

# SUBMISSION

A MUSIC NATION –  
PRIORITIES FOR AUSTRALIA'S MUSIC INDUSTRY

APRA  
AMCOS



# APRA AMCOS – WHO WE ARE

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**APRA AMCOS has been representing Australian songwriters, composers and publishers since 1926.** With 100,000 members across Australia and New Zealand, our membership includes the very best and brightest of established and emerging musical talent at home and around the globe. We administer rights on their behalf, supporting songwriters, composers and publishers in an industry that is a flagship of Australian culture and creativity, generating billions of dollars each year for the Australian economy.

We are affiliated with similar collective management organisations around the world. So when Australian and New Zealand songs and compositions are played overseas, Australian and New Zealand writers get paid. We also help music customers in Australia and New Zealand access music from the rest of the world.

We work in partnership with government to support the development and career paths within Australian music through the cornerstones of live music, digital distribution, local venues, education and the global stage. APRA AMCOS has successfully initiated and lead industry and government co-investment strategies, developing highly regarded capacity building programs, most notably; SongMakers, Live Music Office, SongHubs and SOUNDS AUSTRALIA.

We advocate on behalf of music creators' rights and the Australasian music industry locally, nationally and internationally. Our Ambassador Program includes over 150 influential music creators representing the breadth and diversity of our membership, music publishers, and other industry stakeholders such as music venue operators and music managers. Collectively we promote the importance of music creators' rights and our role in administering those rights to industry, all levels of government, the media and the wider community. We also consult frequently with our Ambassadors to seek their input on issues affecting our members.

# A MUSIC NATION

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**Australia is a music nation.** From the dawn of time, music has been woven into the fabric of this land through ceremony, celebration and culture. From the expression of First Nation peoples to the vibration of migration, music is at the heart of how we come together, express ourselves and provides a soundtrack to what Australia tells the world.

Music percolates everything we do, from live gigs at clubs and hotels, radio and screen content, through education, the way we shop and dine, the music we exercise to and the music each individual listens to on their own. Of all the art forms Australians engage with, music is the most popular with nearly all Australians listening to recorded music.

Music in our cities, regional centres and towns provides them with a competitive advantage. More than half of the population attends live music, with every dollar spent on live music in Australia – three dollars worth of benefits are returned to the wider Australian community. One in seven Australians make music and over 40,000 Australian songwriters were paid royalties for their works last year.

Music now stands alongside the powerhouses of Australian exports – food, agriculture, wine, tourism. At the SOUND AUSTRALIA & Australia House industry market at SXSW in early 2018, there were 52 Australian artists in market. Indeed, over the last five years, APRA AMCOS' foreign revenue generated from the performance of Australian music overseas has doubled. More Australian musicians, than home-grown sports stars, are now globally recognised household names. There are now more Australian music artists, across a diversity of genres, succeeding on the international stage than ever before.

But we are at a critical time for our industry, at a cross road when the economic models that support music are shifting around the world. The digital music revolution has provided enormous export opportunity for Australian music creators and businesses, but risks cultural homogeneity if we don't ensure local artists can be seen and heard.

# TOWARDS A MUSIC POWERHOUSE

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**From local to global, live to digital, the Australian music industry has the potential to do much more.** With a pipeline of talent coming from across the nation and with the advent of a 'second digital revolution', Australia has the potential to go from a music nation, to a music powerhouse. A powerhouse that can fully realise the cultural, economic and social benefits of an even healthier music industry accessible to all Australians.

A Goldman Sachs report into music released in September 2017 estimated the global recorded music market would hit \$US41 billion by 2030. Add publishing revenue and live music to this figure and it is likely for music to become a \$100 billion industry within a decade. Australian artists, publishers and creators have the potential to earn a 5% market share of this by 2030.

But we need to get the policy, investment and industry settings right.

We need to foster a government and industry partnership that supports Australian contemporary music in all its diversity of forms. We need to inform the conversation on copyright, productivity and innovation. We need to unlock the talent pipeline that make up the ancient and diverse cultures of Australia in the 21st Century. We need music export strategies to take advantage of the full trade and diplomatic benefits of Australia's musical talent. We need to create sustainable careers in a sustainable industry. And we need to rethink music education, its inherent cultural value and how it can underpin the creative and problem solving skills needed by the next generation in our changing global economy.



# THE SUCCESS OF TURNING AUSTRALIA INTO A MUSIC POWERHOUSE IS UNDERPINNED BY THESE TWO KEY GOALS

1. A whole-of-government approach to the music industry to fully reflect its cultural, economic and social capacity driving employment, exports, local economic rejuvenation, tourism, hospitality, entertainment, youth development and health benefits across regional, remote and metropolitan Australia, and around the globe
2. Deeper collaboration across the sector with the establishment of a government and industry supported music organisation to be a policy and program leader to inform, champion and build the songwriting, export, educational, sound recording and live music success of Australian music

## IT IS THE MUSIC INDUSTRY THAT AMPLIFIES AUSTRALIA TO THE WORLD

We have an opportunity to really say something. We have an opportunity to speak to hearts, to heal others and ourselves, to uplift, to punch you right in the gut with a lyric. What songwriters do truly matters -- after all, if we didn't have music, what would this world even be anymore?

**Kylie Sackley**

*"Don't be afraid to sing in your own language. Your language is your identity so sing it loud and proud!" Eleanor Dixon*

*"As an artist, it's important to recognise your self-worth – remember that your performance is worth something." BRIGGS*

*"Where I come from has always informed my songwriting, my music, my career path. To make great music, you need to stand for something." Tina Arena*

# CONSULTATION

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As well as consulting closely with our 100,000+ songwriter and publisher members and ambassadors, APRA AMCOS convened a number of consultations with the wider industry including with Association of Artists Managers, Australian Music Industry Network, SOUNDS AUSTRALIA, Association of Independent Record Labels Association, Australasian Music Publishers Association, Australian Record Industry Association and Live Music Office.

This submission is by no means exhaustive of the issues and potential of the Australian music industry. APRA AMCOS will continue to consult with industry throughout the process of this Inquiry and beyond.

*"It all starts with the song. You make a living as a musician by having income from different sources: touring, songwriting royalties, record sales, syncs, sponsorship and more.*

*Without the SONGS, none of that exists. None of the jobs in the music industry exist."*

*Missy Higgins*

# PRIORITIES

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Through this consultation we have identified five key areas for industry and government to prioritise for Australia to reap the social, cultural and economic dividend from transforming from a music nation to a music powerhouse.

These priority areas are centred on:

## **THE TALENT PIPELINE**

Unlocking the talent pipeline we have to offer by creating sustainable careers for all within a sustainable industry

## **THE GLOBAL STAGE**

Enhancing the impact local music can have on the global stage as an export and through soft power

## **LOCAL CONTENT**

Highlighting and prioritising locally created musical content across mediums and a fair regulatory framework

## **LIVE MUSIC**

Giving audiences across regional, remote and metropolitan communities' easy access to live music

## **A SONGWRITING FUTURE**

Foster a new generation of song writing excellence through education





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# PRIORITY 1

## THE TALENT PIPELINE

### **UNLOCKING THE TALENT PIPELINE AUSTRALIA HAS TO OFFER BY CREATING SUSTAINABLE CAREERS FOR ALL WITHIN A SUSTAINABLE INDUSTRY**

Whether it's the very best and brightest of established or emerging musical talent at home or around the globe, Australia has a rich vein of musical talent across genres, across cities and regions and across the sector. Sustainable careers within a sustainable industry are critical to ensure Australian music will further enrich the lives of all. With the advent of a 'second digital revolution', we need to foster more sustainable careers as we create an Australian powerhouse music industry.

With greater cooperation, the Australian music industry can further take the lead to strengthen the future growth of our domestic music industry by empowering creators from across the country and from across backgrounds to be part of the music success story this country is writing.

Central to this success, we advocate for a whole-of-government approach to the music industry to fully reflect its cultural, economic and social capacity driving employment, exports, local economic rejuvenation, tourism, hospitality, youth engagement and health benefits across regional, remote and metropolitan Australia, and around the globe.



