SUMMARY REPORT:

THE MUSICSA 2024 ANNUAL SURVEY OF THE SOUTH AUSTRALIAN CONTEMPORARY MUSIC INDUSTRY

INTRODUCTION

In early 2024 and for the first time, MusicSA implemented a state-wide survey for the contemporary music industry. The survey was wide ranging and sought to understand more about the community that makes up the South Australian industry, more about the challenges and opportunities for industry, and how we can better elevate this important sector.

ABOUT THE SURVEY RESPONDENTS

MusicSA received 360 responses to the survey from a variety of industry professionals.

INDUSTRY ROLES	RESPONSES
Artist/ musician	72.5%
Artist manager	14.7%
Festival/ event/ logistics	14.2%
Technical/ production	11.9%
Other	11.1%
Venue owner/ operator	9.7%
Educator	9.7%
Booking agent	9.4%
Marketing/ PR/ ticketing	9.2%
Graphic Designer/Illustrator	6.9%
Record label	5.8%
Photographer/photo editor	4.2%

Professional practitioner	3.9%
Hospitality	3.9%
Videographer/film crew/video editor	3.6%
Peak body or advocacy group	2.5%
Government employee	2.5%

The vast majority of survey respondents were male followed by female respondents. 5% of reaspondents were non-binary and/ or gender diverse.

GENDER	RESPONSES
Male identifying	63%
Female identifying	28.3%
Non-binary or gender queer identifying	5.3%
Not specified	3.3%

RESPONDENT DIVERSITY	RESPONSES
Identify as Aboriginal and Torres Strait Islander	3%
Identify as coming from culturally or linguistically diverse backgrounds	20%
Identify as being part of the LGBTQI+ community	17%
Identify as having a disability including neurodivergence	24%

Additionally, 67% of survey respondents were born in South Australia, 18% were born in Australia and 15% were born overseas.

The majority of respondents surveyed were located in broader metropolitan Adelaide, followed by the CBD and regional areas.

LOCATION	RESPONSES
Greater Metropolitan Area	81.9%
Adelaide CBD	12.5%
Regional South Australia	7.2%

Survey respondents varied in age, with the largest represented age groups being people in their late 20s, early 30s and early 50s.

AGE	RESPONSES
15-19 years	3.3%
20-24 years	7.2%
25-29 years	12.2%
30-34 years	12.2%
35-39 years	8.9%
40-44 years	9.2%
45-49 years	8.9%
50-54 years	13.3%
55-59 years	7.2%
60-64 years	9.7%
65 years and over	7.8%

Survey respondents said they stay in touch with industry-based information in the following ways:

- 83% social media
- 60% personal networks and communities
- 43% websites
- 38% e-newsletters

WHAT THIS SURVEY TELLS US ABOUT TODAY'S SOUTH AUSTRALIAN CONTEMPORARY MUSIC INDUSTRY:

- Artists and musicians were the largest cohort to participate in the survey

- Nearly 40% of all respondents have worked in the South Australian contemporary music industry for more than twenty years, 25% of all respondents have worked in the industry for more than ten years, 19% of all respondents have worked in the industry for more than five years, and 14% of all respondents have worked in the industry for less than five years.

- 25% of all respondents work casually in the industry, 21% of respondents work as sole trader or contractor in the industry, 18% of respondents work part time in the industry and almost 20% of survey respondents always or usually work full time in the South Australian contemporary music industry.

- 48% of survey respondents derive all or part of their income from non-music professions, 24% of survey respondents derive all or part of their income from music, 9% of survey respondents earn an income from paid gigs, less than 1% of survey respondents earn and income from streaming, music sales, merch sales or royalties, and 4% of survey respondents earn an income from teaching.

- Survey respondents reflected of all genres of music. Rock, indie, pop and blues were the most strongly represented genres.

Survey respondents identified the top three things that would drive the growth of the contemporary music industry in South Australia:

1) Access to, and better support of, venues:- more venues, better quality venues, more community venues and sustainable live music venues.

2) More funding and investment from local government, state government and federal government. This includes more grants and grants programs, more showcasing, mentoring programs and skills development pathways.

3) Better promotion and marketing of and for the music industry. Marketing and promotion for-by-of artists, venues and local live music. Raising the profile of live music in South Australia through mainstream media and tourism avenues.

