Supporting New Zealand musicians: Survey and Focus groups report

UNIVERSITY OF CANTERBURY
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CHRISTCHURCH NEW ZEALAND

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The Research

This research was designed to find out more about the experiences of New Zealand musicians on behalf of the Student Radio Network, and developed out of conversations with James Meharry, the director of RDU, and the Ministry for Culture and Heritage.

An initial focus group was conducted in February 2019 with three musicians in Christchurch to get a sense of their working practices as musicians, and their experiences with different aspects of that practice - performing live, selling and distributing recordings, and promotion. From this discussion we developed a survey that covers several categories of musicians' experience in some detail. The survey was tested by six musicians, female and male, both solo performers and band members, from different genres, and their feedback was incorporated into the questions and overall design of the survey. The final 72 questions ask about musician practice, including income sources, performing and touring; promotional activity, including media coverage; community connections; relationships with student radio stations; and awareness of help and resources. There are a number of open text questions inviting further thoughts on the main topics, and to invite reflection on things like the nature of community and the role of student radio.

The survey was promoted by the Student Radio Network, on air and through social media channels, and was open for responses from June 19 to August 1, 2019. To enter the survey respondents needed to identify as a musician and be over the age of 16. In total 418 respondents answered at least some of the questions. None of the questions required answers, so the total responses for each question are often fewer than 418. Many respondents wrote long and thoughtful comments for the open text questions, and while one remarked that it was 'punishingly long' in the space for final thoughts, many others expressed appreciation for the opportunity to reflect on the issues in the survey, and hope that through it they could contribute positively to the development of the New Zealand music industry.

SUPPORTING NEW ZEALAND MUSICIANS

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Key issues and recommendations

The key issues that arise from the research are about touring; building international profiles; coverage by media; promotional activities, for example on social media; community-building; the support provided by Student Radio; and need for support particularly for female musicians, māori musicians, and disabled musicians. The bigger story that this research sits in is a redistribution of roles in the New Zealand music industry, and the extent to which musicians are doing a significant amount of the work around promoting as well as making music.

The following summary of key points and recommendations include many references to increased funding, but this is not necessarily the only form of support that could emerge from this research. There is considerable scope to improve advice and advocacy, and be responsive to the developing needs of artists, venues, and support networks, across the country, with greater recognition of the needs of musicians based in the regions and in the South Island. Ensuring a sustainable music industry is not simply about access to funding, but supporting production, promotion, performance, and touring so that musicians are able to generate income through multiple sources and develop international connections and income streams.

The following is a summary of findings, followed by some specific recommendations based on these:

Priority areas of support: Two questions in the survey asked about respondents' knowledge of where to get support for aspects of their music practice. The areas for which more than half the respondents indicated they needed help are, in descending order: building an international profile (76.9%), financial support (57.88%), organising a tour (57.4%), and promoting their music (52.54%). These are areas where the respondents don't know who to ask for help, which suggests a need for greater information sharing and support, from agencies and other members of local music scenes.

International Profile and touring: assistance with making connections around the country and especially overseas; advice and assistance with the logistics of touring; and funding, are all identified in the survey responses. While many of the respondents play in other locations around New Zealand, few have yet played internationally, and many identified a need for advice on how to tour. Assistance with building connections with promoters, venues, and other performers overseas seems helpful here. Funding and support for promoting tours in other places could be helpful. While this kind of assistance may currently be available, it appears many musicians, especially in the South Island, don't know who to ask for help. South Island-based musicians particularly identified the cost of getting to the North

Island as a barrier that limits their ability to reach audiences in bigger cities. Stronger networking and support for touring musicians, and understanding of the particular music cultures of different cities are all identified as areas for possible assistance.

There are musicians and producers who maintain an international profile from the South Island while feeling they have little national recognition, and these stories emerged in the focus groups and scoping study. Some additional research to find out what strategies people use to build international connections could be valuable. In the examples from this research, this included community and network building around specific genres, and using a distributor based in the UK.

Promotion: advice and assistance with developing social media strategies, funding to pay for PR and social media promotion. Most musicians are managing their own promotion, and find it difficult to keep up with or to see the value in, social media promotion. Managing their own promotion is seen as a distraction from making music, and a source of stress. Given the role of a social media profile for getting NZ on Air support, some assistance for musicians to reach that level would be productive. Developing a more sustainable profile beyond that point to facilitate touring nationally and internationally, as well as sales and streams, also requires ongoing promotional strategies.

Community: The survey asks about people's perceptions of community in music, and the most common responses emphasised sharing of resources and knowledge, and the ability to connect with 'likeminded' individuals. Most respondents indicated there was not a strong community among musicians in their place of residence, and strategies to develop community could also support promotional concerns and building connections with other places. Responding to these findings could involve identifying spaces and services that are currently effective at building community, and supporting those to expand or replicate models around the country. Several of the focus group participants identified RDU and the SRN as important sources of community, for example.

Venues: It is evident in the survey and focus groups that venues play an important role in supporting community, and are central to musicians' ability to earn money, as performing live is the primary income stream for the survey respondents. There are inconsistencies across the country when it comes to musicians being paid to perform, and there is a wide variety of responses from each location about the range and appropriateness of venues. In Christchurch it is evident that the earthquakes have had an ongoing effect on venues and the scope of the local music scene, as discussed in detail in the focus groups. The participants observed that the ownership and focus of bars had changed in the years since the earthquakes, such that there are fewer opportunities to play and see other musicians play, and a loss of longstanding supportive venues and their owners. Similar themes arose in other cities in the survey, with respondents from Auckland in particular commenting on the loss of performance spaces due to development.

The music scene has traditionally been focused on licensed bar venues, and from the survey responses there is strong support for this kind of venue. However there is also support for other kinds of performance spaces, and for more opportunities to perform in spaces like art galleries and festivals. The focus groups expressed a strong desire for more family friendly performance venues and times.

Venues play a central role in the development of music scenes and careers, and any support for music practice in New Zealand more broadly ought to be responsive to whether there are places for musicians to play, to develop skills and generate income, and what kinds of spaces are available, to expand access to live music and performance opportunities

Media: As the survey was distributed and promoted by the SRN, it is unsurprising that radio was the dominant form of media coverage, with student radio stations and RNZ National the most supportive broadcasters. Music retains a presence in print media, although mostly in the coverage afforded by newspapers, and local newspapers. *The Otago Daily Times* was the most mentioned paper by name for music coverage. The only music magazine mentioned was *New Zealand Musician*, which continues to be highly supportive. Online media, particularly *Under the Radar* and *Music.net.NZ* are also a strong source of support. Given the decline in print music journalism, and the disappearance of music television as a space for promotion, the student radio stations, *NZ Musician, Under the Radar, and Music.net.nz* are the most significant spaces for media coverage.

Additional Challenges: Two survey respondents identified particular challenges emerging from disability. Not only does having a disability make touring more complex and expensive, requiring appropriate accommodation and venues, but dealing with WINZ creates additional barriers. There is scope for inter-agency coordination here.

Funding: Many of the respondents express a desire to be able to earn money from their music, or at least to not lose money by playing, recording and / or touring. However while government funding is frequently referred to in text responses, the most common forms of income referred to in the responses are from performing, and from selling music and music rights. Respondents undoubtedly value NZ on

Air New Music funding, but many of the areas in which respondents expressed a need for support could be well supported with fairly small amounts of seed funding - for mastering, or paying for social media promotion, for example. The data to support this will be available in the full report.

Recommendations for more specific forms of support

The specific forms of support noted here are just suggestions, but they are intended to emphasise that while increased, or any, funding would always be welcomed, many solutions could be developed with some clear support systems and advocacy, and by encouraging and supporting interconnection between musicians, and between musicians and other elements of the music ecosystem.

Building international profile:

- Funding for international promotion - eg radio promotion, inclusion in Spotify playlists, and on other international platforms and networks.

- Advice and assistance with building international connections to facilitate international touring and label support. Facilitating connections with international promoters, venues, other artists, labels and distributors.

- Advice and industry connections for artists around the country that recognises connections to place: how to build a career from Christchurch, Dunedin, and other regions.

Promotion:

- Seed funding and / or advice and assistance for promotion by artists - funding for social media campaigns, advice on how to strategise effective promotion that is often needed to raise profile enough to access other funding but also generate income from live performance and APRA.

- This is an area where other organisations could provide assistance, such as workshops and other forms of support for local musicians developing social media campaigns.

- Funding and/or advocacy for media that proactively support local music: student radio, iwi radio, *New Zealand Musician*, *Under the Radar*, *Music NZ*, local newspapers, RNZ.

Venues:

- Support and advocacy for venue owners who are proactive in supporting local music scenes and cultivate new and diverse forms of music.

- Best practice guidelines for venues and festivals to ensure inclusion of female musicians, māori musicians, and a diverse range of musical practices

- Best practice guidelines for remuneration of performers, and enabling / supporting development of musicians' fanbase

- Funding for all-ages, family friendly venues, and training programmes, and / or advocacy with local councils or other bodies for facilitating these.

Production:

- Seed funding to facilitate higher production values, mastering, etc, to create higher quality recordings for online publishing and streaming services, to build profile before being able to apply for larger amounts of money, and to generate income through sales and streams.

Specific groups:

- Disabled musicians: Advocacy, and access to funding that recognises greater challenges, advocacy with WINZ to enable touring.

- Māori musicians: Greater recognition for reggae from funding agencies - and ensuring recognition of māori artists in funding.

- Female-identified musicians: Advocacy for inclusion, and support for a greater diversity of instruments and roles in bands.

The Student Radio Network:

Student radio stations are clearly strongly connected to their local music scenes, and are seen by the participants in this research, which was developed in partnership with the SRN, as a crucial avenue of support and promotion. Student radio stations are ideally placed to act as advocates for local music scenes, and to support musicians in the places where they live and perform. They are all actively committed to doing these things, but there is scope for the student radio stations to do more, both individually and collectively. This would require a strong commitment to advocating for and supporting the stations, and greater funding.

Some activities that the SRN could do that were identified in the research include:

- Connect local musicians more actively with other centres

- Organise events and tours - connecting local and touring musicians

- Offer gig and event listings for free

- Advise and support musicians' social media promotion, supporting promotion and publicity

- Actively build community, to connect people to each other:

    - For example, meet ups of musicians suggested in focus groups

    - Assist in resource to advocate regionally for other Music agencies interests, as part of building community and networks eg: NZMC, NZ on Air, MMF

- Develop more active tools for feedback on music submitted for airplay

- Grow resources to promote local music through airplay, live to airs, and interviews.

