

Preparing for portfolio careers in Australian music: setting a research agenda

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Abstract

In the twenty-first century, Australian musicians increasingly maintain 'portfolio' careers, in which they combine diverse employment arrangements and activities. Often, these incorporate industry sectors outside of music. This career pattern is widespread but not well understood, largely because of the limitations of existing research. The lack of knowledge about musicians' work and careers means that Australia currently may not provide appropriate and effective policy, funding, initial training and continuing career support across the diverse music sector. This article discusses existing research relating to the careers and skilling needs of musicians in Australia, and outlines a targeted agenda for further research that has the potential to inform stronger alignment between the requirements of building sustainable music careers and musicians' education and training.

Key words: potfolio careers, music education and training, music industry.

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Introduction

Although the word *conservatorio* as a place for learning music goes back to sixteenth century Italy, the establishment of most early conservatoires took place at the beginning of the nineteenth century when the demands of European classical music (especially orchestral repertoire) warranted dedicated virtuoso training (Abeles et al., 1995, pp. 6-9). But what capabilities do musicians need in order build vibrant, sustainable careers in twenty-first-century Australia? Are they still the same? How can higher

education contribute to the development of these capabilities?

In order to answer such questions it is imperative to review recent survey and census-based research into the Australian music labour force, especially regarding what is known about the distinctive portfolio career patterns of professional musicians, and the key challenges they face in building a music career. Considering the implications of these challenges for the professional development of musicians, it is possible to outline structural, policy and professional learning support conducive

to supporting this new reality. This assists in constructing an agenda for targeted research to address the significant gaps in knowledge relating to musicians' career patterns, roles, contributions and skills. Promoting a deeper understanding of key elements in the Australian music sector's cultural and economic fabric in this way yields the potential to improve sectoral health and vitality. Tertiary music education is a key player in this 'musical ecosystem'.

The Australian music sector and its labour force

In 2010, the International Federation of the Phonographic Industry (IFPI, 2012) estimated the global music industry to be worth US\$168 billion, up from \$132 billion in 2005, in spite of the collapse of the conventional record industry. Whilst the IFPI data categories had changed slightly between the two data collections, the figures clearly indicate increased activity. This increase aligns with economic reports from several countries including the UK, US and Australia, all of which suggest increased household expenditure on entertainment. Although these positive reports indicate multiple new opportunities for musicians, they must be considered alongside trends that are fundamentally changing the way in which musicians 'do business' within the music, creative and cultural sectors.

The full range of music activities and industries that make up the Australian music sector is estimated to represent a turnover in excess of seven billion dollars a year (Music Council of Australia, 2009; cf Guldberg & Letts, 2005). Music in turn forms part of a much larger industry sector known collectively as the *creative industries*. There is no internationally agreed definition for the creative industries, but in general they are understood to include industries "that are based on individual creativity, skill and talent with the potential to create wealth and jobs through developing intellectual property" (British

Council, 2012). Music also falls within the *cultural industries*, which are more broadly defined to include categories such as film and video, motion pictures, television, art galleries, libraries, archives, museums, botanic gardens, music and theatre, performing arts venues, and services such as education. Musicians, therefore, work within a large and diverse industry sector; and some of their creativity, specialist and generic skills are transferable across and beyond the creative and cultural industries (Bennett, 2008a).

Based on IBISWorld estimates (Centre for International Economics, 2009) the creative industries are reported to have contributed \$31.1 billion to the Australian economy in 2007-08 with a long-term growth rate exceeding the economy as a whole. IBISWorld estimates include related activity in performance and composition, recording, film and television, education and training, venues, manufacturing, trade and technology, research and information, and health.

Estimating the scale and characteristics of the music workforce itself is problematic because national census collections, including the Australian census, record only the main source of income for each respondent; hence much of the activity undertaken by musicians with diversified work patterns is not captured. Despite this, Australian National Census figures are the most comprehensive data collection available and they provide valuable baseline data on which to base more complex and intensive workforce research. For example, census data published in 2008 (Australian Bureau of Statistics) indicate that 2.9 million people in Australia undertook paid and unpaid work in culture and leisure activities in 2006, and a further 2.5m people participated in culture and the arts as hobbyists.

