UNDERSTANDING CHALLENGES TO THE VICTORIAN MUSIC INDUSTRY DURING COVID-19

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Foreword

The music industry in Victoria has, like these industries worldwide, been heavily impacted by the COVID-19 pandemic. The approach taken in the state, to use lockdowns to slow and, as of December 2020, stop the spread of the virus, and the identification of live music events as prime sites for the potential spread of the disease, meant that all face-to-face music activities were halted as of mid-March. The Victorian Office for Women and the Victorian Music Development Office (VMDO) commissioned this research at the very outset of the lockdowns with a view to understanding how the pandemic was impacting people in all areas of the music sector, and to examine whether there was a differential impact for different groups, in particular men and women or gender non-conforming people. This research was funded by the Victorian Office for Women and the VMDO. The research would not have been possible without the willingness of people from all areas the music sector in Victoria to contribute their time and knowledge in filling out the survey. We particularly thank those people who took part in the interviews for the project for their honesty and generosity with their time.
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Executive Summary

In 2020, the impact of the COVID-19 virus pandemic caused an acute crisis for the music industry in Victoria. An initial Australia-wide lockdown from March to May was followed in the state by a much longer, harsher lockdown from late June to October as a ‘second wave’ of infections developed in Melbourne. The restrictions imposed as part of these lockdowns meant live music stopped almost overnight, with the cancellation or rescheduling of thousands of gigs and festivals. The impact of this on musicians, venue owners and operators, road crews and production companies, and associated professionals and personnel from managers to PR to labels and beyond, was immediate and devastating. This research, commissioned by the Victorian Music Development Office and the Victorian Office for Women, captured data at the height of the second lockdown.

The aims of this research are:

1. to gain an understanding of the impact of the COVID crisis on the income and work activities of those working in the music industry in Victoria;

2. to gain an understanding of what the risks and potential benefits of this situation are and how they may accrue differently across the sector, including their gendered impacts; and

3. to determine how pre-existing problems in the sector may have contributed to, or been exacerbated by, the crisis, and what needs to be considered as the sector restarts to improve the experiences of those working in it.

To achieve these aims, data were collected through a mixed-methods approach using two data collection techniques. The first of these was a survey consisting of forty open- and closed-ended questions. The survey gathered data on the immediate impact of the COVID crisis on respondents’ income and ability to work on their music-related activities, subjective experiences of wellbeing, motivation and future intentions in the industry, as well as data on inclusion in the industry prior to COVID, and finally, how the industry as a whole could be improved post-COVID. The survey was open from the 25th of July to the 25th of August 2020, during which time 292 usable responses were recorded. The second data collection technique used was a semi-structured interview of approximately one hour with eleven respondents who self-nominated through the survey.

Findings

From the start of the COVID lockdown the income respondents received from their music-related activities and the amount of time they were spending on these activities decreased greatly.

- Since the pandemic, the proportion of respondents earning more than 70% of their income from music dropped from over 50% to only 25%. By contrast, those earning less than 30% of their income from music more than doubled, from 28% to 65%.
- Seventy-six percent of respondents’ income had decreased overall, with those in the Live Music area losing a greater proportion of their income than Music Talent or those in Promotion, Management and Support roles.
- Forty-four percent of respondents lost all their music-related work in the pandemic, with those in full-time employment in the sector dropping from 34% to 7%.
- Paid hours lost in music were not made up for by increased employment in other areas
- More than half of respondents were worried about paying for basics like rent and food.

These findings are connected to an emotional component of the experiences that people involved in music have had during lockdown and beyond which needs to be noted, as it colours many of the results in this report. This is a group of people who have collectively gone through the traumatic experience of having a great deal, if not all, the certainty around their career and future wiped out when lockdowns were imposed.

As such, lockdown was a stressful experience for respondents, with most reporting that the majority of their activities had stopped, and that there was considerable uncertainty about whether and when they would resume. Respondents were twice as likely to disagree than agree that they had found it easy to motivate themselves to work on their music-related projects, or that they had been highly productive. They were also doing more unpaid work than before lockdown, and were finding it difficult to maintain their connections within the sector.

However, more than half (52%) of respondents reported that they had learned new skills since the start of the pandemic. The main types of skills gained were:

- Music and music-production skills;
- Online technology skills;
- Business skills; and
- Personal management and coping skills.

Three quarters of respondents (81%) thought that their involvement in music will be different post-COVID. For around a third of these respondents, this change was expressed in positive terms, with people describing new plans, changing their career paths or finding ways to help rebuild the sector and demonstrate their commitment to it, including through using the new skills described above.

For the remaining two-thirds, however, their future involvement was framed more negatively. Some described either already having left the sector, or thought it was likely they would be doing so. In some cases this was in order to try to remain financially secure, but for other respondents the lockdown had given them time to reflect on aspects of the sector they found unsatisfactory, leading them to consider exiting. This is connected to the finding that respondents to the survey were twice as likely to agree than disagree with the statement ‘I have considered leaving the music industry’.

Other respondents anticipated that while they would not completely leave, the amount of time they would have to spend on music-related activities would be reduced, either because they would need to take up more paid work elsewhere to make ends meet, or because they believed the sector will shrink post-COVID and there will be less work to go around. There was also a large number of respondents who believed their role would change, but could not say how because they felt the future was so uncertain. These findings indicate the potential for a significant loss of talent from the sector.

As a way of gathering information about what might be best practice as the industry starts up again, respondents were asked whether they had ever felt as though they were prevented from participating in music-related activities as much as they would have liked before COVID. Forty percent answered yes to this question, and the most common reasons for this were:
that they had experienced discrimination of some sort (eg sexism, ableism, ageism, racism, homophobia);
because of a more non-specific ‘elitism’ in the sector;
because the conditions in the sector made participation difficult; and
regional respondents believed their location made participation harder.

Respondents were asked what they would like to see changed as the industry reopens, and the key themes that emerged here were:

- improved working condition in music-related work, including better pay and hours, improved access to benefits and more job security;
- changing the culture of the industry to increase inclusion and shift the focus to shared values rather than profits;
- more support from outside the industry through grants, government programs or increased funding for bodies such as Music Victoria and the VMDO; and
- more recognition for the contribution of the sector and the skills of those involved in it.

While these findings have been framed here at the highest level of responses from all groups, analysis was also undertaken to determine if there were systematic differences between demographic groups, with a particular focus on gendered differences. Such differences did not play out strongly across the survey results, with similar answers emerging for men, women and non-binary/gender non-conforming (GNC) responses in most questions. Women and non-binary/GNC respondents were, however, less likely to have felt as though they were productive during lockdown, and more likely to have felt that they were prevented from fully participating in music-making activities before COVID. Men were also more likely to have learned new skills during lockdown, and there were gendered differences in the type of skills respondents learned, with men being more likely to learn new music and production skills, and women more likely to focus on online technologies. These and other areas where differences have emerged for other demographic categories have been noted where appropriate throughout the detailed results.

The understanding of pre-existing problems in the industry discussed here makes it clear that although the pandemic was experienced as an unprecedented and unique event, the impact that it had on many in the music industry represented an exacerbation and continuation of already-existing problems. At the same time, many of the most positive aspects of the sector were also enhanced, with community-mindedness, innovation, creativity and commitment to the fundamental worth of music-making also prevalent. Harnessing these characteristics to make improvements in the areas where problems have been highlighted may be key to a more inclusive and healthy music scene in the post-COVID world.

Recommendations arising from these findings have been included at the end of the report (Section 8)
1. Introduction

In 2020, the impact of the COVID-19 virus caused an acute crisis for the music industry in Victoria. An initial Australia-wide lockdown from March to May was followed in the state by a much longer, harsher lockdown from late June as a ‘second wave’ of infections developed in Melbourne. The restrictions imposed as part of these lockdowns meant live music stopped almost overnight, with the cancellation or rescheduling of thousands of gigs and festivals. The impact of this on musicians, venue owners and operators, road crews and production companies, and associated professionals and personnel from managers to PR to labels and beyond, was immediate and devastating.

This research, commissioned by the Victorian Music Development Office and the Victorian Office for Women, captured data at the height of the second lockdown. This research was initially designed with gender in particular in mind, and to develop an understanding of how the crisis had affected marginalised groups (including those finding accessibility difficult on the basis of race, ethnicity, sexuality and functional impairment). It was also designed to provide a snapshot of the changes taking place as the industry adjusted to the crisis, and to assist in making plans for rebuilding. The data collected has ultimately told us more about the second of these goals, as, despite a diverse group of respondents participating in the survey and interviews, most questions did not reveal significant differences between demographic groups. Our interpretation of this is that it is a reflection of the severity of the crisis, and the currently undifferentiated effects of its initial impacts as people were in a moment of reacting to an unfolding event. The most obvious and consistent differences that emerged were between the different music industry sectors. As such, information on how groups compare to one another will be presented only when differences were noted.

2. Objectives

In close collaboration with the VMDO and the Office for Women, this research project has been designed to deliver the following aims:

1. to gain an understanding of the impact of the COVID crisis on the income and work activities of those working in the music industry in Victoria;
2. to gain an understanding of what the risks and potential benefits of this situation are and how they may accrue differently across the sector, including their gendered impacts; and
3. to determine how pre-existing problems in the sector may have contributed to, or been exacerbated by, the crisis, and what needs to be considered as the sector restarts to improve the experiences of those working in it.
3. Background

In the lead up to 2020, the music industry in Victoria was in a strong position. A decade of good fortunes in the recording industries globally, combined with Victoria, and in particular Melbourne, successfully positioning itself as the centre of music-making in Australia and an important contributor on the world stage, meant that music was seen as a key element of the state’s success. This was aided by work being done within the sector to demonstrate the value of music, through research demonstrating the economic and social benefits associated with a strong music scene, and effective advocacy to garner support from government. This ensured the sector was relatively well-supported financially, and enabled the advancement of policy initiatives (such as the Agent of Change legislation to protect venues from noise complaints) that facilitated musical activities in the state. A flourishing live music scene and festival circuit provided platforms for artists at all stages of their careers, and gave audiences ample opportunity to engage with a variety of genres and styles. While there were a number of serious problems that were present and being addressed to varying degrees (as will be discussed below), the Victorian music scene was, on most measures, thriving and in many ways becoming a world leader.  

3.1. The impact of COVID

The outbreak of the COVID-19 pandemic, which reached Australian shores in January 2020, brought an abrupt end to much of this activity. The COVID-19 health response in the state of Victoria centred around a lockdown strategy aimed at preventing the spread of the novel coronavirus and protecting Victoria’s health system, meaning that all live, face-to-face music events ceased, creating flow-on effects for all other aspects of a sector that has become increasingly dependent on live music for income as streaming devalues recordings. The health response developed over several stages, accompanied by economic strategies and emergent events that presented uncertain futures for anyone working in the entertainment sector. Below is a list of key events for understanding the impact of the COVID-19 pandemic for the Victorian music industry throughout 2020:

- Jan 25: First Australian cases of COVID-19 reported
- March 1 & 2: First Australian death and community transmission of COVID-19 reported
- March 11: The WHO declares COVID-19 a pandemic
- March 12: Federal economic stimulus package announced, targeting welfare recipients, apprentices and small-to-medium businesses (mostly employers)
- March 16: Victorian Premier, Daniel Andrews, declares a state of emergency for one month (which will ultimately be extended throughout 2020)
- March, mid-late: National shutdown escalates, including spatial distancing, broad travel bans, testing, contact tracing, and quarantine. At this stage, the fate of major entertainment events in 2020 was in doubt and many were cancelled. State Premiers (especially in Victoria and New South Wales) begin implementing more comprehensive control measures than advised by the federal government, including closure of schools, increasing public hospital Intensive Care Unit capacity, and work-from-home orders to employers.

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1 See Newton and Coyle-Hayward 2018; Music Victoria 2018, June; Arts Victoria 2011
2 Timeline compiled through the following sources: Andrews 2020, September 6; Andrews 2020, September 27; Andrews 2020, October 26; Duckett and Stobart 2020, June 11; Lupton 2020, August 13; Nally 2020, June 30; Sakkal and Llanbey 2020, July 19; Snape 2020, March 12; Sutton 2020, March 16
March 22: Second federal economic stimulus package announced, including changes to unemployment benefits, named JobSeeker

April, early: COVID-19 cases begin falling, seeing the end of the first wave

April 15: JobKeeper payment legislation passed. This would see many out-of-work employees and sole-traders whose income had been reduced supported through a wage subsidy to employers or direct payment to sole traders; a package worth $130 billion.

May 8: Australian government announces plans to ease lockdown restrictions, with responsibility on state governments for implementing the plans

June 20: Restrictions reinstated in the state of Victoria as a second wave of infections is reported, including limits on household gatherings and restrictions on business operations

July 7: Second period of lockdown introduced for metropolitan Melbourne and Mitchell Shire; residents allowed four reasons to leave their homes.

July 19: Announcement that face coverings would be mandatory in metropolitan Melbourne and Mitchell Shire

August 2: State of disaster declared for Victoria, including a nightly curfew (8pm-5am)

September 27: Metropolitan Melbourne restrictions loosen, ending night-time curfew and increasing outdoor meeting opportunities.

October: Gradual easing of restrictions, with businesses such as cafes, bars and restaurants being allowed to open with capacity limits, effectively ending the 112-day lockdown period, on October 26

November 1: Australia records zero cases of local transmission nationwide for the first time since Victoria’s second wave of COVID-19 infections

November 8: Victoria’s intra-state travel limits lifted

Disrupted events that were scheduled for 2020 in Victoria include the Melbourne International Comedy Festival, World Tour Bushfire Relief Concert, Download Music Festival, O_C_E_A_N Arts Festival, Beyond the Valley Festival, Festival X, Queenscliff Music Festival, Hella Mega Tour, Listen Out, Melbourne International Film Festival, Melbourne Fringe Festival, So Pop, Boogie Festival, Melbourne International Jazz Festival, Groovin The Moo, Day On The Lawn, Meadow Festival, Brunswick Music Festival, Under the Southern Stars Festival, Ability Festival, Red Hot Summer Tour and numerous international and local artists’ tours (see Gwee 2020, November 11)

As the Federal government moved to respond to the enormity of the crisis, funding and support for the music industry was slow to arrive. In March the Australian music sector called for a $750 million dollar rescue package, but by June the Prime Minister had announced only a ‘$250 million JobMaker plan to restart Australia’s creative economy’, to be shared among all creative industries. Senate estimates showed that as of late October, more than 80% of the package had not yet been allocated, with all distributed funding to that time going to Screen Australia to help finance film and television productions. The Australian Live Music Business Council found in October 2020 that ‘only 17 percent of businesses in the [live music] sector will be able to benefit, due to tough eligibility criteria. Even then, the money may not flow until the end of the year’. The Victorian state government responded more quickly, with a $15

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4 I Lost My Gig Australia 2020, March 20

5 Prime Minister of Australia 2020, June 25

6 Burke 2020, October 21

7 Lefevre 2020, October 21
million live music venue program announced in July and the first round of funding distributed in September, and a Victorian Music Industry Recovery program offering grants of $4,000 to $50,000 from September, as well as funding for arts recovery in the 2020-21 budget. This was in addition to a variety of business-focused grants and initiatives that music-related businesses could take advantage of, and smaller-scale local government funding. The support offered has, however, covered only some of the needs of the sector, and artists and event organisers turned to social media and streaming platforms to move some events online and create new opportunities for audiences to engage with artists, and for even greatly reduced revenue streams to be maintained, during lockdown. These included initiatives like the weekly ‘Isol-Aid’ festival, an online event that gave artists a 20-minute set each, and created ways for fans to buy merchandise, donate to the artists or to Support Act, an organisation that delivers ‘crisis relief services to artists, crew and music workers as a result of ill health, injury, a mental health problem, or some other crisis that impacts on their ability to work in music’.

However, despite these innovations and interventions, the impact of these event disruptions on music industry workers has been immense. The Victorian Arts and Recreational Services sector, which accounts for many music industry workers and roles, has experienced unprecedented job losses and uncertainty in the wake of the state-wide lockdown. During 2020, employment in the Victorian Arts and Recreational Services sector fell from around 77,900 jobs in February (just prior to the first lockdown), to 51,800 by May, and held steady to around 51,200 jobs by August (a loss of approximately 34.3% of jobs). The impact on full-time work was even more pronounced, as full-time employment fell from around 42,400 jobs in February, to 27,000 in August (a 42.7% loss). While part-time work fell from 35,600 jobs in February to 19,000 in May (a staggering 53.4% loss of jobs), it rose back to 24,300 by August (a 31.8% loss from February), faring better than full-time roles. Further, 33% of employees in the Arts and Recreational Services sector had been employed for less than 12 months, limiting access to the federal government’s JobKeeper employee retention scheme.

CultureCounts reports that 96% of Australian cultural businesses they surveyed had cancelled programs or events, while 88% report they have lost revenue since March 2020. A Live Entertainment Industry Forum report claims that some 79,000 jobs have been lost in the live entertainment industry during the COVID-19 recession, along with a 65% economic downturn valued at around $23.6 billion. The Australian Live Music Business Council similarly reports large losses, as 73% of its members reported a revenue downturn of 75%-100% between March and September, adding that ‘most shockingly, 70 percent of businesses who took part in [their] survey are now predicting closure in the next six months’. This loss of income is comparable to music industry workers in other countries, such as Wales, in which around 70% of music industry workers reported losing over 75% of their income. These rates of cancellation and fears of closure are reflected in creative cities, such as Liverpool, which one study suggests experienced over £1.75 million of lost performance revenue, as over 86% of events that were postponed due to the pandemic were eventually cancelled, rather than being

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8 Creative Victoria 2020, September 20
9 Support Act 2020
10 ABS 2020, September
11 Churchill 2020, p. 2
12 see also I Lost My Gig Australia 2020, May 20
13 Gibbs 2020, April
14 Live Entertainment Industry Forum 2020, October 14
15 Lefevre 2020, September 24
16 Carr 2020, p. 4
Colorado, in the USA, similarly experienced heavy job losses concentrated in the live music sector, where the job losses among musicians, managers, agents and live events businesses made up 87% of all music industry job losses and 89% of all estimated lost sales revenue. Complicating recovery in the live music sector, recent audience research in Australia suggests that outdoor events and digital streaming are preferred to indoor flat-floor and indoor seated events due to safety concerns related to the novel coronavirus. It is, however, worth noting that the effects of the shutdown have not been experienced uniformly across a very diverse industry. The live music sector appears to have fared much worse than recorded music and support services, as while live music has been effectively cut from its key income source (i.e. live events in physical spaces), recorded music continues to channel revenue through ‘streaming, digital downloads, physical sales and synchronisation revenues’, with some album productions delayed because of restrictions facing live tours that accompany album releases. This does not mean that these other areas are unaffected, however, as album sales are connected to tours that promote them, and the portfolio nature of many people’s careers in the sector mean they are likely to have a stake of some sort in the success of the live scene. In this way ‘a healthy live music ecology is necessary to maintain a sustainable live music culture and a proliferation of diverse and robust music scenes’.

Independent artists within Australia have faced similar restrictions to live music sector workers in general as gigs and opportunities for live-event-based sales and promotion have ground to a halt. MIDiA’s latest independent artist survey found that these artists constituted the fastest-growing segment of the global recorded music business, but that due to the COVID-19 pandemic, ‘independent artists need side hustles like never before’. Maintaining an income in the attention-driven streaming platforms may prove challenging for this segment, where around 40% of independent artists spend nothing at all on marketing and may be inexperienced with marketing techniques.

3.2. Precarity, gender inequality and illness: music’s pre-existing conditions

Establishing a career as a musician, artist manager, or in the live music business entails learning a range of entrepreneurial skills in order to support a musical craft through connecting music to a business environment. Historically, the divided interests of major record labels, managers, venue operators, bookers/promoters and music talent have made providing all-encompassing definitions of a singular ‘music industry’ problematic, leading to general acceptance that there are in fact a number of music industries. Within and across these, workers occupy diverse roles, as both the work of making music and of connecting it to audiences cross several industries and sectors. Musicians, composers, singers, songwriters, DJs and other music talent may find income working in live shows in cafes, bars, clubs or festivals, but also through recording, streaming, sales and merchandising, or through

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17 Whitby 2020, September
18 Hunt and Gedgaudas 2020, July, p. 2
19 Patternmakers 2020, September, p. 11
20 Hall 2020
21 Whiting 2019, p. 145; see also Behr et al. 2016
22 Mulligan 2020, September 30
23 Mulligan 2020, September 30
24 Williamson and Cloonan 2007
coordinated album release tours that have flow-on value for food vendors, manufacturing, social media and events management companies. Outside of creative talent, workers are a host of live music industry professionals who assist in connecting, advertising, marketing, promoting and distributing music locally and abroad, many of who also perform multiple roles. These roles are also constantly changing, as the digital disruption of the global recorded music industry through digital streaming, sales and file-sharing have changed opportunities for revenue generation, as music becomes valued for the data it can produce and the advertising revenue it can help attract.25

The number of roles associated with making music commercially viable has led many in the industries to prepare for ‘portfolio careers’: ‘a continually evolving range of concurrent and overlapping paid and unpaid, predominantly part-time and freelance work, in order to carve out a viable living’.26 Portfolio careers have become a mainstay for young workers, as a DIY ethos has become a primary way that inexperienced workers attempt to build careers after the collapse of the youth labour market of the 1970s.27 These types of careers are characterised by what is often described as ‘precarity’.28 For many music industry workers, this patchwork of roles involves part-time, casual and ‘freelance’ work (sole-trader businesses), sometimes performed at a low rate of pay or without pay in the expectation that involvement in the music industry will increase one’s chances of future work.29 Promoters, like music talent and artist managers, ‘wear many hats’ throughout their work days.30 Within the sector, ‘pro-active behaviours, persistence, self-promotion, the careful management of relationships, and excellent networking skills’ are core business development skills.31 For creative workers, the normalisation of unemployment and underemployment in the pursuit of their craft may entail strategic decisions to ‘keep overheads low’ and free up time and energy to perform that work.32

The normalisation of underemployment, DIY careers, multi-jobbing and short-term, project-based, insecure contracts has left large segments of the music industry workforce especially vulnerable to a state of emergency that requires businesses to shut down with indefinite timeframes on resuming trade. Research has shown that even at the best of times workers in the music industry are ill-prepared for contingencies, with the piecemeal nature of their work often leaving them without benefits such as sick pay or super, and with no clear pathways to other types of employment.33 The COVID-19 pandemic and lockdowns experienced by both metropolitan and regional Victorians presented the Victorian music industry with a worst-case scenario where the full effects of this precariousness were suddenly brought home to workers en masse.