There is a risk that student radio is taken for granted as the entry point for musicians into national and international profiles, but there is scope for the stations to do more to actively support the musicians in their local areas to develop as musicians, to build national connections and profile, and international profiles beyond that. As a distributed network with deep roots in music scenes across the country, the student radio network plays a crucial role in New Zealand music.

Survey Results

1. Survey: Respondents

Of the 418 musicians who completed the survey, the majority were male (73.55%), Pākehā (74.92%), and between 18 and 44 years old (74.18%). Full demographic tables are listed in the appendix.

Most of the respondents play originals only (62.9%), or originals and covers (29.01%). The predominant genres were fairly evenly split between electronic, rock, and 'indie', for which the definition was open to the individual respondents. The electronic section reported here encompasses several different subgenres specified in the survey, and a full breakdown is in appendix 1. Note that respondents were able to choose as many genres as relevant, but the overall spread was represented as follows:

Genre	%	Count
Electronic	16.5	150
Rock	14.8	134
Indie	14.6	132
Other	9.5	86
Pop	6.4	58
Experimental	6.3	57
Funk - Soul	4.4	40
Improvised	4.3	39
Jazz	3.5	32
Hip Hop	3.4	31
Folk	2.9	26
Metal	2.8	25
Noise	2.5	23
Dub -Reggae	2.3	21
Alternative country	2.3	21
Downbeat - Instrumental	2.2	20
Country	1.3	12
Total	**100**	**907**

Table 1: Summary of Genres (select as many as you need) (Q6)

The location spread strongly favoured Christchurch and Auckland, with only a small number of responses from regions outside the student radio centres. The location options reflect NZ local government regions with the addition of Student Radio locations and Hamilton.

Answer	%	Count
Christchurch - Ōtautahi	33.33	129
Auckland - Tāmaki-makau-rau	31.78	123
Wellington - Te Whanga-nui-a-Tara	12.40	48
Dunedin - Ōtepoti	8.53	33
Palmerston North - Te Papa-i-Oea	4.39	17
Waikato	1.81	7
Canterbury - Waitaha	1.55	6
Hamilton - Kirikiriroa	1.29	5
Hawke's Bay - Te Matau-a-Māui	0.78	3
New Plymouth - Ngāmotu	0.78	3
Otago - Ōtākou	0.78	3
Taranaki	0.52	2
Tauranga - Tauranga-moana	0.52	2
Invercargill - Waihopai	0.26	1
Manawatū - Whanganui	0.26	1
Nelson - Whakatū	0.26	1
Northland - Te Tai Tokerau	0.26	1
Whanganui	0.26	1
Whāngarei	0.26	1
Bay of Plenty - Te Moana-a-Toi		0
Gisborne - Te Tai Rāwhiti		0
Marlborough - Te Tauihu-o-te-waka		0
Rotorua - Rotorua-nui-a-Kahu Matamāmoe		0
Southland - Murihiku		0
Tasman - Te Tai-o-Aorere		0
West Coast - Te Tai Poutini		0
Total	**100**	**387**

Table 2: Location of music practice (Q7)

Length of time in the industry reflected a very established group of respondent musicians, with 62.8% of respondents having been "involved in music" for ten years or more (Q8). The options offered were broad, and given the concentration of responses over ten years, a further breakdown beyond that point may have been helpful. This is particularly the case given the number of respondents over 25, as detailed in the appendix.

2. Music Activity

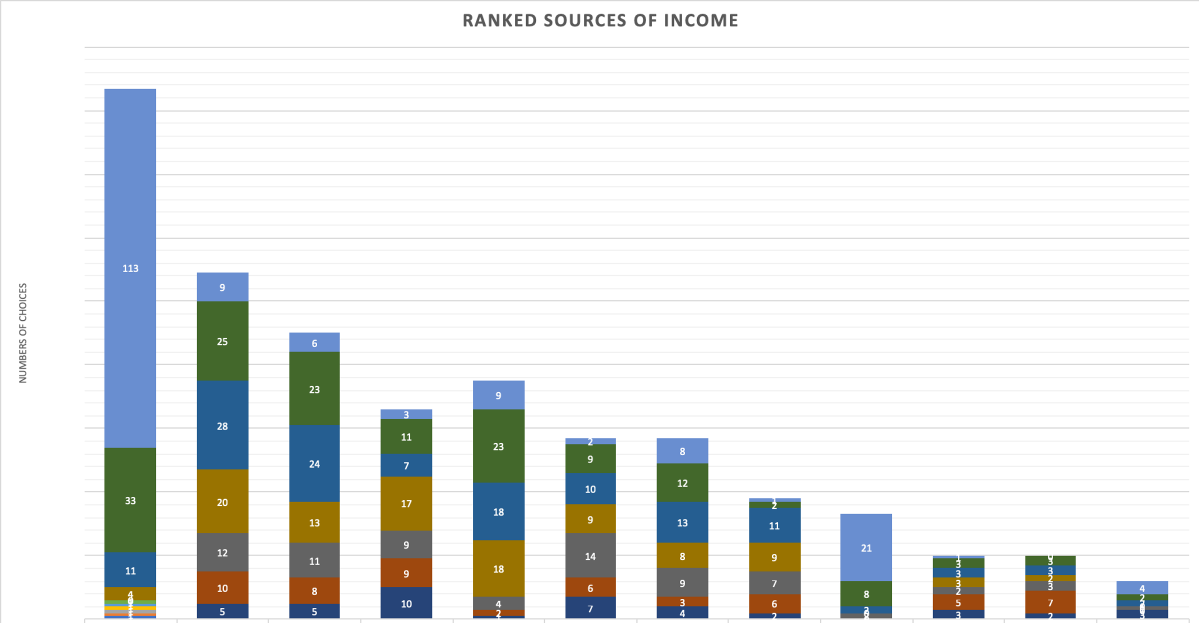
This section of the survey, questions 9-29, addressed a variety of aspects of music activity, including income sources, the distribution of tasks related to performing, recording, and managing other aspects of music practice, venues, and touring nationally and internationally.

In terms of role in the music industry (Q10), survey respondents identified themselves as mostly band members (262) or solo performers (187). Other roles included being a member of a musical collective (75), and work-related roles such as music teaching (47), admin (45), retail (16), venue work (15) and venue management (11), while 95 people selected 'other'. Text entries here included audio engineers, DJs, and promoters. It was possible to select multiple roles, so 751 answers by 377 respondents shows a diversity of roles held. Cross referencing this by gender find that the female respondents are more likely to be solo performers, which was a point of discussion in the female focus group.

Question	Male		Female		Non-binary		Would rather not answer	
	%	count	%	count	%	count	%	count
Solo performer	24.01	103	31.40	38	30	3	14.29	3
Band member	35.43	152	29.75	36	50	5	28.57	6
Member of musical collective	10.96	47	5.79	7		0	14.29	3
Music teacher	6.53	28	8.26	10		0	4.76	1
Venue management	1.63	7	0.83	1		0		0
Venue worker	2.33	10	2.48	3		0		0
Music-related administration	5.13	22	6.61	8		0	9.52	2
Music-related retail	2.33	10	0.83	1	10	1	4.76	1
Other music-related role (identify below)	11.66	50	14.05	17	10	1	23.81	5
Total	Total	429	Total	121	Total	10	Total	21

Table 3: Role in the music industry (Q10) by gender (Q67)

Income received over the previous 12 months reflected a complex combination of sources (Q11). When asked to rank those sources (Q12), performing appears as the greatest source of income with APRA third overall. Notably both online sales (second) and streaming (fourth) just outranked physical media sales in NZ (fifth). While no distinction was made (and may not be easily discernible between online sales and streaming in NZ and overseas, it's likely that these account for a greater number of international sales than that of physical media overseas (eighth). Figure 1 shows the income sources that received more than ten choices and were ranked by more than ten respondents in any one line. A chart of the full results is in the Appendix.



	Performing	online music sales	APRA	Streaming	Physical music sales NZ	Royalties NZ	Merchandise sales NZ	Physical music sales int.	Paid employment	Royalties int.	Merchandise sales int.	NZ on Air
Ranking 01	113	9	6	3	9	2	8	1	21	1	0	4
Ranking 02	33	25	23	11	23	9	12	2	8	3	3	2
Ranking 03	11	28	24	7	18	10	13	11	2	3	3	2
Ranking 04	4	20	13	17	18	9	8	9	0	3	2	0
Ranking 05	0	12	11	9	4	14	9	7	2	2	3	1
Ranking 06	0	10	8	9	2	6	3	6	0	5	7	0
Ranking 07	0	5	5	10	1	7	4	2	0	3	2	3

Figure: Income rankings (Q12)

The following question (Q13) asked about how different music related tasks are carried out, finding that overwhelmingly the respondents are carrying out their own management, promotion, and gear set up themselves. A large minority are also recording themselves and doing their own distribution, although these tasks are the most likely to be paid for. A small majority of people book their own gigs, but that is the task next most likely to be carried out by a music collaborator / bandmate.

Tasks	I have done it myself (%)	Someone else has done it for free (%)	I have paid someone to do it (%)	Aa musical collaborator has done it (%)	I haven't done this in the last 12 months (%)	Total (count)
Setting up gear	70.83	7.6	3.19	13.48	4.9	408
Management	69.74	5.64	2.56	15.9	6.15	390
Promotion/publicity	61.76	9.98	7.36	14.73	6.18	421
Booking gigs	54.38	13.82	3.23	18.89	9.68	434
Distribution	45.07	9.87	16.8	9.33	18.93	375
Recording engineering	43.3	11.48	22.97	13.16	9.09	418

Table 4: Who is carrying out different tasks related to music practice (Q13)

An open text question provided space to add comments about "money and tasks" (Q14). Responses from 37 people focused on a lack of money for musicians in New Zealand and discussed recording and releasing music, performing live, distribution and promotion, and overall issues. In relation to releasing music, several people commented that they do things themselves in order to pay for mastering (one person described spending $500 on mastering in the last year). Others observed the difficulty of making money from streaming services, for example, "The returns from streaming are pitiful, but producing LPs and CDs is prohibitively expensive and the sales aren't worth it unless you are really well known. Virtually impossible to earn a living from music" (male, electronic, Wellington), and "over the past year, with 3-4 album releases (1 of which was on vinyl) I have made under $400 from music" (male, electronic, Auckland).

Respondents gave more detail on the financial issues related to performing live, which is the single most common income stream noted above:

> "There is no measure of the amount of effort that goes into a task compared to return generated. Live gigs were proportionally a bigger earner but they took months to arrange and execute. They weren't profitable when you take into account the work load to make them happen. the return is a few cents an hour pay" (undefined, Christchurch),
>
> "Any shows paying under $300 for a 5 piece band is bullshit" (male, rock, Auckland),
>
> "Venues charge [too] much to play in them, I've noticed that in Europe while touring, the venue will pay the band a flat fee, allow free admission and then make more money on bar sales, students/public in NZ won't pay enough to watch live music especially in a Auckland" (male, Auckland),
>
> "In a nutshell.... for a band that plays originals, basically any monies taken on the door goes straight to the SoundMan. A good night is when you get discounted beers from the venue owner" (male, Christchurch).