## WE CAN UNLOCK THE TALENT PIPELINE IF INDUSTRY:

- Develop a strategy for the investment in research to help inform best practice and policies to better support and sustainably grow the industry
- Support local labels and drive a greater development in local producers of Australian music
- Tackle the barriers so that more women can break through the glass ceiling to enter the music industry and foster sustainable careers
- Aboriginal and Torres Strait Islander creators must be central to the music industry with greater access to career development and targeted approaches in education
- Ensure that Australia's cultural and linguistic diversity reflects and enriches the making, production, enjoyment and export of Australia's contemporary music
- Foster more people from diverse backgrounds engaged with the art of music making through community facilities and targeted mentorship programs
- As new art forms emerge and delivery systems for music change, we must ensure songwriters, publishers and creators have a copyright and regulatory framework in place to ensure there is fair payment for their work and their content
- Targeted programs and industry support for artist managers to equip them with enhanced skills to support the creation, touring and export of locally created music
- Greater collaboration between the music industry and other local creative industries including the screen sector, the interactive games industry and online content creators, and special events and festivals
- Supporting grassroots initiatives like songwriting and composing competitions, workshops, and performance opportunities that are integral to the early stages of a career

# A WHOLE OF INDUSTRY APPROACH

The Australian contemporary music industry, like most industries, is comprised of diverse and often disparate sectors and elements. However, unlike most industries the Australian contemporary music industry struggles to be truly recognised as an 'industry', with most government support focused on the 'arts' based elements of the industry, rather than the ecosystem framework.

In contrast, other industries with similar economic and export opportunities, whether its tourism or the Australian wine industry, is supported more holistically by government. Within the creative industries the Australian film and television industry is supported by the Australian government through Screen Australia – encompassing the development, production, promotion and distribution of Australian screen content. The Australian contemporary music industry has no equivalent.

The Canadian Government has recognised the value and potential of the Canadian contemporary music industry by establishing the Canadian Music Fund which provides over CA\$24 million in annual funding for the creation and worldwide promotion of Canadian music.

In 2018, the Canadian Government also announced an investment of CA\$125 million over 5 years to implement Canada's first Creative Export Strategy. The Creative Export Strategy will promote Canada's creative industries by strengthening Canada's presence in international markets where the business relationships are being built, the deals are being made, and the jobs are being created. The Strategy will also equip Canadian exporters with the tools they need to successfully export their projects.

## **The Australian Government has recognised the need to support elements of the contemporary music industry:**

- SOUNDS AUSTRALIA was established 10 years ago as an APRA AMCOS, Australia Council partnership and has also received Federal Government funding
- The Live Music Office (LMO), established 5 years ago as an APRA AMCOS, Federal Government partnership has received Australia Council funding in the past but is currently unfunded
- SongHubs is an APRA AMCOS initiative that provides intentional song co-writing opportunities to emerging and career artists. Since the program started in 2013, over 691 songs have been written, at 51 SongHubs, involving 408 Australian songwriters and composers. Of these, 25% of the works have been or are pending commercial release. To date, SongHubs has produced commercial releases which have resulted in over \$1.3 million dollars collected in APRA AMCOS songwriting royalties alone. The program has received spasmodic Federal Government support and is currently supported by the Victorian Government
- The SongMakers program, also an APRA AMCOS initiative, was created in partnership with the Australian Government to provide real world professional scenarios to mentor young people in songwriting. The program was originally funded for four years by the Australian Government through both the Arts and Education Departments, but has not been successful in securing continued funding

SOUNDS AUSTRALIA, the LMO, SongHubs and SongMakers are branded service-based programs operated by APRA AMCOS. These programs have grown international markets for Australian artists and music, developed international networks for Australian artists and music businesses (publishers, labels and managers), simplified regulatory barriers and supported and developed live music venues, brought some of Australia's best songwriters and producers to mentor students to create and record new music in schools throughout regional, remote and metropolitan areas, and galvanised government and industry around a shared agenda for music.

**The opportunity now exists to consolidate these individual initiatives within a strategic framework that will focus and enhance these existing outcomes for Australian music. Most importantly it will provide a mechanism for identifying future whole-of-sector priorities and strategies.**

**Bringing together these initiatives in an independent industry supported framework, will promote greater collaboration across the sector, and establish a uniquely national perspective across all practice types, providing a critical contribution to government policy.**

**This will also demonstrate an innovative model for artform and industry development that is not achievable within the current government frameworks for arts and cultural support.**



# CENTRALITY OF ABORIGINAL AND TORRES STRAIT ISLANDER MUSIC

The Aboriginal and Torres Strait Islander Music Office was set up by APRA AMCOS in 2008 to support Aboriginal and Torres Strait Islander songwriters and composers. The office operates a number of programs with industry organisations, focusing on professional development, education; and partners with the wider music industry to address issues of education and training, the lack of performance opportunities, physical distance of remote communities and the lack of economic return.

APRA AMCOS is committed to listening and responding to the needs of Aboriginal and Torres Strait Islander music creators, in particular helping Aboriginal and Torres Strait Islander music creators join APRA AMCOS, register their works and log their performances. Critical to APRA AMCOS is understanding and respecting the importance of Aboriginal and Torres Strait Islander music and culture.

APRA AMCOS continues to invest in supporting and promoting Aboriginal and Torres Strait Islander music creators directly through the activities of this Music Office and through ongoing advocacy and education at all levels. This investment has resulted in a growing ATSI membership and an increase in access to distributions for our members in the financial year. APRA AMCOS current Aboriginal and Torres Strait Islander membership (including applications) is 1,468, which represents an increase of 9.6% on the previous year.

APRA AMCOS continues to invest in the InBound program. The InBound program is an exchange between the mainstream music industry and remote community artists. It is designed to bring industry people to remote communities to experience, understand, appreciate and hopefully advocate for remote community music and musicians and to bring those experiences into their own work.

Song Cycles InBound, supported by APRA AMCOS in partnership with MusicNT, brought industry professionals to the Barunga Festival (80km West of Katherine) and leading Aboriginal and Torres Strait Islander festivals within the NT. The Barunga Festival is held annually in June, and Bushbands in September. The event brings key industry professionals to a remote community to witness firsthand the diversity and calibre of ATSI artists in remote areas.

During FY17 18, the Aboriginal and Torres Strait Islander Music Office, through funding from Create NSW, completed a pilot study on the Starting Ground program. Starting Ground is a targeted skills development program focusing on the delivery of creative and music business skills to the NSW Aboriginal music creators' community.





# STARTING GROUND HAS 3 KEY AIMS;

- To enhance access to the mainstream music business
- To develop career pathways
- To improve Aboriginal participation in the live music economy for emerging and mid-level career music artists.

**"Programs like Starting Ground that foster song craft and industry skills for Aboriginal musicians, are so necessary as not only do they give the opportunity for regional artists to connect with the wider industry, they also give regional artists the chance to up-skill in their home towns. These types of programs have a ripple effect that benefits entire communities. We can't ever think of programs like that as luxury."**

**- Leah Flannagn**



Following completion of the pilot program, in January 2017, the Aboriginal and Torres Strait Islander Music Office received multi-year (3 years) funding from Create NSW to continue the delivery of the Starting Ground program.

During the review period, 17 NSW Aboriginal music artists participated in a 2 day skills intensive workshops held in South East NSW and the Northern Rivers regions. 6 artists took part in a post-workshop industry masterclass; and 2 artists currently being mentored by industry professionals.

In May, 2017 the ATSI Music Office was commissioned by Creative Victoria to undertake a research study to map the Victorian Aboriginal music population. This study relied on a combination of data harvesting, industry consultation and an online survey to gather industry opinions relating to access to services, barriers to entry and possible pathways to improved professional development outcomes for Aboriginal music practitioners. The report was delivered on 31 July 2017. As a result of the research, APRA AMCOS has started delivering a series of connect meetings in regional centres in Victoria and other areas of Australia where songwriters and music industry professionals have a chance to meet each other and gain a better understanding of the industry and where to take their music.





# A TRUE REFLECTION

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The future success of Australian music both at home and on the global stage relies on ensuring that Australia's cultural and linguistic diversity reflects and enriches the making, production, enjoyment and export of Australia's contemporary music.

The 2016 Census revealed that Australia is "a fast changing, ever-expanding, culturally diverse nation". The Census also revealed that there were over 300 separately identified languages spoken in Australian homes with more than one-fifth (21 per cent) of Australians who spoke a language other than English at home. After English, the next most common languages spoken at home were Mandarin, Arabic, Cantonese, and Vietnamese.