These impacts also need to be considered in light of how, despite the many advances made in gender equality in Australian society, the music industry continues to be a domain of differential opportunities and outcomes. For example, only one in five APRA AMCOS members identifies as female, and Australian music boards, awards and festivals continue to

25 Negus 2019, p. 376
26 Bennett et al. 2012, p. 35
27 Bennett 2018
28 Gross and Musgrave 2020, p. 45
29 Strong, Cannizzo and Rogers 2020, p. 17; see the discussion of pathways into the music business from that study of Victoria, Australia for a description of portfolio careers in the music industry.
30 Brennan and Webster 2011, p. 1
31 Bennett et al. 2018, p. 245; also see Bridgstock 2011
32 Threadgold 2018
33 Strong, Cannizzo and Rogers, 2020
be dominated by men. This problem is well-recognised and significant work has been undertaken over the last five years on all levels of the industry to better understand and remedy this situation. This work has extended to various programs designed to improve representation of many other previously marginalised groups in the industry. However, extensive discussion of these issues may not be leading to the changes on the ground that are required. A survey of gender diversity in gig line-ups over a three-week period at 15 small, medium and large venues in inner Melbourne undertaken by Co-Health in the immediate lead up to the COVID shutdown showed that 76% of the people performing were men. The first two Isol-Aid festivals, by comparison, had close to gender parity, with 46% men performers. This suggests that the issue is not a lack of women and gender-diverse performers, but continuing problems relating to their access to opportunities to perform. This can also be related to the ways in which live music performance spaces are not always safe for women and GNC people; and sexual assault and violence can be essentially normalised within parts of the creative and music industries.

Even the slow progress that has been made on this issue is, however, at risk of being lost because of the COVID-19 crisis. During the 2008 Global Financial Crisis, research showed that in the creative industries women were more likely to be laid off or lose work. In times of crisis creative workers’ more risk-averse working patterns include retreating to trusted networks of collaborators which, while understandable, has gendered outcomes. One of the most frequently cited reasons for women (and other marginalised groups) being disadvantaged in these industries is the exclusionary nature of such networks.

For workers more broadly, the COVID-19 recession has accentuated gendered inequalities stemming from the gendered division of labour and workplace precarity. Victoria’s Stage 4 lockdown saw childcare centres limiting access to ‘permitted workers’ from a narrowed number of industries, increasing the care burden for families, while the federal government’s economic policy response has focused on ‘shovel ready projects’ in industries that overwhelmingly employ men, rather than women, and which are likely to produce far fewer jobs per dollar of investment (1.2 jobs for every $1 million spent) than the Arts and Recreation Services sector (5.6 jobs for every $1 million spent). As economists David Richardson and Richard Denniss at the Australia Institute have claimed, ‘stimulus spending focussed on health, education and tourism or entertainment will create far more jobs, for both men and women, than spending a similar amount on construction’.

The music industry (and creative industries more broadly) has also increasingly come under scrutiny for its lack of equality in other areas, in regard to which Australia is yet to produce comprehensive research. Recent research from the UK has demonstrated ongoing, entrenched divisions in creative work in terms of class and ethnicity as well as gender, with these factors also intersecting to create complicated patterns of engagement with culture that

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34 McCormack 2020, March 8  
35 Ingram 2020  
36 see Fileborn 2016  
37 Strong and Rush 2018; Hennekam and Bennett 2017  
38 Wing-Fai et al. 2015  
39 Cannizzo and Strong 2020  
40 Azcona et al. 2020; Childs 2020, May 25  
41 Churchill 2020, p. 3  
42 Richardson and Denniss 2020, June, p. 9  
43 Richardson and Denniss 2020, June, p. 10
still overwhelmingly privilege the male, white and rich. There is still a lack of understanding as to how this plays out in the Australian context - in particular in relation to First Nations people, but also with consideration of people of diverse sexual identities and Deaf and Disabled people - and how this may further complicate the impacts being felt from the current crisis.

In addition to this, recent work has focused on how the structure and expectations of the music industry have negative outcomes for the health and welfare of those involved in them. Research conducted in 2019 with people with long-term experience in music businesses of varying sorts showed that most had experienced periods of ill-health or burn-out associated with their jobs, and that they saw this as being common in the music industry. Other studies have found rates of mental illness among musicians that are much higher than the general population, with some suggesting that there was a ‘mental health crisis’ in the industry well before the pandemic. These negative mental health outcomes in particular are in many ways structural in nature, with participants bearing the emotional burden of an industry where success and failure are characterised as being directly connected to the talent and character of the individual, and where there is increasing pressure to be constantly engaged with marketing and branding activities through social media. These poor outcomes are all connected to the issues mentioned above, with patterns of exclusion within the industry exacerbating the precarity, low pay and poor conditions discussed above for marginalised groups, and these factors combining to create stress and anxiety. The close association of the music industry with drinking and drug-taking, as well as the long hours expected of participants and the blurred lines between work and not-work, also contribute to these negative outcomes.

While none of these ‘pre-existing conditions’ are unique to the Victorian music industry, their existence needs to be considered in understanding how the sector will most effectively respond to this crisis, and how this moment might even be used to address these types of problems.

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44 UK Music 2020; Brook et al. 2020
45 Strong, Cannizzo and Rogers 2020
46 Gross and Musgrave 2020
47 Gross and Musgrave 2020
4. Research Design

This project uses a combination of qualitative and quantitative data-gathering approaches to understand how Victorians in any part of the music industry responded to the crisis. Ethics approval was granted from the RMIT Human Research Ethics Committee for this research.

Data were collected through a mixed-methods approach using two data collection techniques. The first of these was a survey consisting of forty open- and closed-ended questions, developed in conjunction with the VMDO and the Victorian Office for Women. The survey gathered data on the immediate impact of the COVID crisis on respondents' income and ability to work on their music-related activities, subjective experiences of wellbeing, motivation and future intentions in the industry, data on inclusion in the industry prior to COVID, and finally, how the industry as a whole could be improved post-COVID. A copy of this survey can be found in Appendix 1. Survey items were inspected by multiple members of the research team to increase the reliability of survey questions.48 The survey was open to anyone who had undertaken paid music-related activities in the twelve months before the COVID lockdown. It was hosted on Qualtrics, a secure survey platform recommended by RMIT for research projects run through the University, and a link to the survey was embedded on the homepage of the VMDO website. The survey was promoted through a number of different channels: the VMDO and Music Victoria used their social media accounts to inform potential respondents about the study, and reached out to other music industry bodies to request it be sent to their members. Researchers also used social media to advertise the survey, for example through asking high profile industry figures to tweet or post about it, or posting the link on discussions relevant to the subject matter. Media promotion was also undertaken by Dr Strong. The survey was open from the 25th of July to the 25th of August 2020, during which time 292 usable responses were recorded (i.e. where the respondent answered at least one question that was not a demographic question). Respondents were not required to answer all questions, and there was an expected drop-off in answers towards the end of the survey, so response numbers vary across the findings. Response numbers for each survey item are noted in the findings of this report. The sample achieved can be considered to be a convenience sample of available and contactable music industry workers, rather than a representative sample. Consequently, this research report focuses on descriptive data and avoids analytic inferences from this non-random sample.

The second data collection technique our research team used was a semi-structured interview of approximately one hour. Eleven survey respondents were chosen from people who had indicated their desire to participate in an interview by providing their contact details in the survey. These interviewees were selected to as far as possible provide a mixture of genders, work areas, location, age and other demographic factors, a combination of systemic sampling49 and theoretical sampling approaches.50 This method was appropriate because of the focus on diversity in the study’s objectives. A breakdown of the characteristics of these interviewees can be found in Appendix 4. These interviews provided more in-depth information on the topics covered in the survey, and allowed for detailed understanding of impacts that could not be elaborated in the survey. Interviews were conducted over Zoom video conferencing software by a member of our research team. Interviews were audio-recorded with the explicit permission of participants, transcribed and coded using the data analysis

48 Vanderstoep and Johnston 2009, p. 62
49 Vanderstoep and Johnston 2009, p. 32
50 Glaser and Strauss 1967
software NVivo. The interview schedule used to assist interviewers in their questions and conduct can be found in Appendix 3.

4.1. Overview of survey respondents

This section describes the demographic data for survey respondents, to give some context to this study’s findings and how they have been interpreted in this report.

A total of 340 survey responses were received, but 48 were excluded from the final analysis for one or more of the following reasons: the respondent lived outside of Victoria; the respondent was under 18 years of age; or the respondent did not supply responses past demographic questions. A total of 292 valid responses were attained and have been used throughout the analyses in this report. We are not able to report an overall response rate, as the total number of music industry workers contactable through our convenience sampling approach is not apparent. Using survey and ABS data, Figure 1 compares the age range of the study’s sample with the population of employed Victorians. Respondents in this study broadly mirrored the age distribution in the general employed Victorian population, but with a notable skew towards younger age groups.

![Figure 1. Age of Respondents (Q4)](image)

All respondents to the survey indicated their gender identity matched that which was registered at their birth, that is, that they were cisgendered. Figure 2 details the self-reported gender identities of survey respondents. Of all respondents, 43% (n=126) reported that they identified as a woman, 51.5% (n=151) identified as a man, a further 4.5% (n=12) identified as non-binary or as something other than the previous (i.e. gender non-conforming [GNC] or fluid gender identity), and 1% (n=3) declined to nominate a gender identity. Men are known to be

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51 ABS 2020, September b  
52 The low number of non-binary/GNC participants mean that although they will be included in some comparisons in order to ensure this group is represented, the statistics produced are highly skewed because of the small sample size. In some cases, less than ten non-binary/GNC respondents answered questions, and so they have been omitted from comparative graphs where this occurs, but still described in the discussion.
overrepresented in some music industry professions and sectors,\textsuperscript{53} partially explaining the higher proportion of respondents that identify as men.

\textbf{Figure 2. Gender Identity of Respondents (Q7)}

Respondents were also asked to nominate one or more sexual identities that they described them. Figure 3 below details the number of times each sexual identity category was nominated by a respondent. Note that the numbers reported tally up to 310 (rather than the response count of n=292) because multiple sexual identity selections were allowed. Of all respondents, 72\% (n=211) identified as heterosexual, 3.4\% (n=10) identified as homosexual, 10.6\% (n=31) identified as bisexual, 4.5\% (n=13) identified as pansexual, 8.2\% (n=24) identified as queer, while 7.2\% (n=21) declined to respond to the question. Notably, those who identified as heterosexual chose this designation alone, while those identifying as anything else were more likely to nominate multiple terms to describe their sexual identity.

\textbf{Figure 3. Sexual Identity of Respondents (Q8)}

\textsuperscript{53} For example, see this study of screen composers: Strong and Cannizzo 2017, p. 5
Respondents were asked what work roles they performed in the music industry (Question 14). Most respondents nominated multiple roles (n=186, 64%), while others nominated a single role (n=105, 36%), with a single respondent choosing not to nominate any role.

Figure 4 shows the most time-consuming music role that respondents identified they undertook. The most common types of primary work roles for music industry workers in this study are musicians and singers (n=106), which were categorised together here because of the overlap between these creative talent roles. Musicians and singers made up approximately 36% of all respondents. The next most common types of work that respondents dedicated themselves to are venue owner/manager (n=26, 9%), sound engineers (n=22, 7.5%), songwriter/composer (n=19, 6.5%), artist manager (n=19, 6.5%) and promoters (n=15, 5%). There were less than 10 respondents in every other category of work role and only one respondent did not specify their work role. Notably, 55 respondents (or 19% of the sample) nominated a work role under the open-ended ‘other’ option. The most common three were lighting crew (n=8, 2.5%), business owner/director/executive (n=6, 2%), and teacher (instrumental or vocal) (n=5, 1.5%). To help develop a meaningful analysis of work roles, the research categorised respondents into music industry sectors, described in Section 4.2, below.

**Figure 4. Most Prominent Music Industry Role (Q15)**

Another notable distinction within this study’s sample is between respondents located in Melbourne (both the metropolitan central business district and surrounding local government areas, or LGAs) and Victoria outside of Melbourne (also described here as ‘regional Victoria’). Only 45 respondents identified that they lived in regional Victoria (15.5%), while most (n=247, 15.5%) reported living in Melbourne, shown in Figure 5. A selection of statistics that differentiate metropolitan Melbourne respondents from regional Victorian respondents can be found in Appendix 5.
In addition to this, 15% (n=43) of respondents indicated they had a functional impairment of some sort; and 27% (n=79) reported being a caregiver (for children or adults at home). Each of these are introduced throughout the report, as they are relevant. For a complete summary of statistics of survey respondents, including some diversity indicators that have not been used as key points of analysis, see Appendix 2.

Respondents were further asked to nominate what category best described their ancestry (with choices based on ABS data on the most common ethnicities in Australia\textsuperscript{54}), with two open ended selections (‘Other’ and ‘Multiple’). The aim here is to explore the self-identified ethnicities and heritages of respondents. This is admittedly a simple approach to this question: measuring what ‘ethnicity’ means fully requires multiple questions that were not appropriate to include in a survey of this nature.\textsuperscript{55} This question does, however, give us an indication of the diversity in the sector. Figure 6 below summarises the responses to this question in order of most common responses.

\textsuperscript{54} ABS 2017
\textsuperscript{55} ABS 2019
Figure 6. Ethnic Ancestry of Respondents (Q9)

<table>
<thead>
<tr>
<th>Ancestry</th>
<th>Number of Respondents (n=292)</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>135</td>
</tr>
<tr>
<td>Multiple (please specify)</td>
<td>48</td>
</tr>
<tr>
<td>Irish</td>
<td>35</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>33</td>
</tr>
<tr>
<td>Italian</td>
<td>13</td>
</tr>
<tr>
<td>German</td>
<td>9</td>
</tr>
<tr>
<td>Greek</td>
<td>6</td>
</tr>
<tr>
<td>Chinese</td>
<td>5</td>
</tr>
<tr>
<td>Aboriginal and/or Torres Strait Islander</td>
<td>4</td>
</tr>
<tr>
<td>Arab</td>
<td>2</td>
</tr>
<tr>
<td>Indian</td>
<td>2</td>
</tr>
<tr>
<td>African</td>
<td>0</td>
</tr>
</tbody>
</table>

Ancestries nominated under the Other and Multiple categories include: Aboriginal and/or Torres Strait Islander; African; Arab; Australian; Austrian; Brazilian; Central European; Chinese; Cornish; Croatian; Czech; Danish; Dutch; Eastern European; English; European; French; German; Greek; Greek; Hispanic; Hungarian; Indian; Irish; Italian; Japanese; Jewish; Latin; Latvian; Libyan; Lithuanian; Macedonian; Malaysian; Maltese; Mauritian; New Zealand; Polish; Romanian; Russian; Scandinavian; Scottish; Serbian; Sri Lankan; Swiss; Tamil; Thai; Ukranian; and Welsh. These responses were used to develop analytic categories, described below, in Section 4.2.

Respondents were also asked to nominate one or more music genres that they mainly worked within. Only 142 respondents provided an answer to this question, but multiple answers were often given. Figure 7 below details music genres that were nominated by at least 5% of respondents.
Figure 7. Music Genres Played by Musicians (Q16)

<table>
<thead>
<tr>
<th>Music Genre</th>
<th>Number of Responses (n=142)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rock</td>
<td>37</td>
</tr>
<tr>
<td>Pop</td>
<td>19</td>
</tr>
<tr>
<td>Folk</td>
<td>16</td>
</tr>
<tr>
<td>Indie</td>
<td>14</td>
</tr>
<tr>
<td>Blues</td>
<td>11</td>
</tr>
<tr>
<td>Jazz</td>
<td>11</td>
</tr>
<tr>
<td>Alternative</td>
<td>9</td>
</tr>
<tr>
<td>Classical</td>
<td>9</td>
</tr>
<tr>
<td>Country</td>
<td>8</td>
</tr>
<tr>
<td>All others</td>
<td>127</td>
</tr>
</tbody>
</table>

Music genres that were reported by less than 5% of musicians include (in order of popularity): Contemporary, Experimental, Electronic, Soul, Any/All, Punk, Acoustic, Cover Songs, Hip Hop, Indie Rock, Theatre, Improvisational, Multiple, R&B, Roots, Singer/Songwriter, Alternative Country, Folk Rock, Latin Music, Musical Theatre, Opera, Techno, 20s Jazz, 70s Disco, African Drumming, Alternative Rock, Arts Ensemble, Australiana, Big Band, Bluegrass, Bolero, Brass, Cabaret, Choral, Commercial, Country Rock, Cross Genre, Dance, Educational, Film & TV, Folktronica, German Folk, Guitar Based Music, House, Instrumental Progressive Metal, Jazz Trumpet, Kraut Rock, Local Music, Noise, Original, Outsider, Performance, Pop Rock, Post Punk, Psychedelic, Pub Rock, Rap, Reggae, Salsa, Slavic Punk, Soulful Pop, Sound Art, Spoken Word, Synthpop, Western Art Music and World Music.

4.2. Analysis of respondents

Using self-reported demographic information from survey respondents, the researchers have also developed analytic categories to help further project experiences of marginalised and diverse members of the Victorian music industry.

**Ethnic Minority**: Three coding categories were developed from responses to the question ‘Which of the following best describes your ancestry?’ The original question allowed for open-ended responses as well as set categories. Responses that indicated primary Anglo, central European, or open-ended responses of ‘Australian’ were coded as ‘Non-Minority Ethnicity’, while other responses were coded as ‘Ethnic Minority’. Overall, 228 respondents were coded as non-minority ethnicity, while 62 respondents were coded as ethnic minority and a further two respondents could not be classified due to declining to respond to the question.

**Music Industry Sector**: A final set of categories were developed to investigate the different experiences of music industry workers with different relationships to music-making practice and segments of the music business. These categories include: Music Talent (musicians, singers, composers, DJs, and other workers who directly produce music); Live Music Business (Venue operators and staff, bookers, promoters, sound and lighting engineers, and festival
staff); and Promotion, Management and Support (including agents, teachers, artist managers, label managers, PR, marketing managers, government employees and others). These categories align with sectors described by UK Music.\textsuperscript{56} The sectors used by UK Music equate to this study as shown in Figure 8.

<table>
<thead>
<tr>
<th>Typology Used Here</th>
<th>UK Music / Carr 2020</th>
<th>Professions Included in Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music Talent</td>
<td>Music Creators</td>
<td>musician, composer, songwriter, lyricist, sound producer, DJ</td>
</tr>
<tr>
<td>Live Music Business</td>
<td>Live Music</td>
<td>music festival organisers, music promoters, music agents, production services for live music, ticketing agents, concert venues and arenas, road crew</td>
</tr>
<tr>
<td>Promotion, Management and Support</td>
<td>Recorded Music</td>
<td>recorded rights holders, record labels, physical manufacturing and distribution, digital distribution, recording studios</td>
</tr>
<tr>
<td>Music Representatives</td>
<td></td>
<td>collective management organisations, music managers, music trade bodies, music accountants, music lawyers</td>
</tr>
<tr>
<td>Music Retail</td>
<td></td>
<td>retail of musical instruments, manufacture of musical instruments, digital music retail, physical music retail, merchandising</td>
</tr>
<tr>
<td>Music Publishing</td>
<td></td>
<td>publishing rights holders, publishing companies</td>
</tr>
</tbody>
</table>

Overall, there are 135 respondents who were classified as Music Talent (46%), 102 who were classified as Live Music Business (35%), 54 who were classified as Promotion, Management and Support (18.5%) and one who did not state a work role and was hence not able to be classified (0.5%). It is worth noting that those located in the Live Music Business sector were the most likely to state that they hold only one job role in the music industry (46% of Live Music Business workers), compared with Music Talent workers (30%) and Promotion, Management and Support workers (32%). Live Music Business workers appear to depend more often on a single role in the music industry, making them more exposed to losing their connection to the industry in the absence of work in their role.