These responses highlight the overall low level of income from performing live when taking into account the work involved, but also identify the relationship with venues and audiences. The issue of who actually gets paid emerged again a more general comment about work in the industry:

> "All service providers, including musicians, should expect to be paid unless there are particular reasons why they are not being paid - e.g. they are friends; it is charitable; it is simply promotional. Too often musicians are presumed to be prepared to play for nothing even while all the other parties generate income - the venue, the promoter etc. The presumption should be the reverse, that musicians should expect to be paid for what they do" (male, Auckland).

Comments relating to income in general expressed the sense that there simply isn't enough money, for example "weekly income for all of the above is less than the dole (male, electronic, Christchurch). Others commented on specific costs and a need for other kinds of support, such as "It is very expensive to promote your music in New Zealand. Some sort of centralised agency musicians can access for less than the $2,400 it cost me to promote my album" (female, rock / Indie, Wellington), and "There is little to no support, there's no clear path also as to spend what on what, and also its often not easy finding someone who can help, if you do [they're] expensive, and its hard to find someone who can compete pricing wise" (non-binary, rock/pop, Palmerston North).

Two respondents, very helpfully, pointed out that the actual scope of income is more complex than the survey allowed for, while adding to the generalised sense that musicians themselves are less likely to be paid than other industry roles:

> Two issues with your previous question RE money earned from various sources, and putting it in an order or most-least: This is a complex scenario, because though a large grant may come from NZ on Air or Creative NZ, this is different to 'money earnt'. Of these grants, most of the cash is in fact spent on other people and tasks such as editors, engineers, studio hire, promotion etc. It's not money that actually pays the artist. So in that respect, an $8000 grant from NZ on Air actually pays me less than a $1.6k royalties cheque from RMNZ (Male, electronic, Dunedin).

> Those questions above are a wee bit weird. My publisher promotes my music for synch licensing but I dont pay them to do it until I make money. Same with distribution. By the time the distribution fees have come off what I have collected off streaming (a pittance for 600+ listens a month) I dont get a cent and neither does my publisher. So Im only paying someone to do this stuff on commission. The music has to earn something first (female, Christchurch)

3. Venues

In the scoping focus group participants expressed preferences for different kinds of venues, particularly art galleries and outdoor festivals, and a general dislike of playing in bars. Two questions addressed venue choices, one asking where participants had actually played in the previous 12 months (Q15), and the other asking where they prefer to play (Q16). The type of venue actually played in by most respondents is bars (23.75% of 1001 responses), and these are also the most preferred venues (18.59% of 1189 responses), however this also represents the biggest negative difference between actual and preferred venues. Overall the ranking of actual and preferred venues itemised in table 5 is similar, although outdoor festivals, theatres and art galleries show a higher rate of preference than actual performances.

Venue	Actual: played in past 12 months (%)	Preferred (%)	Difference
Bar	25.37	18.59	-6.78
House party	11.99	11.77	-0.22
Outdoor festival	11.49	16.15	4.66
Radio station live-to-air	10.29	8.66	-1.63
Hall (e.g.: community hall)	9.99	10.68	0.69
Theatre/auditorium	8.79	13.71	4.92

Non-licensed venue	7.99	6.56	-1.43
Art gallery	5	7.57	2.57
Livestream online	3.2	2.86	-0.34
I prefer not to play live	2.8	1.51	-1.29
Other:	2.2	1.26	-0.94
Busking	0.9	0.67	-0.23
Total	100	100	

Table 5: Actual and preferred venues (Q15 and 16)

Cross referencing between preferred venue (Q16) and gender (Q67), male respondents express a greater preference for bar venues than female respondents, and significantly greater than non-binary respondents. In turn, female and non-binary respondents express a greater preference than male for theatres and art galleries. Non-binary respondents expressed a clear preference for non-bar venues.

Preferred Venue	**Male (%)**	**Female (%)**	**M-F difference**	**Non-binary (%)**	**Would rather not answer (%)**
Bar	19.74	15.53	**4.21**	8.33	14.29
Outdoor festival	16.16	16.5	**-0.34**	12.5	17.14
Theatre/auditorium	12.85	15.53	**-2.68**	20.83	14.29
House party	12.32	10.68	**1.64**	8.33	8.57
Hall (e.g.: community hall)	10.6	11.17	**-0.57**	12.5	11.43
Radio station live-to-air	9.27	5.83	**3.44**	8.33	11.43
Art gallery	6.89	9.22	**-2.33**	12.5	8.57
Non-licensed venue	6.23	6.8	**-0.57**	8.33	11.43
Livestream online	2.78	2.91	**-0.13**		2.86
I prefer not to play live	1.32	2.91	**-1.59**		
Other:	1.06	1.94	**-0.88**	8.33	
Busking	0.79	0.97	**-0.18**		
Total	(Total 755)	(Total 206)		(Total 24)	(Total 35)

Table 6: Preferred venue (Q16) by gender (Q67): showing difference between male and female preferences

Another issue raised in scoping the study was the way people are paid by venues, and the financial relationship between venue, audience, and performer. When asked how they have been paid by venues (Q17), a majority of respondents answered that they have received door or ticket sales only, while similar numbers had been paid a prearranged amount, or had played for free.

Answer	**%**	**Count**
Door/ticket sales only	31.89	177
The venue has paid me a pre-arranged amount	26.31	146

I performed for free	25.23	140
The venue has paid me a pre-arranged amount and door/ticket sales	9.37	52
I have not performed in a venue in the last 12 months	7.21	40
Total	100	555

Table 7: Payment by venues (Q17)

Some differences in venue payment practice are more pronounced in a breakdown across the four centres with the highest response rates, where respondents in Christchurch and Dunedin are more likely to both pay for a pre-arranged amount and to play for free than in other centres, and those in Auckland are more likely to play for door sales:

Payment	Auckland		Wellington		Christchurch		Dunedin		National	
	%	Count	%	Count	%	Count	%	Count	%	Count
Pre-arranged amount	22.36	36	26.44	23	**29.10**	55	**29.79**	14	26.31	**146**
Pre-arranged amount and door/ticket sales	11.80	19	**16.09**	14	7.41	14	4.26	2	9.37	**52**
Door/ticket sales only	**34.78**	56	32.18	28	30.16	57	29.79	14	31.89	**177**
I performed for free	22.36	36	19.54	17	**28.57**	54	**27.66**	13	25.23	**140**
I have not performed	**8.70**	14	5.75	5	4.76	9	**8.51**	4	7.21	**40**
Total	100	161	100	87	100	189	100	47	100	**555**

Table 8: Payment by venues (Q17) by location (Q7): bold indicates largest percentage/s for each form of payment.

An open text question asking for further thoughts about venues received 36 responses (Q18). Nearly half of these (15) were about the cost structure of playing, particularly the practice of charging musicians to play (in Auckland, Wellington, and Dunedin), which was not included as an option in the survey, or bands playing either for free or very little money once a door take has been shared around. 11 responses commented on a lack of venues. Some of these were in Auckland, where venues are being "squeezed out by property developers", and "Nearly all the house gig spaces and project spaces in Auckland have been shut down." However this seems a particular concern in Christchurch, where of 11 responses, 5 were about a lack of venues, such as "There seems to be a reducing number of venues in our larger cities that cater to original rock/punk type music at the moment...", and "There's bugger all quality venues in Christchurch". One response specifically related this to the ability to perform and connect with others, as, "I have performed less in the last 12 months than at any time in the previous 15 years and this is largely due to the fact that nearly all of the venues that were supporting the experimental music community in Chch during the last decade have closed within the last few years." Given these kinds of comments, it is unsurprising that some suggestions were made about support for venues, particularly for all ages spaces, for example "In New Zealand, bars that are primarily music venues (Meow, San Fran etc) should be more well supported by the council and places like CNZ. There are not enough small theatre spaces available or feasible to use due to price for music performances" (female, Wellington).

4. Touring

The final set of questions addressing music practice covered touring nationally and internationally, asking about touring experience, the challenges of touring, and things that prevent people from touring. Of 327 question respondents, 65.7% had played in a New Zealand location aside from their own place of residence in the previous 24 months (Q19), and of 314 question respondents, 17.83% had played overseas in the previous 24 months (Q23). Nationally, 118 respondents had played in up to 5 different locations, 31 in 5-9 locations, and 27 in ten or more locations (Q20). Internationally, the UK and European countries collectively are the most common destinations (39 respondents), followed by Australia as the most frequently visited single country (25), the US (13), Japan (7), other countries in Asia (6), and locations in the Pacific (5) (Q24-5). Respondents travelling beyond Australia were more likely to play in additional countries, and the variability in responses to this text-based question means detail of length and extent of tours within countries (including the US) are not visible.

The following word cloud provides a sense of more specific locations identified by respondents:

Figure: Word cloud of international touring desinations (Q25)

Two questions addressed the issues that either make touring in New Zealand difficult (Q21), or prevent touring (Q22), as summarised in table 9. The questions were intended to find out what kinds of assistance could encourage touring, either to address the challenges of people who do tour, or to make it more possible for people who don't. Here the single biggest factor for both groups is cost, but the order of other issues differs. For people who don't tour not having connections in other places is the second biggest barrier after cost. Interestingly, more people who do tour think that people won't come to a show, though for people who don't tour that may be a moot point. Smaller differences are evident in relation to not knowing how to organise a gig somewhere else, and being unable to take time off work. Perhaps unsurprisingly people who don't tour find travel more stressful than those who do. The researchers expected that being unable to take time away from family would be a bigger factor in general, but here it is identified by more of the people who do tour than don't.

