communication with the Adelaide City Council especially through the Adelaide Capital City Committee.



Education and Creative Development for Artists

Education

We are surrounded by music in our culture and nearly all of the artists that produce it begin their creative journey in their formative years. Music is one of the most accessible of the Arts as it can capture thoughts, feelings and imagination simply by listening. It easily creates interest in, and is appreciated by, the very young. A continuing interest with age however is not a given and music education is integral to ongoing access and appreciation. It is also an essential part of an overall education as it develops creativity and enhances academic and personal development.¹³ Early education provides the first step to a possible career pathway into the music industry. When the subject is taken to be a serious academic subject, and engaged in as such, children can begin to envisage themselves being dedicated to future studies and vocational activities that will allow them to make a career and gain an income from being a musician or working in the music industry. Moreover, music education is essential to the ongoing survival and growth of music related creative enterprise and industry.

Recommendation 2

Implement the proposed new national curriculum for the Arts to its fullest in South Australia and maximise opportunities for creative musical expression in children.

Research conducted by Morrison and Demorest in 2009 suggests that music is a biological predisposition in human beings, and that it is an integral part of a child's development. There is strong suggestion in the research that we are all hardwired for musical experience and as such we all have the innate ability to respond to music and to develop musically. The fostering of musical ability and responses to music in young children is important to all-round function and growth.¹⁴ Therefore, it is important that policy makers, and in particular those who develop early childhood education curricula, consider music as

¹³ Morrison, Steven J. "Music students and academic growth." *Music Educators Journal* 81.2 (1994): 33. Academic Search Complete. EBSCO. Web. 20 Feb. 2010.<http://www.menc.org/resources/view/harris-poll-links-music-education-to-higher-incomes>

¹⁴ *ibid*

an integral part of the development of young people when developing and implementing such policy.

In Australia, curriculum for the Arts is developed at the national level. Each educational jurisdiction is responsible for its implementation and schools have the flexibility to manage the curriculum in relation to the whole of school philosophy and approach to teaching. The Music Council of Australia found that in 2008 “only 23% of public schools offered a credible sequential, developmental program of music education.” Acara (Australian Curriculum Assessment and Reporting Authority) has recently released a new curriculum called ‘Foundation for the Arts’,¹⁵ which better reflects the importance of music and the Arts more generally in child development and provides a sequential music curriculum. It was endorsed by Ministers in July and is likely to come into effect shortly. It represents a shift in the value placed on the teaching of the Arts as it assumes that all students will study the five Arts subjects from Foundation to the end of primary school. The five arts of music, dance, drama, media arts and visual arts are treated equally as individual subjects rather than ‘Arts’ as a whole being treated as a subject. This means that children will have the opportunity to gain exposure to more sophisticated subject matter on each of the Arts subjects and can legitimately study more than one of the Arts subjects from first year of secondary school (Year 7 or 8). In Years 9 and 10, students will be able to specialise in one or more Arts subjects. The subjects offered will be determined by state and territory school authorities or individual schools but must contain the strands of learning related to ‘making’ and ‘responding’. The new curriculum takes the engagement and achievement of students in music seriously and this is demonstrated by the setting of standards of achievement to which the student is expected to perform.

Recommendation 3

Better equip generalist primary school teachers to deliver a quality music curriculum

On average, primary school teachers receive 17 hours training in music education as a component of their generalist primary school teacher training.¹⁶ In some schools specialist music teachers alone are employed to undertake the role of music development in young people but in others, and most commonly, it is left to generalist teachers at the primary school level. This is not an ideal situation for the quality of music instruction.

¹⁵ Acara Australian Curriculum: The Arts Foundation to Year 10 – 2 July 2013

¹⁶ “Supplementary submission from the Music Council of Australia: Teacher education in music” (Music Council of Australia, 2011) Available at: http://www.innovation.gov.au/HigherEducation/Policy/BaseFundingReview/Documents/Submissions/MtoS/Music_Council_of_Australia_-_Supplementary_Submission.pdf

Research has suggested that many generalist teachers do not feel sufficiently qualified or confident enough to teach music in pre and primary school settings.¹⁷ It is believed that, overall, the provision of music education in the public education system in Australia has generally been minimal and at an unsatisfactory level. The Department of Education and Child Development in South Australia is working to address this issue with particular reference to the implementation of the new curriculum described above. Resources are being developed and trialled with generalist teachers to ensure that they are better equipped to meet the requirements of this curriculum.

Sweden has made music mandatory in all primary education and at least one hour per week of high quality music education is delivered by a specialist. This is based on the belief that all children should be taught music. Students are also provided with access to instruments and space to perform. In Australia only 23% of public primary schools offer a program of classroom music education involving specialist training.¹⁸ Queensland has generally been acknowledged as the leader, in terms of quality and the amount of classroom time dedicated to music, offering an average of half an hour per week of music education by a specialist.¹⁹

If Australia is serious about continuing to develop its music industry it needs to invest in music education, just as it does in other areas that are considered to contribute to the economy of the country. A financial investment in the employment of specialist teachers to undertake the implementation of the new curriculum in schools would go a long way toward building the musicians and audiences for music into the future. Providing development and training for generalist teachers to build their skills and confidence in educating young students in music would further assist.

More broadly there have been many studies showing that musical engagement, starting from an early age, has extremely positive effects on many other non-musical areas of development. General learning, cognitive function, social capacities, physical and emotional wellbeing as well as cultural and social awareness are all proven to improve when music education and engagement is undertaken.²⁰ The new Foundation for the Arts Curriculum will go a long way toward improving public music education and providing greater opportunity for young people to be informed sufficiently to make a choice to pursue music as a vocation. Others may gain an appreciation of music and be inspired to seek it out as well as be an audience for it.

17 Suthers, L. (2007). Early Childhood Music Education in Australia: A Snapshot. Arts Education Policy Review, 109(3).

18 Hocking, Rachel., "University training of music teachers in Australia: primary school" in *Music Forum*, 14(3) , 2008. Available at: http://www.mca.org.au/web/index.php?option=com_content&task=view&id=272&Itemid=1

19 *Productivity Commission Inquiry into Education and Training Workforce: Early Childhood Development*, (Music Council of Australia, 2011) Available at: http://www.pc.gov.au/_data/assets/pdf_file/0008/105956/sub051.pdf

20 Morrison, 2010.

Recommendation 4

Make music education in high schools more accessible and engaging.

Assessing music education in secondary schools is a complex issue as there is quite some discrepancy across schools in their approach to curriculum. The success of the program appears very dependent on the quality and methodology of the teacher as well as the leadership team of the school. The access to music programs appears to be the major problem at this level. When, however, a music program exists in a high school it is staffed by specialist music teachers. In South Australia, under the current arrangements, Year 8 students may be unable to continue at the same level of tuition in high school that they had previously received in primary school. This is because Year 8 music education is commonly aimed at students who have had no previous experience of music education and the program may last only one term or one semester at most. It is at this point that students commonly drop out of music at school as it holds little interest especially for those who have, for example, been part of an instrumental program in primary school.

Academics and teachers have reported that music in secondary schools is frequently not popular or is perceived not to be stimulating.²¹ It seems that it fails to engage students. In contrast teenagers consume music voraciously with many having their own bands, owning mp3 players, and attending concerts in their own time. There seems to be a large disconnect between the students' interest in the school music program and that shown toward informal involvement with music. The actual playing of, and listening to, music is more attractive to students than for example learning musical theory in isolation or only providing access to specific genres of music such as classical or jazz. Creative approaches to teaching and learning are significant in the development of interest in music and music subjects by students at school and retaining them in classes. Music teachers require appropriate and cohesive tertiary studies to be able to develop and structure learning materials and activities for secondary school students. Engagement of students should be at the heart of any program developed by teachers.

A few high schools in South Australia have a Special Interest Music Centre (Marryatville, Brighton, Woodville, Fremont-Elizabeth). These centres select from students, from across South Australia, who have applied to attend and who have demonstrated a talent for music. There are however limited spaces. The schools involved in implementing this program are demonstrating a serious commitment to the subject of music across Years 8-10 and have an

²¹ Ross, 1995; Plummeridge, 1997; Green, 2002; National Review of School Music Education, 2005; St George, 2010

expectation that the students studying at the Centres will undertake SACE studies in music in Years 11-12.

Engaging students in music programs has been shown to reduce truancy and increase participation by those who may not have been achieving academically. It has also been used with success to build social inclusion, identity and self-esteem in at risk students. This is evident in projects such as Northern Sound System located in Elizabeth, an outer northern suburb of greater Adelaide. Northern Sound System is a highly valued service to young people. It provides facilities such as rehearsal space and recording equipment, along with guidance, mentoring and networks. It facilitates entrance into the wider music industry.

Sweden has a forward thinking education system. The curriculum emphasises creativity and it spans the entire period of education for which the state is responsible. It is therefore not surprising that Sweden has a very high number of working artists, songwriters, producers and music professionals, because it views the creation of music as fundamental to its high school music curriculum.²² Vocal and instrumentally based composition and improvisation is encouraged as is peer-based collaborative writing. The role of production and computer based skills is also emphasised and acknowledged as a key tool in the modern musical landscape. It has been stated that music education has been a key factor in transforming Sweden's music workforce.

The *Musical Futures Australia* provides an example of a contemporary music program which provides a methodology for student engagement in schools. The program was developed in the UK and offers a hands-on approach through performance to teaching and learning music. It has been implemented in a number of schools and there is research that indicates its effectiveness. The aim is to fully engage students and it includes students making music in bands with their friends. The Fremont-Elizabeth High School is a Champion School for Musical Futures Australia and as such its ethos underpins everything the school's music department does. This school is also a Special Interest Music Centre. Musical Futures Australia program, inclusive of well trained music teachers, could be considered as an option for wider implementation in South Australian schools to increase engagement by students in music. More broadly, activities at the secondary school level, such as "Battle of the Bands", can develop interest in students who may otherwise have indulged their love of contemporary music and developed their skills only outside of school.

²² Lagerberg, Rikard "Swedish music – the sound of success" last modified August 22, 2012, <http://www.sweden.se/eng/Home/Lifestyle/Music-room/Reading/Swedish-music--the-sound-of-success/>

Musical Futures Australia

Musical Futures Australia is an approach to teaching and learning that can be overlaid onto any existing curriculum or syllabus. Musical Futures is not run as a scheme but more as an ethos that underpins how the music department of a school operates.

Originating and now implemented in over 1000 schools in the UK, the program places hands on student performance at its core and is designed to bring students and their existing passion for contemporary music together in the classroom. There is a special focus on 12-14 year olds as this has been identified as an age where students seem to lose interest in learning music in school.

Musical Futures is being used successfully in 16 schools across Victoria, New South Wales, Queensland and South Australia with extremely positive results, including the first ever primary school program staged anywhere in the world. When it was piloted in Victoria the program was supported by research from the University of Melbourne. In brief, the University of Melbourne found that Musical Futures had a positive impact in terms of students' attitudes toward music, self-esteem in relation to music, engagement with music, levels of musical attainment, group work, task oriented behaviour and general class behaviour.²³

Recommendation 5

Integrate TAFE music courses into Adelaide College of the Arts.

The music program of TAFE SA is delivered at Noarlunga and Salisbury campuses. Both campuses offer Certificate II, Certificate III, Diploma and Advanced Diploma in Music. Salisbury campus alone offers Certificate III in Technical Production, and Certificate IV and the Advanced Diploma in Sound Production. The Certificate courses are between 6 -12 months full time. These programs have a good reputation in their respective fields of music training. A central location in the city, such as the TAFE Adelaide College of the Arts (AC Arts), for such courses however may not only attract more aspiring musicians it may also contribute to the creation of a creative cluster/hub (see discussion on page 50). Such a hub would in and of itself be attractive to musicians wanting to further their studies as they would be surrounded by film students, choreographers, dancers, designers, visual artists and actors. Whether music

²³ "Music Futures and the Australian curriculum" accessed June 5, 2013, <http://www.musicalfuturesaustralia.org/mf-and-the-australian-curriculum.html>

subjects continue to be also offered in the Northern and Southern campuses would need to be considered with respect to capacity and funding.

The AC Arts on Light Square is a vibrant multi-disciplinary arts centre. It offers the opportunity for a natural cross pollination of ideas. This would create a fertile ground for collaboration with other arts disciplines and in turn would contribute to the growth of city vibrancy.

Recommendation 6

Increase the visibility of existing educational opportunities through a prospectus of all available post-secondary music courses across South Australia.

Lack of visibility of the courses and their connection to the music industry makes it hard for some educational facilities to thrive. There are a few pathways available to those wanting to study music at a post-secondary level in South Australia. Knowledge of these pathways by prospective students and the music scene in general is quite limited. The State may be missing opportunities to capitalise on existing talent either by attracting students or by keeping young people with musical aspirations in South Australia. The Elder Conservatorium of Music last year commenced a degree-level course in contemporary popular music: the Bachelor of Music (Popular Music and Creative Technologies). This and the Sonic Arts/Music Technology course are two forward thinking and progressive music courses that are amongst only a handful of their kind in Australia in that they offer high level training in electronic and contemporary music in a university environment. It appears however that this course is as yet not well known by the community generally and by the music community specifically. It is however reaching capacity for student enrolments.

Recommendation 7

Work in conjunction with the Centre for Aboriginal Studies in Music (CASM) to increase opportunities and pathways for Indigenous musicians via a 'one stop shop' website.

The Centre for Aboriginal Studies in Music (CASM) at The University of Adelaide is a facility unique in Australia. CASM responds directly to the identified requirements and aspirations of Aboriginal and Torres Strait Islander music students and offers the opportunity for Aboriginal and Torres Strait Islander musicians to acquire formal tertiary level qualifications in music. CASM offers a one-year CASM Foundation Year, a one-year Diploma in Aboriginal Studies

in Music, and a two-year Advanced Diploma in Aboriginal Studies in Music. These programs provide culturally relevant and supportive professional training in music as well as pathways to other tertiary programs of study and employment opportunities. CASM has achieved a national and international profile through its long standing support for Indigenous musicians and music, its innovative educational programs, and its extensive integrated program of community engagement and performance work.

The Reverb project team met with the staff of CASM on a few occasions and also participated in a round table discussion with staff, students and Indigenous musicians. A few key themes emerged. Young musicians were often unclear or lacked sufficient knowledge about the broader industry pathways available to them for furthering their careers and breaking into the music industry. They also stated that when good opportunities arise for Indigenous artists in South Australia there is quite often not the support and guidance of appropriate management and infrastructure to maximise the opportunities presented. This is a problem common to musicians across the board in South Australia but seems somewhat amplified for Indigenous artists. In addition to the CASM Program, there are some other programs in place that are making efforts to improve opportunities for Indigenous artists such as the Nexus and Kururru Youth Arts Contemporary Music initiative and The Spirit Festival. The Spirit Festival is working with other Australian festivals to ensure that South Australian artists gain increased opportunity and exposure. However, targeted mentorship and management is required to capitalise on these events and create a career trajectory for South Australian Indigenous artists.

One cost effective method for providing career advice and support to Indigenous artists, discussed at the round table, would be the establishment of a website dedicated to career advice. It would be a 'one stop shop' website that is regularly updated and would include suggestions from respected and successful Indigenous artists.



CASM Soul Band: source CASM, *The University of Adelaide*

Recommendation 8**Establish a new international, tertiary level institution in Adelaide for contemporary music education and development**

A new independent tertiary level, contemporary music school should be established with the aim of making Adelaide the heart of contemporary music training and development in Australia. It would offer a mix of tertiary level musical and music industry training which would be fully integrated with vocational development and create clear pathways to employment in the music industry. Equivalent international schools would set the standard for this school. The comprehensive nature of the proposed school's education and its focus on contemporary music would set it apart from other tertiary education options in Adelaide. It would require the student to commit to a vocational path at the outset. The proposed school would offer a unique and progressive environment, akin to the National Institute of Dramatic Art (NIDA)²⁴, which offers accredited music training as an incubator for local, national and potentially international talent. A dedicated learning environment for musicians from South Australia and elsewhere would without doubt raise the quality of live music, and attract and retain young people, in Adelaide. It would provide an environment rich in opportunity for students and industry for creative networking and entrepreneurial activity.

The Brighton Institute of Modern Music (BIMM) in the UK has proven itself as an excellent model of a higher learning institution that delivers high standards in musician development and the music produced. It is recommended as the model most relevant as a reference for the development of a dedicated contemporary music school in Adelaide. It may be that the Adelaide school could be a local branch of (or a sister organisation to) the BIMM upon negotiation. This would provide a direct connection to BIMM and potentially guidance in the establishment and ongoing management of the school. It may also be possible for the BIMM to partner with a local university, such as the University of Adelaide, which has only recently commenced a Bachelor of Music (Popular Music and Creative Technologies) and Honours degree (see Recommendation 6).

The model of education used means that students connect with the music industry throughout their education. In addition the school is comprised of educators and facilitators who are themselves highly accomplished musicians and industry professionals with documented careers in both the UK and international scenes.

²⁴ Students of the National Institute of Dramatic Art (NIDA) enrolled in undergraduate and postgraduate study programs are provided an environment of multidisciplinary learning, professional mentoring, cross-media collaboration and industry exposure, experience and opportunity.

The BIMM model at a glance:

- It provides excellence in music education by offering fully accredited music degrees, diplomas and teacher training;
- Courses cover multiple aspects of the music industry – performance, music business, music production, event management;
- Teachers are highly skilled in their particular musical field and are active in the contemporary music industry;
- Teaching is conducted via group learning sessions in specialist areas and live performance workshops with other musicians. One-on-one tutorials with instructing musicians for mentoring and skills development purposes are a part of the teaching model;
- It offers rehearsal facilities for students that are made available around the teaching timetable, as well as availability at a nearby rehearsal studio.

The Adelaide school could also use the BIMM model and primarily have established industry professionals as teaching staff, including accomplished musicians and industry workers, actively participating in the music industry at a national and international level. Students would have direct access to mentors and nationally and internationally connected teaching staff who can prepare them for, and support them as they progress in, a meaningful career in the music industry. The school would benefit from co-location with other creative schools and industries. The Adelaide Studios (home of the South Australian Film Corporation) and surrounding arts organisations in Glenside would offer a wonderful creative environment with some synergies in activity. It is envisaged that funding will be sourced from the private sector with assistance from the State and Commonwealth Governments through the provision of start-up funding. Creative Partnerships Australia could play a role in sourcing contributors.