\textsuperscript{56} See Carr 2020, p. 124
5. COVID Impacts on Income Sources and Work Time

The first section of the survey asked respondents to report on their income and work time from before and after the COVID crisis began. While the music industry as a whole has suffered because of the COVID-19 pandemic, some segments have reported being hit harder than others. Overall, participants have suffered big losses of income from music-related work, with functionally impaired participants and those working in the Live Music Business sector hit hardest. The Live Music Business sector has worryingly also reported suffering the largest proportions of lost income from any work, within or outside the music industry. It is also notable that income has decreased more among older participants. In terms of time spent on work activities, 44% of participants have lost all paid music-related work, while 55% of Live Music Business sector workers also do not have any non-music-related work activities. This large-scale loss of work hours and income seems to be largely responsible for 57% of participants reporting that they are worried about basics like affording food and rent. This section of the report describes these findings and identifies their significance for understanding the impact of COVID-19 and the health response for the Victorian music industry.

5.1. Income before and during the pandemic

The graph below (Figure 9) shows the change in the percentage of their overall income that respondents were making from music-related activities.

Figure 9. Percentage of Income from Music-Related Activities (Q19 & Q22)

Since the pandemic, the proportion of respondents earning more than 70% of their income from music dropped from over 50% to only 25%. By contrast, those earning less than 30% of their income from music more than doubled, from 28% to 65%. Pre-COVID, 38% of respondents earned 100% of their income from music; this dropped to 20%, whereas the proportion of people earning no income from music-related activities went from zero to 45%.

However, this shift in distribution of income made from music-related activities has not impacted all groups to the same degree. As Figure 10 below shows, women have fared somewhat better than men and non-binary persons in retaining their pre-COVID music-related
activities income. About 34% of women still drew 70% or more of their income from music-related activities compared with 23% of men and 17% of non-binary/GNC persons. It is also notable that, both before and during the COVID-19 pandemic, non-binary/GNC persons have had the most diversified income (yellow segments on the graph below), with 33% drawing between 30-69% of their income from music-related activities pre-COVID and 17% drawing the same amount from music-related activities since the pandemic. It should be noted that this graph does not state the magnitude of income of respondents, but rather only relative estimates of their ordinary (i.e. pre-COVID) incomes.

**Figure 10. Percentage of Income from Music-Related Activities, by Gender Identity (Q19 & Q22)**

When comparing persons with minority ethnic backgrounds to others, persons with minority ethnic backgrounds were more likely to earn a smaller percentage of their income from music-related activities, both before and during the COVID-19 pandemic. As Figure 11 below shows, while 41% of persons with minority ethnic backgrounds earned 70% or more of their income from music before COVID-19, around 59% of others were able to do so. Since COVID-19, the situation has only worsened for persons of minority ethnic backgrounds, with only around 18% earning most of their income from music-related work, while around 30% of other people are able to do so.
When comparing respondents who reported a functional impairment to those who did not, COVID has a much larger impact on the income mixture of functionally impaired persons. The percentage of functionally impaired persons that have less than 30% of their income from music-related activities grew by almost 50% (from 37% to 86%), compared to 35% for non-impaired persons (from 25% to 60%; red bars in Figure 12 below\(^{57}\)). This has occurred despite the fact that the number of hours of work that functionally impaired persons perform (pre- and post-COVID) are very similar to non-impaired persons. It seems that functionally impaired persons can less readily rely on their music-related work to also be a source of income during COVID.

Note: the grey bars in the table below refer to participants who did not respond to this question. This has been represented here because of the differences in valid responses given by persons with functional impairments compared to those with no reported functional impairment.
Participants from different sectors within the music industry also experienced different degrees of change in their music-related income. Figure 13 below compares the three music industry sectors outlined in Section 4.2 of this report: (1) music talent, (2) live music business, and (3) promotion, management and support. While music talent (i.e. musicians, singers, DJs and other music producers) were least likely to earn most of their money from music-related activities pre-COVID, since COVID, it has been the live music business workers who have found most of their income from non-music-related sources. For comparison, of those earning 70% or more of their income from music-related work, music talent went from 43% to 26% (a drop of 17%), promotion, management and support workers went from 66% to 39% (a drop of 27%) and live music business workers went from 66% to 23% (a drop of 43%). Notably, at least 43% of live music business workers who had been making 70% or more of their income from music-related work now make less than 30% of their income from music - a dramatic shift in income sources to outside the music industry.

Figure 13. Percentage of Income from Music-Related Activities, by Music Industry Sector (Q19 & Q22)

Any information about music-related income needs to be read in conjunction with Figure 14 below, which shows the overall change in respondents' income. Seventy-five percent of people reported that their income decreased since the pandemic began, with 60% of these indicating the decrease had been more than 60% of their income. This means that for most respondents, the decreased proportion of income they are getting from music is from a reduced overall income, making the changes in ratio of music-related income shown above more impactful than it initially appears.
The decrease in income was particularly noticed by older members of the music industry. Over 95% of all respondents aged over 56 reported losing income, while the proportion was somewhat lower for younger workers (74%) and workers aged 36-55 years (85%), as shown in Figure 15 below.

Of some 221 respondents who claimed that their income decreased since COVID, 38% reported that most of their income evaporated, as shown in Figure 16. Only 25% of them were able to say that the financial hit was relatively small (i.e. less than 30% of pre-COVID income). Notably, there have not been any significant gender differences in changes in hours worked or in income. Men, women, and people of other gender identities have all experienced similar impacts on their work hours and income.
There was, however, a noticeable difference in the extent of the decrease of income between industry sectors, shown in Figure 17 below. The respondents whose main role was in live music business reported a much sharper drop-off in income, with 64% reporting a loss of 70% or more, compared to around 35% of respondents in the other two areas. The promotion, management and support group showed the most resilience, with the greatest proportion across the three groups (32%) of respondents losing only less than 30% of their income. These results are unsurprising, as for those whose business is focused on live events there was little that could be done to replace this as an income source during lockdowns, whereas the music talent and promotion, management and support groups had more scope to pivot to other activities, and are more likely to have had income streams that continued or even possibly increased (for example, album and merchandise sales).

The severity experienced by live music business workers reflects the Australian Live Music Business Association’s survey of its members, in which 73% of members reported a revenue
downturn of between 75% and 100% since April 2020.\textsuperscript{58} The Live Entertainment Industry Forum estimated that the live entertainment sector has seen a fall of around 65% of economic output since the COVID-19 pandemic began.\textsuperscript{59} The severity of this estimated loss would seem to be borne out in the reported loss of income in this study.

5.2. Work hours per week

Figure 18 below shows changes in the hours per week respondents spent on paid music-related activities. Forty-four percent of respondents had no paid music-related work once the pandemic began. People who had full-time work in music (more than 36 hours per week) dropped from 34% to only 7%.

![Figure 18. Hours Per Week on Paid Music-Related Activities (Q17 & Q20)](image)

There are again sector-related differences in paid hours. In line with the findings in Figure 17, the promotion, management and support category has seen the smallest drop in hours, and people in this category were the most likely to remain in full-time employment in music, as shown in Figure 19 below. However, it should be noted that the creative category had a much smaller proportion of people working full-time in the industry, so the drop in this area was much less pronounced than for other areas.

\textsuperscript{58} Australian Live Music Business Council 2020, September 24
\textsuperscript{59} Live Entertainment Industry Forum 2020, October 14
Figure 19. Hours Per Week on Paid Music-Related Activities, by Music Industry Sector (Q17 & Q20)

Figure 20 shows that although there has been less dramatic change in hours worked outside music, especially in full-time work, there has been an overall slight shift from part-time work into no work.

Figure 20. Hours Per Week on Paid Non-Music-Related Activities (Q18 & Q21)

This shift demonstrates that while respondents have for the most part not lost their non-music-related work, they have overall not been able to make up for lost income by taking on more work elsewhere. Interviewees expanded on this, discussing how, for those who were actively looking for work, there were two main problems. The first was that at this time of crisis there were simply not enough jobs to accommodate all the people who had lost employment, so those in need of work were applying for jobs below their skill level or unrelated to their field. As a live music crewperson recalled:
I’ve mainly been spending the time applying for jobs, jobs that are nowhere near related to the field like bobcat and excavator work because I have my tickets for that. I got my EWP ticket, just trying to find scissor lift jobs. I’ve actually counted – I’ve sent 102 job applications since lockdown started in March. Almost all of them are not related to my field. (Royal, interview)

The second, related, issue was that some interviewees - particularly in production areas - felt that the skills and experience they had were not fully understood or appreciated by potential employers, due to a lack of understanding of what working in the music sector requires. A lighting technician who worked with road crew told researchers:

I’ve been desperately trying to find work. It turns out no-one wants me. I did a video - the first thing that went past "no, we're not taking your resume on" was a driving job for Coles. I was like, yeah, sweet. Okay. I could do that. I can drive. Again, our industry in particular, or in particular the lighting industry or the audio and video, the backstage side of things really teaches you skills that would be applicable to many many other different industries (...) So many different facets come together to make this industry up, and you just have to do it, because there's not enough money in this industry to warrant having your OH&S manager on site and your HR manager on site like you would in an office. You don't have that in our industry, so you have to be that. You wear many hats. So, I tried to convey that in my video interviews and everything is just coming back rejection, and it falls back to lack of knowledge of our industry (David, interview)

This suggests that there may be work to be done in coaching music workers in how to express their skill set in ways that translate to different industries, and for advocacy organisations to undertake educative activities to highlight the benefits of hiring out of work music industry personnel. This issue also relates to the wider question of the perceived lack of recognition of the value and expertise of the music industry as a whole, which we will return to in Section 7.3.

5.3. Income insecurity

Taken collectively, the above results show that respondents to our survey have lost a large amount of their work and income, and are likely to be experiencing financial stress. This is borne out in Figure 21 below, which shows that respondents were more than twice as likely to agree than disagree with the statement that they have been worried about paying for basics like rent and food. Fifty-seven percent of respondents agreed that they were worried about these things.

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60 When interviewees are quoted in this report their pseudonym will be used; quotes from open-ended questions in the survey will be accompanied by basic demographic information on the respondent
Accounts from interviewees on how they have been managing their finances paint a grim picture. For the following participants, any financial security is being quickly eroded, which is concerning for workers in an industry with little future-planning for its workforce.

I got JobSeeker and with the number of cuts and things - and, so, this is strange, the process of events that happened this year is I moved into a bigger house in January because I was like, I want to get a bigger house, and I bought myself a brand new car in January because the job was going great and I'd saved up enough and then in March this came along and, basically, the car had to go pretty much straight away, health insurance had to get cut. Anything that I could afford to cut, I cut. (...) We haven't actually been able to come to an agreement with our landlord, because he's ignoring us. Since March he's ignored us, and I suspect all he's doing is waiting for the eviction moratorium to end, and then he's going to kick us out, because my roommate and I both worked at the same company. Our household income actually got really affected by what happened. So, we're going through those issues at the moment. So, with what JobSeeker, what is - they added that extra coronavirus supplement to it - that $550 a fortnight has just been enough to get me by, and this isn't me, I'm not going out every weekend and getting pissed and living a high life here. I'm going out and getting the bare essentials for groceries. Sold the car. Less rent. Anything I could think of - I've put things on Gumtree to try and sell it just to make that little bit of extra money. (David, interview)

My partner works. (...). She's working from home. I'm lucky that she's incredibly well paid... she's remunerated for the amount of knowledge she's gathered over the years. But I've pretty much depleted all my savings that I had in the bank, which was due to buy me a Porsche when I retired, and that's now not going to happen. I've also had to sell this house (...) but luckily they don't want settlement on it for 90 days, so I've got a few more months to live here before we have to move somewhere else (Hunter, interview)

I'm on JobKeeper. I was entitled to it, so that's about it. Living frugally. I've had to stop putting money in savings, so mostly just paying rent and groceries because groceries have definitely gone up since the COVID. So when I used to be putting a significant
amount away in savings and some but now it’s just kind of hand to mouth a little bit. (Lexi, interview)

Other respondents discussed how they were still putting money into rent and utilities for venues, offices and storage space for equipment related to their music businesses, and that it was unclear how long they would be able to continue to do this. Almost all the interviewees mentioned being able to access either JobKeeper or JobSeeker. Whereas for some interviewees, including those quoted above, this constituted a significant drop in income that caused hardship for them, for others (particularly road crew who had previously subsisted on welfare in between jobs) the payment was more or not significantly less than their usual income:

The COVID Support Payment [Job Seeker] has turned Centrelink into – rather than living in poverty it’s actually turned it into a liveable wage. It’s very low, but it’s enough for me to not worry about buying some food or paying rent or paying bills at the same time. It’s made it a bit comfortable. So when that disappears in a couple of months – a month or two – I’m not looking forward to that. (Royal, interview)

The sentiment at the end of this quote - fear about what will happen when the welfare payments drop, and especially if they drop to their pre-COVID below-poverty line level - was expressed in some form by all interviewees. In general, concern about their economic future and a sense that they had little control over what this might look like was prevalent. There was a common theme in the discussions of their financial situations that any security they currently had was a matter of 'luck' - whether luck that their partner was still working, or that they had a sympathetic landlord who reduced their rent, or that they had secured a contract for six months part-time work just before the pandemic hit. The interviewees felt they had little control or security. This is borne out also in Section 7.1, in discussions from respondents contemplating leaving the industry.
6. Music-Related Activities During Lockdown

The next section of the survey moved on from questions about income and work time to enquiring about how respondents’ music-related activities had been affected by the crisis, including measuring their attitudes to their work, what had changed for them and if they were developing new skills to respond to the situation. This section of the report will describe these three aspects of music industry respondents’ lives during the Victorian lockdown. In general, music-related activities were severely curtailed for most respondents. A smaller number of respondents found alternative tasks they could perform during lockdown, but these were more likely to be unpaid and working time was reduced for most. Some respondents found the removal of a daily need to commute timesaving but, for most, lockdown was a demotivating experience that appears to have impacted the productivity of individual workers, especially in the Live Music Business sector and among women. Musicians and other Creative Talent workers found it hardest to stay in touch in the industry. The need to stay connected may have also encouraged some workers to perform free labour for their industry contacts. During the free time afforded to some by lockdown, workers developed music production skills, business skills, and personal management and coping skills that many say they will use post-COVID. Online technology skills were also developed, although they fell short of the public hype around an online pivot for the music industry. This report section describes these findings and their implications for the future of the Victorian music industry.

6.1. Changed activities during COVID

To begin with, respondents were asked three open-ended questions about how their music-related activities had changed, what made it easier to participate in these activities during COVID and what made it harder. The clear main theme that emerged from responses to the question about how activities had changed was that activities had simply stopped, whether this was through gigs and festivals being cancelled or postponed and businesses shutting down. Many survey respondents expressed this in simple, brutal terms that captured the completeness of the change:

The venue that I book could no longer run shows therefore everything completely stopped. (Man, 46-55, Booker)

All live music gigs that I was engaged to coordinate since mid-March have either been cancelled or postponed to a later date. (Woman, 26-35, Music Coordinator)

They're all dead. I only have my band but we haven't released anything and can’t play shows so no money is coming in. (Man, 18-25, Musician)

Some survey and interview respondents gave more detailed responses that showed how the lockdown had compounded impacts that disrupted years of planning, and that they could see continuing to affect their music careers well into the future:

I originally intended to write a follow up album to my debut album released by my band... on May 1st 2020 but since then, all the plans that were in place to release our debut album... immediately dissolved as of the March 23 Lockdown order. The album was years in the making and we were preparing for a momentous release with a season of pre-release shows booked with support bands, and a launch show - all cancelled. Not to mention all the merchandise that we, to date, have not recouped expenses on. I had already started the process of writing album two and demoing it...
but that’s been put on hold until the whole band can be in a rehearsal and recording studio together. But alas since we’ve now been in lockdown for four months, now my drummer left the band. This puts a whole new stress on me. What do I do? (Woman, 46-55, Musician)

I was a year out of uni at the start of this year and I’m not doing what I want to be doing because my main goal is working in the live space so venues, festivals, touring. I was like, cool, this year is the year where I really, that’s the goal. So I was starting to talk to new people, really trying to put my name out there and saying, “I’m looking for work,” that kind of thing. (…) I started a conversation with a record label, started doing a little bit of work, trial unpaid work for them in the hope of getting a little bit of work going forward with them. I also had a couple of meetings with other people to just say, “I’m interested in other work,” whatever. I was talking to a publicist who was saying, “Hey, I actually need some help for three weeks. My junior publicist is away. Would you like to do that?” I was like, “Cool. I’m really excited to do that,” and COVID shut everything down and of course both of those new opportunities really fell away. (Carly, interview)

This interviewee also described in clear terms what the experience of going into lockdown and seeing the majority of music activities disappearing essentially overnight had been like:

I’d just come back a couple of weeks earlier from working a festival and all of my friends who work in that field were really freaking out. All my friends who are musicians are freaking out. Everyone’s just freaking out. It was a weird time because... I describe it as being at war and feeling the bullet rush past you, having that sense of relief but then all of your friends are on the ground. It was really quite devastating and a lot of my friends who are outside the industry just didn’t get it and so I just felt this really anxious sense of loss, had to go off social media for a day because everyone is just really upset and freaking out and really scared and whatever and I was just lucky. (Carly, interview)

This emotional component to the experiences that people involved in music have had during lockdown and beyond needs to be noted, as it colours many of the results in this report. This is a group of people who have collectively gone through the traumatic experience of having a great deal, if not all, the certainty around their career and future wiped out when lockdowns were imposed. As this quote shows, even those who have been relatively unaffected in terms of their work have still been impacted by the emotional environment created by the pandemic’s effects. As we will see in Section 7 of this report, this has led to many considering leaving or feeling paralysed in terms of being able to make plans.

By contrast, a minority of respondents indicated that while for the most part their work had changed significantly, there were still tasks they could perform while in lockdown. For some people this involved changing focus within the role they had already been doing:

As an arts venue director my role has changed from booking artists, promoting events, managing events to rescheduling programmed events, writing emergency grant applications and fundraising. (Woman, 36-45, Venue Owner/Manager)

No tours to promote. I work in digital marketing, so the type of work we complete on a day-to-day basis has completely changed. Also now working from home instead of an office. (Woman, 26-35, Promoter)

I had some recording opportunities which buffered the loss of live performance. Gigs slowly got cancelled or postponed and rehearsals ceased. A lot of time was committed to reinventing performances for post-lockdown scenarios. (Woman, 36-45, Musician)
More time spent in home studios on songwriting. More time spent on online promotion such as streaming etc. FAR less time spent playing live shows and gigs. (Man 26-35, Songwriter/Composer)

However, even for those who had managed to refocus their work, many also indicated that this still meant a reduction in the overall work they were doing, as indicated in the previous section:

The core of my work hasn't really changed all that much, I am still able to do most of my work tasks from home. However, the amount of work I am doing has decreased and the ease/accessibility of it has been impacted by having to work from home instead of in the office with my colleagues. (Woman, 18-25, Music Supervisor)

Other respondents indicated a much more dramatic change in their work role:

I've had to change my focus to other areas of the industry and I'm now working more heavily in artist management. Previously this was supplementary activity to my work as an agent. My work as a manager has changed quite considerably since before COVID and is much more focused on strategic planning and developing release strategies with artists. (Woman, 36-45, Agent)

I have had to reinvent myself as I can no longer work in live music. I have started building up a client base for online teaching and coaching. (Man, 36-45, Musician)

These quotes demonstrate the potential benefits of portfolio careers, where people who have multiple roles have the ability to change their focus if one role becomes unviable. Across the board for those discussing how they have continued to work, there was an emphasis on how this now happened online and/or in a ‘working from home’ scenario, and how this impacted on their work practices (which is discussed in more detail below). It is also important to note that there was a small minority who reported little impact beyond these changes to how the work is done on their activities:

Same as normal, in the studio all day instead of doing the odd gig. (Man 36-45, Musician)

6.1.1. What made it easier to participate

In order to determine if there were any unexpected benefits coming out of the crisis, respondents were asked to describe anything that was making it easier for them to participate in their music-related activities during COVID. It should be noted that this question had a large number of non-responses (n=82) and around the same number (n=80) of respondents said there was nothing that had made participation easier for them: in the words of one respondent, ‘it is not easier in any way.’ This is indicative of how difficult the situation was for most participants.