Challenges for people who have toured nationally:	**Count**	**%**	**%**	**Count**	**Barriers for people who haven't toured nationally**
It's too expensive	103	**23.79**	22.73	55	It's too expensive
I don't think people will come	83	**19.17**	10.74	26	I don't think people will come
I don't have connections in other places	58	13.39	**20.25**	49	I don't have connections in other places
I don't find it challenging	51	**11.78**			
I can't take time off work	45	10.39	**11.16**	27	I can't take time off work
I don't know how to organise a gig somewhere else	31	7.16	**11.16**	27	I don't know how to organise a gig somewhere else
Other:	25	5.77	**9.92**	24	Other:
I can't take time away from family	19	**4.39**	2.48	6	I can't take time away from family
I find travel stressful	18	4.16	**7.85**	19	I find travel stressful
			3.72	9	I don't want to
Total	433	100	100	242	Total

Table 9: Challenges for people who have toured nationally (Q21), and barriers for people who haven't (Q22)

The 'other' categories for each of these questions included space for text detail. Many of the musicians who don't tour wrote that they just didn't feel ready to tour new music, or find it difficult to organise bandmates. For those who do tour the text responses expanded on points about cost, but also covered the logistics and cost of travelling between the North and South Islands, for example "Two islands is the obvious tough factor, rules out driving and carrying backline etc", and "Christchurch is a lot further away from other main centers. Those in Hamilton/Tauranga/Auckland are an hour or 2 from another city where they can play a gig but travelling to these places or even Dunedin is a much bigger trip." Other issues included concerns about borrowing gear in other places, a perceived lack of appropriate venues, and attracting audiences (two people commented "especially in Auckland"). One respondent developed this point in more detail: "The most challenging thing when playing away from home is that every city/community has slightly different habits/behaviours surrounding gig attendance. For instance, in some towns it's not a problem to draw a crowd on a weekend, whereas in other places it might be difficult. Local public transport can enable or inhibit attendance too. Being aware of local habits, events and transport can help make the right booking."

A similar set of questions was asked about international touring (Q26-7). Here the differences between people who have toured in the previous 24 months and those who haven't are less marked than in relation to national touring, although many fewer respondents had toured overseas. Similar issues are identified - expense, connections, taking time off work, whether people will come, and the logistics of organising a gig overseas. Taking time away from family was a bigger concern for people who don't tour - most likely due to the effects of distance and time required.

Challenges for people who have toured internationally:	**Count**	**%**	**%**	**Count**	**Barriers for people who haven't toured internationally:**
It's too expensive	35	**28.46**	26.40	179	It's too expensive
I don't have connections overseas	25	20.33	**21.39**	145	I don't have connections overseas
I don't find it challenging	14	**11.38**			
I can't take time off from work	14	**11.38**	9.00	61	I can't take time off from work
I don't think people will come	13	10.57	**13.42**	91	I don't think people will come
I don't know how to organise a gig overseas	11	8.94	**12.83**	87	I don't know how to organise a gig overseas
Other:	6	4.88	4.87	33	Other:
I find travel too stressful	3	2.44	**2.51**	17	I find travel too stressful
I can't take time away from family	2	1.63	**4.72**	32	I can't take time away from family
			4.87	33	I don't want to
Total	123	100	100	678	Total

Table 10: Challenges for people who have toured internationally (Q21), Barriers for people who haven't *(Q22)*

Fewer people added text to expand on the 'other' option here. From those who have toured internationally, these comments included 'fatigue' and 'anxiety', but also a more positive observation that "The greatest challenges are understanding the cultures of other people, and coming in to an industry totally detached from NZ, with no connections. The beauty of music however is that all you need to start with is one or two gigs, and it grows from there." The barriers for those who haven't toured overseas were similar to those relating to national touring - not feeling ready, or trying to organise bandmates. Three respondents commented that they have plans for international touring, including one who added "We are playing in Japan next year, its going to cost the band 14k to do 9 shows."

The final question in this section asked about the kinds of support musicians think would make travelling possible, or more possible for them, either nationally or internationally (Q28). The answers correspond closely to the challenges and barriers identified previously. As could be expected, the form of support most identified was funding, but the other options include forms of practical support that could overcome concerns about organising gigs and attracting audiences, including New Zealand and overseas-based promoters, and an 'advocacy' organisation that was left open to interpretation in the questions.

Forms of support that would help touring:	**%**	**Count**
Funding	24.88	261
A promoter based in New Zealand organising it for me	20.21	212
A promoter based overseas organising it for me	17.64	185
Support from an advocacy organisation in New Zealand	14.11	148

Support from other musicians	12.11	127
Support from family and/or friends	5.62	59
Childcare	2.38	25
Other:	1.62	17
I don't need any extra help	1.43	15
Total	100	1049

Table 11: Support for touring (Q28)

The section ended with an open text field inviting respondents to add any other thoughts about touring (Q29). Responses were recorded from 33 people here, of which the greatest number were broadly about the cost of touring (10), and support for touring (10). The most consistent responses commented either that touring is prohibitively expensive, or best treated as a "subsidised holiday" (female, Dunedin). In relation to support, two people commented that disability adds an additional burden on touring for a musician, for example, "I am a disabled musician, and if I wanted to tour overseas, complications with WINZ are a huge disincentive" (male, indie musician, Dunedin). Others had positive experiences with gaining support for touring, for example, "Without Outward Sound it wouldnt be possible. They are all that is good and holy in this dark world" (male, rock musician, Auckland), and "I found a good promoter in Japan who has arranged 3 gigs for me in my upcoming trip to Japan" (male, folk musician, Christchurch). Some commented that attracting audiences is hard in New Zealand, so attracting audiences overseas seems impossible. 7 expressed either plans, "going to play 9 dates in australia this november" (male, indie, Christchurch), "we are targeting China" (male, electronic, Whanganui), or hopes, "dreaming to play sxsw" (male, Otago).

Two responses offered particular critiques of the role of international touring in New Zealand support structures:

> "Touring is my favourite part of being in a band, I feel like NZ music organisations (NZ on air etc...) only pay attention to you when youve had success over seas instead of helping up and coming artists, they should approve grants to acts that arent already establish. Invest in your own country and help struggling artists" (undefined, Auckland)

> "NZ music touring is music export and shouldn't be left to musicians to fumble their way through and fund out of their own pocket." (undefined, Christchurch)

5. Promotion: media coverage

The second section of the survey asked about promotional activity and support from different media. This was intended to gauge which media may be more actively supporting local musicians, the kinds of promotional tasks musicians carry out themselves, and how they feel about that. In considering levels of support for New Zealand musicians the responses here illustrate where support currently comes from, and particular aspects of promotion that may benefit from additional support.

This survey was distributed and prompted by the Student Radio Network, and produced in partnership with the network, so the strength of support by radio indicated in these results is perhaps unsurprising (Q30). Other media are far less supportive, most notably television, on which only 5.9% of respondents had received any air play in the previous 12 months (Q32). Only 33.88% of respondents had received print media coverage (Q34), but 62.09% had received online media coverage (Q36). As a snapshot this has some value, but it could be expected that the amount of print media coverage received by New Zealand musicians has likely declined considerably with the closure of dedicated music magazines and reduction in music coverage by the major newspapers. It would be valuable to be able to compare this over a longer period of time.

Medium: coverage in past 12 months	**Yes (%)**	**No / Don't know (%)**	**Total %**
Radio play	67.10	32.90	100
TV play	5.90	94.10	100
Print coverage	33.88	66.13	100
Online coverage	62.09	37.90	100

Table 12: Media coverage in previous 12 months (Q30, 32, 34, 36)

To understand the media coverage in more detail, respondents were asked to identify where their music had been played or written about. A specific list was offered for radio, which identified that, as indicated above, student radio stations were the biggest media outlet for these musicians, with just over 50% of radio airplay being on a student radio station (Q31). It is worth noting that stations supported by the Ministry for Culture and Heritage through New Zealand on Air provided 70.38% of the radio airplay, on Student Radio, Access Radio, and RNZ stations.

Radio play in last 12 months on:	**%**	**Count**	
The Student Radio Station closest to you	28.52	154	
Any other Student Radio Station	21.67	117	All student radio: 50.19%
On RNZ National	11.48	62	All MCH / NZ on Air supported radio: 70.38%
An online only station based in NZ	10.37	56	
An access radio station	7.41	40	
An international station:	7.41	40	
A Low Power FM station	5.93	32	
A commercial radio station	5.00	27	
On RNZ concert	1.30	7	
An Iwi station	0.93	5	
Total	100	540	

Table 13: Radio play in previous 12 months (Q31)

The survey particularly wanted to surface Student Radio support, but for television, print, and online media open ended text question were used as the options for these media seemed broader. For television only 14 respondents identified an outlet (Q33). Two of these were international, one had music used in a series on 'multiple' channels, 7 had been on TVNZ shows, 4 on TV3 shows, and one each had music played on Māori TV, Rialto, and MTV. Two respondents had identified three different channels each.

68 respondents identified a print media outlet in which they had received coverage (Q35), and for 42 of them this included local newspapers, including the Fairfax and NZME papers, and other regional papers, while many respondents just wrote 'local newspaper'. 8 respondents identified the *Otago Daily Times* specifically, 6 *The Press* (Christchurch), 5 the *New Zealand Herald*, and 3 the *Dominion Post*. Two student magazines were identified (*Critic* and *Salient*), and the only New Zealand print music magazine identified was *NZ Musician*, which provided coverage for 10 respondents. Without historical data to compare this with it is difficult to trace a decline in print coverage for New Zealand musicians but it seems likely to have followed the decline in print music magazines themselves, for instance the closure of *Rip It Up* in 2015.

In contrast, 128 respondents identified at least one space of online coverage (Q37). 33 of these had received coverage on *Under The Radar (UTR)*, and 17 on music.net.nz (*MNZ*), possibly more given the range of different spellings or abbreviations used by respondents. Others include the online versions of local newspapers, social media pages, and a range of blogs. Online spaces are clearly important for local music coverage, and *UTR* and *MNZ* are the most commonly cited of these, more than any of the print media.

6. Releasing music

The next question asked about releasing music for public download or purchase in the previous 12 months (Q38). Of 303 responses to the question, 67.65% had released music, most commonly on 'Bandcamp or similar' (26.03% of releases) (Q39). It is worth noting that of the 5 people who identified a 'major label', three added text detail, which identified "Section 8 records (not sure if this is major or not)", and "DRM", while the third only said 'yes'. DRM was identified by others as a streaming service, but in any case these answers suggest more uncertainty about / unfamiliarity with the definition of 'major' labels than was anticipated in the research design, and that DRM could have been a specific option in the survey.

Music releases in past 12 months:	**%**	**Count**
On Bandcamp or similar	26.03	145
Self-released	22.80	127
On a streaming service	16.88	94
On Soundcloud	15.44	86
On an independent label run by someone else	9.52	53
On an independent label run by myself	8.44	47

On a major label	0.90	5
Total	100	557

Table 14: Music released in previous 12 months (Q39)

In an effort to keep this question streamlined in view of the numerous possibilities for releasing music, the questions don't distinguish between physical and online sales, or between making music available for free or charging for it. Some more insight into this may be offered by cross tabulating this release data with the income sources in Q12, as in table 15, appendix 2. In that table only income sources identified by more than 100 respondents are included, and it finds that releasing on band camp (or similar) is associated with the highest sources of income in almost every category - performance, online sales, physical sales, streaming, and royalties, coming second only marginally to merchandise sales in New Zealand.