Clipsal 2013, Victoria Park: source Helen Page Photography for Music SA

Ongoing Artistic Development

Artistic development is an important part of a musician's long-term career. Most musicians will have their own view of what type of success they are trying to achieve but they will require the opportunity to develop their craft and maximise their individual potential, in whatever direction this may be, whilst living in South Australia. Developing each artist's ability to engage professionally with their craft will help them create, and capitalise on opportunities presented as a result of their artistic output.

Recommendation 9

Increase the funding to Arts SA's Contemporary Music Fund to better support artists, entrepreneurs and industry organisations.

Update: Since writing this recommendation the Parliament passed an amendment to the existing gambling legislation (Statutes Amendment (Gambling Reform) Act 2013) in July 2013 which increased the Live Music Fund from \$500 000 to \$850 000 per annum.

An increase to this fund allows for greater support to be provided directly to South Australian artists and toward the continued development of the local industry. The fund was created in 2002, as the Community Development Fund, as a result of amendments to the Gaming Machines Act 1992 and its amount had not changed since then. It set aside at least \$500 000 per financial year "towards programs that will be of benefit to the live music industry." Following from this legislation the Live Music Fund was established under the management of Arts SA in 2003. Funding has been provided to a number of initiatives:

- Music SA — www.music.sa.com.au;
- Fuse Festival and Business Conference;
- Musicians in Schools;
- Live Music Fund Grant program.

Grants have been provided directly to artists through a 'peer- assessment' process, and to programs, such as the Fuse Festival and Carclew Youth Arts Centre's Off the Couch initiative. Organisations, including Music SA and the Northern Sound System, and other small initiatives as they arise, have also been assisted.

In 2012, Arts SA reviewed the Contemporary Music Program (previously the Live Music Fund). Broad sector consultation on the most effective use of funding was carried out and on the basis of this a new funding model was designed. The majority of the participants in the South Australian music sector interviewed for that review believe that there needs to be more support for the local industry to develop through 'infrastructure and services' being available for artists to build sustainable careers whilst continuing to live in South Australia.

Subsequently, the new funding model for contemporary music in South Australia through Arts SA was designed to; strengthen the South Australian contemporary music sector through long-term strategies that build on its national and international reputation; support existing and emerging professional South Australian-based artists to create quality original music and live performance opportunities locally, nationally and internationally; and assist in the development and sustainability of South Australian based, nationally focused music businesses that support local artist career development.

Key areas of change in the program included:

- division of 'artist' and 'industry' funding initiatives;
- artist development funding program categories;
- investment in the national contemporary music export office, Sounds Australia;
- quarantined funds for investment in song writing development initiatives;
- criteria for 'Organisations' funding' with a peer assessment process;
- Strategic Partnership grants for micro and small-to-medium SA music businesses;
- quick-turn-around 'Pocket' grants for micro and small-to-medium SA-based music businesses.

These are all sound investments for the future of artist and industry development. Arts SA consulted with the Reverb team over development funding options in 2013.

The new funding sends a very positive message from the government of South Australia that it is serious about supporting its musicians and music scene generally. It is recommended that the legislated funding allocation be reviewed regularly for its adequacy to assist the music industry.

Recommendation 10

Establish the 'Music Industry Development Initiative (MIDI)', a music and industry development office for local mid-career artists and entrepreneurs to raise their performance to national and international standards.

The artists in mid-career are the least supported by current training and development opportunities. Most training and development occurring in Adelaide is provided to entry level performers. Those who are more advanced in their careers have some access to training and development at the appropriate level but only on an ad-hoc basis. The most efficient and effective way to achieve development at this level, for maximum effect on the industry, is to create an office with some responsibility for mid-career development. Its primary function would be to implement a mentoring program. The aim of the office would be to create mechanisms for the development of selected South Australian professional, practising musicians and creative entrepreneurs looking to become industry professionals in the global music market.

The office would establish a bank of highly regarded and successful industry professionals to act as mentors for up to 12 months. The program would provide options in structured mentoring for artists and creative entrepreneurs over a 12 month period. Each participant may have a number of mentors over this time or just one over that entire period depending on the availability of the mentors. The Friends of SA initiative outlined in the following Chapter entitled 'Development of Industry Professions is a loosely formed group of individuals, each of whom have been successful in the music industry, and from which mentors for the MIDI can be drawn. The program would enable the selected artists and entrepreneurs to develop and present their music or business more effectively. Artists would also be assisted through the program to develop important networks for further artistic and business career growth. Participants will be better placed to build sustainable careers in national and international markets as a result of the program.

Artistic development will include song writing, live performances and production. The industry stream will have a focus on developing business skills and enhancing professional industry networks and capabilities for global market development.

The MIDI would assist in building South Australia's brand as a 'music city' on the national and international front through the artists and their high quality, 'export ready' music.

The intended benefits would be to:

- Support professional and artistic development through mentoring;
- Build the profile and commercial value of South Australian contemporary music;
- Maximise the potential of artists and export readiness of their products;
- Improve industry capacity and sustainability;
- Identify and develop new international markets;
- Build international relationships with industry and strengthen sister-city relationships;
- Assist artists to maximize the value of 'showcasing' to them.

The office could also play a role in developing Adelaide as a desirable stop for artists touring internationally through housing an industry representative. Their role would be to welcome touring guests and to provide them with some experience of the State's natural and cultural environments.

Recommendation 11

Make high-level training opportunities available to all career artists.

Stagecraft, song-writing, showcase mentoring and visual communication are areas in which career artists may wish to pursue ongoing personal development.

Stagecraft

Currently there is limited training available for performers to learn performance skills and stagecraft in Adelaide. Live shows are more important than ever with an increasing reliance by performers on live performance rather than record sales to earn income. A great stage show is a highly valuable asset for any artist regardless of genre. The capacity for a performer to make a meaningful connection to their audience is essential regardless of the genre of music, whether it be rap, D.I.Y shoegaze band, a jazz ensemble or a death metal band. Stagecraft and connecting with audiences is not always a skill inherent to the artist but it can be a defining element in creating a loyal fan base.

Performance skills are teachable and there are experts in Australia and internationally who are able to coach local artists in these skills. It is becoming more common for artists to have a 'live producer' just as they may have a studio producer. The provision of such training will maximise the quality and competitiveness of local performers and assist in attracting audiences to live performances.

There are a variety of avenues available for the provision of performance skills training. At the entry level there are a number of existing training organisations that could include this in their curriculum. At the higher level for artists who are already performing regularly, the methods of training provision may vary. High level expertise may be purchased for one on one or group training. It may, however, require some initial funding and support from government to raise awareness of its value and before its value is fully recognised.

Song writing

Song writing and composition is at the heart of all original music and still remains the foundation for the music industry. Songs and composition are as valuable now as they ever have been. They provide the key income source for songwriters, producers, composers, and publishers. Their importance extends across the industry from record labels to live music venues.

It is therefore critical that song writing and composition, and the culture that supports it, are valued and fostered in South Australia. Fostering song writing and composition, and lifting standards and competitiveness, can occur through:

- Song writer conferences and showcases;
- Awards;
- Competitions;
- Collaboration between artists.

Collaboration between artists on song writing and composition is less likely to be a structured activity or program. It is, however, possible to create an environment where it is more likely such as through rehearsal spaces, creative hubs and the provision of the means to do this through formal training courses or conferences.

Showcase Mentoring

Showcasing an artist's talent and skill is important to their development. Guidance from managers or other experienced leaders is what makes this experience truly beneficial to their careers. Showcasing alone will not have a significant effect on the development of Adelaide's and the State's music scene. There needs to be a new model for showcasing events that maximises the benefits of these events to artists and which includes assistance in managing the artist's experience. There is, however, a shortage of experienced managers in the State.

Mentors could act as substitute pseudo-managers. A central bank of mentors could be established to provide support and planning expertise in this area through the proposed MIDI. This will help ensure that local artists without professional management are still able to access the skills and experience that can make their attendance at these events meaningful.

Visual Communication

The visual aesthetic of an artist's image is a key component of a professional act. This includes logos, film clips, press shots, album art and website design. Creative, attractive and appropriate visual communication is not an innate skill. Artists themselves can be trained to manage their visual communications but it is also an opportunity for collaboration with other arts disciplines.

Online streaming has changed the way many consumers engage with music and music videos are now seen as an absolutely integral part of the promotion strategy for an artist. YouTube has now become the most popular online tool for the public to discover new music (radio is still ahead overall), and amongst teenagers has become the preferred platform for listening to music.²⁵ Film clips are essential to artists developing a keen fan following and therefore to securing a future career. They are generally quite expensive and out of reach for musicians. The local initiative, 'Clip It', aims to assist Media Resource Centre (MRC) "filmmakers develop and produce music clips for local SA bands, interpreting each song in a creative and resourceful way." It has facilitated opportunities for early career film makers to team up with local artists. 'Clip It' is run by the MRC, in association with Canon Australia. Increasing the visibility of this project may encourage artists to use this medium for image management and promotion.

Music artists may also require support to develop their logos, album art, press shots and web design.

Recommendation 12

Provide artists with training in new online platforms to distribute their music.

There are many free or cheap on-line services that artists can use to help them connect directly to fans and industry. This is a major shift in the industry that can deliver real benefits to artists in South Australia. These services can be used to access audiences and income streams directly.

²⁵ "Music Discovery Still Dominated by radio Says Nielsen Music 360 Report" last modified August 14, 2012, available at: <http://www.nielsen.com/us/en/press-room/2012/music-discovery-still-dominated-by-radio--says-nielsen-music-360.html>

They may also offer artists personalised services like ‘meet and greets’ after gigs, or they may make available to fans the artist’s music tracks that have not been previously released.

Some of these services are better than others and some serve niche markets. Artists need access to timely and quality information to help them capitalise on these services. A regular “tech update” every six months for artists and managers could provide them with current information on new technology and software programs available for their use and provide instruction on how to use them. It would be possible to pilot an event like this to gauge interest and value. Existing training providers could provide a training program of this nature. It could also include information on intellectual property copyright and the musician’s rights to royalties from their creations.

Recommendation 13

Continue the implementation of The National Indigenous Contemporary Music Action Plan within SA and appraisal of its progress and outcomes.

In 2008 Arts SA contributed to the creation of The National Indigenous Contemporary Music Action Plan (ICMAP) through the Cultural Ministers Council’s Contemporary Music Development Working Group.²⁶ This Plan is still relevant. It highlights issues, goals and the appropriate actions to be undertaken to achieve the desired outcomes. It tackles, in a thoughtful and succinct way, issues such as: improving the exposure of Indigenous contemporary music; improving business skills in the Indigenous music sector; strengthening existing networks and organisations; addressing shortages of facilities and equipment; maximising opportunities for young and emerging Indigenous musicians; strengthening links between culture, language and Indigenous contemporary music; targeting support to improve sustainability; enhancing income generation; broadening philanthropic support; improving conservation and access, improving data collection; building the policy profile of Indigenous contemporary music; and managing and reviewing the action plan. It is recommended that this work be continued and supported fully.

In its 2012 review of the contemporary music program, Arts SA recommended investigations into the development of a role for an Aboriginal and Torres Strait Islander (ATSI) Contemporary Music Industry Development Officer to work

26 “Indigenous Contemporary Music Action Plan: Towards a stronger Indigenous contemporary music sector”, (Canberra: Commonwealth of Australia, 2008)
available at: http://cmc.gov.au/sites/www.cmc.gov.au/files/Indigenous_Contemporary_Music_Action_Plan.pdf

within an appropriate organisation. The Centre for Aboriginal Studies in Music (CASM) could be considered for this. This role would include building on the work done by the ICMAP at a local level and actively pursuing the outcomes outlined in the ICMAP. This seems like an excellent way of ensuring a continued push in this important area.

Recommendation 14

Invest in creative hubs that provide artistic stimulation and rehearsal spaces for musicians, and support 'cross fertilisation' of the arts.

Creative hubs act as incubators of ideas and projects and encourage collaboration and experimentation. Creative and social communities of like-minded people can come together and by coming together nurture artists and develop audiences. It is an opportunity to exchange ideas, build skills, and create networks and to work.

Hubs can assist aspiring musicians to develop the skills, expertise and professionalism necessary for a successful career in the music industry. The cross pollination of creative arts is an impetus for creative collaboration and often for musicians to form artistic ventures to advance their careers. The former Integrated Design Commission SA formulated a model for Adelaide's future sustainable development that incorporates the concept of urban hubs throughout the Greater Adelaide area. The implementation of this model would



The Mill Creative Hub, Angas St, Adelaide: source CW Creative Productions

establish creative clusters in major areas of the city (e.g. Adelaide CBD, Marion, Port Adelaide, Elizabeth), in which to promote sustainability and strengthen work, leisure and lifestyle activities in decentralised urban spaces.²⁷

Recommendation 15

Develop a Government Policy to reduce barriers to creative hubs.

A number of creative hubs exist in Adelaide as a result of either geographical co-location of creative enterprises or as a network of individuals throughout a community. The hubs that have grown organically usually have done so as a result of the strong will and desire of their creators and participants, and they survive because of a common direction. A sense of autonomy over their direction is highly valued. Government support, however, may sometimes be required to sustain or enable these hubs to grow.

Finding an existing space or establishing a new physical space for a creative hub presents many difficulties. A space that can accommodate the varying needs of artists alone can be problematic but then to meet all the requirements under the numerous regulations can be daunting if not defeating. There can be a variety of reasons for difficulties in a single building. Negotiating the building code requirements (primarily safety issues) is particularly demanding when a building's use is changed. For example, a creative hub will inevitably have a primary purpose of being a place of gathering, and potentially entertainment and this will not have been the building's previous use if it was a warehouse or a retail outlet. It will therefore require a change in classification, which is accompanied by a range of regulatory requirements and which are usually costly. Limited tenure with the risk of displacement by a new business is another barrier or deterrent to such ventures.

Currently there is no established system for the management of housing creative hubs in the city centre. The Arts Infrastructure Support Policy 2012 of NSW Arts could provide a template for South Australia in how to manage the spaces that have been identified for this purpose.²⁸ This policy facilitates "co-location of tenant organisations at a single property or precinct, and provides opportunity for associated benefits of this co-location to be captured. These include: efficiency benefits (e.g. through sharing of resources); benefits of co-located activities to audiences; and creative collaboration as well as informal interaction between tenant organisations". In

²⁷ For further details on this project listen to Tim Horton's public forum presentation and view the PowerPoint slides at www.adelaide.edu.au/wiser/events/past/#tim-horton

²⁸ "Arts NSW: Infrastructure Support Policy" (Sydney South: New South Wales Government, 2012)
Available at: <http://www.arts.nsw.gov.au/wp-content/uploads/2010/08/Policy-document-FINAL-AUG2012.pdf>



Music SA 2013, Nexus Multicultural Arts Centre, North Terrace, Adelaide source: Helen Page Photography



AWEA West End Xmas, Leigh St, Adelaide: source Helen Page Photography

In addition the policy assists in preserving and adapting significant heritage buildings for arts and cultural use and ensures they are appropriately maintained, accessible to the public and preserved for future generations. This supports the NSW Government's broader priorities such as urban renewal and tourism objectives.

Renew Adelaide is an organisation that specialises in finding new activities or ventures for currently unused or abandoned buildings in Adelaide. Collaboration or consultation with Renew Adelaide in the creation of a policy to guide the provision of physical spaces is likely to result in more rapid progress. A policy will lead to greater understanding of regulatory requirements by the creative enterprise as well as better understanding by the state and local authorities of the needs of the creative enterprise.

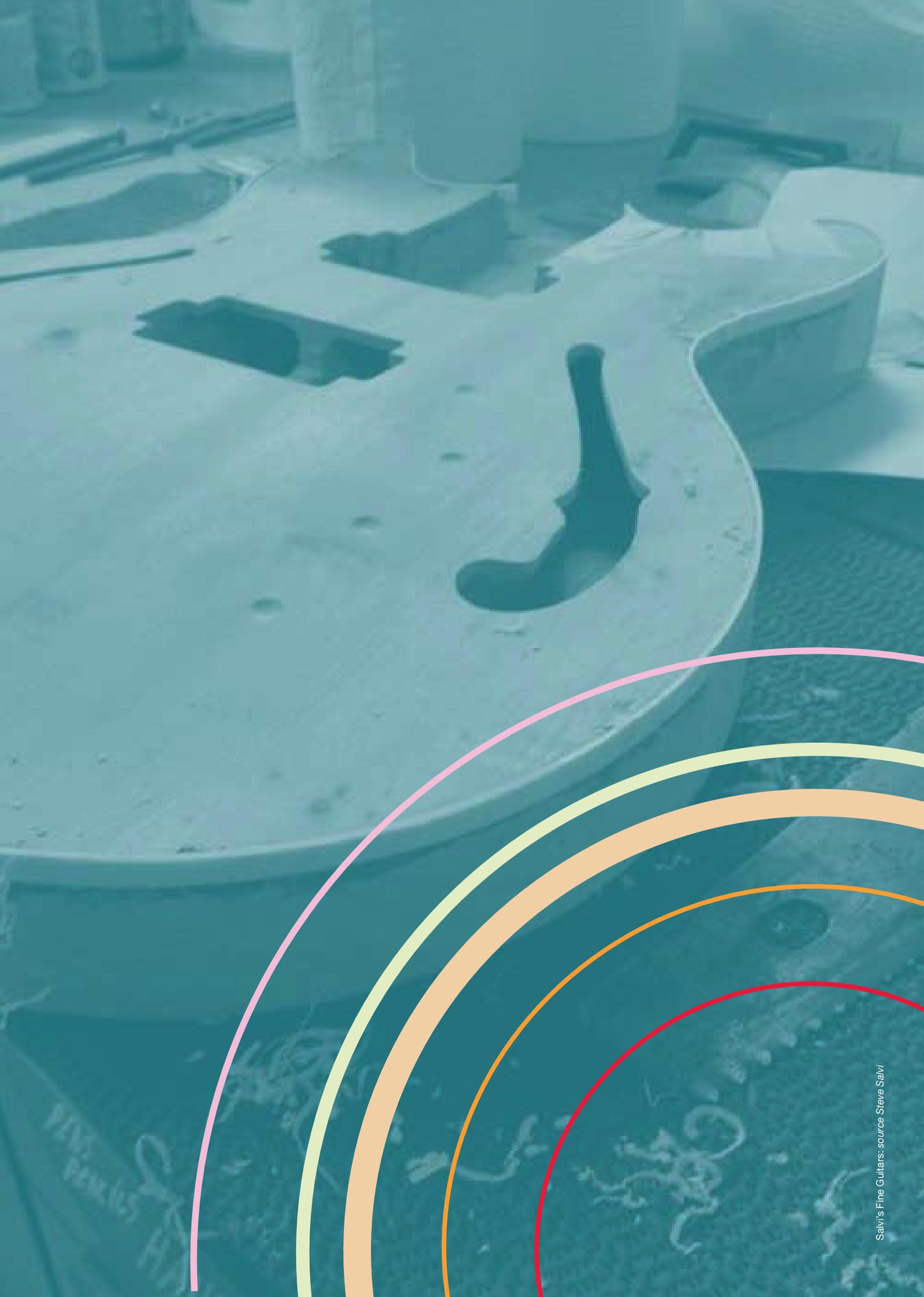
Recommendation 16

Form a new creative hub from an existing cluster of creative organisations.