Deeper analysis of census data, and allowing for the prominence of part time and casual work, suggests that in Australia it is likely some 167,000 people currently earn some income from music (Bennett, 2012). We can also estimate that, given the Australian population is projected to rise to 33

million within the next 50 years (by the year 2060), there will be at least 220,000 people earning part of their income from music and approximately six million people undertaking paid work in culture and leisure. Whilst this workforce will stem from formal and informal education and training in music, business, law, marketing, health, and an array of other disciplines, formal music study is of particular interest to researchers seeking to analyse the music workforce itself, and so it is to this that we turn next.

Despite classical music's reputation as the more stable of music genres, Australia has less than 600 full-time orchestral performance positions and only 48 full-time company positions for vocalists. Moreover, many of these positions are held by incumbents for many decades, and operate in an internationally competitive environment. Approximately 60% of Australia's orchestral musicians come from, or trained, overseas; and approximately 50% of the singers with Opera Australia at any one time were born outside of Australia (Bennett, 2008b). In other genres and sectors –with the exception of music education– the chances of full-time work are even more remote.

Research undertaken across the Australian music sector in 2009 suggests that approximately 0.4 per cent of Australia's 167,000 musicians hold full-time performance positions with a single employer, and that even the majority of this 0.4 per cent engage in multiple activities beyond their full-time roles (Bennett, 2012). In short, life as a musician is complex and diverse, requiring skills and knowledge far beyond those that could realistically be offered within even the most informed, most applied formal music course. The question is what can be learned from a detailed study of the characteristics and dynamics of work and career for musicians; how such an undertaking can be realised; and what benefits more complete data might bring to policy, initial education and training, and professional learning and support.

Music careers and changing markets

Twenty-first-century influences on the Australian music industry such as digitisation, globalisation and deregulation mean that whichever part of the sector musicians work in, they must navigate new contexts and business models and possess new and diverse skill sets (cf Draper, 2009; Rogers et al., 2004; Throsby, 2001). Such social, cultural and technological developments have arguably caused more rapid and profound change than any recorded in musical history (cf Schippers, 2010, pp. xv–xviii), making the career path into and through a music career more challenging than ever before.

It is useful to consider some examples of what this changing climate means in practical terms for Australian musicians. First and perhaps most obvious is the impact of new technologies. Not surprisingly, the trade value of music sales has declined at a rate consistent with the global decline in trade value. The trade value of digital music sales, however, is estimated to average 21% of sales worldwide and continues to grow (Canadian Heritage, 2010) as consumers enjoy “the benefits of technological progress with better and cheaper ways to digitally store and replay music than ever before” (Masnick & Ho, 2012, p. 25).

Not surprisingly, the recording industry is one of several areas of the Australian music sector experiencing significant economic volatility. As the availability of high-quality recording equipment enables home studios to produce recordings at a fraction of the costs incurred even 20 years ago, musicians are increasingly circumventing mainstream distribution channels and selling direct to a global audience. The warnings of this were clear more than a decade ago:

In the new era of globalisation by digitisation, the music industry is at the fore. As in many other industries, global corporations have emerged to create and exploit global music markets. But the music industry goes further than almost any other: the entire transaction of purchasing and delivering music can now be completed in non-material form over the internet (Letts, 2000, n. p.).

The market itself has led the way in the intervening decade: revenues from recorded music have fallen steadily as the music industry has experienced the “rapid emergence and growth of broadband internet services, data capable mobile networks, portable digital media players and online music stores” (Knowles, 2008, p. 1). In Australia, the decrease in major label CD sales accelerated over the 2005-2008 period with ARIA sales reports showing a huge fall in singles and album sales from a peak in 2001 of \$628,625k to just \$369,217k in 2007: a drop of around 40% (ARIA, 2008).