APRA AMCOS notes Diversity Arts Australia's "Voice, Agency and Integrity" Report which has highlighted barriers within the arts and cultural sector to broader representation of Australia's cultural diversity. In particular, APRA AMCOS supports Diversity Arts Australia action agenda which calls to improve the cultural and linguistic under-representation across the creative sector.

A broad and united music industry response to the report is required to ensure that the future of contemporary Australian music is a true reflection of the rich cultural and linguistic fabric of the nation.

*Australia is "a fast changing, ever-expanding, culturally diverse nation"*



## RECOMMENDATIONS

- **A whole-of-government approach to the music industry to fully reflect its cultural, economic and social capacity driving employment, exports, local economic rejuvenation, tourism, hospitality, entertainment, youth development and health benefits across regional, remote and metropolitan Australia, and around the globe**
- **Deeper collaboration across the sector with the establishment of a government and industry supported music organisation to be a policy and program leader to inform, champion and build the songwriting, export, educational and live music success of Australian music**
- **Establish industry wide goals to tackle the barriers to success for Aboriginal and Torres Strait Islander creators**
- **Seek further cross-portfolio partnerships with federal, state and local government bodies and agencies for partnership investment in the Aboriginal and Torres Strait Islander Music Office**
- **Develop key programs and new industry and government co-investment in the professional development and support of artist managers as outlined in more detail in the Association of Artists Managers submission to this inquiry**
- **Establish industry wide goals to significantly tackle the underrepresentation of women in key roles in the sector**
- **Work with government on the development of a strategy to ensure all communities have access to the infrastructure that supports the creation and presentation of contemporary music**
- **Foster greater collaboration between the local music industry and other content industries including the screen sector, interactive gaming and online content**



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# PRIORITY 2

## THE GLOBAL STAGE

### **ENHANCING THE IMPACT LOCAL MUSIC CAN HAVE ON THE GLOBAL STAGE AS AN EXPORT AND THROUGH SOFT POWER**

It used to be that there was a wait of many years between Australian artists breaking internationally. From the Little River Band (1977) to AC/DC, Air Supply and Men At Work (early 1980's), INXS (1988), Savage Garden (1998) and more recently Gotye (2012), Iggy Azalea (2014) and SIA (2016).

Fast forward to 2018, and there are now more Australian artists, across a diversity of genres, succeeding in international markets than ever before. The profile and growth of Australian music over the last few years has been simply amazing to watch and to support. Some have already become globally recognised household names – SIA, Courtney Barnett, Vance Joy and Flume.

This success underpins a local industry that is diverse, innovative and global. The opportunity now is to build on this success, particularly in the North America and European markets to explore the full potential of Australian music exports and people-to-people links in the Asia-Pacific rim and South America.



# SOUNDS AUSTRALIA

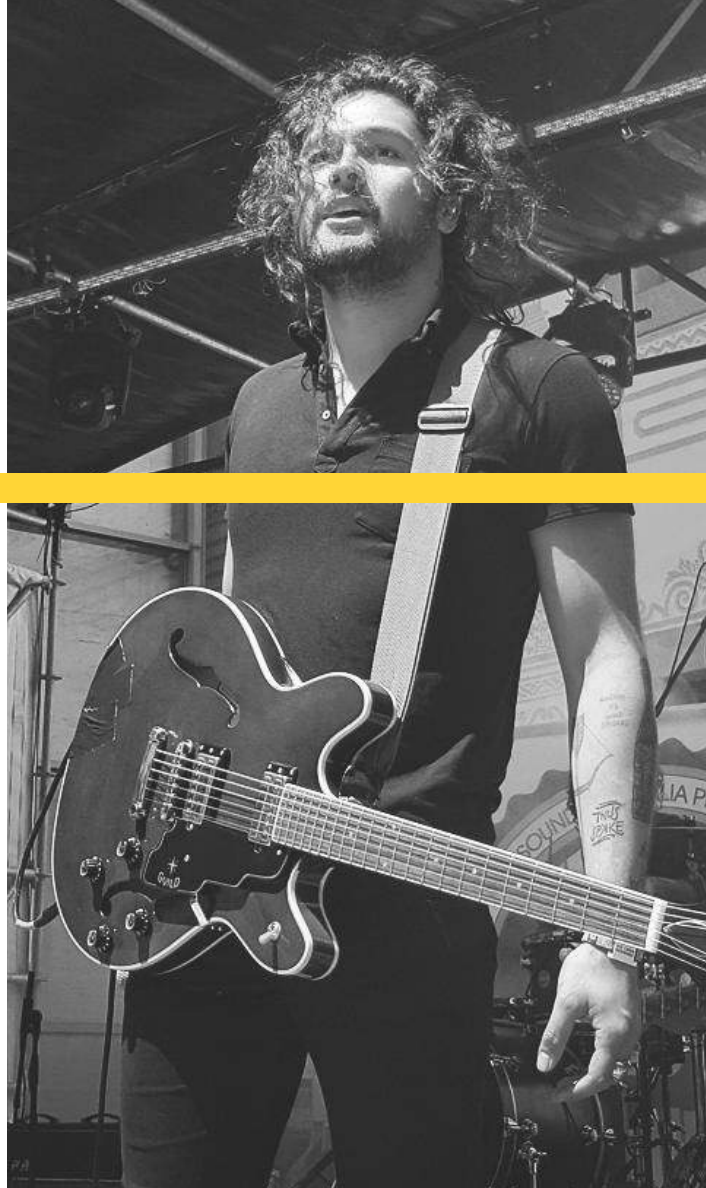
SOUNDS AUSTRALIA is wholly managed by APRA AMCOS and is a joint initiative of the Australia Council and APRA AMCOS, supported by the federal government together with state government agencies and peak industry associations. As a globally recognised brand, it has now become synonymous with producing stellar showcasing events around the globe, featuring all Australian line ups, with some of world's most influential bookers, buyers, managers, agents and promoters in attendance alongside industry tastemakers. Until December 2017, SOUNDS AUSTRALIA employed just three staff, with the fourth appointed in the last twelve months.

The depth of export service offered by SOUNDS AUSTRALIA is broad, with activity to date having taken place at 69 different international events, in 63 different cities across 22 countries.

SOUNDS AUSTRALIA has expedited the artist discovery process and catapulted multiple acts in to the consciousness of the world's most influential music industry across the USA, UK and Europe, ensuring that from their very first export outing, Australian artists are showcasing to key industry leaders and decision makers, resulting in increased professional and commercial outcomes.

SOUNDS AUSTRALIA offers a unique service supporting emerging Australian artist and music businesses to reach global audiences. SOUNDS AUSTRALIA fuels the growth of the Australian music industry, connecting small businesses to global opportunities, contributes to arts excellence and innovation, seeds economic prosperity and job creation for the sector and contributes to cultural identity.

1404 Australian groups have showcased at international events under the SOUNDS AUSTRALIA banner. This is made up of 783 different artists as 302 of them have showcased at multiple events over the past decade. During this period SOUNDS AUSTRALIA has produced 199 Showcase Events that have provided 1611 unique performance opportunities for Australian artists to be seen by global audiences and career building industry.



In addition to showcasing artists, SOUNDS AUSTRALIA has presented 137 B2B networking events for Australian music industry delegates, has managed 31 Trade Stands and coordinated 6439 dedicated meeting opportunities. SOUNDS AUSTRALIA staff have delivered 20 panel presentations on the "Australian Music Market" and have facilitated opportunities for 104 Australian delegates to speak on a variety of topics at international conference events around the world.

With increased investment, SOUNDS AUSTRALIA will continue to bolster the exposure and performance of Australian content across all streaming platforms, whilst tactically evolving its existing web presence, from a practical educational resource, in to a premier go-to content discovery channel. With a focus on digital streams, the export program will also investigate opportunities available through new technology and innovation to drive Australian artists further and faster, whilst decreasing costs and providing exposure for culturally and geographically diverse Australian artists to audiences around the world.

# Sounds Australia



## SOUNDS AUSTRALIA 2.0

Australia is a significant world producer of contemporary music, reflecting an industry that is dynamic, global and innovative. The industry includes live performance, recording, publishing, sync placement, radio airplay, digital services, marketing and promotion. The key priority and where all these sectors intersect is through the global pathways, access and opportunities of exporting Australian contemporary music.

The significance of Australian music exports is recognised by the fourteen industry partners that contributed to the 2016 release of Music Australia's National Contemporary Music Plan. The first of the plan's six key strategies is; Increase Australia's music exports and international market share of music, and the first initiative recommended to realise this strategy is the; continued investment in SOUNDS AUSTRALIA and expansion of its export program.