The hubs and communities referred to above are generally single organisations or communities. There are other spaces made up of several organisations that form a cluster or creative community.

There is potential for a new creative hub to be made up from existing organisations in the West End of Hindley Street and along Morphett St to Light Square. In the space of about two blocks there is Fowlers Live, Music SA, SALA Festival, Nexus, JIVE, University of South Australia, AC Arts, Mercury Cinema, the Jam Factory and Enigma Bar. The area also includes several back-packers' hostels and hotels. This area could be enhanced and re-invigorated to make it more appealing for people who work in this area and for tourists. Integrating contemporary music courses into AC Arts would automatically increase the number of musicians in the area. There are also several unused buildings that could be rented out to other artistic communities at a subsidised rate. Local venue owners may also agree to allow TAFE students to use their stages to practise during the day which will keep musicians in the city, improve their stagecraft and give bands a place to rehearse in the city.

The government also has the option of making buildings available to create new creative hubs. By providing subsidised tenancy, small creative enterprises and artists will be able to co-locate in a central location for minimal cost. This will reduce overheads for artists and enterprises and foster a sense of community and collaboration.



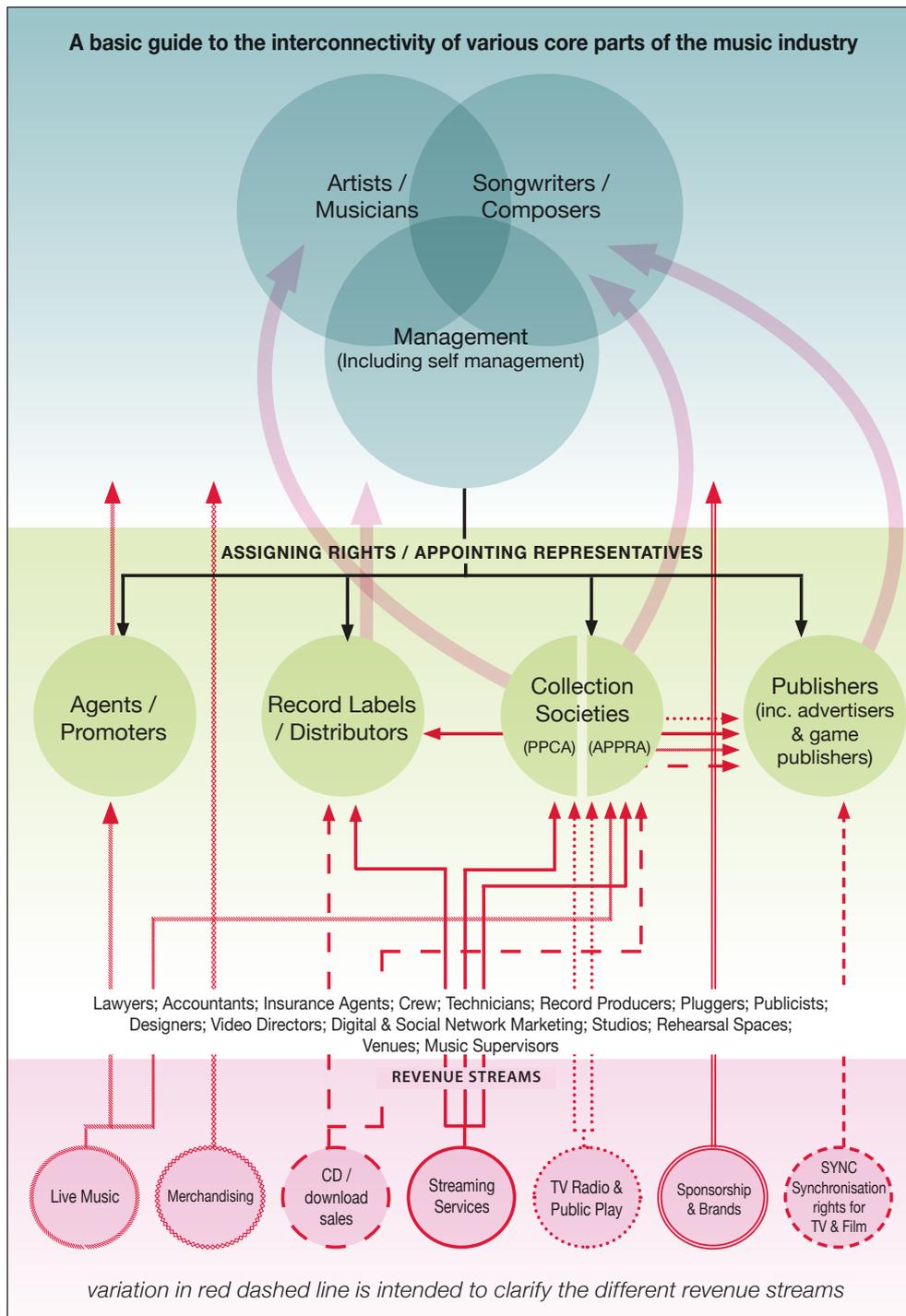
Development of Industry Professions

The music industry starts with the artist but is not only about the artist. An infrastructure and network of people grows around an artist and furthers their career. The flow on effect from the creation of music keeps millions of people employed worldwide. A robust industry creates employment in all areas of music from its creation, to its performance, and to the distribution and promotion of music. The types of employment and/or business include; music publishers; producers; recording studios; sound engineers; record labels; retail and online music stores; performance rights organisations; booking agents; promoters; music venues; road crew; artists; managers; business managers; entertainment lawyers; journalists; educators; musical instrument makers and the myriad of new opportunities and businesses being forged in the ever developing music industry technology. All of these play a role in an active, healthy industry. A healthy industry in turn supports and nurtures the musical vision of the artist and can provide the framework for all parties to gain maximum benefit.

This section of the report covers the ways in which the broader music industry can be developed. This includes all of the activities that are ancillary to the creative work of the artist, rather than the artist him or herself. It should be noted, however, that it is very difficult for musicians to earn a living due to low rates of pay for live performances and due to the fact that the work is rarely full-time. Those who are able to do so often wear several work “hats” within the industry and develop more than one income stream. The development of other vocational streams within the industry can assist in keeping the music industry as the provider of a viable source of employment.

Development of industry professions

The diagram below is meant as a basic guide to the interconnectivity of various core parts of the music industry. There are infinite possibilities of how this chart could flow. In many cases the artist, musician, songwriter, composer can perform all of these roles themselves including selling directly to their fans. Traditionally the major record labels had interest in signing acts for 360° deals in order to capture all revenue streams but with ever increasing shifting platforms of media, promotion and recording techniques there are no hard and fast rules of how the industry has to work in order for an artist to have success.



Audit of Adelaide Music Industry as at August 2013

| | GOOD | AVERAGE | POOR |
|-------------------------------|----------------------------------|----------------------------------|----------------------------------|
| Artists managers | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Promoters | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Booking Agents | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Music Publishers | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Technicians Record Producers | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Technicians Studio Engineers | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Recording Studios | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Music Supervisors | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Sound Engineers | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Entertainment Lawyers | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Accountants | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Road /Stage Crew Technicians | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Pluggers | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Publicists | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Designers | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Video Directors | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Digital & Strategic Marketing | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Rehearsal Spaces | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Venues | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Festivals | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Lighting Engineers | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Recommendation 17

Ensure a high quality website exists to profile contemporary musicians, and include quality film clips, statistics on their performance history, and other information that acts as criteria to indicate the current status of the artists.

Update: Achieved in the course of the residency.

Adelaide has lacked a dedicated and regularly maintained and updated database of musical performers and artists who are operating at a professional level. Such a database is an important aspect of improving Adelaide's live music culture to assist promoters, venue bookers and the public. It provides the means by which bookers may select performers for events and venues and make contact with them. It also assists in developing an appreciation in performers of the standards required for success. The information allows international bookers, not familiar with SA artists, who may be looking for an artist or band to easily find a support act for an international touring act. It assists in maximising exposure of local artists and makes the selection process easier for bookers and therefore increases the likelihood of local acts being considered.

Earlier this year the Reverb team met with Music SA to discuss changes to their existing website. Relatively small changes have meant that the website now has an impressively comprehensive listing of artists along with the characteristics mentioned above.

Recommendation 18

Establish a network of accomplished professionals – Friends of SA

A lot of the business in the music industry is done through people networks. In Adelaide there are a limited number of people who have large professional and international networks. The development of a network of accomplished professionals to mentor and help build linkages and opportunities for local artists and managers could in the first instance be facilitated and nurtured by the proposed MIDI (see Education and Creative Development for Artists Chapter). This could be achieved through bringing together industry professionals, who have in common a connection to South Australia via established personal or business connections, to participate in what will be known as Friends of SA. It is most likely that those people who originate from South Australia, but perhaps are now located interstate or overseas, will be the founding members. This association will be formed on a 'good will' basis and will be tasked with

promoting the assets and value of South Australia along with its local artists, nationally and internationally. They could be approached to be included on a register of professional mentors for local artists and professionals. Some discussions have already taken place with a view to forming the Friends of SA. Friends of SA may also be asked to be involved in assessment panels for grants, awards and other opportunities for local artists.

As described earlier in the discussion related to the proposed MIDI, mentoring is an inherent part of, and vital to, the music industry both for current skills development and succession planning. The industry is constantly evolving so being able to liaise regularly with a mentor helps a person stay in touch with developments.

There are many ways that mentoring and internship schemes can be implemented. Essentially, it involves developing a network of highly regarded industry professionals willing to donate a few hours of their time a month to mentor local artists, as an in-kind donation, via email, Skype, telephone and face to face meetings. It uses networks, new technology and skills and experience matching to create cost effective pathways for local artists to access the experience and knowledge of others to help guide their careers.

This report suggests that the proposed MIDI could provide the foundation for the Friends of SA but there may be other possibilities for example via the Economic Development Board.

Recommendation 19

Develop music industry specific traineeships or internships

The South Australian government may assist in building music industry skills through the provision of specific traineeships. These traineeships/internships would provide mentoring, specific skills training and on-the-job work experience. This would provide an alternative model to academic training and may suit those who have had some industry experience and do not wish to participate in formal training alone. This model could be applied most successfully to the areas of the industry in which there is an immediate need.

Management

It has been identified that one of South Australia's biggest challenges is a lack of professional guidance for artists normally provided by managers. Ensuring there are a sufficient number of professional artist managers is an important, logical first step in developing the music industry in South Australia.

It is beneficial to artists when managers have a background in marketing, accountancy and administration as they need to know how to run exciting and proficient marketing campaigns, balance the books and run an efficient office. Few artists can achieve to the maximum of their potential without experienced and savvy managers.

Mentoring is seen as one, possibly the most, direct way to learn artist management skills as it combines direct knowledge and guidance from an industry professional as well as networking and relationship building with a mentor relevant to the mentee's career in a fundamental way. Often a whole world of networks and contacts can become available to the mentee, which can be a big advantage as it can kick start their career as an industry professional.

Management mentorship/programs such as CONTROL, funded by the Australian Government, have provided music managers with guidance on developing and maintaining a sustainable business. It has proved popular, with middle to advanced career level managers taking part in the program, with encouraging results. CONTROL was aimed at mid level managers who had already, to some degree, proved their mettle. A management mentorship/program aimed at aspiring managers who are selected from a peer group could be very useful.

Recording and Production

One of South Australia's strong industry assets is the quality of its recording studios and sound engineers. Good quality sound engineers are an incredibly valuable and often underappreciated resource for the music community. They can be the difference between an extraordinary performance and an average one.

Interning and mentoring is an excellent method of skills transfer and succession planning. While many of these individuals or organisations already take interns, the provision of incentives by government, such as tax offsets, will encourage businesses to continue to develop the skills of those entering the profession and will increase the capacity for this work in South Australia over the long term.

Recommendation 20

Establish Creative Entrepreneur Award- Contemporary Music

While a number of awards for entrepreneurs exist in Adelaide, some of which may include at times nominees from the creative arts, there is no award that specifically acknowledges the role of entrepreneurs in the music industry. Such an award would provide some focus on music industry vocations and business. It would act as encouragement for those in the music industry to keep striving to build the local industry and potentially spark interest in people considering their vocational future. Fowler's Live currently provides a similar award for 'best music organisation or individual' or 'best music initiative'. Business SA provides awards for business entrepreneurs. There is potential for a collaborative venture to provide an award to a successful South Australian creative entrepreneur in the music industry making their work visible to a larger cross section of the community and indicating the value placed on the business side of music by the community.





Audience Development

The development of sizeable audiences, and their ongoing commitment, is important to both the performance and the business sides of the music industry. South Australian musicians now operate in an international marketplace more than ever before due to easy access to music through new media. Potential audiences are more discerning because they are exposed to the highest quality music from all over the world.

The viability and sustainability of live music is dependent on the capacity of venues and festivals to draw a sufficiently large, paying audience to cover costs at least and preferably are profitable. The more musically educated and discerning the audience is the greater the challenge to engage it continuously as it demands quality entertainment; the greater the quality of the performance, the greater the likelihood of either repeat attendance or attendance at other similar events. This assists in shoring up future demand for live music. The existence of venues alone does not guarantee quality music or a sufficient audience.

Recommendation 21

Designate an existing area within the City of Adelaide as the Central Cultural and Entertainment District (CCED) to enhance the city's profile and facilitate promotion of the area to increase visitor numbers, and to attract business and activity.

Adelaide has a high concentration of live music venues, theatres, universities and cultural institutions, within walking distance from each other. It is in the interest of the live music scene to let the world know that it is a great place to stay and to do many interesting things with ease. The message for international artists and others should be that it is worth staying for a while to enjoy what it has to offer. Adelaide has recently been named the fifth most liveable city²⁹ (along with Calgary, Canada) for the second year running, out of 140 cities in the world. In Australia, Adelaide was second only to Melbourne which ranked first in the world and superior to Sydney and Perth which were also in the top ten. It is also has a 'Walk Score' of 90³⁰ which means it is a very walkable city compared to many other cities of the world. It has a large concentration of cultural institutions and various forms of entertainment within close proximity to accommodation and dining areas. It has huge potential to increase its

29 Global Liveability Rank 2013, (London: The Economist, 2013)
Available at: http://www.eiu.com/public/thankyou_download.aspx?activity=download&campaignid=Liveability2013
30 Adelaide Walk Score, Available at: <http://www.walkscore.com/>

reputation as a pleasant city to visit that has abundant entertainment that can be accessed with ease by walking. It could develop its identity as a 'music city' capitalising initially on the success of festivals such as WOMADelaide, the Cabaret Festival and the Festival of Arts. It is now more accessible from Europe than ever due to more frequent flights and sensible flight paths. In fact it is now becoming an attractive fly out and in destination for international travellers from interstate. This in itself presents opportunities for local tourism. In addition, the easy access to regional areas such as the Barossa Valley holds huge potential for people having longer stays in South Australia. Tourism SA could play a key role in building the CCED concept, and Adelaide and the state's image as a music destination.

Designation of a central cultural and entertainment district would require the identification of existing cultural institutions and sport centres, along with the area of greatest concentration of recreational and entertainment venues within the Adelaide City Council area. The map opposite provides a possible set of boundaries for the CCED. City stakeholders including Adelaide City Council, the Department for Planning, Transport and Infrastructure and the South Australian Tourism Commission are best placed to come to an agreement on the boundaries and the functions of a CCED.