7. Promotional activity

Having established that a majority of respondents had released music in some form in the previous 12 months, and had received radio play and online media coverage, the subsequent questions focused more specifically on promotional activity. Q40 asked about particular forms of promotion, and whether respondents had paid for these, or had not engaged in this kind of promotion at all, in the previous 12 months. Table 16 is sorted to identify the promotional activities paid for, but here even social media, as the form of promotion most frequently paid for (28.22%) was used by many more for free (60.63%). Online advertising on non-social media sites is the only form of promotion more likely to be paid for than not, but by a small number of respondents.

Promotion activity in past 12 months	**Yes – paid**		**Yes – unpaid**		**No**			**Total**
	%	**Count**	**%**	**Count**	**%**	**Count**		
Social Media	28.22	81	**60.63**	174	11.15	32	100%	287
Posters	27.24	73	**38.06**	102	34.70	93	100%	268
Online (not social media)	**13.62**	35	4.67	12	81.71	210	100%	257
Flyers	12.88	34	**21.97**	58	65.15	172	100%	264
Radio	9.89	27	**46.15**	126	43.96	120	100%	273
Print media advertising	6.90	18	**9.96**	26	83.14	217	100%	261
Email list	4.56	12	**29.66**	78	65.78	173	100%	263
Television advertising	0.39	1	**2.35**	6	97.25	248	100%	255

Table 16: Promotional activity in previous 12 months: bold indicates most paid or unpaid form of promotion

The following question (Q41) asked how much money was spent on promotion, in a range from $1-$99 to 'More than $1000'. Table 17 shows the responses sorted from largest to smallest. Cross referencing these responses against each of the promotional activities shown above in Q41, finds that the people who primarily paid for social media advertising fell in the $1-99 range, while those who spent $300 and above were more likely to use multiple promotional channels, and the 17 who spent more than $1000 did so across all possible media, apart from television. No one identified paying for television advertising.

Money spent on promotion in past 12 months:	%	Count
$1-99	32.61	75
$100-299	18.26	42
I don't know	16.52	38
$300-499	10.43	24
More than $1000	7.39	17
I would rather not say	6.09	14
$500-799	5.65	13
$800-1000	3.04	7
Total	100	230

Table 17: Money spent on promotion in previous 12 months

Social media is the most commonly used promotional space, which was also indicated in the scoping research. These results indicate it is also the space where most people spend money. In the scoping research participants identified 'keeping up with social media' as a source of stress, so question 42 asked, of those who had used social media for promotion in the previous 12 months, 'who has done it for you?' The majority of respondents did it themselves, while the next most common was a bandmate, followed by venue owners.

Who does social media promotion?	%	Count
Myself	44.44	240
A bandmate	22.22	120
Venue owner/s	15.00	81
Someone did it for free	6.67	36
A friend	6.11	33
My partner	2.04	11
I have paid someone to do it	2.04	11
A family member	1.48	8
Total	100	540

Table 18: Who does social media promotion (Q42)

On what platform?	%	Count
Facebook	48.21	269
Instagram	33.51	187
Twitter	11.47	64
Snapchat	3.23	18
Other	3.58	20

Total	100	558
Table 19: Social media platform (Q43)		

The most commonly used platform is Facebook, followed by Instagram (Q43). Text entry for the 'other' category was predominantly YouTube, but also Reverbnation, Linked In, Google Ads, and 'my own website'. Cross tabulating with Q42 finds that the proportions of platforms used stay largely the same no matter who does the promotion work. Q44 asked how respondents feel about their ability to 'keep up' with social media promotion, offering options relating to how much social media the respondents 'want' to do. This recognises that there is no specific normative amount of promotion a musician 'should' do.

Feelings about social media promotion: I feel like…	**%**	**Count**
I am unable to do the promotion I want	24.83	72
I some of the promotion I want	24.14	70
I do most of the promotion I want	23.79	69
I do all the promotion I want	19.66	57
I deliberately choose not to do any promotion	7.59	22
Total	100	290
Table 20: Feelings about social media promotion		

Table 20 sorts the responses from largest to smallest, and finds that 48.97% of respondents either feel unable to do the promotion they want, or feel like they do some of the promotion they want. 43.45% feel like they do most or all of the promotion they want. The fairly even spread between 'unable', 'some', and 'most' suggests that there is scope to develop support for musicians in managing this significant promotional avenue. In cross tabulating between feelings about promotion (Q44) and the people who do that promotion (Q43), it is notable that the people who feel like they do all the promotion they want are also more likely to have other people do it for them - bandmate, friend, someone paid, and someone who does it for free.

A follow up question asked how respondents feel about promotion more broadly (Q45), and found the largest percentage of 279 responses was 'I don't like doing it but I do I because I have to'. Promotional work seems like a burden in these responses, with the sense that it is additional labour for musicians.

Feelings about promotion in general	**%**	**Count**
I don't like doing it but I do it because I know I have to	45.88	128
I don't mind it	24.01	67
I enjoy it	21.15	59
I don't like doing it and so I don't do it	8.96	25
Total	100	279

Table 21: Feelings about promotion

The final question in this section asked about knowledge of particular promotional outcomes, focused on radio play and music sales (Q46). This found that the respondents in general have a sense that they know how to do the basic tasks relating to the outcome of promotion - getting music played on the radio, selling music online, and selling physical copies of music. While a majority of respondents answered positively to these prompts, there is still scope to aid understanding of all of these areas. In the context of this survey, promoted by the Student Radio Network, the percentage of people who say they don't know how to get music played on the radio is surprisingly high.

I know how to…	Yes %	Count	No %	Count	Total
get my music played on radio	**57.84**	166	42.16	121	287
sell my music online	**73.17**	210	26.83	77	287
sell physical copies of my music	**61.75**	176	38.25	109	285

Table 22: knowledge of promotional outcomes

The section ended with an open text invitation to add "any other thoughts about promotion" (Q47). 35 respondents added comments here, which expanded on the challenges of social media promotion, the reduction of other media outlets, and general reflection on the value and difficulty of balancing promotion and creation of music.

Three comments specifically related to the decline in print music media, such as "There are no magazines dedicated to NZ Music, which is limiting, so social media has to fill the gap" (male, electronic, Wellington), and "Real shame that the Press in CHC no longer do their Friday Music section. (hence I cancelled my subscription)" (undefined, Christchurch). One comment on the relationship between social and print media put this is in some more context in relation to music practice:

> "Social media is effective but absolutely robs you of your mental and emotional bandwidth. It used to be that you sorted your print promotion ages in advance (given the turnout deadlines etc) and then all you had to do was then develop your show. I find I am sitting on my computer all the time having to be instantly available - its not a headspace I can manage if I'm trying to be creative" (female, Wellington).

That social media has an emotional and creative cost was a common theme, for example:

> "This is the hardest part for me and other introverts" (male, Wellington),

> "Have not got the time. $$, Work, Time and other parts of music writing 1st priority" (male, rock, Canterbury),

"I hate social media but am struggling to come up with a better way to reach my audience as I am completely independent (no label, mgmt, team, anything)" (female, folk, Auckland),

"Promotion is good but there is not silver bullet, so its a lot of time on research on finding out what to do instead of making music" (non-binary, rock/pop Palmerston North),

"Paradoxically it's become harder to find and maintain your audience since the arrival of social media. The number of channels you need to cover has exploded, and it all takes you away from the core task of creating music. Without a decent budget or a willing team of supporters, it's all but impossible for a small outfit to get any momentum going" (female, indie, Whanganui)

Some respondents identified particular aspects of support that would be helpful:

"Support networks in NZ mainly exist for music that is already relatively well promoted - this seems odd" (female, Auckland),

"Promotion is the aspect of music that I have always struggled the most with. I am terrible at self-promotion and hate doing it. Having someone else promoting my music would be the single most beneficial form of support I could receive as a musician" (non-binary, electronic, Christchurch)

"Social media advertising moves quickly - and it is hard to keep up and do it effectively. Advertising is expensive - and often unaffordable. There is no watchdog for music industry services - how do we know the people we pay will do a good job?" (male, Wellington),

"Cutting through noise is difficult, as is getting in touch with and getting through gatekeepers (radio and streaming playlisters, website editors, reviewers etc etc etc). Personally I feel with such a small population NZ (underground/non-mainstream) artists need to look international for their creative living to be sustainable (i.e. they need to achieve a profile that exists beyond NZ media). But there is little infrastructure that might enable them to do that. The government funding for new music is great, but I wonder if there is a gap in terms of enabling or even facilitating the promotion of that content and reaching the broadest possible audience (international & domestic)" (male, electronic, Wellington)

One respondent highlighted a paradox of promotion in a somewhat competitive environment:

"The biggest difficulty with promotion is the first group of people you have access to promote your music to is other musicians and they are trying to promote too so everyone is trying to promote to people who are more focused on their own music" (male, rock, Christchurch)

This section on promotion was designed to gauge what promotional channels musicians use, and get a sense of how they use those channels. It was clear from scoping the research and testing the survey that social media is a significant promotional channel, but without historical data it is difficult to know what that has replaced. The bigger story that this research sits in is the redistribution of roles in the New Zealand music industry, and the extent to which musicians are doing a significant amount of the work around promoting as well as making music. The responses to people's feelings about promotion suggests there is scope here to provide some kind of support.

8. Community

The next section of the survey focused on community, and following on from the scoping research this included questions about being able to see other musicians perform, playing support for touring musicians, open ended questions about the meaning of community, and a number of questions about forms of support.

The musicians in the scoping focus group expressed that contact with other musicians as audience members and while playing support is an important aspect of developing community and building networks across the country. For the respondents as a whole, when asked "Are you able to see other musicians perform in the place where you live?" (Q48), only 24.5% answered "less than I would like" or "never". 34.36% answered "as much as I'd like to".

Are you able to see other musicians perform in the place where you live?	**%**	**Count**
Yes, but could be more	41.58	121
As much as I want to	34.36	100
Less than I would like	23.02	67
Never	1.03	3
Total	100	291

Table 23: Seeing other musicians perform (Q48)

Crosstabulating by location brings out some differences between the main centres. Table 24 finds that respondents in Auckland are the most able to see other musicians as much as they want to (45.12% of Auckland respondents), while those in Christchurch are least able (26.21% of Christchurch respondents). Christchurch also had the highest percentage of respondents who can see other musicians less than they would like to (30.10%). As will be apparent in the focus group discussion, musicians in Christchurch have experienced a significant change in venues since the 2010-2011 earthquakes.