With physical record sales almost entirely removed from the mix, a domestic market the size of Australia is no longer able to make, break or sustain careers. Contemporary music needs strategic and committed investment at all phases of an artists' life cycle to compete on the world stage! International success for our artists leads to an increased profile in the domestic market, which significantly increases the earning potential and ability for musicians and songwriters to derive a viable living from their work.

Prioritising a partnership between industry and government to further drive the music export success story will provide a triple lock guarantee for the future of Australia's music industry and the nation's image abroad; sustainability of the industry to generate substantial international revenue, a diverse and mobile cultural product to underpin Australian Government cultural diplomacy priorities, and a key partner to support other Australian export powerhouses of education, agriculture and services.

**"Without an organisation like SOUNDS AUSTRALIA, young artists and managers similar to Flume and Future Classic would find it significantly more difficult to venture into overseas markets without the resources and expert advice that this organisation provides."**

**NATHAN McLAY**  
Founder Future  
Classic, Manager,  
Flume

**Extract from Sounds Australia submission, October 2018**







## RECOMMENDATIONS

- **Expand the work of Sounds Australia, with new government initiatives to support growth into the priority area of the Asia Pacific as well as other mature markets including South America**
- **Work closely with the Department of Foreign Affairs and Trade, the Department of Communications and the Arts to develop a Cultural Diplomacy framework prioritising the potential of people-to-people links through music**
- **Establish an Australian Music Export Council in close consultation with the Department of Foreign Affairs and Trade, made up of pre-eminent Australian policy leaders, academia and industry to develop an in-depth understanding of the issues, problems and opportunities associated with improving the capacity of Australia's music industry to enhance its role as a globally significant exporter of music**
- **APRA AMCOS refers to the more detailed recommendations in the Sounds Australia submission to this inquiry**





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# PRIORITY 3

## LOCAL CONTENT

### **PRIORITISING LOCALLY CREATED MUSICAL CONTENT ACROSS MEDIUMS AND FAIR REGULATORY FRAMEWORK**

Ensuring that Australian content remains easily accessible to all Australians helps to develop and reflect a sense of Australian identity, character and cultural diversity. In particular, our local songs are a vital means of expressing our ideas, perspectives, values and identity and equally a means of projecting that voice to our fellow Australians and the world.

1. Joining creative forces
2. Copyright fuels new content
3. Fair terms for artists
4. Safe Harbour – not a digital free-for-all
5. Broadcast Quotas
6. Streaming benchmarks

# 1. JOINING CREATIVE FORCES

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Music isn't just accessed through a playlist, a radio station or at a gig. Content is enhanced and made more affecting with music, and producers, directors, developers and designers call upon songwriters and composers in myriad ways to collaborate on telling a story.

As outlined in the Screen Australia Drama Report 2016/17, there was \$1.3 billion total Australian screen drama expenditure driven by the highest level of foreign spend in this country of \$610 million and a healthy Australian slate of \$667 million. Of this there were 41 Australian features, 46 Australian TV drama titles \$321 million. A sign of the screen sectors growing commitment to local creatives can be seen with Australian songwriters and composers who have composed music for productions including *Wentworth*, *Top of the Lake*, *Picnic at Hanging Rock*, and *Great Australian Bake Off*.

Australia's total games industry income is currently worth \$2.2 billion and predicted to grow to \$3.3 billion by 2020. These games need music and sound, which creates a viable professional opportunity for composers, producers and sound artists. Local games developers should be encouraged to partner with Australian creators, and successfully have on Australian games *Paperbark*, *Florence* and *Necrobarista* to name a few.

Whether they are producing an instructional video, need a podcast theme, or are commissioned to do an online series provide another avenue for music creators, especially as the content becomes more sophisticated. Screen Australia's recent report showed that 18-24s were most likely to watch professionally produced screen content via the main social platforms in the last 12 months: 64% via YouTube and 52% via Facebook.

Special events often need unique soundscapes and musical soundtracks for the installations and interactive experiences that draw in crowds. A grand final, when a netball or rugby team runs onto the field to a beloved song or the PA specialised musical call to rev a crowd up. These are just a few of the special projects that require a highly skilled songwriter or composer and that ultimately bring value to community events.

## 2. COPYRIGHT FUELS NEW CONTENT

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To increase the accessibility of local music, Australia must ensure the policy settings are right through a copyright framework that ensures music creators receive fair payment for their intellectual property and continue to innovate in one of the fastest moving industries in the world.

Too often, it is assumed that the rights of creators are a reasonable sacrifice in the interests of technological development. APRA AMCOS sees no reason why technological innovators whose businesses rely on creative content, should not be required to reach commercial agreements with the owners of that content, as they do in respect of every other input cost. There is no reason why technological innovation should be encouraged at the expense of creators or so as to diminish the rights of creators to benefit from the exploitation of their product, simply because technology enables easy access to and dissemination of the product. The copyright industries are particularly well adapted to facilitating the large scale use of creative products, having many years ago responded to technological innovation by forming collective licensing bodies for this very purpose.

Creators, including APRA AMCOS members, have been demonstrably harmed by certain technological platforms who for many years refused to enter into commercial licence agreements on fair and reasonable terms for the use of their music. During that period many APRA AMCOS members' incomes have declined, piracy of their works has dramatically increased, and their works have been devalued generally by the availability of free access to content. Some of these outcomes are simply a product of development, and copyright owners like all others must be able to accommodate change. APRA AMCOS has always sought to adapt to the changing commercial environment by ensuring that its members' rights are licensed wherever possible to alleviate these harms – indeed, Australia is a world leader in licensing new music and audio-visual services. However, what creators do not need is to have their rights eroded, effectively denying them the opportunity to participate in new markets as they develop.

### 3. FAIR TERMS FOR ARTISTS

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Much of the recent discussion around copyright reform in Australia has focussed on the alleged need to introduce more flexible exceptions into our copyright legislation, relying on the flawed assumption that copyright operates as some kind of barrier to innovation. APRA AMCOS strongly rejects this argument. Copyright is the currency in which Australian creators and content distributors trade – it provides the framework that allows creators to be remunerated for their work. The perception of copyright as restricting access to content such as music is outdated and misleading. Blanket voluntary licences and existing statutory licences exist for almost every conceivable use of music. The debate is always really around what is a fair and reasonable licence fee for access to that music and in the event rights holders and content distributors disagree on that value there are a number of facilities available to resolve such disputes. APRA AMCOS' position is that the introduction of overly broad, flexible exceptions to copyright law risks introducing unnecessary uncertainty into the copyright framework. The result of such uncertainty is higher transaction costs as parties negotiate whether a category of use is properly remunerated or falls within an exception or ought to be remunerated. Furthermore, the introduction of additional vaguely defined exceptions to copyright protection ultimately serves to devalue the currency of copyright and erode the ability of creators to make a living from their work.

APRA AMCOS calls on the Government not to introduce additional broad flexible exceptions into the Australian copyright which have the potential to undermine our copyright framework and chip away at the rights of creators.

**“As a freelance film and TV composer, the work is either feast or famine. Traditionally, we have all survived on our royalty streams to feed us in the tough times between projects, especially since the up-front fees are not enough to live on alone. However, with the rise of the streaming giants becoming the main platform for viewers, these royalties have been diluted catastrophically without any additional compensation in the upfront agreements. In fact, many composers are now expected to offer more music, in less time, for a wider scope of rights, and a smaller fee. This is simply not sustainable and I fear the art and craft of what we do is at risk of becoming extinct here in Australia. Careers are already being lost, diversity is already shrinking, voices are being lost, and many Australian films and TV shows will simply no longer have Australian music.”**

**Caitlin Yeo**

## 4. SAFE HARBOUR NOT A DIGITAL FREE-FOR-ALL

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An area of vigorous copyright debate over the last 18 months, in Australia and elsewhere around the world, is the extent to which online services ought to be able to avail themselves of the protections offered by the various “safe harbour” schemes that exist in most territories’ copyright legislation. In the US and EU in particular, commercial online services that provide a platform for users to upload and share music, have relied on copyright safe harbours to absolve them from the need to enter into licence agreements with music copyright owners on fair and reasonable terms. This interpretation of the US and EU safe harbour provisions have been the subject of legislative review and Article 13 of the recent EU’s Directive on Copyright in the Digital Single Market purports to rectify the situation in Europe.