There are a number of benefits to defining and designating such an area in that it:

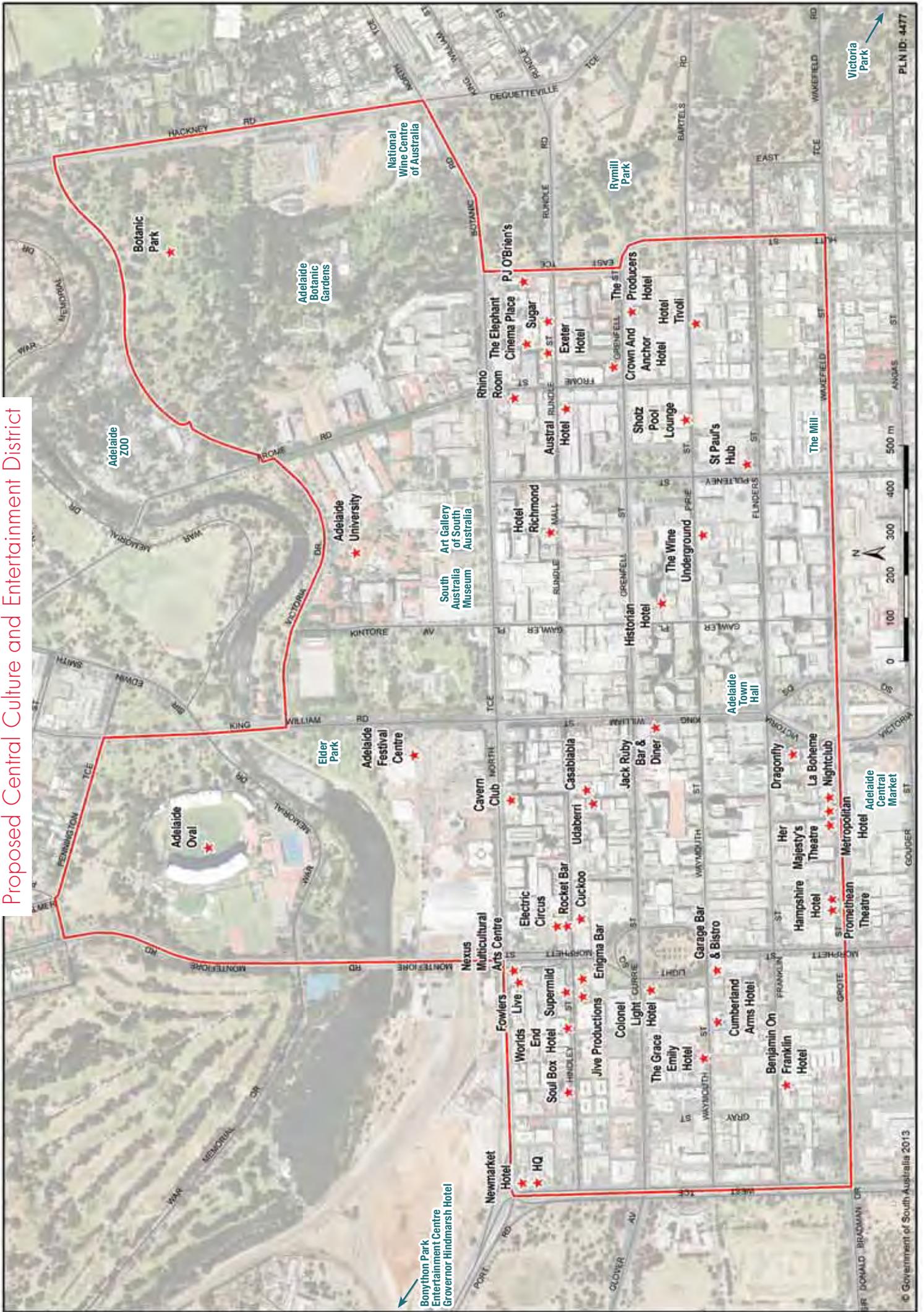
- Makes evident the extent of city life and activity occurring within the City of Adelaide which is likely in itself to attract greater numbers of people;
- Is a ready concept upon which to base marketing to international and domestic tourists with the potential to increase the number of days that visitors stay in Adelaide;
- Increases the area's attractiveness to businesses, especially those with an interest in entertainment and hospitality, and potentially to those with an interest in establishing an office/head office;
- Increases the attractiveness of Adelaide to students considering options for tertiary studies.

Recommendation 22

Develop a comprehensive gig guide

Ideally a gig guide should be managed from a central location whereby the structure and quality of information provided to the public can be overseen. In this way the site could provide the capacity for venues to upload their gig information but with a level of quality control over the site's content and

Proposed Central Culture and Entertainment District



structure. There are some very well curated gig guides available in local press and online but they are generally not fully comprehensive. It is difficult for a visitor to know where to look for a complete picture of activities and entertainment in Adelaide and more broadly South Australia. The gig guide would build the city's reputation for live music with a paying audience and positioning in the market.

The gig and event guide could capitalise on the CCED concept and provide a map that identifies the main live music and entertainment venues in this district. This would be particularly helpful for visitors whether they are staying at backpacker or hotel accommodation as it quickly builds familiarity with the city. Ideally touch screen technology associated with a map of the CCED in visitor information centres, travel and transport centres, and other locations where visitors are likely to congregate would provide many benefits. There is some precedent for this technology in regional airports where all information required for a stay is provided. Potentially such a site could, upon touch, link to the individual venue gigs as well as identify transport options and provide links to public transport timetables and taxi rank locations.

A comprehensive and user-friendly gig guide in Adelaide should include the following:

- Listing by music genre including separate listings for cover bands, original music, festivals and DJs. Trivia and comedy nights and similar entertainment should be listed separately;
- A map of the proposed CCED which identifies venues, cultural institutions, eating areas and other places of interest;
- Whilst accessible in electronic form via a dedicated website and also in hard copy, the hard copy edition should be easily located and be readily available through accommodation, and travel outlets and other locations where people are likely to spend time and to seek out this information. Ideally more sophisticated computer platforms could provide touch screens for ease of gaining the gig guide and a map which allows the viewer to locate themselves in relation to the venues; in addition, a software application for mobile devices would allow the gig guide to be readily accessed by local audiences and tourists who are trying to access information “on the go”;
- Free listings to maximise its use;
- Details of government run or sponsored events.

Production of the gig and events guide could be a joint venture including Tourism SA, Arts SA, Adelaide City Council, and Music SA. The Department of Planning, Transport and Infrastructure may provide assistance in the development of software that provides images of the CCED area and public transportation available to the venues.

Recommendation 23**Develop strategies for large scale contemporary music events**

Events play a large role in the vibrancy, liveability, economy and overall image of a city. Strategic planning regarding events can include a range of benefits including tourism, state or city branding, cultural development and business opportunities. Adelaide already possesses skills, knowledge and experience in building world class events. Unique and exciting events such as the Tour Down Under and the Adelaide Festival of Arts give Adelaide vibrancy and energy and help form the character of the city. New international flights directly to Adelaide make it much easier to host major entertainment events. The redevelopment of the Adelaide Oval, for example, means big events are more feasible than ever.

Currently the music events in Adelaide are either branded, touring events or small scale. They deliver excellent value for Adelaide audiences. There is, however, no individual contemporary music event that draws national or international attention to Adelaide. Such an event could add to Adelaide's brand as a music city.

Building on existing festivals has potential to deliver additional value to festival organisers, audiences and related businesses. Smaller boutique festivals can be grown through building them into a national circuit. Music festivals can also be marketed with related products such as food and wine. It is more difficult to grow the large branded festivals but some of them may be willing to do something unique that makes the Adelaide event a standout in the national tour. This may be staging the event at a unique location or doing a special event such as a secret headliner or a big after party. These are private sector negotiations that would need to take place directly with the organisers and owners of these events.

Adelaide could also capitalise on existing music events that may be occurring within Australia or Asia on an annual basis. Travelling from Europe or the USA is not only costly but tiring for artists, professionals and visitors. Adelaide could host events around existing annual events held elsewhere in Australia drawing on the delegates, artists or paying customers from these events. For example Adelaide could host an event close to the time of BIGSOUND in Brisbane (held every September) or Music Matters in Singapore (held in June). This would allow visitors to Australia to truly capitalise on the investment in time and money they have made and also to allow them to be a tourist and see a little more of Australia and South Australia in particular. Similarly, Adelaide could further develop relationships with the music organisations in Perth, Hobart and potentially Canberra in order to build the worth for international music industry

visitors in coming to Australia at the same time as reducing costs to each party involved at the local level.

This same approach could be taken locally with some of Adelaide's flagship events, primarily government supported, such as the Cabaret Festival, Guitar Festival, the Clipsal 500 and the Tour Down Under. These all have an existing brand which speaks to the nature of Adelaide as a city and they attract many visitors. They offer an opportunity, for the private sector in particular, to capitalise on the existing number of patrons to support further events featuring contemporary music.

A 'Music Festivals in Adelaide' calendar would deliver benefits to all the festivals as well as to audiences. Connecting the existing festivals in this and other ways could deliver benefits to all who participate. There is a large range of successful music festivals in Adelaide including the Fringe and the Adelaide Festival. Existing music festivals range from the national branded touring festivals such as Big Day Out or Soundwave, to the independent niche festivals like Backwater Blues and Roots or the Semaphore Music Festival. While these events are all independently valuable, collectively they form the festival scene. 'Festivals Adelaide' is a collaborative model that was set up for the ten major arts festivals to use their collective capacity to undertake strategic planning, marketing, program development and infrastructure. This model could only work for the privately run festivals if there was a negotiated agreement on such a collaboration. They share a common interest and issues, and they have the potential to gain from such collaboration.



WOMADelaide, Botanic Park, Adelaide: source *Tony Lewis*

Recommendation 24**Support and subsidise under-age shows in the city and regional areas**

'Under age' shows are an important component of audience development over the long term. 'Under age' shows foster an appreciation of live music culture amongst younger generations. Seeing great bands, for example, in a great venue helps get youth excited about live music and makes it more likely that they will have a lifetime of engagement with music and potentially the broader industry.

'Under age' shows are not always financially viable for venues as there is no revenue from alcohol sales. Such events therefore will usually need to be subsidised by state and/or local governments. The licensing regulations may need to be revised to accommodate minors attending these events when held in licensed venues. While the shows would be free, attendees would be required to register to gain a ticket and at the same time to supply their email address thereby creating a database of young music fans. A schedule of a number of events throughout the year, and across the suburbs and regions, would assist in building anticipation and assist in maximising the attendance at each.

Recommendation 25**Create a one-off annual celebration of local music**

Increasing the awareness of local talent and activity in the music scene of South Australia is likely to spark interest and encourage new audiences to attend live music performances. A model, such as that used by SALA Festival or the Festival Fringe, could be applied to live music. Venues would be encouraged to register for the use of their premises by performers. Entry to the event could be free but with bookings required so that numbers are managed and for the purpose of collecting email addresses to assist in the publicity of future such public events. People of all ages would be able to attend.

Such an event would encourage greater collaboration between the venues, artists and the industry generally. It would also contribute to the work being done by the Capital City Committee through the Good Evening Adelaide Strategy. It could also involve regional areas by bringing regional bands to Adelaide or through regional "fringe" events.

Recommendation 26

Support local and national media to promote and represent South Australian artists

South Australian artists require opportunities to become known if they are to gain recognition and an income from their creations. Regulations and codes of conduct, guiding the proportion of Australian content to overseas content in electronic media, are under Commonwealth Government legislation. If South Australian artists are to be supported it is important that their interests are protected through this legislation and that this is continually monitored. In addition, local content needs to be actively encouraged in radio, newspapers and street press, entertainment venues, tourism promotion, festivals and events, Government procurement, film and television, online platforms, and all other media and communications. Incentives through tax offsets to commercial concerns that commit to playing Australian content may provide further encouragement. Such considerations are particularly important in South Australia where local media outlets often use syndicated national content.

Local content is an important element in the development of home grown artists. Quotas cannot force the public to value local content but it can, however, force media to include it in their repertoire. Consumers have to be exposed to the Australian creative products for them to have any hope of gaining a fan or support base. If this occurs it becomes more valuable to media producers. Triple J radio has a big influence over the success of local artists through airplay. It is responsible for the many new local acts gaining their first opportunity to become popular.³¹ This then makes national tours more likely to be financially supported and to succeed.

Studies of arts and cultural quotas have shown that, under appropriate conditions and subject to monitoring their effectiveness, they are an important part of preserving and promoting cultural expression.³² When local content rules are in place, they need to promote diversity of expression.

Radio is still the most frequently used media for accessing music and it is the most common way in which people are introduced to new music. It is therefore an important avenue for showcasing local content. In general, community radio enjoys greater freedom than commercial radio to program its music of preference. This freedom means community radio stations can play

³¹ Homan, S. The music recording sector in Australia: strategic initiatives, (Aust Council for the Arts, 2012)

³² Bernier, Ivan. Local content requirements for Film, Radio and Television as a means of protecting cultural diversity: Theory and Reality (Section I), Available at: <http://www.diversite-culturelle.qc.ca/fileadmin/documents/pdf/update031112section1.pdf>

an important role in providing broadcast opportunities for local artists. This is the case in South Australia. These stations, however, are not-for-profit in nature and often under-resourced. They can therefore struggle to survive and be fully recognised by the listening public. There is, however, support from the Commonwealth Government for community radio stations to play Australian music through the Australian Music Radio Airplay Project (Amrap) initiative. It distributes and promotes contemporary Australian music to community radio stations nationwide.



Drummer from the Carla Lippis and the Martial Hearts Band playing live to air on Radio Adelaide

Commercial radio stations operate in a profit driven environment and therefore have a very different orientation. They are also subject to trade agreements and more stringent regulation. The Australia United States Free Trade Agreement prevents the Australian government from setting local content requirements higher than 25%. Currently there is a national requirement for a minimum of 25% local (Australian) content for commercial radio stations between 6am and midnight. A recent study by the AIR showed that no Australian commercial radio station exceeded the quota by more than 3%.³³ Only one quarter of the quota for Australian content must be newly released, that is, in the last 12 months. This means that a mere 6.25% of music on commercial radio is new Australian content, 18.75% is Australian “greatest hits” and 75% is international content.³⁴ There is a view that the Australian content played by commercial

³³ “Australian Commercial Radio: We don’t want to play Australian music” last modified November 10, 2011
Available at: <http://www.pedestrian.tv/features/music/australian-commercial-radio-we-dont-want-to-play-a/57728.htm>

³⁴ Convergence Review Discussion Paper: Australian and Local Content, (Canberra: Commonwealth of Australia, 2011),
Available at: http://www.dbcode.gov.au/__data/assets/pdf_file/0007/139255/P.4_11352_Convergence_Review_Discussion_Papers_Aus_Content_v4_FA_web.pdf

radio is largely greatest hits and played out of peak listening and advertising time in the early hours of the morning. This view also supports the notion that commercial radio will generally play music that is already successful and therefore does not assist in developing new talent.

Commercial Radio Australia wants to abolish content requirements arguing that it is not equitable as other delivery platforms and services are not subject to the same quota system. Digital commercial radio stations for example have an exemption from the quota system for the next 3 years. When content requirements were abolished in New Zealand 20 years ago it resulted in local content dropping below 2%. South Australia has the highest proportion of commercial radio stations when compared to other states.³⁵ This may place the state at a disadvantage and suggests a possible greater role for community radio in providing airtime to local artists and contributing to their success. Research on the extent of South Australian content is required alongside of ways to encourage increased content across all media.

Recommendation 27

Undertake targeted research to better understand the market through identifying:

- Barriers to the consumption of live music (such as gig times, transport issues, entry prices)
- Live music interests of cultural and demographic groups currently not catered for (e.g. international students)

Market research is a fundamental principle of understanding the audience. Trying to develop an audience or a market for a product without understanding who is being targeted and what they want will be, at best, trial and error. There is very little cohesive data about the Adelaide music industry and audiences. There are surveys, experiences and anecdotes but little robust research. Such research can provide industry professionals and artists with the information they need to make strategic decisions over their business and careers.

Barriers to the consumption of live music

One of the most effective uses of any market research is in deploying an understanding of the barriers to the consumption of live music. Venue owners could be provided with actual information about the reasons people are not

³⁵ "Australian Music Content on Commercial Radio" available at:
http://musicinaustralia.org.au/index.php/Australian_Music_Content_on_Commercial_Radio

coming to shows, whether it is the bands are not liked or the entry prices are too high. There may be other reasons such as the gigs starting too early or late or insufficient advertising. It is very hard to solve a problem when the problem is not adequately identified and market research is a tool to achieve this. A research based project to better understand the preferences and desires of Adelaide audiences will have great value to the entire local industry.

Cultural and demographic groups

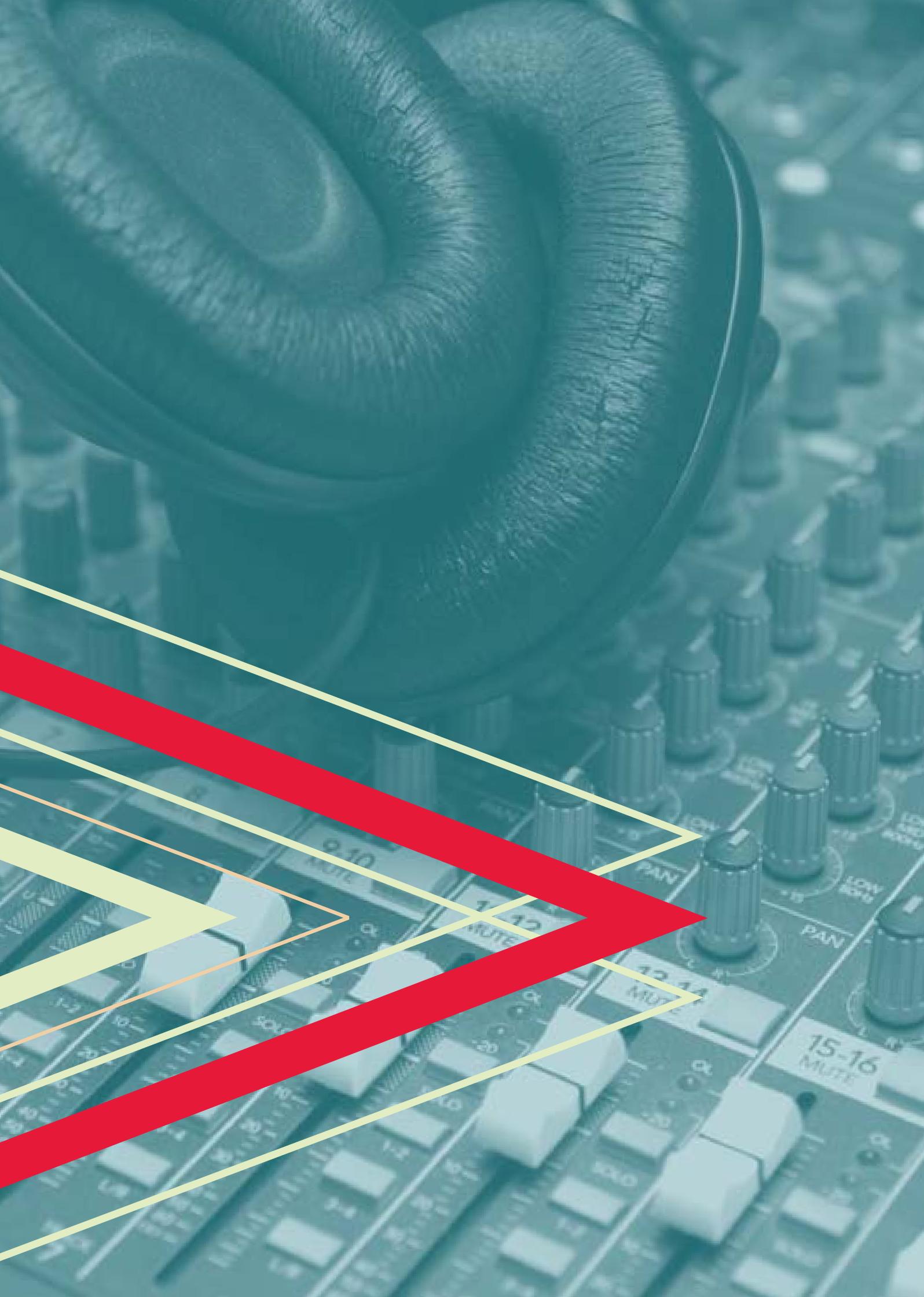
Adelaide has over 20,000 international students enrolled in educational institutions and many more who were born overseas or speak another language at home.