Are you able to see other musicians perform in the place where you live?	**Auckland**		**Wellington**		**Christchurch**		**Dunedin**		**Palmerston North**	
	%	**Count**	**%**	**Count**	**%**	**Count**	**%**	**Count**	**%**	**Count**
As much as I want to	**45.12**	37	40.48	17	26.21	27	30.43	7	30.77	4

Yes, but could be more	41.46	34	42.86	18	42.72	44	**47.83**	11	53.85	7
Less than I would like	13.41	11	16.67	7	**30.10**	31	21.74	5	15.38	2
Never					**0.97**	1				
Total	100	82	100	42	100	103	100	23	100	13

Table 24: Seeing other musicians perform (Q38) by location (Q7)

The next question ask about venues specifically: "Q49 - Do you think there are enough venues to play in and see other people play in the place where you live?". Nationally the response was fairly positive, with 47.42% of 291 respondents choosing "There are a few appropriate venues in a good range of sizes," and 58.42% in total identifying ‘a few’ and ‘lots of’ appropriate venues.

Do you think there are enough venues to play in and see other people play in the place where you live?	**%**	**Count**
There are a few appropriate venues in a good range of sizes	47.42	138
There are some appropriate venues but not of the right size	21.65	63
There are some venues but not appropriate for my music	18.21	53
There are lots of venues that cater for all sizes of gigs, including ones appropriate for my music	11.00	32
There are no venues	1.72	5
Total	100	291

Table 25: venues (nationally) (Q49)

Venues to play in and see others play in:	**Auckland**		**Wellington**		**Christchurch**		**Dunedin**		**Palmerston North**	
	%	**Count**	**%**	**Count**	**%**	**Count**	**%**	**Count**	**%**	**Count**
There are a few appropriate venues in a good range of sizes	46.34	38	45.24	19	**51.46**	53	43.48	10	69.23	9
There are lots of venues that cater for all sizes of gigs, including ones appropriate for my music	**19.51**	16	16.67	7	5.83	6			15.38	2
There are some appropriate venues but not of the right size	18.29	15	23.81	10	18.45	19	**43.48**	10	7.69	1
There are some venues but not appropriate for my music	14.63	12	14.29	6	**22.33**	23	8.70	2	7.69	1
There are no venues	1.22	1			1.94	2	**4.35**	1		
Total	Total	82	Total	42	Total	103	Total	23	Total	13

Table 26: Venues (Q49) by location (Q7): strongest answers in bold.

When broken down by location, Auckland respondents are again the most satisfied with venue availability, with 65.85% in total identifying ‘a few appropriate venues and ‘lots of venues.’ Christchurch respondents most clearly identified having ‘a few appropriate venues' (51.46%), but also gave the biggest response to "There are some venues but not appropriate for my music" (22.33), but also to "There are a few appropriate venues in a good range of sizes". Dunedin respondents are least satisfied with venue availability overall, with no respondent identifying 'lots of venues', and an even split between 'a few' and 'some'.

Question 52 specifically asked about the sense of community respondents feel with other musicians, using a 'Net Promoter Score' on a scale of 1-10, where 0 corresponds to no sense of community, while 10 corresponds to a strong sense of community. The Net promoter Score divides the answers into 3, based on the strength of feeling, rating answers from 1-6 as 'detractors', 7 or 8 as 'Passives', and 9 or 10 as 'Promoters. Table 27 shows the results for all 289 respondents, and then broken down into the five main centres. The two centres with the fewest respondents, Dunedin and Palmerston North, rated the highest for community, having the fewest detractors and most promoters. Auckland has a greater percentage of promoters than Wellington or Christchurch on this scale, although the majority of Auckland respondents were still detractors, while Wellington respondents were the most passive. Of all of the centres Christchurch respondents rated the lowest overall sense of community, with the most detractors, and fewer passives, while Wellington had slightly fewer promoters.

Sense of Community: scale 1-10	**National**		**Auckland**		**Wellington**		**Christchurch**		**Dunedin**		**Palmerston North**	
	%	**Count**	**%**	**Count**	**%**	**Count**	**%**	**Count**	**%**	**Count**	**%**	**Count**
0-6: Detractor	**48.44**	140	**46.91**	38	38.10	16	**57.28**	59	31.82	7	15.38	2
7-8: Passive	36.33	105	33.33	27	**52.38**	22	32.04	33	**40.91**	9	**46.15**	6
9-10: Promoter	15.22	44	19.75	16	9.52	4	10.68	11	27.27	6	38.46	5
Total	100	289	Total	81	Total	42	Total	103	Total	22	Total	13

Table 27: Sense of community (Q52) by location (Q7): strongest answers in bold.

Q53 was an open-ended question asking 'What does community mean to you?' intended to gauge the elements that may contribute to the responses above. There were 217 answers to this question, and the most common themes were 'support', 'sharing', 'like-minded', and a collective endeavour. 112 answers referred to versions of support, including musicians supporting each other by coming to gigs, raising each other up and promoting each other, and also to the public attending gigs - supporting musicians by showing up. 31 responses referred to sharing in some form - sharing gear, ideas, knowledge, sharing promotions on social media, and having 'shared space' to gather and learn from each other. 30 answers referred to having 'like-minded' people around, including friends, and people to talk about music with, perform and collaborate with. 28 answers discussed a community environment more generally, as being one where people show up for each other, and there is a collective sense of creativity. These categorisations were made based on the first idea expressed in an answer, and many of them overlapped with each other so that these responses in particular generate a sense that the respondents wish to be part of a supportive collective endeavour in which their musical friends and collaborators show up for each other and share their gear and knowledge.

Some representative comments about this include:

"A sense of community means togetherness. Supportiveness. Across genders, genres, cultures, practises. Access to music making for ALL and not only for the privileged. Thats community in music. When people from all backgrounds are fully able to participate in a musically enriched life, if they so wish to."

"Having a group of like-minded musicians with whom I can perform, collaborate and socialise in a context where there are good, supportive venues providing us with lots of opportunities to perform and see each other performing. Venues play a crucial role in facilitating community in music. Whenever there are one or more venues actively supporting my community of musicians I feel a really strong sense of community but when the venues aren't there the community dissolves and I lose track of everyone and only retain a vague sense of community because of having been involved with music for so long."

"Mutual support, and transparency with industry knowledge. Musicians often feel they are the only one to "not know" someone or something that is helping other musicians in the industry. A smaller community sometimes feels more competitive, especially with getting the good gig or knowing the "right" people, and knowing the opportunities may be too slim for one to be too vocal or open with this knowledge. Real community is when this information is readily available for anyone, and musicians don't feel they have to compete for opportunity or contacts."

"Camaraderie, going to see other people's bands, playing with other people in other bands, lending gear, being respectful of other people's gear, being supportive, helping to record and promote others, not being a dick when it comes to promotion or picking big nights to play on."

"Here in Wellington, RadioActive.FM has created a great sense of community, and peppers local music through the airwaves every hour of every day. I wonder if we can do more with our student stations - pay a bit more to stations to create written content, reviews, what have you, and build up their websites. This may make up for the still existing gap in music journalism. Love the more recent emphasis on young women in music, also there has bee more inclusion of LBGQT communities, I'm thrilled about that. but we have not included as much Pacific and ethnic communities, there is more potential in building our music communities. ;-)"

9. Support

Questions 56 and 57 asked about respondents' sense of being able to access particular kinds of support for aspects of their work as a musician. Question 56 covered general kinds of support - financial, emotional, and mental health, and question 57 addressed tasks more specific to musical careers - promoting, recordings, organising a gig, organising a tour, and building an international profile.

I know where to go for…	Yes		No		I don't think I need help		Total	
	%	Count	%	Count	%	Count		
… mental health support	48.53	132	34.93	95	16.54	45	272	100%
… emotional support	45.22	123	39.71	108	15.07	41	272	100%
… financial support	28.21	77	57.88	158	13.92	38	273	100%

Table 28: Support 1 (Q56)

As table 28 shows, a majority of respondents are unsure of where to go for financial help as a musician, but are more confident in getting emotional support, and perhaps more surprisingly, mental health support. The people unsure about emotional and mental health support are still a large proportion of the overall respondents for that question. A breakout based on gender shows very little difference in these categories.

The tasks more directly associated with music show more strongly identifiable needs, as in table 29:

I know who to ask for help with…	Yes		No		I don't think I need help		Total	
	%	Count	%	Count	%	Count		
… recording music	71.74	198	15.94	44	12.32	34	276	100%
… organising a gig	57.40	159	31.05	86	11.55	32	277	100%
… promoting my music	41.30	114	52.54	145	6.16	17	276	100%
… organising a tour	35.02	97	57.40	159	7.58	21	277	100%
… building an international profile	16.61	46	76.90	213	6.50	18	277	100%

Table 29: Support 2 (Q57)

The respondents have the greatest confidence in knowing who to ask for help in recording music, followed by organising a gig, but a minority of respondents know who to ask for help with promoting music, even fewer for help with organising a tour, and only 16.61% know who to ask for help with building an international profile. Cross tabulating by gender again produced little difference here, but cross tabulating by location found a greater need for help expressed by respondents from Christchurch for recording music and organising a gig, and significantly so for organising a tour (only 28.28% of respondents answered yes). In relation to building an international profile, 21% of respondents from Auckland answered yes, which was significantly more than Wellington (15.38%), Christchurch (16%), and Dunedin (13.04%) (See Appendix Table 29(a)).

10. Student Radio

The final section of the survey asked about student radio in particular, as the research was supported and distributed by the Student Radio Network. It is perhaps unsurprising that a significant majority of respondents feel that student radio is relevant for them and their music (82.97%), and have had music played on a student radio station (75.09%). A majority has also been interviewed by student radio stations, and feel supported by them.

	%	Yes Count	%	No count	%	Total Count
Student radio is relevant for me and my music	82.97	229	12.32	34	100	276
I have had music played on a student radio station	75.09	208	24.91	69	100	277
I feel supported by student radio	62.36	169	37.64	102	100	271
I have been interviewed by a student radio station	58.12	161	41.88	116	100	277
I don't know what student radio is	4.71	13				

Table 30: Support by Student radio (Q59, 60, 61, 62)

Cross tabulating these responses by location, respondents from Christchurch expressed the lowest levels of support from student radio in these terms (Appendix, table 30(a)). Of 99 respondents to these questions from Christchurch, only 65.66% had music played on, and 51.52% had been interviewed by, student radio. A sense of being supported by student radio was marginally lower than the national rate at 61.22%, although 59.09% of 22 Dunedin respondents expressed that they felt supported by student radio. In Christchurch only 76.77% of respondents felt that student radio is relevant for them and their music, compared with 89.74% of 39 respondents in Wellington, and 100% of 13 respondents in Palmerston North.

There were two open-entry text questions about student radio at the end of this section, asking (Q63) Is there anything you think your local student radio station could do to help you develop as a musician? and (Q64) Is there anything you think the Student Radio Network (all of the stations together) could do to help you develop as a musician? 153 people answered each of these, and as the answers overlapped they will be discussed together here.