In Australia we have successfully argued for many years that commercial online services ought not to qualify for safe harbour protection because they have the requisite control over the content being uploaded to their platforms and indeed are monetising that content with advertising or paid subscriptions to the service. Rather, online services which derive a profit from the exploitation of third party content on their platforms should enter into appropriate licensing arrangements with copyright owners. The Government acknowledged this position in its recent revisions to Australia’s safe harbour provisions, where our safe harbour scheme was extended to educational, cultural and other non-profit institutions, but not to commercial online services generally.

APRA AMCOS calls on the Government not to further reform the Australian safe harbour scheme beyond the scope of the existing newly expanded scheme.

## 5. BROADCAST QUOTAS

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Broadcast quotas are incredibly important for the local music industry. Given we know Australians like to hear their own sounds and voices, quotas provide an enormous opportunity for radio stations to celebrate great Australian musical works and discover the exciting new talent emerging across the country and grabbing international headlines. APRA AMCOS' strong view is that local content requirements continue to remain highly relevant to the Australian broadcast media landscape.

Ensuring that Australian content remains easily accessible to all Australians helps to develop and reflect a sense of Australian identity, character and cultural diversity. In particular, our local songs are a vital means of expressing our history, ideas, perspectives, values and identity and equally a means of projecting that voice to our fellow Australians and the world. The existing quota levels (which are already low by comparative international standards) means we advocate in the strongest possible terms that the Australian content requirements that currently apply to the various broadcast sectors be neither removed nor decreased. In fact, given the talent we see, they should be easily achieved. However, compliance with radio quotas needs to be considered very carefully to ensure the Code remains relevant.

APRA AMCOS' key concern is that under the existing Code radio broadcasters are able to self-categorise which format they fall within for the purposes of determining which Australian Music quota applies to their service. For example, if a station categorises itself as falling within the 'Classic Rock' format, a minimum quota of 20% Australian Music will apply, whereas if the same station categorised itself as 'Gold - encompassing Classic Hits', an Australian music quota of only 15% would apply, and if the category of 'Easy Gold' were chosen, the quota would be only 10%. The various format categories are not defined anywhere within the Code and are out of date - they have not been updated since at least 2001.

Compare this with a jurisdiction like Canada which sets a 35% quota for all commercial radio stations. The Canadian quota requires that 35% of all musical selections played by the station must be Canadian. This domestic policy setting underpins the enormous domestic and international success of Canadian artists such as Drake, Justin Bieber, The Weekend, Arcade Fire and KD Lang.

The Codes of Practice for Community Radio Broadcasting state that stations are required to broadcast at least 25 per cent of Australian music, but many stations go above and beyond this mandate. We question why the format of a service ought to be determinative of the applicable Australian music quota percentage for that service.

APRA AMCOS proposes that all music focused stations ought to be subject to the full 25% Australian music quota which is not only achievable, but is also internationally reasonable.



## 6. STREAMING BENCHMARKS

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In the streaming space, APRA AMCOS recognises the need for a more flexible approach as it is not a linear medium like radio. Music streaming services have local curation teams in Australia and have already demonstrated very good support for Australian artists.

APRA AMCOS is in conversation with music streaming services around the concept of 'benchmarking' locally curated playlists to ensure there is an opportunity for Australian music to be heard and discovered by local audiences, and mitigate the risk of foreign artists unfairly dominating local charts.

In fact, promoting playlists featuring increased levels of Australian music to Australian consumers in an on demand environment may even prove to make good business sense rather than be seen as a cost or inconvenience – our statistics show local works are streamed at least twice as much as foreign works. It is also a way for foreign multi-national companies (who are generating significant revenue from sales to Australian consumers) to support the local music industry in one of the increasingly important territories in which they operate.

It is a complicated conversation and right now, there's a lot of goodwill from the parties – our strong preference is that we're able to arrive at an industry agreed 'benchmark' for Australian content on locally curated playlists.

Local content on video on demand services also directly impacts the use of local songwriters and composer. A University of Melbourne and RMIT study on the catalogues of Netflix and Stan to see how much local screen content each service carries and how this compares to international benchmarks found in 2017 that the Netflix Australia catalogue carried around 2-2.5% local content, much of it licensed from the ABC. Stan's local content level was slightly higher, at 9.5%.

The study found in October 2018, that Netflix's local content level has fallen to 1.6% (82 Australian titles out of 4,959). Stan's local content level has risen to 11.1% (172 titles out of 1,548).



## RECOMMENDATIONS

- **Government to agree not to introduce additional broad flexible exceptions into the Australian copyright which have the potential to undermine our copyright framework and chip away at the rights of local creators**
- **Industry and streaming services to develop an agreed 'benchmark' for Australian content on locally curated playlists**
- **All music focused stations subject to the full 25% Australian music quota**
- **To ensure the intent and integrity of the Code continue, classification and related quota obligations to be reviewed**
- **Industry strategy to ensure greater collaboration across the creative industries to explore more engagement of local songwriters and composers for screen, gaming, online content and special events**



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# PRIORITY 4

## LIVE MUSIC

### **GIVING AUDIENCES ACROSS REGIONAL, REMOTE AND METROPOLITAN COMMUNITIES EASY ACCESS TO LIVE MUSIC**

Australia has one Opera House, but we have 4000 live music venues across the country. Music can be found and enjoyed in town centres, regional capitals and cities across the country any night of the week.

Music provides an enjoyment, an amenity and a variety of activity for the night-time economy. National research conducted by the University of Tasmania in 2015 found the venue-based live music industry in Australia contributed \$15.7 billion of value to the Australian community in 2014, providing vital commercial, individual and civic benefits.

The report, *The Economic and Cultural Value of Live Music in Australia 2014*, set out to value the economic, social and cultural contribution of the Australian live music industry with both a national consumer survey undertaken alongside a survey of venues in Hobart, Melbourne, Adelaide and Sydney.

This research was undertaken in partnership with the University of Tasmania, City of Sydney Council, City of Melbourne, The Government of South Australia, and The Live Music Office as an initiative of the City of Sydney Live Music and Performance Taskforce.

### **OTHER KEY FINDINGS FROM THE RESEARCH INCLUDE:**

- Live music spending in Australia delivers at least 3:1 benefit-to-cost ratio;
- Nationally, an estimated 65,000 full and part-time jobs are created by monies spent on live music (page 39), with taxation revenue generated for all tiers of government;
- Food and drink is the number one expense for those attending a live music performance equating to 29.3 per cent of the total spend;
- Expenditure on tickets comes in second at 19.2 per cent of spend, followed by travel at 17.6 per cent and accommodation at 12.4 per cent;
- Audiences are prepared to travel significant distances to attend live music, and this demonstrates live music is a source of regional competitive advantage;
- Live Music attendance was identified by punters and venues as contributing to improved health and wellbeing.

# LIVE MUSIC OFFICE

**Established by the Federal Government, in partnership with APRA AMCOS, the Live Music Office was set up in 2013 to review the impact of policy frameworks on the Australian live music sector. The Office's scope includes planning, licensing and regulatory policies, as well as cultural, audience and market development strategies.**

The goals of the Live Music Office are to support the growth of the venue-based live music sector in Australia to increase live music performance opportunities and support live music audience and sector development. The following is a snapshot of some of the many projects the Live Music Office has delivered in collaboration with local industry and state, territory and local government;

- Delivering the Western Sydney and Regional Live and Local Strategic Initiative with Create NSW across 10 Councils in Western Sydney and 8 Councils in Regional NSW (18 Councils, 60 events, 236 venues, and 872 musicians employed to date).
- Creating the NT Music Industry Council with MusicNT, Hospitality NT (formerly NT AHA), artists and venues as well as 2017/18 research initiatives including the 2017 NT Live Music Census to be released in July 2018.
- Writing the Cool Little Capital report with Music ACT with the subsequent Urban Sounds Discussion Paper investigating entertainment precincts in Canberra.
- Successfully campaigning for removing the requirement for SA liquor licenses to require consent for live entertainment, also delivering Exempt Development for low impact entertainment alongside the Small Arts Venue variation to the National Construction Code in SA.
- Establishing the Central Geelong Live Music Action Plan development process and providing the framework and terms of reference for the City of Ballarat Live Music Strategy in VIC, with active participation in State Regulation Roundtables also providing national perspective and support.
- Working with the WA Government and WAM in creating the WA Live Music – Arts and Cultural Regulation Working Group.
- Liaising with Arts QLD and Department of the Premier and Cabinet alongside QMusic as a resource for the QLD Live Music Industry Working Group, as well as City of Gold Coast Live Music Taskforce membership and working with Sunshine Coast Council on night economy planning.
- Participating in the NSW Parliamentary Inquiry into the Music and Arts Economy, the Night Time Economy Roundtables 25 point action plan for the NSW Government, and the Committee for Sydney Night Time Economy Commission.
- Drafting and negotiating venue criteria for Sydney lockouts exemptions (now 30 live music venues) in collaboration with Music NSW.
- Live Music Map – Publishing an online map of live music venues, businesses and community radio across Australia; as well as providing 20 online templates and resources covering the practical and business side of producing live music.
- The Live Music Office's government funding ceased at the end of FY2017-18. APRA AMCOS has been advised that the most recent applications for funding of the Office have been unsuccessful. In June 2018, APRA AMCOS announced it is reviewing the Live Music Office achievements and surveying industry and government to identify future priorities of a live music organisation in Australia.