When people move or migrate to another country they take with them many aspects of their home culture including music. Some established cultural groups in South Australia have been very successful in creating vibrant music scenes that celebrate their music. Other groups are still finding there is a lack of music from home. Better understanding of the various cultural groups in Adelaide and what they want from arts programs will equip programmers and communities to develop events that cater to these communities. It could also identify local government grant and sponsorship opportunities. The Student Union at one of the Universities could for example tour a K-Pop band.

Better understanding the arts and music desires of all of the cultural groups in South Australia will create a more culturally diverse, vibrant and rich arts and music scene for all South Australians.



Location: Coopers Brewery, Regency Park, SA: source Helen Page Photography



Trade and Economic Development

Recommendation 28

Develop a long term strategy and lay the foundations for a comprehensive music industry

In South Australia, the music sector is generally treated as not having serious economic credentials such as those of large scale industries such as mining or agriculture. There is also no definitive statistical measure of the economic impact of the music sector in Australia. It should be noted, however, that in June 2013 the Australian Bureau of Statistics (ABS) completed a feasibility study determining that it is possible to construct statistical data to measure the impact of the industry on the economy. A discussion paper has been produced seeking industry feedback on what statistical datasets should be produced.³⁶

ABS data on South Australia suggests that in 2011 there were approximately 464 people deriving their main source of income from music related performing arts,³⁷ with anecdotal evidence suggesting that thousands more have it as a secondary income source. The 2012 net wholesale value of products associated with music recording in Australia has been calculated to be worth over \$398million.³⁸ It was also estimated that in the 2009/10 financial year live music added over \$1.2billion into the Australian economy, supporting around 15,000 full-time jobs and bringing total profits and wages to around \$652million.³⁹

On the international stage, the 2013 IFPI Recorded Music Market Report lists Australia as the sixth largest music market with growth up 6.8% from the same period in 2012; one of only nine of the top 20 markets to see growth.⁴⁰ It should be noted that presently, the market is largely import based with exports being relatively small. However, opportunity exists to build exports of Australian music content to international markets.

It is clear from this evidence that a shift needs to be made from the traditional notion of seeing the music industry purely as a creative endeavour to a more

³⁶ ABS Catalogue - 5271.0.55.001 'Discussion Paper: Cultural and Creative Activity Satellite Accounts, Australia, 2013'

³⁷ ABS Catalogue - 62730 '2011 Employment in Culture, 2011 - South Australia'

³⁸ "2012 ARIA Yearly Statistics", available at: <http://www.aria.com.au/documents/2012wholesalefigures.pdf>

³⁹ "Economic contribution of the venue-based live music industry in Australia", (Ernst and Young, 2011), available at: http://apra-amcos.com.au/downloads/file/GENERAL%20-%20NEWS/NationalLiveMusicResearch_Sept2011.pdf pp2-3

⁴⁰ "IFPI Digital Music Report 2013: Engine of a digital world", (International Federation of the Phonographic Industry, 2013) available at: http://www.aria.com.au/documents/Australia_DMRmaster_final11.03.13.pdf p18

economically beneficial commodity. It should, however, be noted that the monetary value of the industry should not be the only way to assess the impact and success of the sector.

The term 'music industry' in its broadest sense refers to a wide range of occupations and activities. South Australia lacks many of these occupations. The role of the music industry, in this broad sense, its development and its importance in sustaining a live music culture is difficult to measure. Development of the music industry will provide many more opportunities for musicians and their music as well as income streams. Increasing the breadth of industry activity will also offer more opportunity for creative and business partnerships and combinations of these. However, a focus on live performance alone without investing in the broader music industry is unlikely to produce and sustain a healthy environment for live music. The industry needs investment, support and increased partnerships from both the government and private sector if growth is to be achieved and for the industry to compete in South Australia as a viable economic commodity.

Anecdotally, of those musicians who currently derive an income from the industry in Adelaide and more broadly South Australia, live performance makes up the main source of this income, followed by music sales both digital and physical. There is therefore clear justification for the anxiety felt by the music community in Adelaide over threats to live music venues on the grounds of risks to income loss alone.

The ease of transferring or downloading digital music files with or without approval from the rights' holder has transformed the landscape of the industry. At one level it has been battered by the digital revolution which has been accompanied by the decline of the compact disc. This has meant huge job losses, and the creation of various new business models. Over the past two to three years, however, the music industry has adapted to this new, predominantly on-line environment by establishing methods for protecting the rights of musicians and gaining payment through new systems.

The Australian Law Reform Commission (ALRC) commenced in June 2012 an inquiry into the adequacy and appropriateness of the Copyright Act 1968 for the new digital environment. It is considering whether there are exceptions and amendments required to the legislation for Australia to fully participate in the modern, digital economy. It has consulted through two papers, the first of which was a discussion paper and the most recent an issues paper titled *Copyright and the Digital Economy*.⁴¹ The outcomes of the inquiry are due to

⁴¹ "Copyright and the Digital Economy (DP 79)" (Canberra: Australian Law Reform Commission, 2013), Available at: <http://www.alrc.gov.au/publications/copyright-and-digital-economy-dp-79>

be reported in November 2013 and they will have significant implications for the ability of musicians and music business to earn a living through copyright.

The industry, government and the private sector need to work closely together to develop a strategy that will develop and grow the music industry into both a viable occupation for musicians locally in Adelaide, but also create the opportunity for the industry to grow into a competitive economic market commodity and ensure its place in the economy of the future.

Recommendation 29

Establish a universally accepted set of performance metrics to assess the health of the music industry in South Australia across time

The increase in new technologies as applied to the music industry has meant that a clear measure of the success of the industry cannot be gained by utilising traditional data such as physical record sales. In addition, the lack of a standardised measurement across the music industry for gathering and accessing data on all aspects of the industry makes it difficult to assess fully the health of the industry not only in Adelaide, but around the world. It is therefore at present only possible to determine some general trends.

Adelaide's music industry is still relatively small and undeveloped in comparison to the eastern state capital cities in Australia and internationally, but nonetheless it is significant. At the gross level this relative smallness is evident from the lack of industry professionals and by simply observing the relatively small number of performers and industry professionals that achieve national and international success.⁴²

In order to progress beyond this general trend measure of success, South Australia needs to collect a comprehensive standardised set of performance metrics which can stand alongside qualitative information. These performance metrics coupled with the qualitative information and future ABS datasets will, over time, clearly express the industry's economic contribution both in terms of employment and exports and more broadly give a detailed understanding of the industry.

It is still particularly important for South Australia to establish a set of performance metrics and establish a foundation against which the music industry can, on an annual basis, objectively and consistently assess the impact of strategies designed for its development. This data can then be used

⁴² ABS Catalogue - 6273.0 'Employment in Culture, 2011'

to inform decisions and policies that are likely to hinder or enhance progress of the industry in South Australia.

After extensive discussion with industry over this residency, it has been suggested that the type of data that should be collected for this purpose include, but not limited to:

- the number of live music venues and performances;
- the number of patrons;
- the number of performances locally, nationally and internationally by local artists;
- the number of managers, bookers and other music vocations;
- revenue sources, and the broader economic value of music.

A data baseline could be established through conducting an industry wide survey such as the Live Music Census undertaken by Music Victoria in 2012.⁴³ In 2005, the Music Council of Australia also developed a *Statistical Framework for the Music Sector* which outlined a method for determining the Gross Domestic Product (GDP) of music.

Consultations should take place with these organisations as well as the ABS to develop this approach specifically for the South Australian music industry whilst at the same time aiming for consistency with current trends in music data collection across Australia.



Location: Take heart Qld, The Depot, Adelaide Fringe: source Helen Page Photography

⁴³ "Victorian Live Music Census 2012: Incorporating NMIT 'State of Play'", (Music Victoria, 2012) available at: http://www.musicvictoria.com.au/assets/Documents/Victorian_Live_Music_Census_2012.pdf

Recommendation 30**Development of music related industries and creation of music industry clusters**

In addition to musicians and venue operators, the music industry also supports numerous other occupations and activities that relate to the performance of live music. Grouped together, musicians, venue operators and these other occupations make up the music industry as a whole and each fulfils a vital role in the music ecology and economy. Examples of these include record labels; management; sound recording; sound producing; sound engineering; music publishing; manufacturing of instruments and technical equipment; booking agents; and promoters. As referred to previously, in South Australia these occupations and their activities are not as strongly developed as those in the eastern states of Australia.

The development of these wider related music industry occupations, it has been suggested by an International Labour Organisation report, has been generally overlooked by governments and is usually addressed with fragmented approaches that are not conducive to the long term development of the industry.⁴⁴ Development of these occupations, and their related industries, that contribute to the music industry as a whole will, over the long term, create jobs as well as foster and grow local talent. The South Australian Government has a role to play in implementing policies that provide for the systematic and strategic support to these supporting industries. For example, it may be possible to offer a tax credit for recording companies that spend money recording local artists in South Australia. In this way the local industry grows, and economic and employment growth stays in South Australia. Such an arrangement is likely to attract recording companies to the State.

In addition, this will provide a greater connection between the creative and business sides of music and will mean that both the creative and economic potential of talented local musicians can be realised.

44 Ambert, Cecile. *Promoting the Culture Sector through Job Creation and Small Enterprise Development in SADC Countries: The Music Industry*, (Geneva: International Labour Organisation, 2003) available at: http://www.ilo.org/wcmsp5/groups/public/@ed_emp/@emp_ent/@ifp_seed/documents/publication/wcms_117682.pdf, piii

A strong live music industry provides employment for:

- **Artists**
- **The recording industry, publishers and retailers**
- **Music media**
- **The live industry**
 - Venue owners and managers
 - Sound and lighting engineers
 - Event managers
 - Promoters and bookers
 - Managers and accountants
 - Ticketing agencies
 - Food and beverage providers
 - Staging and crew
 - Instrument transportation and set up
- **Other related industries**
 - Technology
 - Instrument production
 - Tourism
 - Retail and hospitality
 - Arts and culture

Further direction for the economic growth of the music industry in South Australia may be found with the adaptation of the work undertaken by 2011 Thinker in Residence and Chair of the South Australian Advanced Manufacturing Council, Professor Göran Roos.

Roos' report looked at the use of the cluster agglomeration in the South Australian manufacturing sector and explains clusters as

"a group of linked actors (firms, financial actors, public actors, universities, organisations for collaboration, media, etc.), where the group's sustainable competitive advantage is grounded in resources (i.e. monetary, physical, relational, organisational and competencies) linked to a particular location. Clusters are a dynamic agglomeration based around knowledge creation, innovation and increasing returns." ⁴⁵

⁴⁵ Roos, Goran "Manufacturing into the future" 2010-11 Thinkers in Residence Report", (Adelaide: Government of South Australia, 2011) Available at: www.thinkers.sa.gov.au pp73-77

Roos further explains that there is substantial evidence which links the existence of clusters to innovation and economic growth. Roos outlines the need for “proactive government intervention” in areas such as innovation, research and policy to produce and grow a diverse industry sector.

The foundation for viable industry which Roos outlines in his report could be adapted for the creation of ‘Music Industry Clusters’ which would utilise this important strategy and model for development and growth of the music industry in South Australia.

These Music Industry Clusters would bring together related businesses, researchers and music professionals to increase innovation, collaboration, knowledge and skills to develop the industry in South Australia and assist individuals to grow whilst maintaining healthy competition. These clusters could be deployed in a number of areas in music related industries including the film industry, music film clip production, sound engineering and music, individually or collectively to create a more innovative cluster precinct.

An example in which a cluster-type innovative approach is being undertaken is seen in the collaboration between South Australian Company, BTM Innovation, the J.M. Coetzee Centre for Creative Practice and Adelaide Research and Innovation (ARI) at the University of Adelaide. The group is engaged in a number of new music software technology developments relating to hi-fi speakers and software. This general approach involving the university sector and the private sector could be extended by encouraging co-location or close proximity locations of cluster participants.

A particular focus for South Australia that should be considered is growth and innovation of the music technology and instrument making industries. The infrastructure for music technology and instrument manufacture in Adelaide exists and thrives at a small scale local level where musicians are familiar with what is on offer and seek customised instruments. It is an area that may benefit from government assistance to reach the wider consumer base which is necessary to grow and sustain the industry including the pursuit of export opportunities for South Australian manufactured products. The existence of good musical instruments that have achieved an international reputation could also act as an added impetus for international musicians to visit South Australia or to stay a little longer when performing here.

There are opportunities for cross discipline collaborations for advancement of the music industry within the universities. An example of this is the Creative Industries Research and Applications Centre (CIRAC) within the Queensland University of Technology which has brought science and the arts together. CIRAC contributes to the information, research and application needs of the creative industries.

Case study – Nashville, Tennessee, USA

Nashville, a thriving hub for country and blues music in the United States, has encouraged small business entrepreneurship through Partnership 2010, a cluster-based pooling of resources in support of the thriving music industry. It has produced inflows of new and innovative businesses and augmented the revenue produced by related high-wage manufacturing opportunities to the tune of US \$500 million and the creation of 2,500 jobs. Nashville has only 225 employees in the musical instrument manufacturing industry sub-category, but this sector alone generated US \$19.5 million of total manufacturing revenue in 2003-04.⁴⁶

Case study – Toronto, Ontario, Canada

Toronto's live music industry has grown in its economic contribution by borrowing ideas from Austin, Texas, which enables music industry development to focus on both economic and cultural development. The promotion of key private industry partnerships and public-private collaborations are essential to create innovative programs and initiatives.⁴⁷

Case study – Chicago, Illinois, USA

A study mapping the Chicago music industry determined musical instrument manufacturing to be a core music sub-industry, producing US \$3.85 (3.25%) million of the total core music industrial revenue of US \$84.47 million. A broader manufacturing industry exists around this sector in the periphery, and combined with the core industries, produces US \$818.91 million of revenue for Chicago's economy. Manufacturing at the periphery supports employment and manufacture in the core music industry in various capacities, such as through audio and video production and material supply, though it is not specific to the music industry. When expanding the definition of the music industry to include core and peripheral categories of work, the figure of employment in Chicago's music industry triples to 53,000 people working in the industry. This study has made evident the value of the contribution the music industry makes to Chicago's broader regional economy, and the considerable value that music instrument manufacture makes as a percentage of total core music industry revenue. The Chicago music industry's overlap with peripheral industries that include manufacture demonstrates the success of collaboration between the music industry and other industries in generating manufacturing and employment and makes a significant contribution to the broader economy.⁴⁸

46 Raines, Patrick., Brown, LaTanya., *The Economic Impact of the Music Industry In the Nashville-Davidson-Murfreesboro MSA*, (Nashville: College of Business Administration, 2006) available at: <http://secure.nashvillechamber.com/president/musicindustryimpactstudy.pdf>

47 Titan Music Group., *Accelerating Toronto's Music Industry Growth - Leveraging Best Practices From Austin, Texas*, (Toronto: Music Canada, 2012), available at: <http://www.musiccanada.com/Assets/PDFs/Accelerating%20Toronto's%20Music%20Industry%20Growth%20-%20Leveraging%20Best%20Practices%20from%20Austin,%20Texas.pdf>

48 Rothfield, Lawrence., Coursey, Don., Lee, Sarah., Silver, Daniel., Norris, Wendy., *City Music: A Report on the Music Industry in Chicago*, (Chicago: The University of Chicago, Cultural Policy Center, 2007) available at: <http://culturalpolicy.uchicago.edu/publications/CMCFullReport.pdf>

Recommendation 31**Venue owners to form an association**

Venue owners should be encouraged by the Government of South Australia with the support of the Local Government Association to form a venue industry association to represent the interests of this vital business sector.

The association would be better placed to represent the sector as a whole on issues of regulation and licensing and would assist owners to build relationships with residents in the vicinity of their premises. This association could also capitalise on the work of, and work closely with, for example the Capital City Committee and the Adelaide City Council to enhance current projects, such as the use of space in the Adelaide City area. The association may also be a point of contact for events and festival planners by assisting with the involvement of venues in future events and festivals.

ECONOMIC FACTS FROM THE MUSIC INDUSTRY

- **335,100** people worked in the music sector in Australia in 2007, more than car manufacturing and mining combined (these ABS figures do not include those in education or broadcasting),
- Music concert ticket sales reached almost **AUD \$1 billion** in 2011, with **11 million** attendances nationally
- In 2011, venues such as hotels, clubs, cafes, and restaurants were estimated to generate 41.97 million attendances, and leverage **AUD \$1.21 billion revenue** through audience spending in licensed live music venues. With **6,300 such gigs each week** across the country, live music also helps to sustain almost **15,000 jobs**
- Live music in hotels, clubs and restaurants generated gross revenues of **\$1.21 billion** and contributed approximately **AUD \$650 million** to the Australian economy in 2010/2011
- Australia is amongst the leading digital music markets internationally
- In 2009/10, each Australian household spent an estimated **\$380** on music related goods and services, totalling over **AUD \$2 billion** economy wide. That is more than households spent on internet charges, dental fees or domestic holiday airfares.

*Source: Australia Council for the Arts, Artfacts webpage <http://artfacts.australiacouncil.gov.au/> and the music council of Australia

Recommendation 32

Develop Adelaide's export potential and trade pathways based on market research

The music industry is constantly evolving and creating a range of new and different markets. Each of these markets holds different opportunities for musicians and the music industry as a whole. In order for South Australia to reach these markets and opportunities it requires thorough strategic planning and focused energy at a macro level to support individual artists and businesses.

International markets can provide a range of opportunities for the music industry, and there is a great deal of potential for the South Australian music industry to compete successfully. Music Nova Scotia's recently commissioned export strategy provided in-depth research on foreign markets that will assist Canadian artists to explore new opportunities for their music on the international market.⁴⁹ This type of information is essential for strategic planning at a local level. Once markets and opportunities are identified it is easier to support artists and music businesses to become more effective in reaching international markets.