Other areas of the music sector, such as live performance, enjoy fairly stable economic growth (CIE, 2009), and the general trend would appear to be towards an emphasis on performance and touring as well as innovative use of the Internet. However, financial viability depends for many musicians not only on talent, but also on their own ‘portfolio’ skills such as in advertising, social media, merchandising, venue management and ticketing arrangements. Increasingly stringent liquor licensing and sound regulations have also had a disproportionately large impact on small venues with less staff available to take on the administrative workload.

While countless Australian musicians enter this diverse industry with dreams of stardom and riches, or simply the expectation to earn a living by performing, many appear to be struggling to build sustainable careers. The most recent iteration of the Australia Council’s periodic survey of professional artists, entitled ‘Do you really expect to get paid?’ (Throsby & Zednik, 2010), suggests a trend of underemployment among Australia’s estimated 16,000 professional performing musicians, reporting that 20% of these musicians experienced unemployment during the previous five years and that 31% worked in additional jobs entirely unrelated to the arts.

Portfolio careers in music

It appears that out of necessity many Australian musicians take on 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 (Bridgstock, 2005). About six in ten musicians maintain their own businesses (Cunningham & Higgs, 2010), and this freelance work is supplemented with a range of other employment activities. This distinctive career pattern is referred to as a ‘portfolio career’ (Cawsey, 1995). Like a share portfolio, the portfolio career allows the musician to balance higher and lower risk options – for instance, to meet artistic needs through freelance performing work, while simultaneously engaging in more financially stable part-time work in music education or arts management (Bennett, 2010).

The work musicians undertake may include performing, teaching, composing, managing, administering and other music-related activities (Hannan, 2003) across diverse music genres such as classical, pop, world music and jazz. Music-related work may also be supplemented by additional concurrent work activities – the ‘day job’ – in order to maintain financial viability (Throsby & Zednik, 2010) or to ensure that their creative time and energy is not driven solely by the whims and tastes of the market.

Despite a plethora of reports on the societal and economic benefits of the creative arts and the broader cultural industries, little of this research documents the work practices, orientations, attitudes, career trajectories and skill requirements of individual creative workers (Thompson, Jones & Warhurst, 2009); and remarkably little detailed information is available about the exact configurations of musicians’ portfolio careers, or how these careers unfold over time. However, recent analysis of Australian Census data (Cunningham & Higgs, 2010) suggests that musicians’ employment destinations can be quite diverse. While most university-level music students view performing as their eventual work destination, there are comparatively few performance jobs in music. Indeed, one third of all music-related jobs in Australia are ‘support’ jobs – concerned with managing, accounting for,

and technically supporting, music (Cunningham & Higgs, 2010).

Of the non-support music jobs, half are 'embedded' outside the music sector entirely. These embedded musicians may be doing jobs like music production and dissemination utilising the online realm (cf Draper, 2008), music education (cf Mills, 2004), or social work in the not-for-profit sector (cf Bartleet, 2008). However, no research has so far been conducted into which roles this embedded one-third of the music workforce occupy; what economic, social or cultural value they add; or how they got there.

Skills for music careers

Music is the most broadly offered university arts discipline in Australia, with some 159 undergraduate and 120 postgraduate courses enrolling an average of 5,500 students (DEST, 2011). Some have argued that these students are being prepared for nineteenth rather than twenty-first century careers and working environments (Letts et al., 2011; Schippers, 2004). The core of higher degree course provision continues to be disciplinary expertise and technical skill (e.g., "how to play my instrument well"), and these skills remain central to success in the contemporary music career. In spite of an increasing number of courses and pathways to develop industry awareness and skills, overall higher music education has not kept up with recent transformations to the Australian creative economy and music sector (Hearn & Bridgstock, 2010). While university music majors are very much in the minority when it comes to vocational music training – the 2006 Australian census reported that 215,000 Australians had completed some form of formal music training – these shortcomings are hardly compensated by the growing number of Technical and Further Education (TAFE) courses at pre-vocational, vocational and degree level, often with a strong focus on generic skills.