# FIVE YEARS ON

## 2018 Industry Survey of the Live Music Office

In August 2018, APRA AMCOS conducted a stakeholder survey with Voice Project on the Live Music Office five years after its establishment. The survey provided stakeholders with the opportunity to give feedback on the quality of work practices and services provided by the Live Music Office.

Over two hundred people from across federal, state and local government, industry, venues and creators were invited to complete the survey. Participants were located across regional, remote and metropolitan Australia with a small number of international participants involved in live music regulatory best practice.

The results indicate that the Live Music Office has a high level of stakeholder engagement (86%). Stakeholders support the work done by Live Music Office (89%), feel comfortable recommending it to other people (84%), and intend to continue using its services (88%).

The majority of stakeholders see the organisation as successful (82%) and report it having a good reputation (81%). However, the overall result is moderated by fewer stakeholders expressing confidence that the Live Music Office has a positive future (73%). This result was below what is typically seen for this question (-11%) and can be attributed, in part, to the funding uncertainty of the Live Music Office.

Critically, the majority of stakeholders feel that the Live Music Office is effective at promoting the interests of the live music scene (Impact, 80%). Stakeholders report that the office successfully reduces barriers for live music (85%) and advocates on behalf of live music scene (85%).

Most stakeholders were aware that the Live Music Office provided services to 'support the development of planning, licensing and regulatory policies and practices' to for both venues (72%) and government (75%). Stakeholders were supportive of the Live Music Office offering these services (91%) and felt the offering would be useful to their organisation (89%). Of those stakeholders in a position to answer, 72% reported that their organisation was intending to use these services in the next two years.

Relatively fewer stakeholders were aware the Live Music Office provided services and support to develop 'audience, market and cultural development strategies' (52%). Stakeholders were overall supportive of the Live Music Office offering these services (85%) and felt the offering would be useful to their organisation (85%). As with awareness - usage intentions were lower for these services. 63% of stakeholders, who provided an answer, reported that their organisation was intending to use this service in the next two years.

Based on these findings, APRA AMCOS is currently developing a blueprint for the future of the live music office and the services it provides.





# CASE STUDY: LIVE AND LOCAL

## *AN EXAMPLE OF LIVE MUSIC CAPACITY BUILDING WORK*

The Live and Local Strategic Initiative was initially developed in partnership with Create NSW (then ArtsNSW) and the Live Music Office in response to research that had identified that music as an art-form was under represented in Western Sydney under existing programs. It is a model that can be rolled out across any state and territory to help build the capacity of venues, council and expose existing and new audiences to the very best music Australia has to offer.

The strategy was designed to identify Councils that wanted to support their music industry through a competitive Expression of Interest (EOI) process, and was later expanded to include a second round for Western Sydney as well as for Regional NSW.

Through this program, Create NSW and the Live Music Office have had significant reach and impact for artists, venues and local government across Western Sydney and Regional NSW in a relatively short time frame, with a model program that we would advocate for wider application.

The Objectives of the Live and Local Strategic Initiative were to support local businesses in programming live music, build capacity for local Councils to provide sustainable, locally specific music based events, provide direct access to best practice of contemporary music presentation, promotion, strategy and networks, enhance connections for local musicians to the local and domestic music industry, deliver best practice policy and regulatory guidance to local councils, coordinate a strong, collegiate music network within Western Sydney & Regional NSW, support all-ages audience development and access to live music.

**For further information on Live & Local, please refer to the Live Music Office submission to this inquiry, October 2018.**



# INVESTMENT INCENTIVES

In 2015 APRA AMCOS in conjunction with the Australia Council, PPCA (Phonographic Performance Company of Australia Limited), Australian Hotels Association and Restaurant & Catering Industry Association commissioned Ernst and Young (EY) to investigate whether tax offsets would stimulate more live music activity across the country.

EY surveyed some 23,000 venues (both those staging live music and those not staging live music) and a range of major and independent record labels, offering several options for tax offsets. Almost half (45 per cent) of restaurants and cafes surveyed stated they would stage live music if tax offsets were provided. Hotels and bars also supported the move, with one in five stating they would introduce (or re-introduce) live music if tax offsets were on the table

## THE HIGHLIGHTS AND KEY FINDINGS FROM THIS WORK ARE:

- Increase in total output, employment and value add: The highest output, employment and value-add came from providing a 'combination' venue cash offset of \$40,000 for new live music venues, and 20 per cent expenses offset for existing live music venues.
- Increase in venues staging live music: Based on the venue survey data, 45 per cent of restaurants/cafes/other, 21 per cent of hotels/bars and 5 per cent of clubs and nightclubs that are not currently staging live music would stage live music if a range of tax offsets were provided, an estimated 2,017 new venues intending to stage live music across Australia.
- Increase in live music performances: Up to 284,193 additional live music performances per year are expected under the combined venue scenarios. This is an increase of approximately 87 per cent over current levels.
- Increase in live music attendances: Up to 31.1 million additional attendances are expected under the combined venue scenarios.
- Increase in sound recording investment: Sound recording producers reported that an offset would assist in reducing overhead costs and allow for increased investment in new and current artists.
- **Impact on tax flow and net difference: Tax offsets generate additional spending in the economy, which results in additional tax revenue for government. The net difference between the total tax offset paid by government and the additional tax revenue received varied across the various scenarios investigated, and was highest under the combined venue scenario of \$10,000 cash offset for new music venues and 5 per cent expenses offset for existing music venues, providing a net return to government of \$40.2m, and the greatest return on investment for government.**







## Research and Development (R&D) tax incentives

*R&D tax incentives – Australian Government*

The government introduced the R&D tax concession in 2011 allowing companies to claim a tax deduction in their income tax return of up to 125% (and 175%) of eligible expenditure incurred on R&D activities. In 2018 a cap was introduced of \$4million in refunds.

Small innovative creative industries would similarly benefit from an opportunity to increase their cash flow when they most need it – during their initial growth phase and when reporting a tax loss.

### Eligibility considers:

- Core R&D activities are the part of the work where the company tries to do or make something that has not been done before and cannot be done without experimenting
- To prove it, the company must aim to create new knowledge by following a path from concept to conclusion with measurable experimental outcomes to support the reasons for the conclusion.
- Core R&D activities could be, for example, the testing of a new or improved product, device, process or service.
- A business must have at least one core R&D activity in order to claim.

### Research has found that:

- A dollar in tax credit for R&D stimulates a dollar of additional R&D
- Recipients of tax credits perform significantly better on a series of innovation and performance indicators (such as the number of new products, sales with new products and originality of innovation) compared to when there is an absence of R&D tax credits. The authors concluded that R&D tax credits lead to additional innovation output.



## RECOMMENDATIONS

- **Leverage the framework and legislation already in place, such as the Federal Government's R&D tax concession or film industry tax offset to provide incentives for venues to stage live music (restaurants/cafes/bars/hotels/clubs)**
- **A whole of government and partnership approach to ensure the music industry achieves its potential without over-regulation and red-tape, and where artists have sustainable careers, venues are viable, and we have a vibrant local music culture**
- **Investment in the Live and Local Strategic Initiative Model to help build the capacity of venues, council and expose existing and new audiences to the very best music Australia has to offer**
- **Further recommendations can be found in the Live Music Office submission to this inquiry, October 2018**



# PRIORITY 5

## A SONGWRITING FUTURE

### **FOSTER A NEW GENERATION OF SONGWRITING EXCELLENCE THROUGH EDUCATION**

What is the future for Australia's music education? How do we give access to a quality music education for all Australian children? What are some of the practical steps we must take to ensure music students are industry ready? Should Australia follow the Swedish example and expand the focus of music educators on the art of songmaking? How do we support music educators around the nation and how do we equip the next generation of educators?