For those who did indicate that there were things that had made things easier, the most often mentioned of these was the online tools that enabled the continuation of some activities. A fuller discussion of the use and affordances of digital technologies can be found below in Section 6.2 on new skills. In addition to this, respondents mentioned that working from home had a variety of benefits:
Working from home has given me more time, as it cut out my 3hr+ daily commute to work. It has also given me more flexibility over my hours as I’m not committed to the 10am-6pm office hours I used to work by. (Woman, 18-25, Music Supervisor)

The extra time they had at their disposal was mentioned often, but it was also noted that this did not always facilitate paid activities, but rather enabled the pursuit of interests for their own sake:

Not commuting to non-music work has meant far more time to devote to my own music practice and development (unpaid). This has been a wonderful benefit and something my boss would never have agreed to pre-pandemic. (Woman, 36-45, Instrumental Teacher)

I have had more time for personal practise and songwriting/composition but it is personal development, not paid work. (Man, 26-35, Musician)

I have nothing but time to be able to focus on representing an artist and learning new skills. (Man, 36-45, Venue Programmer)

This extra time could be on the part of other people also, leading to an increased demand for services, such as teaching music, that our respondents could provide:

People have more time for extra curricular activities and want to learn something fun, like singing! (Woman, 26-35, Vocal Coach)

In addition to this, people mentioned benefits that were less tangible, such as changes in attitudes and behaviours:

Artists are craving contact and problem solving, therefore communication is a lot more frequent and they are open to many more innovative ideas that they wouldn’t ordinarily look at. (Woman, 46-55, PR)

A cohesive “we’re all in this together” mentality, thus downplaying a lot of politics that previously persisted over the industry. (Man, 26-35, Agent)

These ideas that effects of the lockdown such as having more time and being able to relate and communicate more effectively are beneficial are explored further in Section 7.3 in the discussion on what changes participants would like to see in the industry and how lockdown enabled a reflection on some of the disadvantages to the expectations in the industry.

6.1.2. What made it harder to participate

The follow up question to this was what made it harder to participate. A large majority of the responses to this question related to the restrictions of lockdown, with many respondents replying that ‘everything’ was harder, or that there was simply no work at all they could do. The open ended answers to this question will be used to elaborate on the responses to questions 26.1, 26.2, 26.5 and 26.6 (see Appendix 1), which cover some of the specific lockdown impacts. The responses to these questions are represented in Figures 22 and 23, below.
Questions about motivation and productivity produced very similar answers. Figure 22 and Figure 23 above show that the majority of respondents did not find it easy to motivate themselves to work on their music-related projects during lockdown, and did not feel highly productive. However, 26% of people agreed they were finding it easy to motivate themselves, and a similar proportion (28%) agreed that they had been highly productive in their music-related endeavours during lockdown. A number of factors were described by respondents as impacting their motivation and productivity:

- A lack of momentum from **no live shows**, difficulty getting together in groups to write, record and practice. (Woman, 18-25, Musician)

- **Being locked down** has made it very difficult to motivate band members to put in hours behind the scenes for releases and rehearsals. (Man, 26-35, Musician)
Being unemployed and at home should have, in theory, made writing music easier, however, I have been unable to write anything during this time. (Non-binary Person, 26-35, Tour Manager)

Depression, unable to work in person with other musicians, lack of motivation and energy. (Man, 56-65, Songwriter/Composer)

Being a drummer it has been hard arranging safe time and space to rehearse, or to be involved with live stream events like isol-aid. Performing is where I gain most of the joy in my life, and not being able to engage in physical community spaces is mentally taxing. (Woman, 26-35, Musician)

Internet connection, isolation, anxiety around loss of routine. (Woman, 26-35, Music Coordinator)

Lack of shows and in-person interactions have meant that the ability to network has been decreased. Also, our releases have not been doing as well without shows to promote them. (...) Also for the beginning of the lockdown, the lack of social interaction, weekly attendance of shows, uncertainty and the demoralisation by many of my colleagues (especially in the live scene) meant that it was really hard to stay positive and motivated to do your work. (Woman, 26-35, Label Manager)

Insecurity, finance, having to learn a completely different trade, lack of passion, fear, time. (Man, 26-35, Venue Owner/Manager)

Feeling overwhelmed and the uncertainty surrounding the future of the music industry. Restrictions changing and being unable to plan ahead. Lack of financial security has made it difficult to conduct my business and has also made me reluctant to invest in areas of my business that could provide extra income streams (difficult to take financial risks when there's little funds to begin with). (Woman, 36-45, Agent)

The loss of routine, opportunities to network, uncertainty and mental health issues (largely in response to the Victorian lockdown) feature prominently in respondents accounts of their loss of motivation and productivity. Lockdown not only effectively halted the live music sector, but also interrupted rehearsals, future planning and coping strategies used by music industry workers to manage the precarity of working in the industry that has long preceded COVID-19. This also disrupted the social aspects of respondents’ lives: many commented on how the interactions and connections fostered by simply being together in the same spaces as people were central to their personal wellbeing as well as their careers, and the loss of this was keenly felt.

When assessing the differences between music industry sectors, respondents’ music industry roles appear to have a correlation with their productivity during lockdown. As shown in Figure 24 below, Promotion, Management and Support sector workers fared best, with more agreeing that they have been highly productive than disagreeing (42% vs 38%). Music Talent fared a little worse (with 47% disagreeing that they had been highly productive), but Live Music Business workers seem to have had the worst impact on their productivity, with 62% disagreeing that they’ve been highly productive and only 15% agreeing with the statement. The morale of live music business workers would seem to have taken a harder hit during the COVID-19 crisis than other areas of the music industry.
The following two participants describe a common theme in what is shaping the productivity slump reported: the halting of live music through venue shutdown.

The complete stop to live music has made that part of my work impossible obviously. Also I’m limited in music production work I can do at home because my flatmate is working from home. I used to have my home completely to myself to record and produce music during the day, but I now live in an office environment and can’t make noise because they work on the phone all day. (Man, 46-55, Musician)

Social distancing rules and the shut-down of live music venues and bars that employ musicians have made it impossible for me to earn money from my sole-trader business as a performing musician. (Woman, 36-45, Musician)

A notable difference in the issues highlighted in the above quotes is that while some musicians were able to find opportunities to continue to work in their craft and record music in lockdown, for most in the live music business sector the shutdown of live music venues severed any opportunities to either do meaningful work in their profession or to reasonably plan for the future of their careers in the sector. This difference between the accessibility of musical craft versus the inaccessibility of live music business in lockdown may help to explain why the live music business sector has suffered a larger dent to morale than other sectors. However, as the musician quoted above notes, not everyone has access to an appropriate domestic space to practice and perform their craft.

It is also notable that women and non-binary/GNC people were 14% more likely and 20% more likely respectively than men to disagree that they had been productive in their music-related endeavours, as shown in Figure 25 below. This disparity indicates that gendered differences in work roles and labour unrelated to music may have had an impact on morale since the COVID-19 pandemic. This is perhaps unsurprising, as the Victorian lockdown...
curtailed paid childcare services and access to community-based childcare and other paid domestic care services, exacerbating the impact of gender- and age-based care roles.

Figure 25. Productivity in Music-Related Endeavours, by Gender Identity (Q26.5)

The lockdown also impacted on music industry workers’ willingness to perform free labour that would have been paid for outside of the Coronavirus pandemic. Figure 26 below shows that 39% of respondents (n=100) are doing music-related work for free that normally they would be paid for. The ‘disagree’ category, representing 24% of respondents (n=76), should be approached with some caution, as there is likely to be a combination in here of people who are refusing to do work without being paid (for example, an artist not taking on online gigs for free), and those whose work simply cannot be done (a member of a road crew, for example).

Figure 26. Performance of Free Music-Related Work (Q26.2)

It is particularly interesting to note the much higher proportion of people indicating that they have been doing more free work than say they have been highly productive or motivated, as this suggests that a lack of motivation or productivity has not prevented many people from continuing their work. However, the potential for exploitative activities to be taking place, with
people offering their labour for free in a constricted market, should be noted in relation to this finding. This is in the context of an industry where free labour is sometimes seen as being ‘part of the job’, and it can be difficult for participants to draw a line between creative activity that they want to undertake for the sake of it and what should be paid for, as this interviewee described:

Teaching has stayed the same, it’s just online. But absolutely, every other music thing is unpaid. And I think with the album that I released as the sample pack, I made it free because I knew that most of the people that would be downloading it, would be other artists and musicians. Album sales are just so small that I just thought it would be much better to get out there. But I’ve never really expected income. I think I probably would get better at that; I reckon and maybe value my time. It’s just hard because if you don’t do work for payment, then that means you don’t do that work, which is kind of okay, but it means you don’t do that creative activity. It’s always a decision like do you do it or do you ask for more money. I don’t know, I’m sure you just get better at that as you go along. And as you get older, I think, you are less likely to do stuff you don’t want to do for nothing, or stuff that you’re not as into. (Elise, interview)

At times the free work being done by respondents included supporting the creative endeavours of others in the music and broader media industries and may have been an opportunity for workers to branch out into complementary roles and skills. As one lighting technician told researchers, the lockdown gave her an opportunity to join other industry workers on low-budget projects built on community goodwill:

I had a friend – between lock downs I had a friend in a band, he – they got to squeeze in shooting a music video. I volunteered as an extra on that and I borrowed a light from the warehouse and then helped them pack up at the end of the night. I know – so that was the film industry. And also a lot of audio guys – a lot – they were industry people, industry related people, a lot of those people were working for free just for something to do, just to get on a console, push some buttons, hang some lights just for fun because it was in an audio company’s warehouse. But they have some lighting so they – so a lot of people, I think, worked for free on that or worked for beers. But I wasn’t there in any kind of – I was there as an extra. (Lexi, interview)

An area that came up often in interviews that relates to the preceding three survey questions about how and to what extent people have maintained their music-related work is the idea of doing work for the benefit of others in the music community. This is not exactly work that is being done for ‘free’, as respondents are doing it deliberately as a gift to others; but at the same time it helps to maintain connections in the industry and keep certain skills alive. For some interviewees, this involved finding a number of small ways to show support for artists or businesses, and for the industry as a whole:

I guess I’m doing a bit more, I’m a little bit more active on social media and on amateur activism I guess in a way, like trying to push Bandcamp Fridays and making lists of artists recommended to my social network to try to push people to spend money on gigs. I’m spending a lot of money on – I bought two PBS memberships this year and that kind of thing, stuff to try to – answering every bloody survey under the sun about COVID’s impact on the music industry. One of the things I didn’t say that I do because it’s so minor, but I also DJ at my friend’s night once a month. I’ll stuff it, I’ll put that into
I Lost My Gig. At least that’s another 90 bucks that they realised I didn’t get. (Carly, interview)

Other interviewees mentioned doing advocacy work with organisations such as Save Our Scene, or searching for ways to become involved with these types of organisations or policy-making bodies. Recognition by interviewees that there were things they could do to help others in the sector was driven by an underlying belief in its worth and a passion for music, combined with a philanthropic drive that has been observed at other moments of crisis (such as the benefit gigs for bushfire victims early in 2020). As one respondent said:

I might be leaving this industry but I’m still working on helping, because I believe in it. I'll never give up on it. I do believe in this industry, so I want to be able to help. (David, interview)

The music industry is a highly networked sector, where connections to other people are vital in finding work and establishing a reputation. Losing contact with networks because of lockdown may therefore be disadvantageous and make re-establishing one’s practice or career harder. Figure 27 below shows that 36% of respondents agreed that they had found it easy to maintain connections to others in the industry during lockdown, with 43% disagreeing with this statement.

**Figure 27. Ease of Maintaining Connection in the Music Industry (Q26.6)**

Perhaps unsurprisingly, it is the loss of in-person events and networking opportunities that were cited by survey respondents as producing the most difficulties for workers seeking to maintain their connection.

>No events and no IRL [in real life] meetings makes it harder to form bonds and build relationships. (Man, 36-45, Artist Manager)

>It is] harder to liaise with teammates and other members of [my] organisation. Communication has been harder. (Woman, 26-35, Venue Owner/Manager)

When broken down by Music Industry Sector, this question reveals that those working as musicians and other music producers found it much harder overall to maintain their

61 See [https://ilostmygig.net.au/](https://ilostmygig.net.au/)
connections in the music industry. Over half of music talent workers disagreed that they found it easy to maintain their industry connections, compared with around one-third of all other workers. Also, only around one-quarter of music talent workers agreed with the statement, compared to nearly half of all other workers, as shown in Figure 28 below.

Figure 28. Ease of Maintaining Connection in the Music Industry, by Music Industry Sector (Q26.6)

This difficulty in maintaining connection for those in the music talent category may partly occur because these people can, to some extent, simply ‘get on’ with at least some aspects of their creative practice (practicing skills, writing songs) without needing other people to be involved, and this was the situation described by some respondents. However, as mentioned earlier, interviewees who are musicians often mentioned a feeling of isolation in their comments, and also discussed how the circumstances of the lockdowns made conversations difficult and sometimes led to a withdrawal from discussions:

In terms of talking about actual professional things or even making plans, then yeah, that conversation’s been dying out, absolutely. Those sort of – the people you’d really only talk to to book a show or stuff like that, yeah, absolutely haven’t spoken to any of them. And I find that also for me I’m sort of becoming reluctant to make plans and talk about what we’re going to do when we get the chance to keep working on this next recording and stuff like that, because it’s just so many people feel so pessimistic about it that I just don’t want to have that conversation. I don’t want to say, ‘Hey how about we try this when we get the chance to put the bass tracks down’. Because I don’t want to get the reply of, ‘lol, we’ll never get the chance to put them down’, or, ‘yeah, sure in 2023 I might’. I get it, but also shut-up there’s nothing to be gained from this negativity anymore. So yeah, I just don’t even have these conversations. (Rain, interview)

Another musician interviewee similarly discussed how lockdown had led to him becoming disconnected, partly because of the uncertain nature of what was happening, and required a conscious recognition of the disconnection before he could take steps to start reconnecting with others:
For a while I did feel completely disconnected and it took some self-motivation to re-contact people. I guess I figured that the whole thing would pass before long and it wasn’t going to be very protracted, as protracted as it’s been so the whole lockdown thing. The mentality is you lock down; everything closes down. Then after a while it’s like well how long is this going to go on? Really you need to maintain some connections because eventually we’ll come out the other side of this albeit in a slightly different environment from a work point of view so I started re-making connections and contacting people and having some telephone conversations and some online Zoom things.  (Mike, interview)

By contrast, those in the live music business and promotion, management and support areas have less they can do entirely on their own. Interviewees from these areas discussed tactics that they put in place from the start of lockdown to both maintain their connections in the industry and a sense of normality:

I would say I’ve definitely reached out to more music industry people in lockdown than I would have through online means but saying that, it’s no contest compared to what I would be doing in person. I have been a little bit more actively – there are a few people who, I’d said at the start to people, over summer I ran into people and they’d say, “Yeah, send me an email about that,” or whatever. So I try to do a little bit of that even after everything was shut down, just to ask them how they were going and to reach out and to make sure that I was connected but it’s been hard and I wish I had done a bit more of that. I have noticed that I have been connecting a little bit more on social media with people but it’s not active networking. I guess it’s just checking in with people I’m already connected with. I guess that’s the thing.  (Carly, interview)

I’m lucky, we’ve got a nice home office. And I sit here, and what I tend to do is I do like I did when I was in my office at [my production company] and that’s try and ring 20 people a day. These days it’s not about hassling for business because there isn’t any; it’s more about just health and wellbeing of, “Hey, how are you doing? Just thought I’d give you a call, I’ve not spoken to you in a couple of weeks, yeah I saw that” – so I still do that stuff.  (Hunter, interview)

The idea raised here of looking after people being a motivator for staying in touch was also mentioned by other interviewees, and was sometimes their main goal:

Yeah, look I’ve been making a point of reaching out to people and even people from my Sydney years and stuff as well because a lot of my Sydney era friends would be considered high risk mental health and physical health. They’re all old and just – you know the rough kind of pirate type people, so I’ve been making a point of reaching out to them. But also, people in my local who I work with now, so just contacting, chatting, sending memes, anything you can kind of do. More so than when I pre-COVID. So that’s relevant.  (Lexi, interview)

Opportunities for more formal catch-ups, such as online networking events, were mentioned often as a positive way to counteract some of the isolation of lockdown:

There have been a few. Things like the VMDO’s done a few classes. They’ve been doing their breakfasts. I feel like there’s definitely lots of opportunities to connect with people there.  (Elise, interview)
Across the board though most things in the industry happen at face-to-face events, as noted above, and again by participants such as this musician:

Socialising in physical spaces is usually a way to meet people and find more music-related work activities. (Woman, 18-25, Musician)

Together, the above four questions give us some insight into the experiences of participants during lockdown and how their normal music-related activities have changed. The following response from one survey participant gives some insight into the interaction of all these elements, and how they play out in individual experiences:

In relation to my current job, the main disadvantage has been the decreased accessibility to my colleagues. Although we can still keep in contact online it is not the same interaction as being in the office with them. It has also made it difficult for me to learn and develop my skills and knowledge in the company (which I was hoping to do this year) as the company, and most companies are simply in survival mode, instead of working to foster and expand new projects and people. Not being able to attend live music concerts and events has made it harder to discover new music and artists through that avenue, which is a big part of the job. Being a recent graduate, I would’ve also been using this time to network, explore new areas of the industry, and perhaps look for another casual job in the industry, which has become very difficult at the moment with social restrictions, unavailability of employment and a drop in the economy. More broadly, the pandemic has led to a decrease in my mental health, which overall has just made me less productive and excited to get up and do work every day. (Woman, 18-25, Music Supervisor)

This early-career participant’s lack of contact with others has curtailed her career-building and networking activities, leaving her less motivated and less productive. The above four graphs do give some insight into the persistence of music-related activities in the face of very difficult circumstances, and show that up to around a third of respondents remain highly engaged in one form or another and are unwavering in their commitment to the industry. They also show, however, the potential for significant losses of talent and knowledge in the sector if those that are struggling more with the situation cannot be retained, a risk which is discussed further in Section 7.

The final way in which we measured what had been making participation harder for respondents was in relation to caring responsibilities. In the demographics questions at the start of the survey, respondents were asked if they had caring responsibilities. The 27% of respondents who answered yes to this question were later asked if their caring load increased during the lockdown.
Eighty-seven percent indicated that it had, with 74% (80% of men and 100% of women and gender non-conforming persons answering this question) saying that this had made it harder for them to participate in music-related activities, as shown in the two pie charts above (Figures 29 and 30). It therefore appears that caring responsibilities have been an additional demotivating factor for those who have them, particularly women and non-binary/GNC persons.
6.2. New Skills

A slight majority of respondents (52%, n=116) said that they had learned new skills during the lockdown, as shown in Figure 31, below.

Figure 31. Were New Skills Learned During COVID-19 (Q27)

Respondents identifying as men were somewhat more likely to respond ‘yes’ to this question (56% of men respondents) than people who identify as women (46% of women respondents), shown in Figure 32 below. Six of the nine non-binary and GNC respondents who answered this question had learned new skills, with three saying they had not. Gendered differences in skills attainment during the COVID crisis are described in the following pages of this section of the report.

Figure 32. Were New Skills Learned During COVID-19, by Gender Identity (Q27)
Those who answered yes to this question were then asked to describe what these skills were, shown in Figure 33. The main themes that emerged were around the gaining of new skills in music creation and production, in business, in online skills and personal management and coping skills. Around a fifth of those who indicated they had learned new skills gave responses relating to more than one of these categories (for example, a respondent who said they had learned 'a little about online recording, online streaming, a little about better playing techniques, a little about better sound engineering'), which have been coded into multiple categories, or that overlapped categories (for example, where someone says they have learned new musical skills online), in which instance the response has been coded to the category deemed most relevant.

Figure 33. What New Skills Were Learned (Q28)

There was, unsurprisingly, a difference between sectors in terms of which types of skills were more likely to have been mentioned, with people in the creative category being much more likely to have learned new music and production related skills. As shown in the graph below, the creative group was the least likely to have acquired new business or personal management and coping skills.
Description of what skills were learned were also described somewhat differently by women and men, as shown in Figure 35 below. Women were more likely to identify online/technological skills than men (44% of women, compared to 30% of men) and men were more likely to identify music creation and production skills than women (48% of men, compared to 27% of women). Of the six non-binary and GNC respondents who answered this question, two indicated they had learned music skills, two had learned online skills, and one each had learned business or coping skills. This gendered distinction is reflected in the discussion of respondents' answers to Question 28 below.