84 responses expressed appreciation for the support of student radio. These ranged from simply saying 'no', to statements like "they're awesome", to more detailed answers, such as:

> "I've been supported really well in my "career" by both RDU and bFM, they've made it easy to have my music played and have been incredibly helpful in helping promote when we've had things to promote and talk about. I don't think there's anything else they can do. Live to airs. On air interviews. Playing the music. I've had help with all of these."

> "Radio Control is awesome. They play my music, and they've had my band play in the student lounge, recorded it and live-streamed it. That was so helpful with promotion."

> "I think there is currently a good balance between the work I have to do to benefit myself as a musician, and the support I get from student radio."

Because the questions asked about things student radio stations could do to help respondents develop as musicians, there was a range of suggestions that were critical of the student radio stations. These included themes such as:

- Reducing rates for promoting local music - cheaper advertising, not charging for gig guide listings, and using social media to support local acts
- A recurring critique is that it can be difficult to get responses to emails and to song submissions. These respondents didn't specify any particular station in this respect.
- 26 responses were variations of 'play my music'

There were some very detailed suggestions about ways the student radio network could support local musicians more effectively, with 28 responses that discussed how the stations could be more connected and support musicians across the network. These may be summed up in the following comment:

> "Student radio and RNZ are the only stations that have played my music. It is crucial to emerging and experimental musicians in Aotearoa. I feel a bit out of touch with what student radio is doing these days, but reflecting on these questions about people needing help with organising gigs, mental health, etc. I wonder if the radio station can assist there? Organising workshops, promoting support services, etc? Also wondering how there can be more connection between venues, bands and radio?"

11. Success

To finish this discussion, two of the open text questions from earlier in the survey are transposed here. These asked 'What would New Zealand 'success' look like to you, for your own music practice?' (Q54), and 'What would international 'success' look like to you, for your own music practice?' (Q55).

There were 236 responses to Q54, describing what New Zealand success would look like. The majority of these referred to income (84 responses), with most of the respondents simply expressing a desire to be able to live off making music, or at least cover the costs of making music, or simply not lose money by making music. Many of these answers expanded on what that might look like – by being able to tour regularly with reasonable audiences (ranging from 100 people to 'booking out the Powerstation'). While some answers referred to government funding, the majority linked financial success with the ability to earn money from performance and sales, for example:

> "Regular online sales & gigs enough to cover costs of gear, production and distribution of the music. For me if I could comfortably do something like press releases to vinyl and cover costs and know the vinyl would sell I'd feel like the market is heading in the right direction."

> "Getting paid to play, getting songs on the radio and getting royalty checks and being treated like a real business."

46 responses referred to playing and recording music more than the money that may be earned, identifying specific festivals or venues they would like to play, numbers of sales they'd like to make, and simply having an audience for their music live, and recorded. These are closely related to the 44 answers referring to 'recognition', which is described as being written about by *Under the Radar*, being invited to play gigs in other parts of the country, to have their music known by others, and, as in one example, moments such as "Someone drives past and sticks their head out the window of their car and yells "mate, you rock!"". 22 responses identified specific numbers of sales and streams, ranging from 500,000 plays on spotify, to selling 50 records, or simply being played on radio, TV, and other spaces. 16 responses emphasised 'creative growth' in some form, along these lines: "Never being content, Always striving to be better and staying humble. Touring constantly."

Considering 'International success' encouraged 230 respondents to reach further than above (Q55). Here the responses were more evenly spread, primarily between 'touring', 'recognition', and 'money'. 47 respondents described touring internationally without losing money, and building connections with other musicians, potential collaborators, audiences, and promoters. 49 responses referred to recognition, either simply to be known, or being able to tour, collaborate and be signed to international labels because of being known. Recognition and touring are connected to sales of music and merch, and being paid by international promoters. Money was most specifically mentioned in 47 responses, in similar terms as 'New Zealand success', but on a bigger scale – touring without losing money, or becoming rich from selling out venues and being able to work with major producers and collaborators.

The following comments are representative of the responses describing international success:

> "International success would look like being able to consistently play good gigs overseas no matter where, being able to headline at larger venues in New Zealand, being featured on places like Rolling Stone & NPR, touring through Europe and America, being able to make a good living financially off my music, and feeling a sense of security that I don't have to get a "real" job, also being able to make actual money from YouTube, radio, and streaming services"

> "Being funded to do a tour, and lots of people came to the shows, and we didn't lose any money. And no one missed their flight, and no one got sick, and we were all happy and we got to eat at a range of nice vegetarian restaurants, and stay in hotels :)"

> "being able to travel freely/play smaller festivals and not be in debt forever."

"Being on sold out festivals, on tour constantly, overseas recording in larger studios, having writers/producers help make songs, getting paid a actual healthy amount to pay off a mortgage and enough to support a family, and retire with"

Focus Groups, July 2019

Two focus groups were carried out in Ōtautahi Christchurch in order to understand in more detail the experiences and challenges faced by female musicians and māori musicians in the city. These were semi structured, following a question guide that reflected the overall framework of the survey. Initial questions asked about the participants' current role in music and a brief history of their involvement in music. Going into more depth, the participants were asked about aspects of music practice they find particularly challenging, challenges they feel they have specifically faced as women and as māori in the Christchurch music scene, and how they navigate those challenges. They were asked how they feel about performing as women and as māori, if they feel a sense of community with other musicians, and what that means, whether their music gets played on the radio, how they feel about promotion, and what kinds of support they would find helpful for their music practice.

The focus group participants have had many different roles in the local music scene. Four women participated in the first group, facilitated by one of the honours students who co-designed the research. The women have variously: played in bands with men, played with women, performed solo, Dj'ed, and MC'ed; they have all either played electronic instruments or sung, or both; and they have had other roles in the local music scene such as editing music zines, working in student radio, hosting radio shows, and teaching music. In the māori group there were five participants, four male and one female, who whakapapa to Ngāi Tahu, Waitaha, and several North Island iwi, and a male facilitator (Ngāi Tahu) who also plays drums in several indie rock bands. All of the participants are vocalists and musicians in a range of hip hop, dub, roots, and reggae groups, while one is also a producer and record label owner.

The focus groups created space to discuss specific challenges identified by the participants. In discussion these related to genre, identity, recognition, promotion, and the particular challenges of changes to venues in post-quake Christchurch. The participants in both focus groups have all been involved in making music in Christchurch for a number of years, and many are strongly established in the city, with family, employment, whakapapa, and other commitments that mean moving to Auckland or Wellington to build a career is not a priority. This means the discussions highlight the particular issues faced by musicians who wish to pursue careers or sustain a music practice away from the centres of the New Zealand music industry.

Challenges: Female musicians

For the female musicians, working within a male-dominated music scene is a central challenge, and this was most often expressed as a desire to work with more female musicians, and to be given more recognition by male musicians and promoters. Specific issues include being the only woman in a band line-up, or even the only woman in the room while on stage at a gig; the pressure to perform and present in a certain way, which can be enjoyable, but is also not shared by male colleagues; the lack of female producers and tendency for women to be vocalists in bands or solo performers, limiting the apparent range of female presence in music scenes; and the difficulty of participating in the scene while growing older and / or having children:

> "the downside of the whole community thing is that when you're a bunch of guys making music with each other, and you're putting on a show, you look at your friends who are a bunch of guys in bands and you get those bands to play, right? And that's so… it just becomes a self-fulfilling prophecy."

> "Sometimes I'm at a gig, I'm the only woman there you know? Playing a gig. It's 10 o'clock at night and I'm the only woman in the room…. Most of the people that came up with me have had children now, don't go out, you know? And so there's a whole – I very rarely go out to a gig and see women of my age or older playing…. [But] It is so amazing when you go to a show and you see a woman on stage and you see how the women in the audience react to her. And you just love it and get so excited and inspired, like whatever type of gig you go to. I've seen it so many times. And […] young women are like starved here in Christchurch for people on stage that they can identify with…"

> "We even have these events, they're called Red Zone Battles – this like, battle event where it's MC versus MC just a freestyle battle. And you look around and it's always dudes. Like, it'd be a good 80/20 type thing. And even if a female maybe featured on the roster, it's like: "Woah, she's dope for a female". You know?"

> "unless you're making a conscious effort to be a contributing female in the arts and tautoko or support other females and other women around you and making the conscious effort to be aware of that, you just kinda get thrown to the wayside. Because it is a male dominated industry."

> "I don't actually want to go to those spaces because they don't really make me feel good and there's no one there that I'm like – that I connect with. Just seeing the line-ups for gigs, it's just: dude dude dude dude dude."

Solutions to the low representation of women in local music focused on supporting other female musicians, and encouraging greater commitments from other bands and venues to ensure women are included in gig line ups. At the moment the participants feel that the onus is on women to continually speak up for representation, which is tiring. For example, one commented in relation to a particular male-centred gig, "I just thought, I could make a comment here, which I generally do, like: "Where's the women at?" And then I thought – I'm fucking sick of it, man. I'm sick of being that squeaky…I sound bitter now." There was consensus that men also need to speak up, for example, a suggestion that venues could be more proactive in refusing to book all-male lineups, and that male musicians could ensure that there are women on the bill when they play.

However responsibility for identifying female performers and bands who could be included in gigs also cannot fall solely to other women, as participants have found when raising the issue of representation to male peers. Raising the profile of female performers so that venues, promoters, and other performers can more easily seek women out themselves is a priority here, and a number of approaches were suggested for this. One is a list the participants knew of, which was created a number of years ago with details of female performers. They suggested this could be maintained and circulated more broadly as a resource for promoters and other bands. They also discussed the value of organising gigs and festivals with all-female lineups, to prove the scope of performers, and address the claim that there are not enough women to book. Alongside increasing the profile of female performers, the participants emphasised the need to support each other, and suggested 'meet up' type events to just network and connect with others in Christchurch.

While increasing the profile of, and support for, female musicians was identified as a key issue, the participants of the first focus group also observed the narrow range of roles fulfilled by women in the music industry in New Zealand and internationally. They observed that women tend to be the singers in bands, and are seldom found in production:

> "I think, it's like, on the international stage as well though – it seems to be everywhere. Because when I was working [in a European country], we were put into different studios every week. And not once did I get put in a studio with a chick producer. I don't even know if there were any chick producers. It's just all guys…. And in the song-writing three day events–it was kind of funny because if there were girls, we were the singers not the songwriters."