Sounds Australia provides an invaluable support service to artists who have been selected for showcase events. This service maximises the chances of these artists gaining national and international market success. It is envied internationally.

A detailed report should be commissioned for South Australia which can assist local artists. This first step will ensure there is robust market research and industry intelligence which can be disseminated widely to the South Australian music industry. This report should then be followed up with an articulated export strategy similar to that of Nova Scotia and would include strategies for business and skills development; export readiness and pursuit of export opportunities.

⁴⁹ *Music Nova Scotia Export Strategy Executive Summary March 2013* (Nova Scotia: Sound Diplomacy and Nordicity, 2013) available at: <http://musicnovascotia.ca/sites/default/files/MNS.exportstrategy.execsummary.pdf>



Sunburnt open country in the Barossa Valley South Australia
© John Wallace | Dreamstime.com



Laura Hill, Woodstock Winery, McLaren Flat, SA: source Helen Page Photography



Sector Growth in Metropolitan and Regional Areas

Recommendation 33

Develop Port Adelaide as a live music destination

Around the world, old ports are highly prized real estate for arts and creative communities. Port Adelaide has struggled for some time to develop its local economy and community activity, and to be viable as a destination for visitors. Renewal SA has taken leadership on the development of the Port Adelaide area over the past 18 months and it is committed to creating a lively and interesting environment which fully utilises Port Adelaide's natural and historical assets. Only 15 kilometres from the city with abundant space, Port Adelaide is the perfect location for the development of a live music centre as there are many areas which are largely uninhibited by concerns of disturbing residents through noise. It is particularly well suited to the staging of music festivals. There is no doubt that such festivals would create and inject bursts of intermittent life into the Port. The festivals will also play a bigger role in making the location visible to a younger and broader population, and will increase the likelihood of visitors at times additional to those of the festivals. It will assist in breaking down the perception of Port Adelaide being too far from Adelaide to travel and potentially the view that there is too little to do there.

Invest in live music infrastructure

Renewal SA's Port Adelaide Renewal may be best positioned to consider investment in infrastructure that would make Port Adelaide more attractive to music entrepreneurs. Facilities such as fencing, toilets, stages and power outlets can cut tens of thousands from production costs making it more attractive to promoters and music communities to invest in live music events at Port Adelaide. Such events could also be further supported by the provision of additional transport such as express trains or buses at the time of events. Local business could assist in providing some sponsorship.

Setting a precedent for what is possible; the Laneway Festival to be held in Port Adelaide in February 2014

It was clear that there has been a lack of confidence in the capacity of the Port Adelaide area to attract and successfully engage the interest of a music festival entrepreneur. The assets of the Port Adelaide location are clear, as are its suitability for open air music festivals. The St Jerome's Laneway Festival Director contacted the Reverb project team regarding a possible new location in Adelaide for his festival, a well established and well structured

festival conducted across the nation. The capacity to relay a good understanding of the Port, along with knowledge and information on some of the requirements of such a festival, inspired the confidence in him and provided the impetus for the possibility of it being held at the Port. He then worked with Renewal SA, a partner in this residency, to establish the Laneway Festival in Port Adelaide. It will be held in February 2014. If the event is successful, and there is no reason to believe it will not be, it will provide a precedent for future festivals in Port Adelaide.

Redevelopment of an old building in a non-residential area as a rehearsal space/studio/cultural hub.

Port Adelaide has many old abandoned buildings. Most of these buildings are heritage listed and cannot be demolished. The cost of refurbishing them is very high but their heritage listing means that the owner is obliged to maintain them. Identifying one or two of these buildings, in an area like the Wool stores precinct, that require minimal development and earmarking them for artist spaces would be an excellent way to encourage practising artists from a range of disciplines to work in Port Adelaide. This is due to there being less residential development and therefore less need for noise attenuation at present. This situation can be exploited until the surrounding areas are developed for residential use. The redevelopment would, however, require significant investment that is unlikely to come from the private sector without some form of government contribution or support.

Recommendation 34

Develop a strategy to strengthen regional touring and create a touring circuit

Local Councils or development authorities in regional South Australia could benefit from training local people to take up the role of a booker of acts for their region. This could be a collaborative activity with scheduling throughout the year. Local communities are often hungry for entertainment and they represent a relatively untapped audience base. It may also be possible to link these activities with the activities of Tourism SA. Port Augusta, for example, is the gateway to the Flinders Ranges and consequently hosts many buses full of tourists. There is opportunity to maximise access to live music in collaboration with local venues.

The Adelaide city area does not offer enough opportunity for artists to hone their performance skills especially in front of new audiences. The relative isolation of Adelaide from other major cities means bands need to find

other ways to attain the “10 000” hours (considered to be the benchmark for successful performance development) to assist them to build quality performances through audience ‘review’, credibility and success. Suburban and regional shows offer bands the opportunity to play to new audiences and to expand their fan base. There are several companies and individuals, in Adelaide, already doing this successfully, and this indicates that it is not only possible to establish regional tours but to benefit financially. Bookers need to seek opportunities outside of the city, negotiate with regional and suburban venues, and promote the acts. These people are often the “glue” that holds these touring circuits together.

It is important for artists also to look independently at the opportunities available to them in regional and suburban environments. Some artists may find a natural home and income from playing winery shows or regional festivals. Many genres of music do well in regional environments and greater levels of activity may broaden opportunity, assist career development and add to the income stream. The growth of online platforms and national radio has meant that many artists can build a reputation outside of the city area making regional touring profitable.

In addition, venue owners must feel that they can benefit financially and otherwise from supporting live music. They must commit to providing a space and the appropriate facilities (e.g. stage, lighting) required as well as payment for the performer. Unfortunately gaming machines have often successfully competed against live music. In regional areas the local hotel or sports centre bar is most likely to provide space for performances. In suburban areas, where there is sufficient non-residential space, it may be possible to set up designated entertainment precincts which would be free of conflicts with the needs of residents. Local councils have the power to reduce existing barriers to having live music venues and events in their council area (see Chapter on Regulation).

Port Lincoln and Whyalla appear to have an energetic and committed local music community. The local communities also appear to respond well to visiting artists by attending performances. These centres could gain benefit for their local music scenes through local musicians being support acts for touring artists. This would assist the local artists to network with Adelaide artists and managers. Like Port Augusta mentioned above, there is also opportunity to work with Tourism SA to maximise the attendance by tourists at live music performances by local artists alongside touring acts.

The Australia Council and Country Arts SA have several initiatives in place to help support regional tours for contemporary musicians. In addition, it is important to strengthen links with the private sector to make performances more viable and desirable for bands and venue operators.

Regional centres can be worthwhile tour destinations in their own right but it is also important to investigate the potential for additional shows between larger gigs such as playing in Mt Gambier on the way to Melbourne from Adelaide. Performers can maximise their exposure to audiences in this way. A mining town such as Roxby Downs offers another possible location for performers. Large corporate employers could sponsor live music gigs to:

- Provide entertainment for employees;
- Provide a business opportunity for local venue operators;
- Provide bands with a performance opportunity;
- Help build a live music culture in regional towns.

There is assistance provided by government to maximise the likelihood of musicians touring to places where it is simply not economically feasible without assistance to perform. The Contemporary Music Touring Program assists emerging and established musicians to take their music on tour to Australia's regional and remote areas. The program provides assistance of up to \$15,000 to aid in meeting touring costs such as transport, accommodation, insurance, production and marketing. It is an initiative of the Australia Council for the Arts and is designed to assist in the circulation and performance of original, contemporary Australian music in Australia's regional areas. Applications proposing performances in Australia's remote areas are looked upon as a high priority and in these instances an increase to the full amount of \$15,000 is available through the *Touring Remote Australia* (or TRAX) Component of the program. The South Australian Government also provides grants of up to \$10,000 for national and regional (in SA) tours, as well as grants of up to \$15,000 for international tours.

Recommendation 35

Build on large events as part of a strategy to engage bands in regional centres

In regional areas it is cost effective to add live music to existing cultural events and bring into focus local musicians and talent. Such events include orientation week at regional university campuses, agricultural shows, horse racing carnivals and other specialised events. Generally, this will create a market that may not otherwise exist and is likely to be easier than creating a new market in isolation. In Port Lincoln, for example, they have tied live music and 'Battle of the Bands' style competitions into their hugely popular Tunarama event with great success and local support. Universities should also be encouraged to include live music in their orientation week celebrations and perhaps leverage the city campuses' expertise and artist arrangements.

Recommendation 36

Regional Development Australia Barossa to develop and pilot a regional music development strategy as part of their Events Strategy:

- Establish a touring circuit of wineries
- Establish a permanent stage and other infrastructure
- Local Council to employ a booker and publish a regional gig guide
- Develop a contemporary music festival/showcasing event
- Incorporate live music in community and visitor venues through
 - The revival of the Barossa International Music Festival
 - The celebration of the Barossa tradition of choirs and bands
 - Including live music into other arts event such as the SALA Festival
- Leverage Adelaide events such as the Fringe along with the positive attributes of the Barossa
- Support the development of emerging local artists by the provision of i) a rehearsal studio space and ii) mobile audio systems for performances
- Apply the small venue licence provisions to the Barossa and remove the needs test in the South Australian Liquor Licensing Act
- Develop creative hubs, and music industry clusters, encouraging for example music instrument artisans
- Establish a venue for arena size shows at a winery

Barossa Valley is world-renowned for its wine, closely followed by its beautiful wineries, food and natural environment. Its close proximity to Adelaide makes it a favoured destination for tourists and locals alike. The Barossa Valley has many positive attributes that makes it well suited to developing a strong live music scene. The strong community spirit makes a strong foundation for the building of collaborative music industry ventures and support for local and visiting musicians. In addition, the Barossa has a large number of possible venues by virtue of the wineries which are well removed from residential areas making noise attenuation requirements less likely. There is especially opportunity for large live music events in and around the iconic wine estates such as Seppeltsfield and Chateau Tanunda. Large scale events such as outdoor music festivals, however, require a significant initial outlay for the basic infrastructure such as the stage, power on site, lighting, fencing, bathrooms and toilets. This has clearly been prohibitive for the region. There is, though, a demonstrated desire for this kind of event with the towns of Gawler and

Kapunda having already taken the initiative with the Kapunda Art and Music festival and support for “Buskers in Gawler.”

Privately run one off events, such as the nationally originated “Day on the Green”, are clearly financially viable when all the right characteristics are available in one place and there is an economy of scale. The region could benefit from a local venue that is permanently available for local and international acts. Some level of public investment in permanent infrastructure at one or more locations will make it financially more feasible for acts and shows to perform on a more regular basis in the region. It would also allow the establishment of an annual contemporary music festival.

Acts that normally tour the arenas and play one show in the Adelaide Entertainment Centre may consider a second performance in the Barossa if there is a venue with sufficient capacity. The permanent infrastructure would mean there would be very little cost to the promoter and additional audience is attracted. It provides both the artist and the region with a commercial opportunity. Local artists could benefit through providing support to major touring acts. In addition, the local music industry could also benefit through local entrepreneurs being able to book acts without the repeat overheads for the infrastructure.

Permanent facilities provide many other potential benefits to local communities as a versatile function space for weddings, functions and other community events. Depending on the location and management of the facility, there are also opportunities for everyday usage of components such as providing changing facilities for cyclists.

Consultation with the regions suggested that a youth focussed festival in the Barossa would be successful. It was agreed also that a Train the Trainer approach would be beneficial in building the capacity of the region to conduct events on an ongoing basis. The basic premise is to fund a local Adelaide promoter with experience in organising and running events to host a festival for all ages in the Barossa and at the same time train one or two aspiring local music enthusiasts. The trainees could then take up the role in the following year. The trainee becomes the trainer and teaches one or two local aspiring promoters how to organise and run an event and so on.

The venues available in the actual towns of the Barossa region and in regions more generally, tend to be the local hotel, sports centre and community hall. The ‘needs test’ in the Liquor Licensing Act can act as a significant barrier to new and different types of venues being introduced due to the potential for objections to be raised by the existing businesses (refer Regulation Chapter). An existing business can easily be a monopoly under these conditions. This

can further reduce the likelihood of live music being supported by venues because, in the case of a monopoly, the business does not need to attract the music loving patrons. This is especially the case if the venue receives revenue from gaming machines which makes paying for music performance seem less attractive to the venue manager. There is opportunity for smaller more intimate businesses and events in churches, cellar doors and galleries that could be realised with a reduction in barriers and positive encouragement.

Recommendation 37

Create an outreach of the Northern Sound System and provide a rehearsal space in Gawler

Gawler is the gateway to the Barossa region. It is easily accessed from the city by train. This presents a range of possibilities for the town. In particular it has an area around the train station that would lend itself well to a local music festival and may also be able to house a rehearsal space.

Local business people, police and venue owners raised with this residency's team the issue of youth feeling socially disengaged in the town. The Gawler Council could establish a dedicated rehearsal space for young musicians. In addition the City of Playford and the Gawler Council could consider establishing an outreach of the Northern Sound System for disadvantaged or disengaged youth in Gawler.



Derelict Warehouse (Harts Mill, Port Adelaide): source *Matthew Weinel/ Dreamstime.com*



Regulation

Live music is just that. It is music performed by actual musicians and this requires a physical 'place'. The place is subject to many forms of planning, development, safety and environmental regulation. In Australia the place in which live music is performed and enjoyed is often also a place of alcohol consumption. In many cases the income for venues from alcohol sales subsidises, and makes viable, the programming of live music. Hence there is good reason to discuss both building and liquor licensing in relation to live music. Both the sale and consumption of alcohol and building requirements are regulated for the safety and amenity of patrons and staff. Most venue operators do not take issue with the need for regulation in principle, but in practice the demands and conditions imposed on their business by existing regulations can make the provision of live music financially unattractive and potentially non-viable.

Venue operators, particularly in the Adelaide City area, are facing increasing levels of difficulty in running their businesses because of urban intensification and perceived associated gentrification. They may be subject to increased rents and greater noise restrictions. A number of regulations deal with issues, such as noise, in a 'one-size fits all' manner. This does not allow for diversity in the types of businesses that may evolve or be brought into existence and generally favours one type of venue monopolising a given area. A number of well-loved music venues in Adelaide and across the other major Australian cities have been forced to close because of what they regard as excessive restrictions to their business.

The goal of these recommendations is not to remove all regulatory responsibilities from venues. Instead they are designed to encourage a collaborative approach that allows live music to thrive and at the same time ensures the comfort, safety and security of staff, patrons and the community.

Recommendation 38

Invest in research on problem behaviour, and the environments that reduce its incidence, to inform future pathways

The key concerns for South Australia Police are:

- Alcohol related violence;
- Public intoxication and related anti-social behaviour;
- Supply of alcohol to minors;
- Public safety.

National and international research suggests that licensed premises in general terms are at higher risk of violent behaviour due to increased alcohol consumption. A significant proportion of violent incidents occur in, or within close proximity to, hotels and nightclubs.⁵⁰ However, not all licensed venues are problematic and research has also shown that in any given area a small number of outlets can be associated with a disproportionate number of instances of alcohol-related harm.⁵¹ Hotels and nightclubs, particularly those with extended or 24 hour trading, tend to be the most problematic type of licensed venues with which violence is associated.⁵²

Venues or events that are well managed are likely to minimise the risk of violent incidents. Awareness by management of the risk factors and preparation to mitigate these risks are a key part of their success. The “Best Bar None Scheme” was established in Manchester, United Kingdom, in 2003 by licensees to demonstrate their commitment to socially responsible practices by adhering voluntarily to a set of quality controls and benchmarks for best practice. It has been industry led, in association with local councils, liquor and gambling authorities and the police. The scheme has spread to Canada. There is a strong emphasis on staff training and establishing clear policies for staff to follow. The requirements for inclusion in the scheme exceed those legally required in South Australia’s General Code of Practice Guidelines issued under the *Liquor Licensing Act 1997*. Best Bar None provides a comprehensive and detailed list of actions required of management especially in relation to informing staff of and training them in policies, procedures and legislation. There is, however, only anecdotal evidence largely from venue owners and councils at this time indicating its success in reducing anti-social behaviour by venue patrons and

50 Haines B & Graham K 2005. Violence prevention in licensed premises, in Stockwell T et al (eds), *Preventing harmful substance use: the evidence base for policy and practice*. England: John Wiley & Sons: 163–17

51 Briscoe S & Donnelly N 2001b. Assaults on licensed premises in inner-urban areas. *Alcohol studies bulletin* no. 2. http://www.lawlink.nsw.gov.au/lawlink/bocsar/ll_bocsar.nsf/vwFiles/AB02.pdf?file/AB02.pdf#target=_blank

52 Briscoe & Donnelly 2001b; Chik Chikritzhs T & Stockwell T 2002. The impact of later trading hours for Australian public houses (hotels) on levels of violence. *Journal of studies on alcohol* 63: 591–599 Alcohol and Crime, Updated July 2010, South Australia Police,

there is no readily available empirical research. Regardless, there have almost certainly been benefits from the greater communication between bar and club owners with the authorities and between the venue owners themselves.