In terms of **music and production**, respondents discussed very specific new skills that they had developed during lockdown. Much of this was related to needing to be able to record and
collaborate on music under the lockdown conditions. As such learning how to use digital audio workstations (DAWs) such as Ableton and Logic, and learning new recording and production techniques, were frequently mentioned:

Music production skills from course, learn and record new songs (Man, 18-25, Musician)

Online collaboration tools + music production software (Man, 36-45, Public Servant [Music Development])

Notably, men were more likely than women to report that they had developed skills specific to their knowledge of how to play music:

New guitar playing techniques (Man, 56-65, Musician)

I have learnt how to use effects and pedals in a live setting on my brass instruments as well as some production skills (Man, 26-35, Musician)

Music theory, mixing proficiency has increased (Man, 18-25, Musician)

Musician interviewees also commented on the opportunities afforded by lockdown to learn new musical skills, and noted that in addition to this the time available to people in lockdown provided the opportunity to improve on existing skills:

I think a lot of musicians, including myself, their skill set has increased. When it comes back to the point we’re able to go out and do live gigs I actually think the quality of music, despite the fact that I have to say you see a lot of people doing stuff online and some of it’s amazing and some of it’s really ordinary. But I think generally the level, the skill sets that people are developing during this process will actually help to elevate the quality of the music that people are producing. I think that’s a good thing. (Mike, interview)

A small number respondents mentioned developing skills related to the way in which they undertake their musical practice, rather than the practice itself:

Better time-management and structuring of practice sessions. Also deliberately cultivating resources to be inspired by which has been great for motivation and something I did not previously feel I had the energy or time to do. (Woman, 36-45, Instrumental Teacher)

**Online skills** were the second most frequently mentioned category, with only slightly fewer mentions than music skills. At times there was an overlap between these categories, with musicians describing ways in which working online was creating new possibilities creatively (although they also note how other aspects of the situation limit what is being achieved):

There is a lot of talk amongst friends, of yeah let’s do a collaboration on this and it especially helps that I tend to – the stuff I make at home tends to be more on the experimental side of things. So it’s noise, music, drone, improvise, whatever. So it’s the kind of thing where you can sit there and lay down your tracks and then send them to someone else, and they can throw their stuff on top and send it back to you. You can run those other bits through a peddle or whatever. And, so it’s music that opens itself up to that kind of collaboration. What I have noticed is that people who are a bit more traditional in their approach to songwriting or whatever are more open to that
kind of thing now. It’s kind of like, well I’ve got nothing to do, so yeah hell let’s make a noise record. Let’s try it! (Rain, interview)

The single most often mentioned new skill in this area is the ability to use live streaming technology, as this became almost the only way to deliver live music content during lockdown. Live streaming was, however, only one of a suite of skills people were learning as a way to try to translate their pre-lockdown music activities into the online environment:

I have learnt how to run online events. Along with a friend, I ran a series of online events every week. (Non-binary Person, 18-25, Promoter)

Utilizing online gigs and tip jars, looking at other ways to make income from my artists (Man, 46-55, Artist Manager)

A lot of new online related skills including new processes, and advanced skills in programs like Photoshop, out of necessity to create content when we’re not able to do so physically (Woman, 26-35, Label Manager)

These comments all imply the need to learn a whole set of skills: ‘running an online event’, for instance, suggests not just working out how to set up a live stream, but how to promote it online and, possibly, to do things like set up something like the ‘tip jar’ mentioned in the next comment, or market and sell merchandise. Similarly, the idea of moving physical content and activity online potentially covers a myriad of activities.

Others participants reported learning more ‘soft’ skills to do with learning how to effectively work within the limitations of the online tools:

Directing Zoom meetings. I’m a wizz at presenting powerpoint presentations online, whilst sharing screens and keeping attendees engaged. (Woman, 46-55, PR)

Learning how to teach singing via Zoom, how to perform live via Zoom.

However, some (here and in response to Q25) noted the limits of what can be achieved online, whether because of a dislike of working in these modes, questions about whether what it offers can be genuinely viable as a replacement for revenue generating activities done offline, or recognition that certain activities simply cannot be done through these systems. Women respondents were noticeably more likely to report issues they faced with online technologies and negative digital work experiences:

I have had to deal with the horror that is online recording and teaching. Ugh. (Woman, 56-65, Musician)

I have been speaking with tech people about the potential of streaming but found it very difficult to be motivated by it as it’s just not financially viable for the artists, the venue or myself. Quite disheartening. (Woman, 36-45, Venue Owner/Manager)

As I can’t DJ at a venue, I’m not DJing for an audience when I’m on my decks in my room. I’ve tried to livestream but the technical difficulties are too hard to figure out. (Woman, 18-25, DJ)

62 ‘What factors have made it harder for you to participate in music-related activities during the crisis?’
Venues closing means I could not perform live as a musician with my band and my tour was postponed. This is the main way I sell Merchandise, which has not done well online. (Woman, 26-35, Vocal Coach)

Respondents also noted the ways in which even activities that could be done online, particularly live gigs, lacked important elements of the in-person live experience:

Lack of live performance makes it hard to gauge a tangible vibe from the fans. Face to face media interaction makes it a little less "exciting" for the artists to genuinely promote themselves. They are a bit wooden. (Woman, 46-55, PR)

[we are missing] connections with audience. People will always prefer "face-to-face" gigs (Woman, 26-35, Musician)

Lack of skills in online presentation, also a lack of interest in the online platform which is a different kind of exchange entirely to live performance and playing. (Woman, 46-55, Musician)

For these respondents, particularly women, the online skills acquired may be used only temporarily as a stop-gap measure during lockdown, and may have been acquired purely as a matter of necessity during lockdown (as opposed to the musical skills described earlier, which respondents were more positive about engaging with). It was also noted that access to reliable and fast internet is unequally distributed, meaning for some respondents moving activities like live gigs online was never an option. A regional respondent who did some music teaching noted the:

Unreliable NBN service and slower NBN service in the regional area. Our upload speeds are around 3MB/s on avg and downloads 45MB/s much slower than city counterparts so trying to do live online lessons is really difficult to get a clear picture feed to the student/s. Upgrading them costs way too much in comparison with city offerings - it puts regional areas behind the 8-ball straight from the start. (Man, 46-55, Musician)

For other people, online tools were not appropriate for the tasks they initially tried to use them for, but could be adapted to meet other needs:

But the [choir], as a director I only had four rehearsals with them before things shut down and we've been trying to continue it through Zoom meetings but of course Zoom’s hopeless for lessons and performing together because of the latency. You can't really do it effectively. So we've kept connected – because it's a very community-based choir one of the questions that I asked the choir, I did a little survey when I first took over as Director and one of the main reasons they said that they liked to be a part of the choir was not so much for the singing but the social aspect of it, just to be connected to community and singing together is a great thing. It gives people a sense of belonging, it's like the tribe mentality, I mean we love being part of a group. So we've kept it going via Zoom. (Mike, interview)

The move to online activities was celebrated in coverage of the crisis, and was seen as an indicator of the inventiveness of the music sector. However, the discussion by respondents suggests that a combination of the limitations of these tools and their complete impracticality for whole segments of the industry means they may have less utility in a post-COVID world than the musical and production skills described above, or new business skills. This is discussed further in Section 7.1.
In terms of business skills, a variety of such skills were mentioned, including digital analytics, copyright, grant writing, and marketing and promotion skills. Respondents varied between those wanting to improve their understanding of the area they were already working in, and those who had changed directions and needed to develop an entirely new skill set:

I have started an artist management business. It is the first time that I'll be working in this capacity, so I am learning every day. (Man, 31-45, Venue Programmer)

Because of the circumstances these skills were mostly being acquired online, and some respondents described taking advantage of a variety of online workshops to improve their skills:

More learnings - from VMDO and AustCo. Webinars and workshops. Have participated in conflict management training, strategic planning workshops… have had time and access to these workshops usually would not have been able to attend living regionally. (Woman, 46-55, Artist Manager)

A small subsection of this category described learning new skills because of a need to move to a new career outside of music, including learning job-seeking skills such as resume writing.

In terms of personal management and coping skills, the category mentioned the least, and mainly by those in the Promotion, Management and Support category, respondents reported ways in which they had learned to manage themselves differently, or changed the way they related to others. A number of participants mentioned finding ways to improve their networking skills and keep these active under the changed circumstances:

How to keep in contact with peers in the industry and adjust activities that would regularly be done somewhere else to working at home. (Woman, 18-25, Artist Manager)

The other key theme that emerged here was respondents classifying various coping strategies as new skills that had been gained. These included:

Staying power (Man, 36-45, Musician)

Resilience Training (Man, 26-35, Promoter)

Flexibility, not reacting to sudden changes, just going with the flow without stress about the changes (Woman, 46-55, Venue Owner/Manager)

Balancing home life while working from home (Woman, 26-35, Artist Manager)

Although these types of skills were only mentioned by a small number of participants they have great potential for having an ongoing impact on the lives of the people who report developing them. Interviewees often reported relying on their own organising skills, coping strategies and small networks of family and close friends to manage the impact of the Victorian lockdowns on their day-to-day lives.

Interviews provided an opportunity to more fully understand the ways in which these categories overlap and interact. For example, this quote illustrates how learning new music production, business, social and online skills have all been relevant to this interviewee:

And through these Instagram videos, I have definitely learned how to do a good Vaporwave filter effect, because I need to be snappy. I went on YouTube and did a
whole lot of tutorials. I’ve used YouTube a lot for self-learning. What did we learn? We did that resilience course from the VMDO. There was one other course that we did – totally escapes my mind. Maybe it was... I can’t remember. So, one of them was the resilience course which definitely we’ll use that in music work going forward. (…) Maybe the accounting side of that stuff I’ve been able to really fine-tune and can definitely use that later on. And there’s probably some programs that we might be able to use afterwards as well. Actually, there’s probably some really good social media slash marketing things that we’ll be able to use from the label, back in the venue side of things, the venue festival stuff. Yeah, for sure. (Jacob, interview)

For Jacob, skills development, driven by self-reliance, has prompted him to consider what might be usefully incorporated from his lockdown experiences into his future business practice, as well as maintaining a sense of control over his work in the music industry. While this is a positive outcome for an individual (or business), it is not a strategy that the industry as a whole can rely upon to keep its workforce motivated and connected through a pandemic-scale disruption. We will return to consider what might be more usefully pursued on an industrial scale in Section 8 (conclusions and recommendations) of this report.
7. Beyond COVID

The final section of the survey asked questions about what respondents thought would happen next, and how the music industry could improve as they reopened and adjusted in the wake of the crisis. The questions asked here revealed that while most respondents felt their roles in the music industry after COVID would be different to what they had been, only a third were positive about this change and most had contemplated leaving the industry altogether. Factors that made it harder to participate in the music industry before COVID, including sexism, racism, ageism and ableism, present ongoing problems for participating in the music industry. While most participants identified practical ways to change the music industry in a post-COVID world, women and non-binary persons were particularly vocal in advocating for broad-scale economic, cultural and political reform. The biggest changes that respondents advocated for included industrial relations reforms, cultural change to address health and environmental issues, financial support for the arts sector, and greater societal and governmental recognition of the value of music industry work. This section of the report describes these findings and their relevance for a music industry moving into a ‘COVID normal’ setting.

7.1. Involvement in music post-COVID

Respondents were asked if they thought their involvement in music would be different after the crisis has passed. Over four-fifths of participants answered yes to this question, with only 19% saying no, as shown in Figure 36 below.

Figure 36. Perceived Changed Involvement in Music (Q30)

Do you think your involvement in music will be different when the COVID crisis has passed?

(n=230)

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<th>Yes</th>
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<tr>
<td>Percent</td>
<td>80.5%</td>
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Those who said yes were then asked to elaborate on how they thought their participation would be different. Around a third of the answers to this question could be characterised as describing the future in positive terms. These answers often contained specific plans and indications of how these respondents would make what they wanted happen. The main themes that emerged among these were to do with new opportunities that were seen to be opening up as a result of COVID, and the possibilities presented through the changing position of online content.
The new opportunities identified by respondents were often connected to the new skills developed in lockdown (as discussed in Q28 - see Section 6.2), including new business, music and social skills, as well as changes in direction that people had decided on during this time:

I am rebranding so my artist perception will change for the better. My music is going to be more focused and my production of songs/my own songs will be made to play out (Woman, 18-25, DJ)

There will be more competency as there have been a lot of emerging musicians and other talents during this lock-down. This will lead to pursuing the enhancements of my skills and always offering an extra mile to those who express an interest in my product. As well, I am dubious that there will be big gigs with big format bands which leads me to reinventing my product and offer an initiative which can be suitable for the new status quo. (Woman, 26-35, Musician)

It's changed my mindset about how things can be done so significantly. I feel the idea of a standard project roll out will be looked at in a very different light moving forward. The goal posts have drastically shifted. (Woman, 26-35, Label Manager)

I think COVID has allowed me to evaluate where I am in my career and develop my skills to a point where I am confident to move in a new way. Isolation has allowed me to show myself and my peers of what I am capable of, allowing me to move into bigger roles in the future. This hopefully means that I will be able to uphold more paid positions and less volunteer roles. (Non-binary Person, 18-25, Promoter)

In many of these responses there was an acknowledgement of the difficulties that will be encountered in the long term because of COVID, but these were presented along with a strategy for how these effects might be ameliorated:

For the foreseeable future I'm going to be unable to tour international artists here in Australia and Australian artists overseas. So this is going to change my involvement considerably. (...) So I'm going to need to develop a roster of Australian artists to represent here in Australia, as well as develop other areas (artist management) of my business, so I've got something to work on until international touring is permitted, viable and realistic. (Woman, 36-45, Agent)

In addition to this, there was a segment of respondents who used this question to reaffirm their commitment to their involvement in music, and outline actions they would take to support others in the scene:

My band mates and I are planning on performing for free in venues post COVID to support the venue owners get back on their feet (Man, 56-65, Musician)

I feel more committed than ever to the value and importance of music and the arts for the health and wellbeing of communities and cultural and social vitality. I feel that especially as a folk musician that it's important that all of us have more access and more opportunities to play and engage with live music. (Woman, 46-55, Musician)

I will be able to do more productive and positive things for community radio including podcasts. (Man, 46-55, Musician)

In regards to online content, respondents in this group emphasised the potential of this for opening up new audiences and possibilities for collaboration as a way forward for them in a ‘COVID normal’ world and beyond:
I believe there will be more focus on live streaming music to open up a new dimension of accessibility for music fans. (Woman, 26-35, Music Coordinator)

I think there will be a lot more long distance collaborations and musicians being able to offer teaching further afield than their immediate cities localities. Also I think people/musicians have had to generate their own projects internally - via online concerts etc - so thinking of lateral ways of how to connect to audiences. Online audiences also can be very different to those based in home cities etc - so again connecting to new audiences. (Woman, 46-55, Musician)

The majority of respondents, however, saw their future involvement in more negative terms. The themes that emerged here were people saying they would either exit the industry or have to reduce the time they spend on their music-related activities, have to rebuild their career, or that they were so uncertain about what would happen next that although they believed their involvement would be different they had no clear concept of what this would look like, and therefore could not make plans.

In terms of exiting, the responses here help to elaborate on the answers to Q26.4 (shown in Figure 37, below) which asked whether respondents had considered leaving the music industry since the start of the COVID lockdown.

**Figure 37. Consideration of Leaving the Music Industry (Q26.4)**

The above graph shows that 58% of respondents agree that they have considered leaving the music industry, and 31% disagree with this statement. This figure is broadly in line with surveying in the UK music industry, where an Encore Musicians survey found that 64% of musicians were considering leaving the industry and that 71% of respondents identifying as female reported considering leaving the industry. This is a dramatic shift from earlier research, such as the 2016-2017 Making Music Work survey, which found that only 12% of musicians were thinking about leaving the music industry (although, as will be seen below, musicians were less likely to agree with this statement than other workers). For some respondents in this study (in open-ended answers to Q31) exit is not hypothetical:

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63 Venvell 2020, September
64 Bartleet et al. 2020; see Bartleet et al. 2020, June 18 for the leaving industry numeral.
Sadly my optimism has been replaced by cynicism. I have always been critical but balanced by optimism. Now, the cynicism I tried to keep at bay and defend myself from has come to pass. There is NO SAFETY NET FOR ME and neither the music industry or the government seems to recognise me or have a place for me. (Woman, 46-55, Musician)

The music industry accounts firm I worked for let me go in March. I no longer work in the music industry. I now work for a Tech firm earning more income. I have had to take what I could to pay rent. Sadly I don’t think I will have an opportunity to get back to music related work for a very long time and I have to consider being paid less for the same roles in the long term. I have worked in the industry for over 15 years. (Woman, 36-45, Accounts and Finance Manager)

Interviewees provided more detail on the decisions that people were faced with and what factors they were considering when thinking about leaving, including around what resources, such as super, they have at their disposal. For example, one executive with experience as an artist manager claimed:

I’m going to be [nearing retirement age] in December, and one of the options I’m looking at is just accessing all of my super... and retiring. Because I’m not sure my role in the music industry is sustainable anymore. I’m not sure if there is a role for me, or there won’t be by the time we get to next year. Production companies aren’t going to be back to work till February or March next year, which means we’ve had nearly 11 months off. It’s 95% certain I’ll be accessing all of my super on my [next] birthday, and taking it all out and sinking it into a property somewhere and living in that property mortgage-free... Increasingly, I’m thinking now – after doing this since I was 16, I’m at the point now, once I can access my super, I’m going to go dark on social media and walk away and have absolutely nothing to do with this industry whatsoever is my plan. I’m going to disappear. I’ve got my eye on a property way up north in the countryside, and I’m going to be riding a bicycle a lot, and re-engaging with riding bicycles and looking at nature, and have absolutely nothing to do with this industry. That’s how I’m feeling at the moment, but who knows how I’ll feel if and when it does actually change. I just don’t think – I don’t think we’re going back to work until March at the earliest. (Hunter, interview)

It is worth noting though the uncertainty in Hunter’s narrative - the door is being left open for the possibility of staying in the industry if possible, and the majority of interviewee discussions about exiting emphasise that if they exited, it would be by necessity not by choice.

Rain, a musician who is currently intending to stay in the sector, elaborated on a number of different scenarios that they saw playing out among other musicians they knew, giving some insight into other factors that might be leading to people thinking about leaving:

I’m pretty plugged into a network of people and I wouldn’t be surprised if there are a few people who don’t go back to playing music after this because they need to be doing other things. I think for a lot of us it’s become almost habit and I’ve toyed with the idea of chucking it away a couple of times because I’d be financially better off. I’d have more time, that kind of thing. But I also know I’d be miserable without it. I think for a few people they’ve probably hit the point where they haven’t done this and have realised that they’re actually enjoying not being in bands anymore. Most of my friend group were all hitting our forties and stuff. And I definitely know a few people who are going, ‘Now I’m forced to sit at home and not lug a whole drum kit halfway across the state.
Work insecurity intensified by the Victorian lockdown and the global COVID-19 pandemic has brought to the fore the question of whether work in the music industry is sustainable for many. Rain points out that they and their peers are considering a career transition amid uncertainties about their finances and health due to the physical nature of their work and the expectation that a post-COVID music industry will be more competitive. This experience reflects a recent Macquarie Business School survey of 203 Australian musicians, which concluded that, ‘overall sentiment about income and employment returning in 2021 and beyond is quite negative among the majority of respondents’, as is ‘general life satisfaction relative to pre-COVID times’.

However, despite these stories of musicians exiting the industry, there is a difference in the response to this question across the different industry sectors, with those in the music talent area much less likely to have agreed with this statement than in the other areas, as shown in Figure 38 below.

**Figure 38. Consideration of Leaving the Music Industry, by Music Industry Sector (Q26.4)**

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65 Crosby and McKenzie 2020, October 1, p. 8
This difference between the sectors may be a reflection of the finding from the *Making Music Work* study,\(^66\) that found that for ‘Australian musicians... their top reasons for staying in the field related to a love and passion for music, the centrality of music to their identities, along with development of individual skills and capabilities. In contrast, a sense of security and stability was the weakest career motivator.’ This idea was reflected in some quotes from our respondents:

I'm not sure if I'll return to live music. It's a precarious industry and I've juggled this for over 20 years, which is tiring. I've considered leaving the music industry altogether because of this, but I can't imagine my life without it, either, and I don't know who I am without it. It so deeply shapes my sense of self. I am focusing more closely on my songwriting, recording, and producing, and I see my career heading more in this direction (rather than live performance). (Woman, 36-45, Musician)

For this respondent, the connection of music to their identity made it hard to consider leaving despite the problems they could perceive. Those in the Live Music Business and Promotion, Management and Support sectors, on the other hand, were more likely to be watching businesses fail or be at risk of failure, and may have seen fewer pathways back from this, and this was noted by a number of respondents.

Most respondents though were not definite about leaving, but anticipated that the time they would be able to spend on music-related activities would need to be reduced. Figure 21 showed that most respondents were worried about affording basics like food and rent (see Section 5.3), and financial concerns were the central reason for people needing to reduce their time, or change music from a career to a hobby:

My life outside of my family is live music. It has been since I left school. It is all I know. for it to be completely taken away overnight is so scary. I have a family to support. I'm not sure I can leave all of my eggs in the live music industry basket. (Man, 36-45, Sound Engineer)

I would like to [stay in music], but I would also take whatever's thrown at me. I've already applied for a couple of music teacher jobs and been knocked back because more experienced people are also looking. I'm going to find out before the end of the week if I get [non-music job]. If that happens, then I'm doing it. Maybe I'll find a way to incorporate music into that. Maybe when [my teaching position] picks up again next year I can do both. But, no absolutely I'll be taking whatever comes my way. (Rain, interview)

Others noted that they believed the time they spent on music would be reduced because the sector as a whole would be smaller, with less work and opportunities available, and a likelihood of lower pay because of increased competition:

With less events possibly running in the future and tighter budgets, there is less opportunity and chances of getting paid employment at music festivals and events. (Woman, 18-25, Events Manager)

There will probably be less work and lower pay (Woman, 56-65, Tour Manager)

The music industry is already built around portfolio careers where most people need to balance a variety of roles, either within the music sector or some in music and some outside,

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\(^66\) Bartleet et al. 2020, p. 71
in order to survive. The findings here suggest our respondents believe that this will be exacerbated post-COVID, with people who have been able to make a living from music needing to take on non-music work, and those who had already been balancing music and non-music work needing to shift the balance towards non-music. Even though these people will not leave entirely, this will still represent a loss of contribution to the sector.