The following also rated strongly as opportunities to drive the growth of the local industry:

- Touring - more interstate and international touring into South Australia, touring more local artists interstate and overseas
- Audience development - shifting ticket buying patterns and growing the audience-attending culture
- Industry Development - programs, pathways, mentoring
- Education - pathways in schools, in vocational, in music and in music careers
- Fair pay for artists
- Regional and rural access, inclusion, equity to the South Australian contemporary music industry

Survey respondents noted the following as barriers for audiences attending live music in South Australia

- 51% lack of familiarity with local artists so don't actively seek out or go to gigs by local artists
- 40% associated costs of attending live music - transport, drinks, food, merch
- 30% changing audience attitudes and patterns towards attending live music

The following were also mentioned as barriers for audiences attending live music:

- The lack of local venues
- cost of tickets
- the difficulty in finding out what's on
- lack of touring artists into South Australia

Survey respondents were asked to identify the main issues facing the South Australian contemporary music industry today:

- 52% noted the increasing costs of business, inflation and cost of living
- 46% noted low/ decreasing audience numbers and low/ decreasing revenue sales
- 41% noted the lack of potential to generate cash flow and/ or income
- 35% noted the lack of paid performance opportunities for local artists

Survey respondents were asked about their perception of the financial state of the local contemporary music industry since the pandemic:

- 80% believe the financial state of the music industry in South Australia is worse than before the pandemic
- 17% believe the financial state of the music industry in South Australia is the same as before the pandemic
- 3% believe the financial state of the music industry in South Australia is better than before the pandemic

We asked respondents to comment on the accessibility of live music spaces in South Australia for people with disabilities

- 34% respondents believe accessibility is neither good or bad
- 22% respondents believe accessibility is poor
- 18% respondents believe accessibility is good

When asked whether survey respondents thought the Government of South Australia is working well with industry to effectively support the local industry, respondents answered:

- 17.5% Strongly disagreed
- 22% Disagreed
- 22% Somewhat disagreed
- 22.7% Were neutral
- 10.8% Somewhat agreed
- 4.2% Agreed
- 0.8% Strongly agreed

Survey respondents were asked what Industry Development and/ or Advocacy do they want MusicSA to do more of:

- Advocate for more funding and investment for the contemporary music industry sector at local, state, federal levels
- Advocate for dedicated investment to unlock sustainable pathways, showcasing and export opportunities
- Advocate for the importance of small-medium commercial and community venues, and local and community festivals, to the local live music ecosystem
- Advocate for better music education pathways and opportunities
- Advocate for fair pay for artists
- Develop and support more artists and industry networking activity and engagement
- More regional and remote engagement and activation, development and support
- Activate more local and cross-border touring opportunities

MusicSA asked survey respondents to identify what Industry topics they wanted to know more about. They answered:

- Grant writing
- Digital marketing and PR
- Music festival and event planning
- Touring
- Export
- Showcasing

We also asked survey respondents what MusicSA programs and activities had positive industry outcomes in South Australia and their response was:

- Approximately half of survey respondents weren't sure what previous programs and initiatives were offered by MusicSA

Those respondents that were familiar with MusicSA programs and initiatives rate the following as the most valuable:

- Industry Development activity (workshops, one-on-one sessions, mentoring etc)
- Scouted
- The SA Music Awards

Survey respondents were asked how many grants they had applied for in the last eighteen months, and how many applications were successful.

- Of the responders, approx. 50% had not applied for grants in the previous eighteen months.
- The remaining responders indicated they had applied for approx. 180 grants and 29 were successful – a success rate of approx. 16%

MUSICSA'S KEY TAKE-AWAYS FROM THE 2024 ANNUAL SURVEY

- There is a desperate need for more industry development and grass roots development for the whole contemporary music ecosystem

- Many in the industry don't understand the distinction between the South Australian music organisations or what each of their roles are (named as examples - MusicSA, the Music Development Office, Adelaide City of Music Office, Carclew, Adelaide Guitar Festival)

- Many in the industry don't understand the overarching structure of South Australia's grant, advocacy and government music industry bodies

- Networking opportunities are in high demand and would be very beneficial for the industry

- Grant funding opportunities and access to information about grants is in high demand

- There are key gaps in basic areas of education about how the music industry functions and how people can work within it

- Regional industry members are hungry for professional and industry development opportunities
- Respondents represented a wide cross-section of industry, however almost 75% were working musicians. This reflects the lack of ancillary music businesses in South Australia scaffolding working musicians.

- Almost all musicians identified another area of the industry that they worked in, with the most popular secondary answer being artist management, festival logistics and production. This indicates that few musicians can sustain a full-time career writing and performing music in South Australia.

What survey changes and evolutions we will consider implementing for the next annual survey:

- An online survey is just one way of gathering information. MusicSA will explore additional ways for people to participate to be more inclusive and respresentative
- We will gather more difinitive data about grant applications – who people are applying to, what kind of grants are they applying for and more data about grant succcess rates

MusicSA, June 2024