"There are so many facets to contemporary songwriting and producing across both the creative and business side of things. And it's hard to learn all the inner-workings without having the opportunity to be mentored and to get real hands-on experience. This opportunity needs to be accessible to all Australians, or real talent will fall between the cracks."

**KLP (Kristy Lee Peters)**



## SONG MAKERS

A joint initiative with the Federal Government, the SongMakers program focuses on songwriting collaborations in secondary schools. The program received government funding for 4 years (the Review Period covers the first 6 months of the final year), and the APRA Board has similarly committed to fund for 4 years. The program is based on sending a high profile APRA Ambassador, accompanied by a music producer, into 50 schools for two days to write and record new songs. The 50 schools were chosen from 180 schools nationally that had applied to participate in the program. To extend the value of the program beyond the 2 days in-school, and to support schools not chosen to participate, a range of free resources have been developed that support the Australian Curriculum. The program provides real-world collaborative songwriting experiences, demonstrates the technology processes involved in recording and importantly, introduces the concept of 'ownership' and intellectual property.

50 SongMakers workshops ran in FY2017-2018, with 800 students participating over the year.

A longitudinal study of the program outcomes was undertaken by the University of Tasmania, with the final report delivered in December 2017. The report found that SongMakers is 'internationally significant in the fields of arts education and vocational education, with few comparable programs demonstrating the kinds of consistent and sustained positive outcomes for students' learning in and beyond music.'

### **It found that, among other things, SongMakers increased:**

- **the range and quality of students' songwriting and general music skills;**
- **their real world understanding of the contemporary music industry, including about producing songs;**
- **their awareness of the diversity of professional careers in the industry;**
- **their understanding of, and willingness to try, different creative approaches; and**
- **their motivation to pursue a creative career and/or related skills and training on leaving school.**



SongMakers also increased students' all-important enterprise skills, including in collaboration, goal-setting, working to deadlines and problem-solving. The report also found that SongMakers acted as a catalyst for cultural change in schools as it motivated teachers to create more ways for students to make original music and connect with the industry. As well, the program was found to be a boost for the mid-career professionals (mentors) by providing unique professional learning and networking opportunities which diversified their skills and income.

It is hoped that further Australian Government funding can be secured in order for the program to continue. In the meantime, a state government trial of the program is being rolled-out in Tasmania through an investment by the Tasmanian Department of Education. Kicking off in early 2019, this will see an extended trial of a revised SongMakers model across the State, involving students drawn from a number of Tasmanian schools in five regional clusters, and two professional development masterclasses for teachers. If the trial is successful, it is hoped the program will be expanded across even more of the State and include a Fast-Track to Industry camp for young writers.



## RECOMMENDATIONS

- **Greater support and cooperation between federal and state governments to expand the SongMakers program to help foster a new generation of song writing excellence through education**
- **Government commitment to ensure that every Australian child has access to music education to ensure the next generation are equipped with the creative and problem solving skills needed in our changing global economy**
- **Industry and Government co-investment in opportunities to develop international songwriting/production/recording opportunities for Australian songwriters, composers, recording artists and producers through SongHubs**



APRA AMCOS' INDUSTRY PARTNERSHIP,  
PROGRAMS AND COLLABORATION





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## APRA AMCOS HAS BEEN INVOLVED IN REPRESENTING THE INTERESTS OF THE WIDER MUSIC INDUSTRY, BOTH INDEPENDENTLY AND TOGETHER WITH OTHER INDUSTRY PARTNERS, INCLUDING:

- Australian Music Industry Network (AMIN): APRA AMCOS provide core funding and project funding for the AMIN group, consisting of WAM, Music NT, Music SA, Qmusic, Music NSW, Music ACT, Music Victoria, Music Tasmania. We also provide funding for AMIN itself, which connects and represents the state and territory music industry development associations of Australia. APRA AMCOS regularly partner with AMIN organisations in the delivery of education programs to songwriters throughout Australia.
- Australian Artist Managers (AAM): APRA AMCOS provides core funding for AAM and we also fund the “Co-pilot” mentoring program. The 2018–2019 Co-Pilot Program will see six emerging managers paired with experienced, established Australian managers over a 6–12 month one-on-one structured mentor program, whereby each pairing is chosen based on current learning needs and individualistic management styles.
- The Australian Music Centre (AMC): is the national service organisation dedicated to the promotion and support of both the art form of music and the creators and performers of contemporary classical, improvised jazz, experimental music and sound art in Australia. APRA provides ongoing assistance and support for the work of the AMC. The AMC partners with APRA in presenting the annual Art Music Awards mentioned above. In May 2013, AMC officially moved into the APRA AMCOS Headquarters in Sydney.
- Music Rights Australia (MRA): is an organisation that protects the creative interests of artists and songwriters through educational initiatives, government lobbying and the protection of copyright. APRA AMCOS is a funding partner of MRA and APRA AMCOS’ Head of Legal, Corporate & Policy sits on MRA’s steering committee.
- Australian Copyright Council (ACC): is an independent, non-profit organisation which advocates for the contribution of creators to Australia’s culture and economy and the importance of copyright for the common good. It works to promote understanding of copyright law and its application and to foster collaboration between content creators and consumers. APRA AMCOS is a funding member of the ACC and our CEO is the current Vice Chair of the organisation.
- The Copyright Society of Australia (CSA): is a not-for-profit society whose members are copyright professionals. The Society runs 5 or 6 educational functions a year on a variety of copyright related topics along with the biennial Copyright Law and Practice Symposium. The Society also sponsors the Dr Kevin Lindgren student prize for outstanding tertiary student presentations on copyright. APRA AMCOS’ Head of Legal, Corporate & Policy was President of the Society from 2014 to 2017, and is currently a member of the management committee.
- Music Australia (MA): APRA AMCOS’ Publisher Relations and Repertoire Director is a current MA Board Director.

# MUSIC GRANTS

APRA AMCOS continues to support a comprehensive Music Grants program. Each year the APRA Board sets aside 1.75% of the distributable revenue to fund projects and organisations promoting and supporting the use and recognition of music by members.

The APRA Board approved funding in the following broad categories: Skills Development, Recognition, Education, Special Projects, Core Funding (selected organisations), Market Development and Industry & Community Partnerships. The most successful category was Core Funding closely followed by Skills Development, reflecting APRA AMCOS's commitment to investing strongly in the future of the industry.

APRA AMCOS also makes significant charitable donations each year to two music focused charity organisations, Support Act Ltd and Nordoff-Robbins Music Therapy Australia.





## INTERNATIONAL COLLABORATION DEVELOPMENT

SongHubs is an APRA AMCOS initiative originally financially supported by the Federal Government. SongHubs partners emerging and established Australian songwriters with renowned international songwriters and producers, creating new works for local and international markets, and assisting songwriters and producers in making professional and creative connections to further their careers.

In FY2017-18, 8 SongHubs were presented worldwide, delivering over 143 new musical works, with almost 20% of the works commercially released, or included in film/TV synchronisation deals, with many more in negotiation for commercial release. Territories covered in the past 12 months were Sydney, Germany (twice), Auckland, Brisbane, Bali, Singapore, London, USA, and Melbourne.

**Since the program started in 2013, over 691 songs have been written, at 51 SongHubs, involving 408 Australian songwriters and composers. Of these, 25% of the works have been or are pending commercial release. To date, SongHubs has produced commercial releases which have resulted in over \$1.3 million dollars collected in APRA AMCOS songwriting royalties alone.**



## A RESEARCH FUTURE

To ensure future policy settings and programs service the very best outcomes for the sector, the industry must collaborate closely to ensure research underpins the decision making process.

Current research project funded by the Australian Research Council will look at the Economic and Cultural Value of Australian Music Exports to be released in early 2019.

The project aims to investigate the cultural and economic value of Australian music exports. It will be the first methodical study on how Australian artists are developed internationally through government and industry programs. It intends to provide a detailed picture of entrepreneurial activity within and between industries, not-for-profit sectors and governments.