There are many limits to the factors for which venues can take full responsibility with many needing to be managed at a broader societal level. A University of Stirling (UK) study similarly examined the abuse of alcohol across a number of nations. It concluded that licensing authorities must be empowered to tackle alcohol-related harm by controlling the total availability of alcohol in their jurisdiction. Additionally, the report suggested that this should be located in the context of a whole of population approach to alcohol fuelled anti-social behaviour, especially violence. Notably the report states that

“Long-term success in minimising the harm from alcohol will only be achieved by population measures that reduce the affordability and availability of alcohol products for all drinkers. The research evidence is unequivocal: such population measures are the most effective in reducing alcohol consumption and alcohol-related harm. The implications of this shift in behaviour are profound. Most of the harm from alcohol is now driven by low cost ‘off’ sales, not by sales in pubs and clubs.”⁵³

The issue of alcohol abuse and its ramifications for health and social policy is beyond the scope of this report. Much of the research however has clear implications for the management of environments in which people congregate to socialise and be entertained. For example, having people congregating on the streets in their attempt to find transport home has been shown, through research in other cities, to increase the risk of alcohol related harm. Similarly ‘pre-loading’ with alcohol by those attending entertainment districts in some Australian cities has been identified as common. Knowing the way in which this actually plays out in Adelaide and South Australia generally would assist in finding the best resolution to the problems here. It has been shown by Moore et al that “[venues] that produce the most assault-related injuries are also those that produce the greatest proportion of severely intoxicated patrons, suggesting that underlying [venue]-specific risks may contribute to both forms of alcohol-related harm”.⁵⁴ Hadfield further analysed this in a report prepared for the City of Sydney and concluded that Moore’s work could have significant flow on effects for the “local enforcement, prevention and research activity as venues that accommodate the highest proportions of severely intoxicated customers can be identified using police data and surveyor ratings

⁵³ Stirling University Report – Cite:
<http://www.stir.ac.uk/media/schools/management/documents/Alcoholstrategy-updated.pdf> p10

⁵⁴ Moore, S. C., Brennan, I. and Murphy, S. 2011. Predicting and measuring premises-level harm in the night-time economy. *Alcohol and Alcoholism* 46(3), pp. 357-363.

of intoxication”.⁵⁵ This suggests that investment in further research in such areas would be a cost efficient way of identifying these problems, providing facts that may influence and guide the behaviour of all stakeholders as well as the basis for the generation of solutions. (Refer also to Recommendation 27 related to market research). The characteristics of sites in Adelaide and other suburbs where there is a high occurrence of problem behaviour should be “unpacked” for a better understanding of methods for reducing harm. Specifically, a more sophisticated understanding of the role, if any, of live music venues and their characteristics, and those of entertainment they provide, in this problem behaviour should be sought. Ideally a comprehensive approach drawing on qualitative information from social and psychological research along with police and hospital data should yield a better understanding

Recommendation 39

Create a framework for collaboration and planning, having a common language as its foundation, for communication across the music industry, SAPOL, the Liquor and Gambling Commissioner, local councils and residents

In a recent paper Burke and Schmidt from Griffith University compared the planning and management regimes for live music venues across the eastern state capital cities over a two year period. The research suggested that the approach taken by Brisbane in a place-based approach known as the Valley Music Harmony Plan (2004), resulted in positive outcomes. It replaced legislation dealing with noise, planning and liquor to create Entertainment Precincts which were legislated by the State government. These precincts led to good outcomes and had a number of benefits for the venues.⁵⁶

This Plan meant that operators have been (and continue to be) granted certainty for investment, with increased protection from incompatible development and noise complaints, if they are located in the designated area. The research suggests that the night-time economy had significant growth and support. The research argued that *“this functional separation and concentration in Brisbane differs significantly to Melbourne, with its more liberal approach and diffused venues. Brisbane is effectively placing the problems in one key site, leaving the rest of the city with few live music or night-time entertainment options”*. In effect this gives ‘first-occupant rights’ coupled with other significant certainties

⁵⁵ Hadfield, Phil. Night Time Economy Management: International Research and Practice A Review for the City of Sydney (Sydney: City of Sydney, 2011) available at: http://www.cityofsydney.nsw.gov.au/__data/assets/pdf_file/0016/131740/InternationalEvidenceLiteratureReview.pdf pp6-7

⁵⁶ Burke and Schmidt, How should we plan and regulate live music in Australian cities? Learnings from Brisbane Australian Planner, Vol 50, Issue 1, 2013

to both residential developments as well as the live music venues in their respective precincts.⁵⁷

Although Adelaide does contain three distinct entertainment areas (Hindley Street, Rundle Street and Gouger Street) within the square mile, each with a different emphasis on licensed premises, these have grown naturally rather than as a direct result of considered planning. Since July 2012 the establishment of the 'Capital City Zone', which encompasses the above areas, attempts to define these areas for a particular use (e.g. restaurants, clubbing etc.) whilst recognising that such precincts should have a more Melbourne type approach. It also seeks to encourage licensed premises that will responsibly manage their impacts thereby allowing venues to operate throughout the zone in proximity to residential premises.

Adelaide therefore is attempting to plan for a dedicated, central live music and entertainment district with regulations specific to that district or zone, but this approach means that it must fit retrospectively into the existing mixed use environment including residential populations. There are different views on the value of 'zones' versus integration. Bringing venues and other forms of entertainment together into a specific zone or zones, at face value, makes management of problem behaviour and noise easier through standard regulations and their enforcement. There appears to be value in containing alcohol related violence and the like to specific zones which can then be intensely policed and managed. On the other hand there is the view that there are benefits to having a diverse range of activity, as it is believed this inherently makes an environment safer through greater public activity and consequent visibility of the actions of others. It is also believed that it creates a more communal, interesting and inclusive environment reducing anti-social behaviour through addressing its cause.

Regardless of the view taken on this issue it is clear that the greater the communication and collaboration between stakeholders in exploring issues and contributing their solutions, the better the outcome.

In South Australia, the State Government's Consumer and Business Services (CBS) office is responsible for the imposition of conditions (often as a result of conciliation between objectors and applicants). While it is clear that in recent times there has been a commitment to resolve the issues and tensions that have developed through areas of diverse use in the City of Adelaide and beyond, many matters remain unresolved or problematic. Commitment from all parties to work together to achieve outcomes is required.

⁵⁷ *ibid*

Successful planning before events can significantly reduce risks to the safety of patrons and risks of annoyance to surrounding residents or businesses at the time of the event. This collaborative approach ensures that the enforcement bodies understand the nature of the event/venue and that organisers are proactively managing risks.

Enforcement agencies in South Australia involved with licensed venues and live music:

- Consumer and Business Services (previously the Office of the Liquor and Gambling Commissioner) is a division of the Attorney-General's Department, which regulates the *Liquor Licensing Act 1997*. The objectives of the Act are to encourage responsible attitudes towards the promotion, sale, supply, consumption and use of liquor and to minimise the harm associated with these products
- Local Government – planning and compliance officers
- Licensing Enforcement Branch (SAPOL) - policing of a range of regulated industries.
- Local police (SAPOL)

These branches all deal with different issues and work collaboratively with large scale events.

At the time of this report the Adelaide CBD had 272 licensed premises with entertainment consents. In total, 29 of these have an Entertainment Venue licence and 78 have a Special Circumstances licence.

Recommendation 40

State Government to take the lead on clarification of roles and responsibilities held by regulatory and enforcement bodies

Public confusion, created by intersecting and overlapping regulations between authorities, needs to be overcome. Although some Local Government authorities produce guidelines, greater collaboration is required between the Commonwealth and State governments to clarify the roles and responsibilities of regulatory and enforcement bodies particularly in relation to the cross over between the National Construction Code – Building Code of Australia (Cwth), the Development Act (SA) and the Liquor Licensing Act (SA).

The State Government and Adelaide City Council are committed to increasing the residential population in the city as discussed earlier. This creates the

potential for conflict between the desires of some for a quiet living environment and the owners of live music venues. It is vital to the survival of live music within the City of Adelaide that the issues of balancing residential growth and mixed-use land be addressed now so that entertainment venues and residents can co-exist into the future.

Recommendation 41

A more flexible approach to the Late Night Trading Code of Practice

The recently developed *Late Night Trading Code of Practice* took effect on 1 October 2013 in South Australia. This is part of a broader strategy to reduce alcohol related incidents of serious violence in and around South Australia's licensed venues. New measures for implementation by venues depend upon their actual trading hours, their capacity and their location. Venues that trade after 3am will need to have metal detectors available for use, high-definition CCTV, and adhere to an early morning ban on glassware, and drink promotions in the form of free drinks, shooters and doubles⁵⁸. The regulations take effect progressively over the night with the first taking effect from 12.01am and with the greatest focus of regulation being on reducing violence between 4am and 7am.

The increased requirements apply only to venues that are licensed to operate beyond 3.01am. These requirements are likely to be fairly easily managed by the large capacity venues, such as nightclubs, with high customer turnover and economies of scale, as they can afford the cost of implementing the new requirements. Smaller venues dedicated to live music are unlikely to be able to afford CCTV or metal detectors both of which are required for venues over 200 in capacity when operating after 12.01am if licensed to operate after 3.01am. They are also unlikely to want to influence the "atmosphere" of the venue in this way. They may, however, wish to stage music later than mid-night which could potentially mean they will need to incur the cost of implementing these requirements. These requirements are unlikely to affect many existing venues as few currently are licensed to operate after 3.01am.

While some venues present live music beyond 3.01am the majority of venues do not. They may, however, have a licence that allows them to do so in which case they will be subject to the new requirements. This approach fails to differentiate between types of venues. A more nuanced approach is likely to yield more positive results for all parties. It should be noted, however, that

58 New Late Night Trading Code of Practice, (Adelaide: Government of South Australia, 2013) Available at: http://www.olgc.sa.gov.au/default.asp?page=liquor.Licensees_Obligations.code_of_practice.Liquor_Code_of_Practice_first_page_021203.htm

the Liquor and Gambling Commissioner (LGC) has some discretion over the application of licence conditions and requirements of venues and the specific needs of venue owners.

Recommendation 42

Encourage a culture of early and late night activity, reducing the early morning issues of anti-social behaviour

The social culture of the city of Adelaide has been largely for the younger people to start their social activities late in the evening and stay out until the early hours of the next day often after preloading with alcohol. The reasons for this are unclear but this issue and the characteristics of environments that may encourage people to seek entertainment at an earlier time should be subject to research. This research could then form the basis for a long term approach. Live music is likely to benefit through an expansion of entertainment options at an earlier time and access by a broader patron base.

Through the 'Good Evening Adelaide' Strategy, the State Government and Adelaide City Council have identified efforts to grow and diversify Adelaide's evening, night and late night experience as a priority for greater activation of the city centre and increasing its attractiveness to visitors and the residents of South Australia.

Currently most live music fits into the Night and Late Night category but there is lots of scope to program live music earlier in the evening. There needs to be ongoing conversations with venues and bookers on what would encourage them to start shows earlier. Having some shows starting earlier will keep people in the city in the evenings and will be a better fit with existing public transport times.

This is not to say that live music needs to stop at midnight but that live music should start earlier in some places. It may also go later in other places to cater for audience demand. Different venues and scenes will have different cultures but those that could cater to an early evening audience should be encouraged to do so.

Recommendation 43**Reduce barriers to live music created by legislation meant for other purposes and encourage dedicated live music venues**

Artists need spaces to perform, write, record and rehearse and audiences need spaces to connect with artists. A reduction in available space, due to the changing nature of the city environment described earlier, is an ongoing threat to live performances. Complex legislative requirements can provide significant barriers to the creation of dedicated live music venues and spaces and threaten the capacity of existing venues to continue to operate.

Renew Adelaide has stressed the importance of a regulatory system that supports and grows venue based creative and cultural enterprises. It suggests that this requires a cultural shift in the various departments and enforcement bodies as well as changes to the legislation.⁵⁹

In the United Kingdom, the Home Office issues guidance to licensing authorities in relation to the carrying out of their functions under their liquor licensing legislation. It is designed in particular to support and assist police officers in interpreting and implementing their legislation in relation to its licensing objectives. Such guidance for enforcers, alongside of that provided to venue owners, could assist in reducing misunderstandings and provide an important basis upon which to manage enforcement.

The Parliament of South Australia recently passed the *Liquor Licensing (Small Venue Licence) Amendment Act 2013* that covers venues with capacity of fewer than 120 people. The legislation will be initially trialled in the Adelaide CBD and if successful may be extended to other suburban areas of the State. The Act which was introduced to the Parliament by the Government has recognised that the existing liquor licensing legislation and its associated processes, has stood in the way of new venues being approved. In particular this category of licence does not require the 'needs test' (see p113) and limits the capacity for other parties to take legal steps to prevent the establishment of a venue. Furthermore the legislation means that no separate application for entertainment consent is required (approval is at the Commissioner's discretion) for entertainment during the standard hours of service. These are defined as being 11am to midnight with extensions of opening hours until 2am possible upon application. This legislation certainly opens the door for new and different bars and for some level of entertainment in these bars. The emphasis of businesses operating under this provision, however, is likely to be more related to the bar patrons than live music followers.

59 Ware, Ianto. Regulatory Barriers to South Australia's Venue-Based Creative Initiatives. (Adelaide: Renew Adelaide, 2013). pp55-56

Venues that have a high emphasis on live music as their business need to have more than 120 patrons on an ongoing basis to make the venue viable through ticket sales. Well established hotels are an exception as they can present small live music events subsidised to an extent by their alcohol sales.

At present the reality is that most income for venue owners will come from the sale of alcohol. The business owner will use music and entertainment as a means of drawing a large crowd to increase bar sales. A venue that is dedicated to live music must provide quality entertainment as it is the only means by which it can command higher prices for entry and ensure the business' viability if it is not to rely on bar sales alone. Medium sized venues dedicated to live music should be encouraged through the reduction of regulatory barriers.

A different business model for these venues is required. Jive, in the West End of Adelaide, is an example of a successful live music venue that has a very good track record for its management and with minimal problems related to alcohol. The Rhino Room is another example of a successful medium capacity venue with a business built primarily on entertainment which in its case is a combination of live music and comedy.



Adelaide West-end, Leigh St: source Helen Page Photography

Background Information

Commonwealth

National Construction Code – Building Code of Australia

The Building Code of Australia (BCA) is the nationally accepted technical document which sets the standards for buildings and building work in Australia. This document outlines what can and cannot happen in buildings and the conditions under which this is determined. Each state is able to have variations to the code and their own particular specifications.

The Disability Discrimination Act 1992 and Disability (Access to Premises) Standards 2010

The Disability Discrimination Act 1992 and Disability (Access to Premises) Standards 2010 aim to counteract inherent discrimination afforded to people with disabilities ranging from genetic pre-dispositions, physical illness, mental illness or the functionality, such as vision and hearing impairment, in comparison to an assumed standard of an ‘able body’. In terms of the built environment (and in this case, live music venues) this is most relevant when considering ease of access to those with limited mobility.

South Australia

The Development Act and Development Regulations

This act regulates conservation, use, development and management of land and buildings. The act regulates the ‘use’, and thus the change of use, of buildings. It also regulates ‘development’ which includes building work and alterations.⁶⁰ Most Licensed Venues are under the authority of their Local Government that is responsible for assessing and determining Planning and Building applications.

Liquor Licensing

The Liquor Licensing Act 1997 regulates the sales of alcohol in South Australia. The Act regulates the conditions and standards required in order to sell liquor.

The Environment Protection Act

The Environment Protection Act provides regulation on ‘pollutants’ including noise.

60 Ware, Ianto. *Regulatory Barriers to South Australia's Venue-Based Creative Initiatives*. (Adelaide: Renew Adelaide, 2013). p16

Teasing apart the areas in which the legislation intersects and creates duplication or variation of requirements for gaining permission to operate a venue, especially with entertainment, is a large and complex task. Significant work is underway in government to make regulations for licensed premises more streamlined and easier to navigate. Change will require commitment and collaboration from several different agencies and levels of government to work towards a more coordinated approach. The development and legislation of the Small Venues Licence in South Australia provides a good example of collaboration between regulatory bodies to produce a positive outcome. The approval process required to gain this licence is now much easier than the previous process which was the same as that currently required for those venues that have a capacity of more than 120.

There needs to be clarity for licensees and venue operators over the issues they are required to address in their business and over the agency that has responsibility for each of these. There appears to be some progress toward achieving this recently with Consumer and Business Services (CBS) working with Adelaide City Council to streamline matters and reduce duplication especially in relation to building regulations. For example, CBS is now referring to the Council's building rules assessment and will be relying on Council's final inspection of the venue to deem it fit for use, whereas previously CBS conducted its own inspection.

DOUBLE HANDLING: The Building Code of Australia (BCA) and Liquor Licensing

There are complications arising from double handling of issues due to the crossover of sections of the Building Code with Liquor Licensing. An example of this is the section relating to the capacity of licensed venues. Planning authorities will assess a venue or a room in a licensed premise and assign a maximum capacity based on factors like the size of the room, the size and number of the exits, and facilities such as bars and toilets. This capacity is submitted as part of the application for a liquor licence. Licensing authorities make their assessment based on the BCA criteria and may assign a capacity that differs from the capacity approved by planning authorities. This creates a more lengthy process and more confusion for licensees. Consumer and Business Services have advised at the time of this report being written that this process is being changed so that the liquor licence applicant is required to submit the venue capacity through the Council's Development Assessment System or an independent certifier.

The expert panel, ThinkDesignDeliver, who are undertaking the Planning Reform agenda for South Australia, could address this issue. This panel will review the State's 20 year old planning legislation. They will also look at all other legislation that intersects with planning and any other factors that impact the planning system.
<http://www.thinkdesigndeliver.sa.gov.au/>

In the United Kingdom the loss of local pubs and other community venues due to many of the issues described above and throughout this report, led to the Localism Act which came into effect in early 2012.⁶¹ It is described by the Local Government Authority there as having four key measures; freedoms and flexibilities for local government; new rights and powers for communities and individuals; reform to make the planning system more democratic and more effective; reform to ensure decisions about housing are taken locally. Within this new legislation is *The Community Right to Bid*. This allows communities to seek to make a valued building or piece of land a community asset where its main use furthers the social wellbeing or interests of a local community. The 'community asset' will be included on a local authority register. If the assets on the register are put up for sale, the community is given a window of opportunity to express an interest in purchasing the asset, and another window of opportunity to bid, under the Community Asset Transfer scheme.

⁶¹ Localism Act (UK) Introduction, available at: <http://www.local.gov.uk/localism-act>

Overall the Localism Act creates a great deal more flexibility in planning and also empowers the local community to make decisions about their local neighbourhood. It may provide some avenues for future legislation in South Australia.

Recommendation 44

Establish a 'one stop shop' for development and licensing applications

It is recommended that a 'one stop shop' be created for the processing of applications for licences by new applicants or existing venue owners. The proposed 'one stop shop' will work across the various regulatory bodies and with applicants to ensure a satisfactory outcome for all parties. Applicants, however, will be required to submit one application only and will have one organisation with which to communicate.

This could be considered by the ThinkDesignDeliver Expert Panel on Planning Reform.

Recommendation 45

Encourage shared responsibility in planning

The State Government should encourage stakeholders (including residents, venue owners and regulatory authorities) to take shared responsibility for planning in order to create a more equitable arrangement in planning. Currently the traditional 'polluter pays' model is used. In terms of live music, this principle is most often employed to determine who is responsible for noise management. The onus of responsibility however needs to be placed on the party who is changing the environment to respect the reasonable expectations of existing land users. This applies to both venue operators and residents.