Bridgstock and Hearn (cf Bridgstock & Hearn, 2012; Hearn & Bridgstock, 2010; Bridgstock, 2012) have identified four 'meta-capabilities' for career success among twenty-first-century creative professionals. The capabilities are: disciplinary agility; social networking capability; creative enterprise; and career self-management. We outline each of these capabilities briefly in turn.

Disciplinary agility. Disciplinary agility is the ability to traverse different disciplinary perspectives and terminologies. It is involved in the interaction, translation, and synthesis of knowledge between and among disciplines and sub-disciplines. Disciplinary agility has been documented in professional musicians working across and between genres, a range performance sites including online and digital environments, and 'embedded' settings in the community and in education (see Bartleet et al., 2009; Harrison, 2010).

Social networking capability. Social network capabilities are those involved with building and maintaining relationships for mutual benefit in work and career (Forret & Dougherty, 2001). Being social network capable involves what McWilliam and Dawson (2008) refer to as network agility – the ability to develop and navigate social networks in a strategic and enterprising (and yet genuine) manner. In the twenty-first-century context, social network capability includes the capacity to exploit the affordances of social media and other digital platforms.

Enterprise. These are the skills associated with outward focus – identifying and taking advantage of creative opportunities, and adding value through music work. Broadly speaking, enterprise skills are those involved with the application and distribution, as opposed to the generation or making, of creative work. This includes skills for venture start-up and management (whether for social, commercial or cultural ends), and a cluster of enterprise sub-skills to do with creative opportunity recognition, design, risk management, resilience, and effectuation (Duening, 2010).

Career self-management. Unlike the 'traditional' linear career pattern in which an employee works their way up the corporate ladder, and in which professional development activities are driven by a department of human resources, a much greater imperative exists for portfolio career musicians to recurrently obtain or create employment for themselves, and otherwise manage their own careers in an ongoing way (Arnold & Jackson, 1997). Bridgstock (2011) demonstrated an empirical link between the propensity and ability to career self-manage, and positive career outcomes among emerging and established creative professionals, including musicians.

Effective career self-management occurs through an ongoing interaction of reflective, evaluative and decision making processes, based on ongoing information gathering about self and the world of work (Bridgstock, 2009). It can also involve a significant degree of adaptability and self-reinvention. Underpinning the ongoing process of career self-management is the development and maintenance of an adaptive career identity. The 5,500 students enrolled in tertiary music programs enter university with expectations of a high-level, full-time performance career (Lebler et al., 2009). The disparity between these expectations and the realities of the profession described above leads to identity conflict for students in the course of their tertiary studies. Identity, according to Palmer (1998, p. 13) is "an evolving nexus where all the forces that constitute my life converge in the mystery of self ... identity is a moving intersection of the inner and outer forces that make me what I am." The inner forces described by Palmer relate to the motivation of students to study music in higher education settings (see Harrison, 2011), while the outer force comprise the industry expectations and realities.

The workplace context ideally helps to define the components of training. As musicians become more experienced, they learn the adaptive skills in order survive and work in music. Identity is

therefore shaped by experience, training and context. A significant aspect of context relates to range of tasks musicians will perform. According to O'Connor (2005), musicians' work is complex, multidimensional and subject to change in an era of globalisation and shifting paradigms. Becoming a musician involves taking on a variety of personally and professionally challenging roles. O'Connor also notes that the demanding nature of a music career requires more than merely technical skills (O'Connor, p. 12). The process of locating and acquiring the complete range of core qualities required for a successful musical career are the product of environment, behaviour, competencies and beliefs that contribute to identity (Harrison, 2008).

Future prospects are determined by the interface between behaviour, competencies and beliefs to create identity. Students (and consequently graduates) therefore need to be trained to develop the skills and attributes to deal with conflicting and ever-changing career identities in order sustain a career in their chosen profession. With a few exceptions (cf Carey & Lebler, 2012; Gaunt, 2010), this is rarely considered in the structure of training, support mechanisms and on-going professional development for musicians.

A research agenda

There are several key areas for which systematic investigation into musicians' career trajectories, working lives, skill development needs, and other professional support opportunities would be beneficial. These can help identify ways in which the Australian music industry can be scaffolded and developed, and inform the content and organisation of professional training and life-long learning initiatives.