For others who were not wanting to leave, their plans involved simply trying to rebuild careers and businesses that they saw as having been set back significantly, if not completely destroyed, by the shutdown:

I think there will be an element of starting again. I was just starting my career in the Australian/Victorian music industry and really looking forward to networking at gigs and other events. I feel like once we come out of the pandemic, I will have to start again almost by re-establishing myself as a musician and introducing myself to producers and songwriters and mix engineers and so forth. (Woman, 18-25, Musician)

For a large number of respondents, however, while they agreed that their involvement in music was going to change, they did not have a clear idea of what this would look like due to the ongoing uncertainty about what would even be possible:

I don’t have faith that live music will have as much of a demand as it once did. I also think venues will be extremely regulated and restricted and therefore kind of lame so I reckon the best events will be illegal which is hard to monetise in a career sense (Man, 26-35, Agent)

It is unclear at this stage, but with so many people talking about the 'new normal' it is hard to imagine people being comfortable or even allowed to gather close together such as they would at a live music event. (Man, 46-55, Sound Engineer)

A key theme that emerged in these types of answers was around a lack of clarity about what would be possible in the live sector while COVID restrictions or the possibility of future lockdowns remained. Aspects of this were explained in detail by an interviewee:

Lockdown means nothing for our industry, because we’re still going to have social distancing restrictions, even if we’re not locked down as such. Everyone else will go back to normal, but social distancing rulers will remain in place for a long time, at least until the majority of people are vaccinated by this thing, whenever that comes. And who knows, it could be a forever thing that gets put on. We just do not know. Coming back to the money thing, when it comes to how little money there is in this industry versus how much work is involved, there's a thing going on saying, basically for a venue and a promoter and an artist to be profitable, and the margins aren't that big - and when you say 'profitable' it makes it sound a bit like you're the CEO of Telstra trying to make a couple more million a year. This is just about making sure that what you're doing is viable and can survive. So, it's not big margins that we're talking about here, but you realistically need 90 percent to almost full house to really warrant doing these shows, (...) with socially distance restrictions, we're going to have at most 50 percent capacity. You know you're going to be losing before you even open the doors. This industry is not going to come back until we can start packing venues again. Or, the ticket prices go through the roof, and in a recession, who is going to have that money? (David, interview)

In this context, the idea that people may be putting off making plans in the face of uncertainty and the recent experience of having their previous plans destroyed overnight can be seen as
a logical decision. In an interview, Marcy explained how making plans that proved to be fruitless took a toll on her emotionally, financially, and in terms of her energy:

I guess I’ve been, like most people, completely in limbo. Venues themselves don’t really have any idea of what’s going to happen. There’s been periods where I’ve become more motivated, so I guess actually workwise I’ve spent some time redesigning some of our collateral stuff. I spent time redesigning the way that we might operate as a venue, and sent that out to quite a few bookers and had some chats with them, but it just was really going nowhere. The reality is that nobody wants to commit to shows that may or may not go ahead. Not only is it financially a waste of time, it’s an emotional investment for agents to speak to bands about whether they want to do something, lock it in, and then for it to fall over again and get pushed back again, and dates get postponed and postponed again. So there’s that kind of emotional investment in doing a show, and promoting a show, that falls heavily on the artists themselves, even if they do have a booking agency. A lot of bands that play at the size venue we are, the onus is upon the band to actually promote their own shows. It’s an emotional investment as well as, I guess, a financial investment. Also, there’s that use of their fan-base, reaching out to their fan-base and getting people excited about a show only to have it cancelled or postponed again. So there’s only so many times a band’s going to want to do that anyway. Yeah. There’s been that on-again off-again sort of thing, and I’ve just kind of let it go a bit, I guess, because it just seems so fruitless. If you’re a kind of person that gets invested in an idea and you’re constantly having to cancel it, it’s not very good for your self-esteem or for your confidence. I’ve kind of backed off on that. (Marcy, interview)

Because of the uncertain situation, it is too soon to tell at this point whether waiting to make plans will put respondents at a disadvantage or an advantage in the long term; it is possible that to some extent the respondents reported on earlier who are being more proactive in making plans may ultimately be disadvantaged if, as described above, their plans need to keep changing as the circumstances continue to evolve.
7.2. Access and participation pre-COVID

As a way of gathering information about what might be best practice as the industry starts up again, respondents were asked whether they had ever felt as though they were prevented from participating in music-related activities as much as they would have liked before COVID. A majority of participants, 60%, said that this had not been their experience, as shown in Figure 39 below.

**Figure 39. Feeling Prevented from Participating in Music-Related Activities (Q34)**

While this is an encouraging statistic, there were still 40% of participants who had been limited in some way in what they could do. It was in this part of the survey that the differences between different demographic categories became the most apparent, with women, non-binary, ethnic minority, LGBPQ (lesbian, gay, bisexual, pansexual or queer, the chosen identities of our respondents) respondents, and those with caregiving responsibilities all being more likely to answer yes to this question (see Figure 40 below). It should also be noted that of the three First Nations respondents who answered this question all said yes.
All participants who answered yes were then asked to elaborate on the ways in which they felt they had been prevented from participating. The main theme that emerged from the responses to this open-ended question was that discrimination of various sorts had impacted on respondents’ experiences in the music sector. The types of discrimination noted include sexism, racism, ageism and ableism.

As a ‘female-presenting’ artist, I have felt a lot of the time that I am undervalued. If I was a male, other males wouldn’t assume I don’t know things and therefore I may have been given more opportunities based on my talent, skills, and experience. (Woman, 18-25, DJ)

Gender and gender discrimination still plays a big role in the music industry, which in turn has made me feel unwelcome or uncomfortable in certain areas of the industry and that I have to work 10 times harder to prove myself in those areas. That in turn has sometimes affected my confidence and willingness to participate. (Woman, 18-25, Music Supervisor)

It’s also been very misogynistic. It survived on bullying. As someone who’s very camp and not particularly big in stature, I’ve suffered from huge amounts of bullying and stuff in this industry. (Hunter, interview)

Yes the music industry is very white (Woman, 26-35, Musician)

I work predominantly with CALD artists and those who are under-represented, so securing gigs, funding, touring opportunities is harder than working with musicians of other more popular genres. (Woman, 46-55, Agent)
I emigrated here from overseas for university initially - and I often feel I lack the connection with the music industry due to lack of history and contacts that I may have been able to foster through growing up here and knowing the culture deeply. I think my race probably exaggerates it as the industry feels very insular and exclusive at times (Man, 26-35, Musician)

The industry tends to cherry pick acts based on ageism (Man, 56-65, Musician)

Ageism and people with special needs (physical) or any (Man, 66-75, Songwriter/Composer)

Solo parent looking after a 3 year old makes it difficult to see shows and be involved as much as I would like. However being a good parent is very important to me and takes priority, and calling on baby sitters all the time is not something I agree with, so I'm a bit torn at this stage. (Woman, 46-55, Venue Owner/Manager)

Unsurprisingly, there was a correlation between the identities of the people replying and the types of discrimination they noted (eg, women were more likely to comment on sexism). A minority of respondents who discussed these types of issues also provided examples of how these forms of discrimination could cross the line from making access difficult into active abuse and physically dangerous situations:

Sexism & ageism. I have been digitally raped at music venues without much sympathy from the venues concerned, such is the prevailing sexism. I have been knocked back as I’m not in my 20’s, although I write contemporary pop (Woman, 46-55, Songwriter/Composer)

These types of situations were expanded on in much more depth by interviewees:

Heteronormativity as well within the industry is a big thing. You’ve got toxic masculinity that’s very common within the industry. I’ve been yelled at, I’ve been abused, I’ve been beaten up by my employer in this field because of toxic masculinity, because if I stand up for what’s right and a dickhead boss doesn’t like that, they’ll beat me up. He’s a fucking big strong – no. That’s the norm in this industry. You get a lot of those types here and it’s fucking disgusting. That’s another major issue, but I don’t see that changing anytime soon. (Royal, interview)

In terms of training and development, I think there’s another risk factor for me and concern over the years has been the fact that we are unregulated in a lot of ways, and that makes women particularly vulnerable. I’ve nearly been beaten at work twice over the years, from getting into arguments with men who have not responded well to having a female have a strong opinion; those particular situations where people are drunk and volatile, and it’s late at night and you end up in an argument with somebody. You’re actually in quite a vulnerable situation as a young woman – I’m talking about probably close to eight years ago now, and one scenario probably about 10 years ago – where you really are vulnerable because you don’t really have the confidence to know whether you’re in the right or the wrong. I think that those situations leave women, particularly young women, in a really – you often hear about scenarios where young women will be taken advantage of in the industry, particularly because they are actually uncertain, and they really want their career to work so they’re really, really keen and that the power dynamic is very, very skewed. You end up in a situation where you really want to be a success, you don’t want to rock the boat, so when somebody asks you to come and sign a contract at their hotel room you think, well, maybe it’s okay.
Should I go? Or when you end up in an argument with somebody over something and you really stand up and you stand your ground on certain situations. There can be quite volatile men in this industry who are in it for maybe the wrong reasons, or they’re in it because they think they’re going to pick up chicks; who knows what their personal goals are in being in that job. Then when you question them, or you force an issue with them, sometimes you can find yourself in a very, very vulnerable position with them. As I said, two of those situations I was nearly beaten. They were terrifying situations that I would never like any young girl to go through. (Marcy, interview)

Research is increasingly suggesting that these types of experiences have been under-recognised or downplayed as simply being, as Royal says ‘the norm in this industry’.67 This includes a recent survey in New Zealand showing that 45% of women creatives ‘report not feeling safe in places where music is made and/or performed’.68 Although survey respondents were not probed to recall specific instances of harassment, some survey respondents and interviewees described instances of harassment and violence. These will undoubtedly play an ongoing role in shaping participation in the Victorian music industry post-lockdown.

Other respondents mentioned elitism and gatekeeping more broadly within the industry as something they believed was holding them back:

There will always be some kind of exclusivity and cliques in the industry. I think it is hard for people to see that when they are involved in them, but when you are on the outside it really can show through the level of gatekeeping that is happening in the industry. (Non-binary Person, 18-25, Promoter)

The local scene is very ‘sceney’ and elitist. No matter how much I worked or the high standard of product I delivered, I always felt that I was locked out of the local scene and that my art didn't matter. (Woman, 46-55, Musician)

Regional-based respondents also noted their location as a limiting factor:

When you live in remote areas you are overlooked by urban based organisations. If you don't have (can't afford) management or publicity and if you are not with a major booking agent then you won't be offered gigs. (Man, 56-65, Musician)

However, other respondents focused on how the precarity and poor conditions in the industry limited their participation. Pay was a particular issue in this regard, with the need to supplement music income with income from outside the sector noted as a key limiting factor:

Time poor. Everyone stops music in their 30’s & 40’s cause it doesn’t pay enough to live and support families (Man, 36-45, Venue Owner/Manager)

I felt that I was locked into my part-time work in order to maintain my income to pay rent, which left me mentally drained and time-poor. (Man, 18-25, Sound Engineer)

Respondents who said that they did feel their involvement in music-related activities had been limited in some way were then asked what they thought could be done to make participating easier for them. The themes that emerged here overlapped significantly with the responses to the following two questions, and will be covered in the discussion of these.

67 See Fileborn, Wadds and Tomsen 2020
68 Hoad and Wilson 2020
7.3. Improving access post-COVID

All respondents were asked if there was anything they thought could be changed as the industry reopens to make it more accessible, particularly to marginalised groups. The frequency of types of responses given are represented in Figure 41 below.

**Figure 41. Proposed Changes to Music Industry to Improve Accessibility (Q36)**

Many respondents presented practical suggestions that were mainly to do with improving accessibility. These included things like having Auslan interpreters, ensuring venues are wheelchair accessible, and considering diversity in hiring practices:

There should be stronger support across the board to First Nations people. And it starts with HIRING them.

Other respondents mentioned working to ensure shows are held in safe spaces, including through bystander training. This included thinking about using different spaces as venues, and varying the times at which music is performed, in addition to making the current venues safer:

Getting music out into more smaller venues like cafes and public spaces, at all times of day, and in schools and community centres and gardens, where every one feels safe and welcome and people of all backgrounds can mix and enjoy and socialise and share an experience as a community. Creating more small community festivals and events.

Some comments mentioned ways in which online events held during lockdown had advantages in terms of accessibility:

One key take-away from Covid is the access problem has been highlighted, with everyone going digital it has meant audiences that may have had access problems have been able to access virtual music live shows and we'd like to consider...
implementing this in the future so that those people can continue to access live entertainment.

Responses therefore contained a mixture of ideas about ways to make conventional music-making sites and businesses accessible, and ideas about different ways in which music-making could be approached that are fundamentally more inclusive.

Other respondents however noted that more targeted resources may be required to ensure that these types of changes can happen. People mentioned providing more grants, workshops and mentorships to marginalised groups, as well as simply ensuring that careers in music are more financially viable across the board (as will be discussed further below). Others noted the biases that are embedded into the systems that deliver these types of resources:

I work with musicians who are First Nations, LGBTIQ+, and people living with disabilities. There is very limited support for them and again it almost always takes the form of competitive grants processes, that can be humiliating and depressing for marginalised groups who are constantly being made to beg for limited resources, and who sometimes find the nature of competing against other marginalised people also dehumanising. There needs to be systemic changes to the way funds are delivered, a change to maybe a threshold qualification rather than a competitive ranking. A more equitable and universal funding arrangement instead of musicians having to constantly prove their worth to those who hold money and therefore power. (Man, 46-55, Musician)

The need for this type of fundamental cultural change was a common theme in responses.

You have to do positive discrimination. Both structurally and on an individual level each person retraining to stop when they automatically go for who to ask....who else could I ask? Also it's necessary to not just 'make it easier for people to join in what's happening' but meet people where they are themselves - join in what's happening in their communities. The mountain may not come to Mohammed… (Non-binary Person, 56-65, Songwriter/Composer)

There is an incredible amount of systemic change that should happen after COVID. Representation for First Nations people, gender diverse people and people who have accessibility issues needs to be brought to the forefront. So many music companies profit off the art of those in minority groups and yet they are not represented at an executive, board or organisations level. (Woman, 26-35, PR)

This type of cultural change was connected to a need to increase people’s awareness of their own biases, especially if they were in positions where they could make a difference to the experiences of others:

More empathy from people in positions of gender and racial privilege, and a willingness to educate themselves. (Man, 26-35, Musician)

Backstage is a male dominated hetero mess. I've met less than 15 queer people in the industry while being there for 5 years. This is the way it is. What could change is the men pulling their heads out and stop being cunts to anyone slightly different to them. (Non-binary Person, 26-35, Lighting Technician)

Others noted the importance of education of various types provided from within the industry to change perceptions and behaviours within it:
I think there’s been some really nice progress in music over the last – since I’ve been involved at least. The things – I know there was a pilot program for education around sexual harassment and assaults in venues. Those types of initiatives I think are awesome and they should almost just be in high schools as well, they’re so good. I don’t know how far it got past the pilot program, but that was something that I really felt was awesome. The VMDO does – they’ve been unconscious bias training which is really useful. I think there’s a few of those things that are – yeah, they’re helpful in that they’re – I guess they’re just really good at showing people what the situation is at the moment. So, as many of those kinds of things that can be done. I think they’re awesome. (Jacob, interview)

Providing pathways into education for marginalised groups was also suggested:

It all needs to begin with training of the craft. Training and development needs to be available to all regardless of socioeconomic factors. And training and development needs to be encouraged among minority groups. (Man, 36-45, Musician)

Respondents also mentioned leadership as an important area where changes need to be made, both in terms of who is represented in the leadership roles in the industry, and ensuring that those in leadership are aware of issues relating to inclusion and prepared to take action on these:

Positions of power in funding bodies, venues, booking agencies, the music press, independent radio, rights bodies - right across the board in the industry - are held by older white men. The industry will only become more accessible if there is change at the top reflecting the diversity of the community of actual musicians. (Man, 46-55, Musician)

More education for those in positions of power to bring these marginalised groups on board. I think these decision makers need to have the business case for inclusion demonstrated to them or else they will be too concerned about the slim margins inherent in the industry. (Man, 26-35, Venue Owner/Manager)

The respondent who was quoted in the previous section discussing threats of violence at live events, Marcy, agreed that training is a key element of changing industry practices, and mentioned security as an area that could be focused on in this regard, but that there are cultural shifts that need to take place elsewhere in order for this to be seen as a serious option:

I do think that [training] definitely needs to be extended to security guards, and that’s one of the things that we haven’t really done very well. We do need to accept that the security industry itself is a scary place. I’ve worked in venues where I’ve been running nights and I have known that security guards have taken people out the back way and pushed them downstairs, or punched them in the back of the head when they’re ejecting a person. There’s been some really horrific and disturbing violent situations that people find themselves in working in this industry. When you’ve tried to address those situations, you often find yourself being gaslit, or told not to make a fuss. I remember even in some of the more open-minded venues that I’ve worked in, that are a lot more female-front or female-focused, when I’ve wanted to have conversations about making sure the security guards are very aware of the fact that we have certain types of patrons or whatever, I’ve been laughed at in meetings. Oh, come on, those guys – like they’re really going to sit through some sensitivity training? Please. You know what I mean? You can end up, even in the more open-minded venues or the most forward-thinking venues, in a situation where people laugh at you because it’s
like, come on, these are security guards; get real. That type of thing. So protecting ourselves in that way, I think, and extending our knowledge and training to security is another area that I think would protect women a lot. (Marcy, interview)

Not all the changes that respondents called for were focused on cultural change and financial support. Some respondents claimed that there should be more explicit rules around how the music industry, and especially live music venues, operate. The following quotes are taken from respondents working as music talent and salespeople, pointing to accessibility, mobility and gender discrimination issues that they want to see addressed on an industrial level:

Charter of conduct for venues, promoters and bookers to give platforms to a more diverse performance roster than has been standard for too long. Pale, male and stale can't continue. (Woman, 46-55, Merchandise Salesperson)

Compulsory gender parity on all concert bills. (Man, 36-45, Songwriter/Composer)

Guidelines for making the industry more accessible (Woman, 26-35, Musician)

The idea of having quotas or diversity riders for gig line-ups that ensure marginalised groups are included was common among these responses, with the idea that it was not enough to simply rely on those in the industry to make good decisions coming through clearly.

On the other hand, there was a minority of respondents who thought that nothing needed to be done in this area as they did not believe it was a problem and that the industry was ‘heading in the right direction’. For some respondents, this was because their own experiences in the industry made them think it was already quite inclusive:

I think my part of the sector is fairly inclusive we have had gay and lesbian people work for us as well as people of colour. We’re open to anyone as long as they work hard and fit in with everyone else (Man, 36-45, Lighting Technician)

I don't understand exactly what you mean as I've never felt that the events I've worked for were not accessible for a particular group of people. I've seen regularly those people you mentioned above in the events I worked for. (Man, 56-65, Sound Engineer)

For others they did not think this was a problem because they believe the industry is already a meritocracy where ‘talent’ is the only important factor:

I have always thought music should be based on merit. The market decides, no special treatment should be given to anyone. (Man, 46-55, Musician)

It is noteworthy here that there was a pattern that emerged among people who said that access for marginalized people was not a problem. This type of response was more likely to come from men and people working in the live music sector than from the other areas. At the same time, accounts from women and non-binary interviewees working in this area presented a very different picture. The quotes earlier relating to violence or threatened violence in the industry were both from people in the live sector, a venue booker and a lighting technician. Furthermore, another woman recounted at length a variety of sexist practices that she had been subject to in road crews on a daily basis:

Just little things. It could be the inexperienced managers or just the fact that somebody would walk into a room and be like “There’s nobody here, we need a person for a job”. And I’ve been in that room and a dude walks in and is like “This person’s not available, this” and these are all juniors – “This junior’s not available, this other person’s not
available, we don’t have anybody, we need more people, we need more crew”. And I just sat right here and I’m not even considered an option. It’s not – my name’s not on any list or just – when they yell out, when they go and get people to load a truck and stuff they’ll just pick their mates, “We’ll come bro it up in the truck”. But I can lift and pack any truck just as much, if not more, then some of those guys. But it’s just “We’ll just hang out, be the boys in the truck” kind of – but on the stream I’ve had a guy yell in my face, “No girls in the truck”. And that’s a guy who doesn’t actually know me either. (Lexi, interview)

The contrast between the accounts of women and non-binary people working in this area and the survey responses that suggest there is no problem is marked, and indicates that developing a greater understanding of this problem among those who work in this field, especially in road crews, may be fundamental to working towards a culture change in the live music area.

The final question in the survey was about what other changes respondents would like to see taking place that would improve the sector for all those working in it. The key themes that emerged here were in relation to conditions needing improvement, and the need for cultural changes in, and increased support for, the music industry, as shown in Figure 42. A less prevalent but still clear theme related to the need for greater recognition of the importance of the industry, and the skills of those working in it.