Existing venues that are compliant with existing noise attenuation regulation should not then be liable for any future loss of amenity because of new or changed conditions such as a residential apartment block being built in close proximity.

This approach would protect existing venues from lengthy legal processes or expensive noise attenuation measures such as noise reports and sound proofing.

It is important to note, however, that responsibility can fall both ways. Venue operators wishing to open a new venue or modify operating practices such as trading hours would be responsible for noise attenuation. Ideally the responsibility for noise attenuation should be shared. Venues should take reasonable

measures to control sound and developers building in mixed use areas should add design features such as double glazed windows to help soundproof new buildings. This principle should be employed at both state and local government levels.

Recommendation 46

Create a set of regulations and guidelines specific to noise management by live music venues and related building development

Noise is measurable and in South Australia is measured by a sound level meter that complies with *Australian Standard AS 1259-1990 Acoustics—Sound Level Meters* in terms of decibels. In South Australia the Environment Protection Authority (EPA) has responsibility for enforcement of the regulations under its legislation covering a wide range of noise pollution such as construction, large industry and wind farms. The legislation also contains a general requirement that people must take reasonable and practicable measures not to pollute. The EPA has jurisdiction over outdoor events and it provides a set of technical guidelines for use by sound engineers and government officers for the management of noise. Local councils have wide ranging responsibilities for managing such pollutants as apply to residential construction and noise generated by dogs and people.

There is, however, unlike other noise, no set and objective standard for assessment of the noise emanating from licensed venues in South Australia and against which an assessment can be made as to the extent of noise pollution. The legislation used for its management and regulation is a special provision of the Liquor Licensing Act which provides that if:

- (a) an activity on, or the noise emanating from, licensed premises; or
- (b) the behaviour of persons making their way to or from licensed premises, is unduly offensive, annoying, disturbing or inconvenient to a person who resides, works or worships in the vicinity of the licensed premises, a complaint may be lodged with the Commissioner under this section.

Complaints are managed on a case-by-case basis and when they are not able to be resolved through conciliation can be referred to the Licensing Court. Enforcement of the legislation is the responsibility of the police.

Noise from live music venues is therefore not usually subject to objective assessment as per the management of noise pollution under the EPA

legislation.⁶² The EPA's Guideline for use of the *Environment Protection (Noise) Policy 2007* states that "a comparison with the indicative noise levels and consideration of the factors of clause 19 of the Noise Policy may assist the Commissioner or Licensing Court in situations where an objective assessment procedure is considered useful." The fact remains that in most cases the Commissioner has not made a determination on noise levels and this makes it difficult for venue owners to manage the noise from live music in the most effective and efficient manner. It also creates difficulties for the police to assess any given situation and adjudicate fairly between parties.

It is acknowledged that managing noise and dealing with complaints about noise is not straight forward. For example, there is evidence that modern styles of music contain large amounts of low frequency sounds or the 'base beat' which have been identified as being more annoying to listeners than other frequencies.⁶³ It is not only perceived to resonate within the chest cavity but it has been found to be transmitted over long distance and through buildings. Low frequency noise is also less likely to be present in the general environment and therefore is more readily identified.

Queensland is the only state that has specified in legislation the allowable level of noise emissions from licensed premises in precincts that are zoned as 'entertainment'. Most councils in South Australia do, however, have noise reduction provisions.

There is significant confusion about how noise is measured and enforced. A collaborative project between State and Local Government should:

- Identify all current measures for assessing and enforcing problematic noise;
- Seek to define a standardised method and means for measuring noise;
- Seek to define the level of noise that is permissible and during what hours;
- Seek to define who is responsible for the measurement of noise and for managing noise complaints;
- Develop a mechanism to ensure that the developers of residential properties and venues are well versed in building standards and techniques for noise minimisation;
- Develop a mechanism for the provision of information for stakeholders on good practice regarding noise and live music.

⁶² Guidelines for use of the Environment Protection (Noise) Policy, (Adelaide, Government of South Australia, 2007) Available at: http://www.epa.sa.gov.au/xstd_files/Noise/Guideline/guidelines_noise_epp.pdf

⁶³ Hadfield, 2011, p151-152

The recently consolidated Adelaide (City) Development Plan indicates a move in the right direction in relation to future development and new licensed venues. It specifies noise attenuation requirements and states the specific levels in decibels that are not to be exceeded. For example, the Principle of Development Control 91 states:

“Development of licensed premises or licensed entertainment premises or similar in or adjacent to a Residential Zone or the North Adelaide Historic (Conservation) Zone should include noise attenuation measures to achieve the following when assessed at the nearest existing or envisaged future noise sensitive development:

The music noise (L10, 15 min) is:

- (i) less than 8 dB above the level of background noise² (L90,15 min) in any octave band of the sound spectrum; and*
- (ii) less than 5 dB(A) above the level of background noise (LA 90,15 min) for the overall (sum of all octave bands) A-weighted level.”*

In addition, in relation to the noise receivers, and particularly for those who may move into the area through residential development, it states:

“Noise sensitive development in mixed use areas should not unreasonably interfere with the operation of surrounding non-residential uses that generate noise levels that are commensurate with the envisaged amenity of the locality”.

The Plan, however, does have a negative side in that new licensed venues may be discouraged from starting up as they have to take into consideration ‘envisaged land use’. This may introduce a level of uncertainty as the envisaged land use is not necessarily predictable.

Recommendation 47

Encourage local councils to create their own live music plans in conjunction with local development plans

The establishment of live music plans by Councils that have, or are likely to have, venues that provide entertainment would force consideration of their strategies for cultural and entertainment centres, alongside other considerations such as safety, parking and noise. The Adelaide City Council is currently developing such a plan. The Local Government Association could assist by providing templates and models for successful plans. These plans could be part of each council’s Development Plan or complementary to it. The plans

would create clarity for council staff, venue operators and rate-payers. It would allow prospective venue owners to know what to expect when considering opening premises in the council area of their preference. Furthermore, councils could create a guide for the stakeholders.

Currently local councils are able to intervene in liquor licensing applications and propose changes to existing liquor licences such as amending trading hours.⁶⁴ Councils often intervene where there is a precinct licensing statement, or alcohol management plan, for a particular area. They can also intervene on behalf of local rate-payers about patron behaviour, noise, or concern about potential noise or disturbance. Consistency in regulations would help alleviate some of the problems and confusion.⁶⁵

Collaborative Problem Solving: Case Management Services

Currently the Department of Planning, Transport and Infrastructure provides a free and voluntary Case Management service for venues wishing to apply for a Small Venue Licence.

The Case Management service provides the applicant with a Case Manager who assists the applicant to navigate the Planning (Council), Building (Council) and Liquor Licence (CBS) applications and minimises double handling of matters and allows for consistency of advice.

The service is in partnership with Adelaide City Council, Consumer and Business Services and SAPOL and provides the applicant with certainty prior to lodging all applications.

This is a good example of how collaborative activity across regulatory and enforcement bodies can streamline processes, minimise double handling and provide consistency of advice.

⁶⁴ South Australian Liquor Licensing Laws: A Guide for Local Councils (Adelaide: Government of South Australia and Local Government Association, 2006), p13, available at: http://www.olgc.sa.gov.au/general/Publication_Pages/Guide_for_Local_Councils.pdf

⁶⁵ Adapted from John Wardle's report September 2008 <http://www.mca.org.au/images/pdf/MCAIivemusicstudywardle.pdf>

Recommendation 48**Amend the Liquor Licensing Act***Remove the definition of ‘entertainment’ in the Licensing Act*

It has been suggested that the removal of the definition of entertainment⁶⁶ from the Liquor Licensing Act would make it easier for venues and businesses to host various types of live music rather than only that specified in its licence. This opens up the possibility of live music becoming not only more diverse but more prevalent. Currently liquor licences can be granted, with conditions on the type of entertainment that is provided including the specification of the genres of music (for example, folk music or acoustic music only or ‘no grunge music’), or types of bands (for example, only solo acts, duets or two-piece bands). These restrictions are often imposed with the agreement of both parties but this is generally because the licensee wishes to avoid further cost. The licence may also include restrictions on the licensee’s capacity to advertise performances. South Australia is one of the last states in Australia to regulate performances in licensed premises in this way.

In other states the red tape for live entertainment in licensed premises has been cut so that hotels, clubs, restaurants, cafés and other venues no longer need a special licence to present live entertainment. It has been legally recognised that live entertainment is considered a normal activity in licensed premises and should not need special permissions.

Remove or Replace the ‘needs test’ requirement for a licence

The ‘needs test’ in the current South Australian Liquor Licensing Act 1997 requires applicants for a hotel licence to show that there is a gap in the local market and that there is a need for the proposed service in the locality in order to gain approval for a licence.

This provision enables existing businesses to object to the new licence being granted on the basis that there is no ‘need’. The larger the number of existing businesses the more likely there will be objections. It has been argued that the ‘needs test’ is used by existing businesses to block competitors. It can also be an impediment to new hotels in areas of small population as it can be argued that the population is sufficiently serviced by existing hotels. This may be particularly disadvantageous to potential tourist destinations in which new venues could build alternative attractions for tourists and provide overnight accommodation where it does not already exist.

66 A Private Member’s Bill was introduced in the South Australian Parliament, by Greens Legislative Councillor, The Hon Tammy Franks MLC and was aimed at removing the definition of ‘entertainment’ from the *Liquor Licensing Act 1997*.

The clause referring to the ‘needs of the public in that locality’ has been amended in other states (and in the Small Bars Section of the SA Legislation) because of concerns over anti-competitive behaviour. In Western Australia it has been replaced by a Public Interest Test and in New South Wales it has been replaced by a Social Impact Assessment. These changes mean that existing businesses are no longer able to object on a ‘need’ basis. Objections may only be made on grounds such as disturbance to the neighbourhood or impact on amenity.

The South Australian Government could follow the lead of the other states and remove the ‘needs test’ from the Liquor Licensing Act 1997 for all venues not just small bars. A ‘Public Interest Test’ or ‘Social Impact Assessment’ similar to those elsewhere could be implemented to complement zoning restrictions that control impacts on amenity.



Adelaide West end, Hindley St.: source Helen Page Photography

Melbourne Liquor Reform and the Rise of the Laneway Culture

Melbourne is often praised for its “laneway culture” and diversity of licensed establishments. Music industry leaders consider Melbourne the Live Music Capital of Australia and the city has a reputation for great bars and great bands.

Liquor Reform

Part of the reason for Melbourne having this culture is because of a review of the 1968 Liquor Control Act (1968) in 1986 that led to a series of changes in the regulations. The purpose of the review was to identify the object of liquor legislation and the best means of attaining that object.

It noted that:

- *alcohol abusers impose costs on society in general: road accidents, community cost subsidy for treatment, and for dealing with drunk behaviour, as well as many others*
- *(but) the majority in Australian society do not misuse alcohol*
- *policy should not deny access to a flexible and varied set of public facilities for the purchase, enjoyment and consumption of alcohol*
- *liquor legislation should not inhibit the free responses of industry to legitimate consumer desires*
- *instruments of alcohol abuse policy should be related to targets (e.g. fiscal policy; proper planning; licence cancellation and suspension; and penalties)⁶⁷.*

The conclusion was that the legislation had little relevance to these objects and it was recommended that liquor licensing be reformed to ensure:

- The liquor licensing legislation was not the primary mechanism to counter alcohol abuse
- The legislation was flexible and less economically and otherwise intrusive for licensees
- A clear separation of the judicial and administrative functions of the legislation.

The licensing reform was undertaken in 1988. Greater flexibility for licence holders, and lowered barriers to entry, led to a significant increase in industry participants as well as a much greater diversity in premises beyond ‘the pub’. Many smaller players entered the market and the average size of licensed premises has decreased (in turnover, physical scale and/or employment numbers) as licensees were able to cater for smaller niche markets. These establishments are also able to provide functions that had not previously been possible such as serving alcohol without food. The administrative simplicity of the reformed system saved time and expense and the separation of judicial and administrative functions streamlined the application process.⁶⁸

Deregulation of liquor licensing does not mean an automatic increase in live music venues. Many of the venues that are able to open under more flexible conditions may choose not to have any live music. More flexible conditions and lower barriers to entry however make it much more viable for existing and potential venue operators to consider hosting live music.⁶⁹

⁶⁷ “Australia’s Live Music Capital – Winner Declared In The Sydney Vs Melbourne Debate”, last modified April 16, 2013. Available at: <http://musicfeeds.com.au/news/australias-live-music-capital-winner-declared-in-the-sydney-vs-melbourne-debate/>

⁶⁸ Nieuwenhuysen, John., Discussion Paper: Victoria and New South Wales: Liquor Law Comparisons (Westfield Group, 2007) Available at: http://oj.hss.uts.edu.au/oj1/swerve_spring07/hole_in_the_wall/070924_Discussion_paper.pdf

⁶⁹ *ibid*

Make the objection and conciliation process more equitable for the applicant by empowering the Commissioner and through final resolution of objections

Currently when an application is made for a new licence or a change in licence, it is made public so that interested parties have the opportunity to object to its approval. Objectors may be businesses, individuals or organisations. When an objection is raised, the objector and the applicant are required to take part in a conciliation process. The conciliation process will be completed upon the objector being satisfied that the issue has been resolved or upon the applicant agreeing to the objector's demands, at which time the objector will formally withdraw their objection. For example, a nearby resident may be concerned that a proposal by a venue for live bands to perform will cause noise pollution. A noise report may show that the venue is appropriately soundproofed and noise will not be an issue in which case the objector can withdraw their objection. If, however, they are not satisfied with the noise report the venue operator may simply agree not to host live music so they can have the licence granted. In a scenario like this, if the objector will not withdraw the objection and the licensee wishes to pursue having live music, the issue will go to the Commissioner for a decision but only if both parties agree to the Commissioner dealing with the matter. Otherwise the matter is automatically directed to the Licensing Court. The legal process can often be costly and lengthy for both the objector and the applicant.

Changes should be made to the Liquor Licensing Act to compel both parties to have determinations made by the Commissioner to avoid unnecessary court proceedings. The process would be much faster and a party, dissatisfied with the Commissioner's decision, should be able to appeal to the Licensing Court but only on specific grounds.

Additionally the Commissioner should be granted power to group objections together into one matter allowing multiple objections of the same nature dealing with a particular licensed venue to be resolved as a single objection with multiple parties. Currently there is no legal way to close off conciliations on specific issues, as multiple parties can raise the same objection. It is subject to the conciliation process for several months before resolution after which a similar or identical objection can still be made by another party which will again require a conciliation process. There is no legal mechanism to declare that the issue has been addressed and resolved. In this case of a noise complaint the licence applicant may have to commission several noise assessment reports which can be very costly. Lengthy delays create a great deal of stress for small businesses with no certainty as to whether they will be granted a licence or when this may occur.

Recommendation 49

Work with the Federal Government to achieve changes to the Building Code; small to medium venues that come under class 9b.

The Building Code of Australia (BCA) classifies buildings according to their type and purpose and the classification means the building is subject to specific regulations. It is for this reason that re-purposing heritage buildings can be problematic.

Class 6 buildings are typically shops for the supply of goods and services to the public. Class 9b buildings are those used for places of public assembly for entertainment or recreational purposes. The difference between these classes refers to the primary purpose of the building. That is, a building may be classified as having its prime purpose as being for people to gather or for people to buy things (including alcohol). Theatres, galleries and halls are all classified as Class 9b while cafes, restaurants, bars and hotels are Class 6.

In some cases, the activities carried out in hotels, bars, cafes or restaurants may lead to them being categorised as 9b buildings. This occurs when there is seen to be a change in use from a place that primarily sells alcohol to a place that primarily provides entertainment. New venues wanting to provide a mixture of services such as having a bar and providing occasional theatre shows or exhibitions may also be classified as 9b. When they are classified as 9b, places of public assembly for entertainment, they are subjected to major compliance requirements such as the installation of fire hydrants; sprinkler systems; smoke detector systems with 24 hour monitoring and direct connection to the fire brigade; mechanical smoke extraction systems; increased fire rating and isolation of walls and doors; disabled facilities and access; and increased structural requirements for floors.⁷⁰ These requirements are in place for safety reasons.

There is a tension however between the need for safety and the commercial viability of businesses with minimal operating budgets. This is particularly true when re-purposing heritage buildings which require lots of structural work to meet requirements. While safety of patrons cannot be compromised, it may be possible to be more flexible in the way risks are mitigated. It may also be possible to introduce a graded system of compliance so that smaller venues with smaller capacities can ensure safety without being subjected to the full range of conditions as part of Class 9b. This will require a national focus with input from a range of stakeholders from many industries including the music industry.

⁷⁰ Music industry position paper - The case for regulatory reform (Music Victoria, 2012)
available at: http://www.musicvictoria.com.au/assets/Documents/Music_Victoria_position_paper_Li.pdf

Varying Class 9b in NSW

In 2009 NSW introduced a variation to the Building Code that changed the criteria for which buildings should be classed as 9b, places of assembly. They deleted part (c)(i) of the classification (see below) which means that discotheques, nightclubs or bar areas of a hotel or motel providing live entertainment or containing a dance floor are no longer subject to the regulations of Class 9b.

Assembly building means a building where people may assemble for—

- (a) civic, theatrical, social, political or religious purposes including a library, theatre, public hall or place of worship; or*
- (b) educational purposes in a school, early childhood centre, preschool, or the like; or*
- (c) entertainment, recreational or sporting purposes including—*
 - (i) a discotheque, nightclub or a bar area of a hotel or motel providing live entertainment or containing a dance floor; or*
 - (ii) a cinema; or*
 - (iii) a sports stadium, sporting or other club; or*
 - (iv) transit purposes including a bus station, railway station, airport or ferry terminal.⁷¹*

This variation makes it far more viable for smaller, multi-use venues to provide entertainment and sell alcohol.

⁷¹ Wardle, John., "Local Government and Live Music – Friend or Foe?" in Music Forum magazine, Vol 19 Issue 2 (February 2013)
Available at: <http://musicincommunities.org.au/news/mentors-blog/641-local-government-and-live-music-friend-or-foe>



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The Future of Live Music in South Australia

Live Music Thinker: Martin Elbourne

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