Music career patterns

Perhaps the most obvious knowledge gap arises from the complexity of creative work patterns. To date, survey and census-based statistical collections poorly represent the cultural

sector with regard to both “size and variety of professional identities and employment relationships” (Gollmitzer & Murray, 2009, p. 6). We do not have detailed information about the portfolio career patterns and processes in music, musicians’ social and economic contexts, and the supply chains they operate within (see Cox, Ninan, Hearn et al., 2004). In part, this is because of the sheer variety of scale, economic activity and organisation of the creative sector, which “has yet to be properly mapped and understood, even by the people involved” (Hartley, 2005, p. 26).

Extant survey and census-based research tends to overemphasise the musician’s ‘main job’, and may de-emphasise or ignore completely other employment undertaken in a portfolio career pattern. Because the Australian census only asks about the respondent’s main job, some have suggested that it underestimates the artist population by over 50 percent (Throsby, 2008). National university Graduate Destination data (Graduate Careers Council of Australia, 2011) has likewise been criticised for painting an artificially dismal picture of the employment outcomes of creative and performing arts graduates, because it relies on ‘full-time employment’ as its sole indicator of graduate success, and does not acknowledge the prevalence of the portfolio career in these sectors (Bridgstock, 2009).

Existing research has thus been unable to paint a sufficiently comprehensive picture of the portfolio nature of musicians’ careers so far. In addition, we do not know about how the career pattern unfolds over time, and how musicians juggle and manage their various concurrent and overlapping employment arrangements. We also do not know very much about which roles embedded musicians tend to occupy, what kinds of contributions those roles make, and what career trajectories out of the music sector and into other industries look like.

Skills for music careers

While a number of important capabilities for success in the twenty-first-century music career

have been described and explored empirically, significant questions about skills for the music portfolio career remain. For instance, we lack a sufficiently detailed understanding of the characteristics of an effective social network for music career development, or the processes involved in forming and maintaining such a network (Bridgstock, Dawson & Hearn, 2011). Likewise, there is significant benefit in gaining a more nuanced understanding of the important features of a worthwhile opportunity for creative enterprise in music, so that musicians can learn to recognise them and exploit them.

Further, 50% of Australian musicians are estimated to include work outside of the music sector (Cunningham & Higgs, 2010). It is not clear what the professional skill requirements of this 50% are, although it is likely that they will need to possess a somewhat more diverse skill set than is usually taught in music courses at university, and will also benefit from having disciplinary agility. Research is required to investigate how to meet the skill and capability needs of the embedded music workforce. As soon as this picture becomes more clear, we need to explore whether and how important twenty-first-century creative capabilities such as career self-management can be learned by emerging music professionals, and how higher education can contribute to this endeavour (Hearn & Bridgstock, 2010). We believe this research needs to employ a range of quantitative and qualitative methods, which not only focus on the broader social, cultural and economic dynamics of how portfolio careers operate within the music sector, but also the ways in which the musicians themselves experience these dynamics.

Conclusion

As we have outlined in this article, the life of musicians in twenty-first-century Australia is drastically different from that of their nineteenth-century colleagues. This impacts all aspects of their profession, including the needs for music education and training of music professionals.

What is needed to address this is further research that outlines a detailed and accurate picture of the working lives, career trajectories, and economic circumstances of portfolio musicians in Australia.

This research should examine four key areas in particular. Firstly, it would examine factors that influence the ability of portfolio musicians to create sustainable work practices, and factors that lead to migration or even attrition from the sector. Secondly, it would determine the impact of digital and online environments, and how these environs influence the shape, level of income, and viability of portfolio musicians' work. Thirdly, it would identify gaps in current portfolio musicians' skills development and career support from the perspective of industry professionals. Lastly, it would aim to outline authentic pathways for the development of these skills within both initial training and as a part of life-long learning trajectories.

Such a picture would provide the higher education sector with important information about skills requirements and development needs for portfolio careers in music, thus facilitating a better alignment between the education and training of musicians and industry requirements.

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