**Figure 42. Proposed Changes to Music Industry for Workers (Q38)**

The most mentioned theme in the responses to this question was in relation to the working conditions in the sector, particularly pay, benefits, security and hours, all of which were seen as problematic. Respondents from all sectors noted that they had little security and were not paid enough, and that there was often a lack of clarity about what they even should be paid. Live gigs were seen as being a particular issue, with solutions offered by a number of respondents being that free entry gigs should not be reinstated post-COVID, and the standard fee for entry should be raised:

Better & fairer payment for artists, creatives and workers. Casualisation of a skilled workforce is killing us. A long overdue raising of ticket prices esp for small venues - no more “three bands for ten bucks”. (Woman, 46-55, Merchandise Salesperson)
All live performances (excluding open mike nights) should require a door fee. (Woman, 46-55, Agent)

Minimum rates of pay and standard conditions for musicians (Man, 26-35, Musician)

Fair pay not cash in hand, not “you MAY be able to DJ if you promote the event and sell hundreds of tickets for nothing in return”. (Woman, 18-25, DJ)

One interviewee explained how a lack of guidelines around what people should be paid made negotiating difficult, particularly when musicians are made to feel lucky for having any work at all:

Is it okay to do a $10 gig? What’s the standard? Because I definitely wouldn’t have done as much as I had done if I had insisted that I got paid. (…) I’m just so bad at asking for money. I’ll happily accept a really nice whiskey for performing, which is okay, but I think I should get the money and the whiskey. Maybe a way to kind of negotiate because I think you feel really inferior. You’re just like, “Oh, thank you.” You just feel so grateful for the exposure, but that’s not really okay (Elise, interview)

These issues around pay and conditions were noted in all areas of the sector, as well as the way in which problems flowed from one area to another:

The casualization of the workforce is rife throughout the backstage industry. Because of this we are seeing underemployment and mass layoffs. This completely screws over workers. Lack of leave and sick pay is absolutely screwing over employees. I feel this needs to change drastically. This needs to change (Non-binary Person, 26-35, Lighting Technician)

One of the big [issues] when it comes to music I think is sustainability of income, right? Musicians, I think they’re probably number one but then also all elements of the industry where sustainability of income, it’s just not there. Musicians are nothing and they can’t and it’s really difficult. I think it was really interesting that so much music was made and recorded between March and now because all of these young musicians who usually work at bars and venues and wherever else, suddenly got more money than some of them have ever seen on an ongoing basis in their lives and didn’t have to go to work. They were getting paid a liveable wage and then not having to go and slog it out at a bar or whatever. (…) There’s a lot of horrible things that are happening to the industry right now but if that could start a conversation because of what we’ve been through, that would be amazing, talking about minimum wages for artists, or more funding for venues, so that they could actually pay artists properly who perform. (Carly, interview)

Additionally, respondents noted that even where there were clear guidelines as to what workers were entitled to, the informal nature of the industry could make it easy for less scrupulous employers to ignore their responsibilities or punish those who tried to insist on them:

Remuneration needs to be reviewed and organisations should have to comply with fair work standards but they seem to continue to operate under the radar (Woman, 36-45, Accounts and Finance Manager)

Accountability to pay award rates and conditions for gigs. Guaranteed super contributions we are legally entitled to are ignored even when the legal requirement is
expressed. Making a point of it makes sure you don't get hired again. (Woman, 26-35, Musician)

This idea that there was inequality in the industry whereby people in positions of power could take advantage of others was also raised through the idea that benefits were unequally accrued because of industry structures:

By the nature of the business it benefits a few at the top who make most of the money while the majority of the people make very little. There needs to be more equity for all. It would be good to see the artists who make the most hand something back into development programs to assist others. One example is how little a major act pays a support act on a tour. (Man, 46-55, Studio Owner)

Interviews illustrated some important aspects of the negative effects of the conditions of the sector by showing how they led to injuries of various sorts, and how, perversely, lockdown had proved positive in providing a space for healing:

Unfortunately, (...) there was one stage where I was working that much, which I think goes to show how much this music industry works for as little money as they get - I actually created a fracture in my foot, not by anything falling on it. It was just by working. This just created because I was on my feet that much. (David, interview)

Jenny Moon also discussed work-related injuries, and described how one of the benefits of the lockdown for her had been the opportunity to have surgery on one she had been carrying for some time, noting that this was the first time she had had a long enough break from work to go through this process:

So, that was a good thing to get done, it's something I'd been saving for for years to do and never really been able to fit in a long enough period of time without work to do it. So, that was good. And I know quite a few people that have done that - have had knee reconstructions and have done some elective surgery from injuries that normally we don't get time to do for ourselves and take that time out, as business owners in this industry. I know of four company owners that have done it in our industry, the equipment industry or staging, or whatever. So, that's good. (Jenny Moon, interview)

Other interviewees also observed similar benefits of lockdown in relation to mental health:

I would say – actually this is the – this is the weird contradiction, I – for me I actually feel like having not been at work my mental health is significantly better. Even though everything about me has been defined by my job I am my job and it’s very much ingrained, no matter how hard I try not to be, or try not to do that job I can’t not be a roadie/lighting tech. It’s in me. I can’t get rid of it. I wish I could sometimes. But overall, I actually feel better. I feel more confident in myself. I don’t feel like – pre-COVID I felt like every day of my life, of my career, was an uphill battle, constantly beating my head up against a brick wall trying – like an actual battle every day, every minute of every day. And I don’t have that at the moment because I’m not fighting anything or anyone. So I still very much love my job. I still very much want to go back to my job. It’s still what I want to do when I grow up. I miss the people, which I never thought I’d ever say. But if I was there in the thick of it I would be – a common thought that went through my mind while I was working a lot is you wish that the place would burn to the ground and then you’d toast – but the only tear I would weep would be my inability to toast the marshmallows on the ambers because the people who went inside with it were too toxic. It’s just a passing thought. I don’t feel that way anymore. A lot of – a few people,
music industry people whether they’re lighting techs or musicians, a lot of them have said that their mental health has been better, or they’re actually, for lack of a better word, enjoying it. (...) A lot more positivity has come out of this then I ever thought there would be, particularly for this industry. (Lexi, interview)

This improvement in mental health was by no means noted across the board, with other respondents in interviews and open-ended survey comments discussing poor mental health as a result of the lockdown. It is, however, noteworthy that for some participants their music jobs were causing mental and physical injuries that the lockdown was unexpectedly providing respite for. This provides an illustration of the intensity of the pressures caused by the conditions in the pre-COVID industry and the consequences of these, and some of the benefits of the enforced break during lockdown.

The next key theme was to do with the culture of the industry, and how what was valued within the industry could change to increase the wellbeing of those working in it and make it more accessible. The ideas discussed in Section 7.2 around finding more ways to increase the representation of marginalised groups were strongly echoed here, and these will not be revisited here. Many of the cultural changes that respondents wanted to see were directly related to mental health issues in the industry. Mental health issues and public responses to poor mental health have been a focus across the music industry in Australia and have been a focus in media and industry responses to the COVID-19 pandemic. Respondents identified changes they would like to see to mental health support in the industry:

Bullying and mental health issues should not be commonplace and swept under the rug. (Woman, 36-45, Accounts and Finance Manager)

Mental health first aid officer in [road] crew (Woman, 36-45, Sound Engineer)

A number of respondents noted that the way the industry was closely tied to alcohol sales meant, and that this reliance on alcohol had other negative effects on industry workers in terms of health:

Removed alcohol excise from venues who provide large performance spaces. Encourage alcohol free engagements - Australia and the music industry have a very fractured relationship with booze (Man, 36-45, Musician)

Liquor companies and venues made money from alcohol sales during gigs, but respondents felt that this was not redistributed equitably to musicians or those making events happen. The idea of the equitable distribution of resources in the industry was mentioned in other contexts also, with some respondents advocating a smaller, more community-focused approach for the sector:

A shift of power away from the majors and back to the indies. We are already seeing this happen throughout the pandemic. Live Nation to AEG have furloughed. WME to Paradigm have furloughed. The majors are losing clients. Artists are resorting back to the people they trust. Like the rock & roll days. (Man, 26-35, Agent)

69 See Association of Artist Managers 2020; Music NSW 2015, February 23, February 23; Support Act 2020
70 Brunt and Nelligan 2020
More touring opportunities in Australia ie regional venues. More DIY ethos, less reliance on Industry figures. Less focus on 'new upcoming bands/ next big thing' (Man, 26-35, Musician)

More focus on performers and the content they are creating itself rather then the crowd they bring/ popularity of the band (Man, 18-25, Musician)

Again connected to resource management and fairness, a number of respondents also mentioned environmental issues in the industry as an area that needed cultural changes in relation to:

More attention to environmental, safety and mental health issues. (Woman, 56-65, Tour Manager)

Environmental changes!!! To me this is the biggest thing that should change. We are going to start with an almost clean slate once CV lifts - promoters/venues/artists all have the ability to 'start again' with how they approach their own environmental footprint (Man, 26-35, Promoter)

One interviewee connected a need to change the culture around environmental issues in the industry to the points mentioned earlier around profits:

I definitely would not like the industry to go back the way it was. It was misogynistic, it didn’t care about the planet. One of the problems with the industry was it only started in about 1956. And ever since that point, it’s been moving – people are so busy working, no-one’s had time to stand around and contextualise that industry, and look at it and do a SWOT analysis: what were its strengths, what were its weaknesses, what was good, what was bad, what could we make better. I think this natural pause, which could be good – almost a year’s pause is a time for it to reconfigure itself and sort itself out. I’ve always been an advocate of triple bottom line accounting because I think that’s where we all should be. Planet, people, and profits, rather than just profit. And the music industry has always just been about profit. (Hunter, interview)

Another interviewee, Rain, identified the marginalisation of workers based on sexist and racist attitudes as signalling a need to completely reform the industry from its cultural roots upward:

I would put a big caveat on everything that I say about this. That is I come from the punk rock background of fuck the industry, I’m glad to see it collapse. I am glad to see complete pig fucking, excuse my language, but complete pig venue runners like [venue owner] lose their business and get racked over their coals for their garbage sexist, racists approaches to music booking. I’m completely happy to see all the structure that exist solely to make money off creative people’s endeavours and homogenise them and particularly marginalise, already marginalised people, particularly queer and non-white people who don’t fit a marketability definition. I’m happy to see all those collapse, I am happy to see people seizing the means of production I guess and moving into doing things for themselves and realising that you don’t need these traditional structures. Whether that – that’s been a gradual thing anyway and is the slow collapse of the music industry over the last twenty years of the record industry in particular. So that’s – I would like to see a change, but I’ve always wanted to see a change. (Rain, interview)

The Victorian public health lockdown measures have presented an ambivalent situation for many in the industry who have been dissatisfied with the privilege that it affords to some social
groups over others. At once, the lockdown has disenfranchised workers by limiting music-related work (especially in the live music business sector), while also (temporarily) breaking music production from its dependence on problematic gatekeepers in the live music sector. The replies above demonstrate ways in which the shutdown has encouraged some respondents to think radically about ways in which the sector could be fundamentally different.

In terms of support from outside of the industry, the most commonly mentioned version of this was simply more money, whether this be through grants, government programs or increased funding for bodies such as Music Victoria and the VMDO. These calls for support reflected the life stages and career stages of respondents. For younger and early-career music industry workers, especially music talent, starting a career was seen as needing focused financial and industry support, especially in the wake of COVID:

As the music industry is arguably quite difficult to break into there is a lot of competition, especially in the early stages. This can sometimes lead to bitterness and rivalry. Any organisations, programs, or opportunities to make it easier to start your way into the industry in a more collaborative and positive way, that nurtures engagement with peers, as opposed to seeing them as just a competitor, would be highly beneficial. (Woman, 18-25, Music Supervisor)

COVID has proven that those who commit to the industry are basically left without any help or resources when the shit hits the fan. It would be great to see some financial safety nets, whatever they might be, made available to those in the industry. (Man, 18-25, Musician)

Financial support for emerging artists. This could be directly, or through label / performance opportunities specifically for them. (Established musicians will be the first musicians to receive opportunities moving forwards, and there may not be anything left for emerging / less established musicians to be able to continue their careers and make a living.) (Woman, 26-35, Musician)

For more seasoned music talent sector workers, marginalisation of workers on the basis of ethnicity and age played a larger concern when they considered how support could be distributed. Respondents hence described existing competition for grants and opportunities as inequitable or unjust:

The prevalence of competitive funding is inequitable. It advantages those with middle class Anglo backgrounds who have the specific literacy of grants applications, funding for musicians overwhelmingly goes to those from privileged backgrounds and those with record company support. I'd like to see meaningful levers of equity applied to funding allocation that mean an act on Sony isn't going to get 20 grand for tour support that effectively operates as a subsidy to a multinational corporation. (Man, 46-55, Musician)

I would like to see respect and opportunities offered to older musicians, artists and songwriters. I would like to see it mandatory that if any artist has been living off their art for a minimum of 3 decades, once they reach age 60 they should be eligible for an early age pension in recognition of the contribution they have made to the wellbeing of society and the cultural identity and heritage of the nation. (Man, 54-65, Musician)

For all ages and career stages, the music industry’s competitive business structures are a target for reform through providing further support for industry workers. Many expect this
competitiveness will lock out marginalised workers and continue to favour those in already privileged social positions.

The idea that there was not enough government funding for music was connected in many comments to a lack of recognition of what the industry does and the skills required to succeed in it, from government and from wider society. In Section 5.2 above, we made reference to respondents discussing how a lack of recognition of the skills required to succeed in music-related work was a barrier to finding work outside the industry. This idea that there is little understanding of how the sector works or the value that it has among the wider community or among politicians and other decision makers emerged as a key theme in interview and survey responses, and this was then connected to perceptions of low pay in the industry, as well as difficulties in having music industry work valued and supported in government policy:

It to be recognized by the government as a legitimate industry that employs MANY Australians and contributes to making society better as a whole. (Woman, 26-35, Promoter)

For me it starts with respect and acknowledgement of value. Easier said than done in the current climate (Woman, 36-45, Musician)

More recognition in the mainstream media and then in turn from governments. We have one of the most coveted independent music scenes in the world and we are not recognised for that (Non-binary Person, 36-45, Musician)

A changed perception by Govt and much of the community that the Arts are merely a hobby and people don't need remuneration or proper remuneration for it. Change community perception that created works are free for them to reproduce and make known that Music and artistic copyright is a property that is owned by the creator, just like a patent or a car. (Woman, 46-55, Songwriter/Composer)

A road crewmember, David, articulated this point further in pointing to what he sees as a devaluation of the behind-the-curtain work of backstage and technical crew in the arts sector more generally:

I guess the big thing to advocate, I think, for this industry is lack of awareness for what we do, and musicians as well. Like, most people think, oh, you're blessed with a voice, so you just get up on stage and start singing. It's like, no, there's a lot of hard yards that they put into it. The late-night gigs in the Corner Hotel or something like that if they're lucky, and the next day they've got to get up and go to work at 9AM. Everyone has done their hard yards to get into this industry, and a lot of people just don't appreciate it. The general person would see a doctor and go, "okay, well, they went to university for five or six years and they've done this amount of work experience". They know their background. They know what's involved in being a doctor but, realistically, Australia's opinion, and I'm going to really broaden this out of the arts, is completely - it's just way too low. (David, interview)

David went on to describe how this translated to an unwillingness to pay premium ticket prices among his friends and family, and how this will have a direct impact on the viability of the industry in 'COVID-normal' conditions:

I realistically think it's either going to be – people need to accept the fact that tickets are going to be a lot more expensive and the atmosphere is going to be shit, because
there's only half the people in the venue, or we're just not going to see it for a while. (David, interview)

For other interviewees the dismissive attitudes towards the arts often found in the broader political climate in Australia had impacts on their own feelings of worth and confidence in their creative practices. As Elise, a musician, commented:

I think even though I really love doing what I’m doing, sometimes it’s really easy to feel like you’re not doing a real job or you’re not feeling like you’re – there’s just not that self-doubt, it’s quite big actually. There’s a lot of barriers with just my beliefs or society beliefs that what you’re doing is not important. It’s hard, there’s not a lot of government support. There’s not a lot of love for the arts. There’s not enough love for the arts. And I just think of the way the ABC has been butchered, that breaks my heart. And in fact, if that’s how they’re treating the national broadcaster, and if that’s how they view communications, then it’s hard to feel valued enough. Bigger things make a huge difference because the support for the bigger organisations or even support for medium organisations, that impacts right down to the individual artist. (Elise, interview)

The calls for support and recognition for the music industry and arts sector in general among both survey respondents and interviewees echoes industry and political campaigns to reconsider the value of the arts sector and its role in Australian society (i.e. Save Live Music, Save the Arts, Save Our ABC). The transformations being called for by many respondents here are fundamentally about changing the way that their work is valued. This is an ambitious but necessary discussion to raise if the industry is to address the income insecurity that has been exacerbated during the COVID-19 pandemic.
8. Conclusion and Recommendations

In a report released by the VMDO at the start of 2020, the Victorian music industry was characterised as a sector ‘that runs to a large degree on luck, timing and public sentiment, and where many of the places where security could be previously maintained are eroding’. Only a few months later, that luck ran out in a spectacular and unanticipated fashion across the sector, and as it did so the areas of risk that had already been identified were brought into sharp relief. This research has revealed that while there was a trend for around a third of answers to questions about motivation, productivity and future plans to be positive, showing that there was a solid core of respondents who have found ways to continue working on their music-related activities and/or constructively plan for a changed future, most participants were experiencing difficulties, sometimes of a career-ending nature. The profound uncertainty in the sector at the time this study was done was central to these difficulties, in combination with the emotional upheaval that had accompanied the lockdowns and the abrupt end, reduction, or significant change to the day-to-day work activities of most respondents. These effects have been most marked for those in the live sector. While there was no demographic, in terms of gender, age, ethnicity, sexuality or disability that had clearly been systematically impacted more across the factors measured, questions about problems in the music industry before COVID hit revealed ongoing experiences of discrimination, in addition to issues around conditions and a perceived lack of recognition and respect for what the sector offers.

The recommendations below are, therefore, as much about continuing efforts to address problems in the sector that had already been identified, but which have now been greatly exacerbated, as COVID-specific suggestions.

Recommendation 1: Sector mapping and targeted funding. The rebuilding of the music sector requires whole-of-industry mapping to identify where the biggest risks are for sustainability and ecosystem collapse in the wake of COVID, along with targeted support to ensure key roles and infrastructure remain. All parts of the music industry are reliant on one another to some degree, and so to ensure a healthy and diverse music scene no one area can be allowed to fail. Doing this successfully will involve:

- Ensuring a variety of types of venues survive, to ensure pathways for artists from emerging/hobbyist to internationally successful remain. Including spaces for new and unconventional artists in a risk-averse environment is particularly important in this regard;
- Considering all types of support that are needed to create music, both live and recorded, including roadcrew, technicians and the physical infrastructure required;
- Involving representatives of all areas of the industry in consultation and decision-making processes; and
- Successful lobbying for increased grants and government funding to achieve these aims.

Recommendation 2: Maintain and improve gender and other types of diversity and counteract discrimination. Respondents have identified discrimination, harassment and bullying on the basis of gender and other identity markers as being characteristic of the music sector pre-COVID. In the wake of the COVID-19 crisis, the work that was happening in the

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71 Strong, Cannizzo and Rogers 2020, p. 56
sector to counteract this may decline as the focus is put on survival and rebuilding. We recommend:

- facilitating the continuation of discussions and programs that were underway already on this topic, including bystander training, the establishment of safe spaces, and workshops, mentorships and training programs tailored to women and gender non-conforming people;
- monitoring and reporting on inclusion where it is possible to do so, such as venue and festival line-ups, label rosters and representation on boards; and
- ensuring all grants and government funding made available to the music sector include diversity considerations or, ideally, quotas.

Assessing whether diversity has increased or decreased post-COVID is complicated by a lack of data on how diverse the industry was to begin with. Although a picture was being built of where and how women participate, other marginalised groups have not been understood as well. This also means developing a more complex, intersectional understanding of how discrimination plays out, and how this might be impacted by the COVID-19 crisis, is yet to be established. Therefore, it is also recommended that more research is undertaken to identify how barriers to participation in the industry have intersectional aspects to them.

**Recommendation 3: begin a conversation about how to improve pay and conditions.**

The poor pay and conditions of precarity in the music industry were leading to illness and burn-out before the COVID-19 pandemic, and have also contributed to the difficulties people are encountering in maintaining their careers through the crisis. This is a difficult area to address, as it involves changing the culture within the industry around expectations and practices, but also engaging with society-wide shifts towards precarious employment and a ‘gig economy’.

The first steps in this process may involve:

- considering how distinctions can be made between hobbyist activities where pay may genuinely not be an issue and events where pay is appropriate;
- setting expectations (e.g., guidelines distributed to venues and artists) for what people should be paid for their contributions and empowering them to ask for it;
- considering the viability of a union that advocates for music workers not eligible to join any existing unions; and
- engaging in advocacy for meaningful government-funded safety nets for precarious workers, such as a Universal Basic Income and/or permanent increase to JobSeeker.