## GENDER PARITY IN THE MUSIC INDUSTRY





# THE GLASS CEILING

In 2017 the APRA board approved the development of programs and funding to support the growth of female representation within the membership. As a result of an APRA AMCOS commissioned study by RMIT on Career Pathways and Barriers for Female Screen Composers, a series of recommendations were adopted from the beginning of the review period, to provide opportunities to support female and non-binary members across the broad APRA AMCOS membership.

Our main priority is to achieve a 25% growth in new female members year on year over a 3 year period (with September 2018 being the end of the first year).

In the past 12 months APRA AMCOS initiated:

1. Networking and partnership opportunities through member workshops and events
2. Mentoring program implemented across contemporary pop, art music, screen composing, heavy music, jazz and classical genres, for female and non binary members at various stages of their careers
3. Committing to a 40/40/20 quota (40% women; 40% men; 20% discretionary) across the organisation's programs and event series

Ambassadors – 36% with a 40% target to be achieved by Dec 31 2018. Ten new female ambassadors have been appointed in the last twelve months

SongHubs/SongMakers/National Member events – achieved 40%

Judging panels at Screen and Art Music Awards – achieved 40%

4. Engaging men in equity initiatives



## FOREWORD FROM REPORT:

While the music industry in Australia is healthy and vibrant, women continue to be underrepresented in key roles in this sector and make up only a small proportion of those making money from their musical endeavours. This imbalance represents not only an inability of women to access the social, psychological and economic benefits of music making, but a loss of potential talent to the industry and audiences. As an organisation committed to redressing this situation, APRA AMCOS has commissioned this research on screen composers – a group that is more highly imbalanced in terms of gender than other parts of their membership – as a preliminary exploration of what factors are limiting or enabling the development of women's careers in music. This type of industry-focused research on music and gender has not been undertaken in Australia previously, and the findings will be useful in determining strategies for moving towards greater gender equity in music.

# SPECIALIST SKILLS AND PERSONAL DEVELOPMENT PROGRAM

In conjunction with state music bodies, APRA AMCOS will soon launch a series of personal development workshops across Brisbane, Melbourne and Sydney. Delivered by Accredited Professional Coach Viv Fantin, the "Tune Out Your Inner Critic" workshop aims to help female and non-binary songwriters and composers conquer self-doubt through identifying, managing and responding to what their inner critic is saying.

The workshops will run from 29 - 31 October 2018 and be open to previous female mentorship program applicants and other female and non-binary members. The specialist skills and personal development program will continue into 2019 with further workshops, panels and networking events planned.

"Thankfully the situation is finally changing but it won't happen fast enough on its own. It will actually require existing industry players to take more responsibility for the opportunities we offer to talented women. We need to attract as many smart and talented young people as possible - regardless of their gender."

**John Watson, Eleven Music and APRA AMCOS Ambassador**

## MENTORING PROGRAM

### Partners involved in the mentoring program and details

- Jazz - Emerging Jazz Composer Mentorship administered by SIMA. Recipient was Freya Garbett
- Classical - National Women Composers Development program administered by Sydney Conservatorium of Music. Those selected are offered the opportunity as part of a 2 year program
- Recipients were Peggy Polias, Bree van Reyk, Georgia Scott, and Josephine Macken. Link to full details of program and article in Limelight Magazine
- Film Mentorship for Female Composers in Partnership with the AGSC
- Jay Stewart Mentorship for Female Television Composer
- Mentorships for Female Popular Contemporary Songwriters
- UNFD Mentorship for Heavy Music Songwriters
- Female composers in WA, SA, VIC - The Summers Night Project, administered by Soundstream in partnership with Decibel.

"Our industry has been waving the flag of inclusiveness for years, but the small numbers of women we organically recruit each year tell an entirely different story. If music is to face its complex technological and legal future with talent from all demographics, then it's time for a little less conversation and a little more action. For APRA AMCOS this means a deliberate recruitment and re-training program to draw female talent we know is out there."

**Jenny Morris, Chair, APRA Board**

# APRA AMCOS MEMBERS

## WHAT THEY SAY

**“On any given day we talk about logistics, our five year plan, we communicate with our US, UK and Australian booking agents. We have a financial planner, an accountant, and our manager working with us. We’re dealing with cash flow, amongst grant writing, advocacy, and local & international touring. We make money through many income streams: music publishing, as session vocalists, streaming, merch and corporate gigs...”**

All Our Exes Live In Texas

**“In the evolving landscape of streaming, where bulk content is king, and artists can reach audiences on the other side of the globe with the click of a mouse, it is the diverse and unique ideas that stand out and get heard above the rest. We need to foster and support an equitable industry where gender and race are given the opportunity to thrive and flourish over time to ensure a long and sustainable industry. Supporting female composers at all stages of their career, supports all composers and makes for a richer musical landscape. ”**

Caitlin Yeo

Composer and President of the Australian Guild of Screen Composers

**"A career in music today doesn't need to be 'here or there' for Australians. It should be about doing, connecting, and creating, with no boundaries.**

**The internet had made the possibility of competition a more level playing field and with the right resources and know how, Australian musicians have the potential to not only compete but also lead the field".**

Barney McAll



**"The work the team at SOUNDS AUSTRALIA do is invaluable and essential. The way the team at Sound Australia approach their charter and the results they achieve is inspirational not only to our own domestic community but that of all other international territory models. The Australian music community is forever indebted to SOUNDS AUSTRALIA for their contributions to the industry."**

JUSTIN COSBY, Head of A&R, Inertia



**"Our art is raw,  
unaffected, and  
unique, and it's no  
wonder people  
around the world are  
taking notice."**

Ben Abraham



**"Contemporary songwriting is more global and  
collaborative than ever, so it is vital that the work is  
being protected and can flourish anywhere in the  
world, and that the music creators can continue to do  
what we were born to do."**

Guy Sebastian





**... As an artist and a creator it gives me security and ownership of my original works. Copyright is my superannuation....**

Alex Hope

**"Copyright has afforded me to take some genuine creative risks, and I want the next generation of songwriters and composers to take those leaps too, and to propel us to new places."**

**Kate Miller-Heidke**

**"It's such an exciting time to be an Australian artist, we're on global playlists, playing the major festivals and getting booked on TV shows. But getting to this point requires support from so many partners and so much time and effort to be successful. It's a huge investment to be able to go overseas and do it right."**

Amy Shark

**... It's so crucial to be educated in all forms of music business copyright especially because our music can be played on different forms of media without our knowledge and these laws allow us to have more control of where our music is being played...it's a form of security.....**

Emily Wurramara

**I realised my songwriting had value when ... On a real song level: when people were emotionally effected and moved by it. On a business level: when I began to understand the monetary value of original songs.**

Holly Rankin (Jack River)

**"It's virtually impossible to make a long term career plan as a songwriter, composer or musician, because the nature of the business is instability. Copyright and authorship is vital to sustainability, creativity, and longevity."**

Amanda Brown, composer, and APRA Board member

**"For songwriters and composers copyright is security. It means ownership. It adds comfort and confidence to the creative process and allows for inspiration and creative risk with the knowledge that there will be amongst other things, credit and financial reward at the end. It is imperative to secure copyright for future generations."**

Jenny Morris, Chair APRA AMCOS

**"Teaching kids the draft of songwriting gives them a creative practice they can do for the rest of their lives."**

Kav Temperley (Eskimo Joe)

**Touring for me, particularly here in Australia, is everything. It feeds my kids...I make my living from touring music, and it's important for me to get out to all the regional places as well. I tour most of the year and visit some of the littlest towns throughout Australia, but we have to have these venues to play in...**

Kasey Chambers

**"Landing in Sydney off the bus across Australia from W.A, we set about doing 9 shows a week for the next few months around Sydney and this proved to be incredibly formative for us as a band. I can't imagine how we would have developed had it not been for the live music venues we frequented in that period."**

Mark Lizotte (Diesel)

**"I cut my teeth by touring and playing live. Those small venues both in regional towns and in the big cities, were my university education, my apprenticeship. You get better by playing, making mistakes, figuring out what works. And you do it relentlessly."**

Jimmy Barnes

**"I started my career at a time when you could hone your craft at the clubs, pubs and storied little venues of Sydney and around NSW. It wasn't that long ago, and a lot of those places aren't operating anymore. These venues are career pipelines..."**

Josh Pyke