**Recommendation 4: Make the value of music-related activities and workers more visible.** Improving the pay and conditions of participants in the music industry is connected to ensuring money is coming into the sector that truly reflects its worth. Educating the public and those in positions to make decisions about how funding is distributed will facilitate this. This includes:

- fostering a greater understanding of how labour-intensive gigs are, from small-scale events through to the largest stadium shows. This would include increasing the visibility of the less obvious jobs, including backstage and other behind-the-scenes roles;
- highlighting the expertise and high skill-levels of industry workers in all positions, including their suitability for work roles outside the music industry; and
explicitly connecting these to questions about what music is worth, whether in considering ticket prices, what is being paid for recorded music, or how much funding the sector receives.

This is also relevant to outcomes for those in the sector who may have to diversify their employment as the sector rebuilds. A clearer positive narrative about the skills and knowledge of those who work in music will help to make the ways in which their abilities are transferable to other industries more obvious to potential employers and to themselves.

**Recommendation 5: Improve contingency planning.** While often described as 'unprecedented' and 'unpredictable', the COVID-19 pandemic was an event of a type that has happened before, was warned of, and could happen again. It was not even the only disastrous event to impact the music sector in 2020, with the bushfires over the new year period having a significant effect on the summer festival circuit. This type of planning should be done:

- on an industry-wide level: how can advocacy groups, government and industry work together to identify and plan for likely large-scale events that could affect the viability of the sector, including economic upheavals, climate change impacts (including natural disasters) or public health crises; and
- on the level of companies and individuals: how can the VMDO and government encourage those in the industry to ensure they understand what can go wrong on a sector-wide scale and within their own businesses?

Case studies drawing on key examples of businesses and individuals that survived or thrived during COVID (including innovations such as Isol-Aid, or companies that changed the focus of their work while unable to undertake their normal tasks) could assist in creating strategies to draw from in this regard.

**Recommendation 6: Ongoing research on the impact of COVID and how the sector is recovering.** The research in this report was undertaken at a time of significant uncertainty, with many participants at a point where they were unsure what their next steps were, and where others who did have plans in place may have seen these disrupted. Knowing what happened next will be important for understanding what shape the industry takes as they fully reopen, and will be important for the contingency planning suggested in Recommendation 4 and the industry mapping and diversity goals in Recommendations 1 and 3, particularly in gaining knowledge of what areas or types of people may be finding rebuilding harder and why.
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Appendices

Appendix 1: Survey Questions

Q1. This project is designed to gather information on how Victorians who usually get part or all of their income from music-making activities are responding to the COVID-19 crisis, with a particular emphasis on how this may differ for different groups of people. This research has been funded by the Victorian Music Development Office and the Victorian Office for Women, and is run by researchers at RMIT University. Participation is voluntary. The survey will take 15-30 minutes to complete. A full, downloadable, information sheet, including contact details for researchers can be found by clicking here: Information sheet survey. By continuing with this survey you are giving consent for the information you provide to be used for this project.

☐ I would like to proceed with the survey
☐ I do not wish to proceed with the survey [end of survey]

Q2. For the purposes of this survey ‘music-related activities’ means any activity involving the creation, performance, production, dissemination, recording or sale of any music or music product, including activities only relating to the business side of music as well as the creative.

Q3. In the last 12 months, have you been paid any amount of money for your participation in music-related activities?

☐ Yes
☐ No [end of survey]

Q4. What is your age?

☐ Under 18 [end of survey]
☐ 18-25
☐ 26-35
☐ 36-45
☐ 46-55
☐ 56-65
Q5. Where do you live most of the time?
- Melbourne (please specify suburb) ____________________
- Victoria outside Melbourne (please specify where) ____________________
- Outside Victoria [end of survey]

Q6. Does your gender identity match your sex as registered at birth?
- Yes
- No
- Decline to answer

Q7. What is your gender identity?
- Man
- Woman
- Non-binary
- Other (please specify) ____________________
- Decline to answer

Q8. Which sexuality/ies do you identify with? [multiple selections allowed]
- Heterosexual
- Homosexual
- Bisexual
- Pansexual
- Queer
- Other (please specify) ____________________
Q9. Which of the following best describes your ancestry?

- [ ] Aboriginal and/or Torres Strait Islander
- [ ] African
- [ ] Arab
- [ ] Chinese
- [ ] English
- [ ] German
- [ ] Greek
- [ ] Indian
- [ ] Irish
- [ ] Italian
- [ ] Other (please specify) ____________________
- [ ] Multiple (please specify) ____________________

Q10. Have you ever been, or do you believe it is reasonable to think that you could be, subject to racial profiling or stereotyping in Australia on the basis of your ethnic identity?

- [ ] Yes
- [ ] No
- [ ] Decline to answer

Q11. Do you speak a language other than English in the home?

- [ ] Yes
- [ ] No
- [ ] Decline to answer

Q12. Do you have a functional impairment (for example, a physical, mental, learning, sensory or other impairment)?
Q13. Do you have responsibilities as a caregiver (for example, for children or parents)?

- Yes
- No
- Decline to answer

Q14. What roles did you perform in your music-related activities? [multiple selections allowed]

- Musician (Instrumentalist or singer)
- Songwriter/composer
- DJ
- Agent
- Artist Manager
- Label Manager
- Venue owner/manager
- Promoter
- PR
- Sound engineer
- Road crew
- Other (please specify) ____________________

Q15. Which role did you spend the most time on?

- Musician (Instrumentalist or singer)
- Songwriter/composer
- DJ
Q16. What genre of music do you mainly work in?

Q17. In January and February this year, immediately prior to the COVID shutdown, approximately how many hours per week did you spend on music-related activities that you were paid for?

- 1-5 hours
- 6-10 hours
- 11-15 hours
- 16-20 hours
- 21-25 hours
- 26-30 hours
- 31-35 hours
- 36-40 hours
- 41-45 hours
- 46-50 hours
- More than 50 hours
Q18. In January and February this year, immediately prior to the COVID shutdown, approximately how many hours per week did you spend on paid work that was NOT music-related?

- 0 hours
- 1-5 hours
- 6-10 hours
- 11-15 hours
- 16-20 hours
- 21-25 hours
- 26-30 hours
- 31-35 hours
- 36-40 hours
- 41-45 hours
- 46-50 hours
- More than 50 hours

Q19. In January and February this year, immediately prior to the COVID shutdown, approximately what percentage of your income came from music-related activities?

- less than 10%
- 10-19%
- 20-29%
- 30-39%
- 40-49%
- 50-59%
- 60-69%
- 70-79%
- 80-89%
Q20. Since the COVID shutdown, approximately how many hours per week have you spent on music-related activities that you are paid for?

- 0 hours
- 1-5 hours
- 6-10 hours
- 11-15 hours
- 16-20 hours
- 21-25 hours
- 26-30 hours
- 31-35 hours
- 36-40 hours
- 41-45 hours
- 46-50 hours
- More than 50 hours

Q21. Since the COVID shutdown, approximately how many hours per week have you spent on paid work that is NOT music-related?

- 0 hours
- 1-5 hours
- 6-10 hours
- 11-15 hours
- 16-20 hours
- 21-25 hours
- 26-30 hours
- 31-35 hours
Q22. Since the COVID shutdown, approximately what percentage of your income has come from music-related activities?

- 0%
- 1-9%
- 10-19%
- 20-29%
- 30-39%
- 40-49%
- 50-59%
- 60-69%
- 70-79%
- 80-89%
- 90-99%
- 100%

Q42. Has your overall income...

- Increased [links to Q43]
- Decreased [links to Q44]
- Stayed about the same

Q43. Please indicate how much your income has increased by.

- 10%
- 20%
Q44. Please indicate how much your income has decreased by.

- 30%
- 40%
- 50%
- 60%
- 70%
- 80%
- 90%
- 100% or more

Q23. Please explain how the music-related activities you have been involved with have changed during the COVID crisis?

Q24. What factors have made it easier for you to participate in music-related activities during the crisis?
Q25. What factors have made it harder for you to participate in music-related activities during the crisis?

Q26. Please rate the following statements. Since the start of the COVID lockdown:

“"I have found it easy to motivate myself to work on my music-related projects" (26.1)

“"I have been doing more music-related work for free that before COVID I would have been paid for" (26.2)

“"I have been worried about paying for basics like rent and food" (26.3)

“"I have considered leaving the music industry” (26.4)

“"I have been highly productive in my music-related endeavours" (26.5)

“"I have found it easy to maintain my connections to others in the music industry" (26.6)

[Strongly agree]
[Somewhat agree]
[Neither agree nor disagree]
[Somewhat disagree]
[Strongly disagree]

Q27. Have you learned new skills relevant to your music-related activities since COVID?

[Yes]
[No [links ot Q30]]

Q28. What new skills have you learned?
Q29. Do you believe these new skills will be helpful post-COVID?

☐ Yes
☐ No

Q30. Do you think your involvement in music will be different when the COVID crisis has passed?

☐ Yes
☐ No [links to Q32]

Q31. Please explain how you think your involvement will be different.

Q32. Did your caring load increase during the COVID lockdown? [displays if answered ‘yes’ to Q13]

☐ Yes
☐ No [links to Q34]

Q33. Did your increased caring responsibilities make it harder for you to participate in music-related activities?

☐ Yes
☐ No
Q34. Before COVID, did you ever feel as though you were prevented from participating in music-related activities to the extent that you would have liked?

☐ Yes

☐ No [links to Q36]

Q35. In what ways did you feel you were prevented from fully participating?


Q36. Are there things that could be done as the music industry is re-opened that would make participating easier for you?


Q37. Is there anything you think could be changed as the industry re-opens to make it more accessible to all people, including First Nations people, women and gender diverse persons, the LGBTI+ community, people with functional impairments and people of colour?


Q38. Are there other changes you would like to see happen that would improve the industry for those working in it?


Q39. Do you have any other comments?
Q40. If you would be interested in participating in a 30-60 minute interview to explore these issues further, please leave an email address that you can be contacted on.

[end of survey]
# Appendix 2: Overview of Survey Sample

<table>
<thead>
<tr>
<th>Age</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-25</td>
<td>42</td>
<td>14.4%</td>
</tr>
<tr>
<td>26-35</td>
<td>88</td>
<td>30.1%</td>
</tr>
<tr>
<td>36-45</td>
<td>76</td>
<td>26.0%</td>
</tr>
<tr>
<td>46-55</td>
<td>48</td>
<td>16.4%</td>
</tr>
<tr>
<td>56-65</td>
<td>30</td>
<td>10.3%</td>
</tr>
<tr>
<td>66-75</td>
<td>8</td>
<td>2.7%</td>
</tr>
<tr>
<td>76+</td>
<td>0</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

**Location**

<table>
<thead>
<tr>
<th>Location</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melbourne</td>
<td>247</td>
<td>84.6%</td>
</tr>
<tr>
<td>Victoria outside Melbourne</td>
<td>45</td>
<td>15.4%</td>
</tr>
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</table>

**Gender Identity**

<table>
<thead>
<tr>
<th>Gender Identity</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Woman</td>
<td>126</td>
<td>43.2%</td>
</tr>
<tr>
<td>Man</td>
<td>151</td>
<td>51.7%</td>
</tr>
<tr>
<td>Non-binary</td>
<td>8</td>
<td>2.7%</td>
</tr>
<tr>
<td>GNC</td>
<td>4</td>
<td>1.4%</td>
</tr>
<tr>
<td>Decline to answer</td>
<td>3</td>
<td>1.0%</td>
</tr>
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</table>

**Sexual Identity***

<table>
<thead>
<tr>
<th>Sexual Identity*</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heterosexual</td>
<td>211</td>
<td>72.3%</td>
</tr>
<tr>
<td>Homosexual</td>
<td>10</td>
<td>3.4%</td>
</tr>
<tr>
<td>Bisexual</td>
<td>31</td>
<td>10.6%</td>
</tr>
<tr>
<td>Pansexual</td>
<td>13</td>
<td>4.5%</td>
</tr>
<tr>
<td>Queer</td>
<td>24</td>
<td>8.2%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Decline to answer</td>
<td>21</td>
<td>7.2%</td>
</tr>
</tbody>
</table>

**Ethnic Identity/Ancestry**

<table>
<thead>
<tr>
<th>Ethnic Identity/Ancestry</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aboriginal and/or Torres Strait Islander</td>
<td>4</td>
<td>1.4%</td>
</tr>
<tr>
<td>Category</td>
<td>Count</td>
<td>Percentage</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------</td>
<td>------------</td>
</tr>
<tr>
<td>English</td>
<td>135</td>
<td>46.2%</td>
</tr>
<tr>
<td>Irish</td>
<td>35</td>
<td>12.0%</td>
</tr>
<tr>
<td>Chinese</td>
<td>5</td>
<td>1.7%</td>
</tr>
<tr>
<td>Indian</td>
<td>2</td>
<td>0.7%</td>
</tr>
<tr>
<td>African</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Italian</td>
<td>13</td>
<td>4.5%</td>
</tr>
<tr>
<td>German</td>
<td>9</td>
<td>3.1%</td>
</tr>
<tr>
<td>Greek</td>
<td>6</td>
<td>2.1%</td>
</tr>
<tr>
<td>Arab</td>
<td>2</td>
<td>0.7%</td>
</tr>
<tr>
<td>Other (please specify)</td>
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<td>11.3%</td>
</tr>
<tr>
<td>Multiple (please specify)</td>
<td>48</td>
<td>16.4%</td>
</tr>
<tr>
<td>Experienced Stereotyping</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>65</td>
<td>22.3%</td>
</tr>
<tr>
<td>No</td>
<td>210</td>
<td>71.9%</td>
</tr>
<tr>
<td>Decline to answer</td>
<td>17</td>
<td>5.8%</td>
</tr>
<tr>
<td>English as a Second Language at Home</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>34</td>
<td>11.6%</td>
</tr>
<tr>
<td>No</td>
<td>250</td>
<td>85.6%</td>
</tr>
<tr>
<td>Decline to answer</td>
<td>8</td>
<td>2.7%</td>
</tr>
<tr>
<td>Functional Impairment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>43</td>
<td>14.7%</td>
</tr>
<tr>
<td>No</td>
<td>240</td>
<td>82.2%</td>
</tr>
<tr>
<td>Decline to answer</td>
<td>9</td>
<td>3.1%</td>
</tr>
<tr>
<td>Caregiver</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>79</td>
<td>27.1%</td>
</tr>
<tr>
<td>No</td>
<td>208</td>
<td>71.2%</td>
</tr>
<tr>
<td>Decline to answer</td>
<td>5</td>
<td>1.7%</td>
</tr>
<tr>
<td>Music Industry Role (Most Time-Consuming Role)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Musician (Instrumentalist or singer)</td>
<td>106</td>
<td>36.3%</td>
</tr>
<tr>
<td>Venue owner/manager</td>
<td>26</td>
<td>8.9%</td>
</tr>
<tr>
<td>Role</td>
<td>Count</td>
<td>Percentage</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------</td>
<td>------------</td>
</tr>
<tr>
<td>Sound engineer</td>
<td>22</td>
<td>7.5%</td>
</tr>
<tr>
<td>Songwriter/composer</td>
<td>19</td>
<td>6.5%</td>
</tr>
<tr>
<td>Artist manager</td>
<td>19</td>
<td>6.5%</td>
</tr>
<tr>
<td>Promoter</td>
<td>15</td>
<td>5.1%</td>
</tr>
<tr>
<td>Road crew</td>
<td>7</td>
<td>2.4%</td>
</tr>
<tr>
<td>Agent</td>
<td>7</td>
<td>2.4%</td>
</tr>
<tr>
<td>PR</td>
<td>5</td>
<td>1.7%</td>
</tr>
<tr>
<td>Label manager</td>
<td>5</td>
<td>1.7%</td>
</tr>
<tr>
<td>DJ</td>
<td>5</td>
<td>1.7%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>55</td>
<td>18.8%</td>
</tr>
<tr>
<td>Decline to Answer</td>
<td>1</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

*Note: Multiple sexual identity selections were allowed.
Appendix 3: Interview Schedule

As interviewee if they are happy to be recorded and ensure they understand the details of the study, including funding agencies, purpose of study, their role, and the terms of their consent to the study. Advise interviewee that their participation is voluntary and that they may withdraw from the interview at any time without penalty or ill-favour. Briefly describe the interview schedule to the interviewee before beginning questioning. The interview will proceed in four parts. Each part contains one guiding objective (listed at the beginning of each numbered list, below), and a numbered list of probing questions.

Part One: Work and Life History
Tell us about your involvement with music before COVID.

1. What work have you done in the music industry?
2. How would you describe your role/s in the music industry to an outsider?
3. How long have you worked in the music industry?
4. Have you been able to sustain a living through your music work? If not, what other forms of work have you done?

Part Two: Challenges of COVID and Lockdown
Tell us what has happened to you since the lockdown.

1. How has COVID and the Victorian lockdown impacted your music work?
2. Are you finding yourself doing more unpaid activities related to your work?
3. Have you taken on any paid work beyond your usual music industry role(s) since March?
4. Have you been able to sustain yourself through paid work since March? If not, how are you making a living now or what are you doing differently?
5. Have you accessed governmental income support (i.e. JobKeeper, JobSeeker or the $1500 “disaster payment”) or withdrawn funds from a superannuation account since March?
6. Have caring responsibilities impacted on your music work during the COVID lockdown?
7. Have you found opportunities to connect with other music industry workers during the lockdown?
Part 3: Strategies and Planning

Tell us what you plan to do from here.

1. Have you changed your approach to work in response to COVID or the lockdown? How so?

2. Have you found opportunities to develop new skills or methods for working in the music industry during lockdown?

3. Do you plan on changing your approach to working in the music industry after lockdown?

4. Do you plan to continue to work in the music industry after lockdown ceases?

5. If lockdown were to continue until the new year or beyond, would you still plan to work in the music industry?

Part 4: Improving the Industry

Would you like the industry to go back to the way it was?

1. Are there things that could be improved, and if so, how do you think that could happen?

2. What were the biggest challenges you faced before lockdown and how could these be addressed?
Appendix 4: Interviewee Characteristics

All names are pseudonyms with the exception of Jenny Moon, who gave permission for her name to be used.

<table>
<thead>
<tr>
<th>Name</th>
<th>Gender</th>
<th>Age</th>
<th>Role Description</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marcy</td>
<td>Woman</td>
<td>36-45</td>
<td>venue booker, self-employed</td>
<td>15</td>
</tr>
<tr>
<td>David</td>
<td>Man</td>
<td>26-35</td>
<td>road crew (production management)</td>
<td>15</td>
</tr>
<tr>
<td>Royal</td>
<td>Non-binary</td>
<td>26-35</td>
<td>lighting (mainly corporate)</td>
<td>6</td>
</tr>
<tr>
<td>Rain</td>
<td>Non-binary</td>
<td>36-45</td>
<td>DIY musician &amp; music teacher</td>
<td>25</td>
</tr>
<tr>
<td>Elise</td>
<td>Woman</td>
<td>26-35</td>
<td>musician &amp; music teacher</td>
<td>6</td>
</tr>
<tr>
<td>Jacob</td>
<td>Man</td>
<td>26-35</td>
<td>promoter</td>
<td>10</td>
</tr>
<tr>
<td>Carly</td>
<td>Woman</td>
<td>26-35</td>
<td>DJ, label manager, lots of roles</td>
<td>3</td>
</tr>
<tr>
<td>Lexi</td>
<td>Woman</td>
<td>26-35</td>
<td>lighting</td>
<td>20</td>
</tr>
<tr>
<td>Hunter</td>
<td>Man</td>
<td>56-65</td>
<td>event staging/production</td>
<td>40</td>
</tr>
<tr>
<td>Jenny Moon</td>
<td>Woman</td>
<td></td>
<td>production company director, primary carer</td>
<td></td>
</tr>
<tr>
<td>Mike</td>
<td>Man</td>
<td>56-65</td>
<td>musician</td>
<td>45</td>
</tr>
</tbody>
</table>
## Appendix 5: Differences between Melbournian and Regional Victorian Respondents

<table>
<thead>
<tr>
<th></th>
<th>Melbourne</th>
<th>Victoria Outside Melbourne</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-35</td>
<td>47%</td>
<td>31.1%</td>
</tr>
<tr>
<td>36-55</td>
<td>42.5%</td>
<td>42.2%</td>
</tr>
<tr>
<td>56+</td>
<td>10.5%</td>
<td>26.7%</td>
</tr>
<tr>
<td><strong>Gender Identity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Woman</td>
<td>44.1%</td>
<td>37.8%</td>
</tr>
<tr>
<td>Man</td>
<td>50.2%</td>
<td>60%</td>
</tr>
<tr>
<td>Non-binary or GNC</td>
<td>5.3%</td>
<td>2.2%</td>
</tr>
<tr>
<td><strong>Sexual Identity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Heterosexual</td>
<td>69.6%</td>
<td>86.7%</td>
</tr>
<tr>
<td>LGBPOQ</td>
<td>30%</td>
<td>8.9%</td>
</tr>
<tr>
<td><strong>Ethnicity Status</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethnic Minority</td>
<td>22.7%</td>
<td>13.3%</td>
</tr>
<tr>
<td>Non-Minority Ethnicity</td>
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<td>86.7%</td>
</tr>
<tr>
<td>Not Codifiable</td>
<td>0.8%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Caregiver</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>25.1%</td>
<td>37.8%</td>
</tr>
<tr>
<td>No</td>
<td>73.3%</td>
<td>60%</td>
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