The participants had several ideas about how this tends to happen in mixed-gender groups. Some of this was identified as about instrument choice and role modelling, as in this discussion between all of the participants:

> Because if you think about it as a female, some people, I don't want to say most, but we want to be at the front…. usually girls end up being a singer…. And guys, are the ones who are choosing the drums and the keyboards and guitar, and being producer…. But maybe it's because there's more...
>
> …There's more females doing that particular role, and it's assumed that women want to be that, and so they do it.
>
> … and then they are the front person of the thing, or their own artist in their own right.
>
> [.… so then] you see someone on stage singing as a woman and you think that's me, I can do that, that's the female role.

The participants also identified an impulse to smooth things over for male band members:

> "… all the guys that I know who play music are quite introverted, and so even though they're on stage with a guitar or something they're still quite shy, so I think women, we grow up in this kind of role of just making everyone comfortable, or whatever our role is, so that I think sometimes women in a band end up being in the front of the band or something like that, whether they're singing or not, because we just know how to do that in life, and guys kind of don't know how to do that on stage."

There is a clear need identified here to encourage women into a wider range of roles in music, through mentoring, training, and support. However as above, the responsibility for raising the profile and range of women's roles in music can't simply fall to women, for example, as male band members also need to be prepared to step forward and enable women's roles in bands to expand.

Challenges: Māori musicians

Challenges identified in the second group focused on the participants' identities as māori musicians in Christchurch, but also the perceived lower status of reggae and roots music in the South Island. The participants identified Christchurch as being "overwhelmingly Pākehā," and for those from the North Island this made the city, at least in the 1990s and into the 2000s a place where "You don't want to be a Māori caught down here. You know what I mean? You might get smashed in the square or something, you know?" Building musical community was important in finding a place here, as one participant observed to another, "It was always sort of like that until early 2000s I think that's when we came down and we met up with you guys and you guys were the only ones doing reggae and sort of like touching the whole dub thing out here." While the city remains overwhelmingly Pākehā, the participants identified a "a lot of diversity of culture in Ōtautahi". However they perceive music audiences as being very segregated, where even within the reggae scene, one participant observed that while there was little support for a recent gig by pasifika reggae group the Runtingz Family, "In Christchurch you've got the sound system thing, you've got Subtle and Eyez Down, it's very Pākehā - you're not gonna see a Māori person almost at their gigs, but it's reggae. But there's just this segregation still. It's still present. It's kind of a historical segregation."

Racism in relation to reggae in particular is perceived to go further than the Christchurch music scene, however, as in this exchange between all of the participants:

> The struggle for reggae is really interesting because if you look at who are some of our biggest export bands: Freddies, Katchafire, Black Seeds, who have been going from the start and are still going, they are almost our biggest bands –
>
> Legacy yeah.
>
> And then you have a look at the festivals, and this is sort of more the North Island, the big festivals, One Love, East Coast Vibes, they are all reggae festivals. And people in the North Island, the support for reggae is huge, but the industry is not [...] who gets funding [...] who are the gatekeepers of the industry and what agendas do they have?
>
> But do they have their own awards at the awards ceremony for strictly reggae?
>
> There's roots.
>
> Yeah, it's roots, it's not reggae.
>
> I guess what I'm just saying is, it just feels to me like, is it racism? Straight up?
>
> Oh yeah. Masses.
>
> Straight up
>
> Of course it is. It can't be anything else.

Community and Venues

All of the respondents identified a lack of community and broader music industry connections in Christchurch that makes maintaining a music practice challenging. When discussing community the participants referred to the value of specific venues, and of connecting and working with other musicians. The earthquakes changed the musical context of the city, alongside its physical fabric. Participants in the māori focus group in particular, both male and female, keenly felt the loss of the pre-quake music scene:

> We can all remember how awesome it was obviously pre-quakes. Not a day would go by where you couldn't go watch live acts somewhere randomly. You know you could go out there and there was something going everywhere, you could do it almost every day. And obviously that was a big kick in the teeth for us, you know. And we can come back from it and stuff as well but then politics get involved. And then nothing happening for so long.

The particular features of the city's music scene before the quakes were a more centralised hub of venues around Sol Square and Poplar Lane, and the dedication of specific owners to maintaining a live music scene. The longest standing venue for local musicians was the Dux de Lux in the Arts Centre:

> When I started putting on gigs we had Dux De Lux, which was the ultimate small venue for upcoming bands. Most bands in Christchurch probably did their first show at the Dux, or if not, some of their earlier – [Inaudible – multiple voices sharing experiences all at once] – exactly. So that was a real place for live music in Christchurch and it's not a big venue. Touring bands would play elsewhere but The Dux was really the place that supported the local community and gave everyone a lot of first opportunities and we don't really have that now.

Other important spaces were focused around particularly supportive personalities:

> Another guy that made a really good go of it was Al [Parks] at Al's Bar. He had some good bands in there. […] He tried to push the local bands and he also – I saw Weta there, Trinity Roots, I saw D Dub in there – and it was just a great venue and he made such a good go of it but you have to have lots of energy to do those things…
>
> … And that's it. He's a single person. It's his bar. He had the personality and drive.
>
> My main one that I remember the most [was] Beleza. Julie she really pushed small good music and did her best to chuck roots bands in there or anyone that just wanted to start out. For me, Julie was the grandmother – for my experience – of introducing music into Christchurch and as soon as that earthquake hit again, it was more like a parting of talent and people and venues and then just trying to bring it all back together was quite an undertaking.

Two of the venues most credited with sustaining community in the years immediately following the earthquakes are no longer running: Dux Live (2011-16) and the Auricle (2013-16). The Auricle was an experimental music venue on New Regent Street, which one of the participants (and another survey respondent), identified as sustaining a small but active experimental and noise community that has since lost its nexus. Dux Live replaced the Dux de Lux:

> After the earthquakes when Dux Live opened a whole heap of stuff started happening, especially because there were no other venues, it was sort of like: "Oh we've got something to do" and then town opened and then Dux Live just became dedicated music followers who would go there. Foot traffic stopped. Dux stopped making money and then they had to close. And I think that was a real loss for Christchurch because the music scene collapsed [after the earthquake] and then it came back real quick. Since then, I think there's still a lot of bands and musicians in Christchurch but they've just got nowhere to play.

Both of those venues sustained different parts of the music scene in the years immediately after the earthquakes, but as the city continued to change were unable to remain in business. The earthquakes had a significant effect on spaces to play and to sustain community, such as a shift from individual bar owners to a scenario where:

> Now they've got like Board of Trustees or Board of Directors looking after a conglomerate of bars that want certain bands. I'm probably one of the worst because I'm booking for a venue now and they require certain music. […] I'm not booking DJs, I'm booking bands and duos and solo acts but I really really want to book bands in a lot of places to bring that culture back but it's hard because you're trying pander to these people because at the end of the day it's their business. It's a different environment to try and push music now because there's at least six or eight bars that are owned by a team of people and they all have a very set view on what they want. So it's more about what is available and what can we do to implore them to be able to take on a new genre.

The primary solution emerging from this discussion was a need to make it possible for dedicated music supporters to create new spaces again, of a reasonable size ("the Darkroom is so small, I mean I love that place, but it is just so small"), ideally in a hub of venues that could collectively sustain a wider range of music, and run by individuals who care about the music:

> what we really need is someone like Al who is passionate about local music. And yes, it is a business and they need to make money, but they are also about supporting, building something back up again. Because unless someone does that, if it's just bars putting on music to make money, it's going to be really hard to build it back up from sort of a grass-roots level.

Community with other musicians

Community with other musicians was closely linked to venues in discussion, but also a practice of collaboration and jamming together. These musicians acknowledged that some of their own sense of a loss of community post-quake could be a result of age, and for some, having young families. However they also identified a desire for spaces and ways of working together that could accommodate a wider range of needs and aspects of life, such as:

> "more accessible gigs, in every sense of the word. I'm kind of sick of going out and a band not starting till 11. And people, women especially, who are mothers, I'll go out every now and again, but a lot of mothers can't get to gigs, or have family responsibilities"

> "it would be cool to have more family friendly stuff, like gigs during the day, and if you wanna have a wee beer over here, that's cool, but then you've got your little ones running around, and they're involved in it…. And I think that's hugely what we're missing is opportunities to do life and music with our families, you know, and it doesn't have to be this removed thing, where you can only get out if you have a babysitter that night, you know like, opportunities for us to be amongst our culture with our families."

> "If there's somewhere where kids could go with recording facilities and stuff, I'd be willing to put some time in because that's what I do. I could help. I could teach people my techniques and basic stuff if there was actually something like that where people could come together for that kind of thing. But it's just hard when there's not even that. There's those of us who – I volunteer every week on RDU – there's those of us who are willing to volunteer, willing to put our time in and build community. But if you don't have a place to do it, then… But there's just hope that Christchurch moves, that things happen with the rebuild and you know? "

In these focus groups, as in the survey, the participants expressed a desire to connect with other musicians in different kinds of spaces, not just gigs in bars: through family-oriented events; working with young people; playing festivals and gigs with other female musicians; connecting with māori, pacific, and migrant communities; jamming and collaborating with each other; and networking type events that are not specifically performance-focused. These kinds of community-building activities require appropriate spaces, as well as time and organisational support. There was a strong sense from the focus groups that the earthquakes disrupted the music scene, and that is still rebuilding. For several of the focus group members, RDU provided a focus for community, providing connection with other musicians through working there (two of the participants were former employees of the station), or volunteering as show hosts. When so many venues have gone, RDU has provided stability for the music scene in Christchurch.

Investment / professionalisation

Several of the participants are sustaining a career on a small scale through music, by working with venues, maintaining multiple projects, or teaching. They had strong suggestions about how to develop music practice through knowledge, skills, and some financial commitment. These points identify several areas in which Christchurch-based musicians would benefit from stronger support and advice:

> "I find artists aren't wanting to invest into their craft. Like, ok this is studio time for you, and you can get it mixed and mastered at $80 an hour, which is a great price. Why are you not doing that? Oh because you're content with grabbing your phone and doing your little live feed in your room, and then getting a bunch of likes and a

> bunch of comments, and that validates you, rather than getting something that's mixed down it's mastered, and it's great quality. It's like people are content with just being a bedroom MC, and just dropping a few tracks in their room with their phone."

> "I think [people need] more knowledge and awareness of how much things cost. If you want something on Spotify it needs to be this quality, this standard, and you know you can go for this person mastering, this person mixing. I think there's heaps of levels of cost."

These points identify the tendency for people to use accessible, cheap and low-fi techniques for recording and distributing music, which make recording accessible and can build connections and community, but also limit the ways that music can be heard. Investing in studio time and mastering is not necessarily possible for many people, making advice, assistance, and funding potential avenues for support. Other points specifically reflect the ways in which the music industry doesn't need to be purely North Island focused, but again, musicians need information and support to take advantage of new opportunities:

> "I think giving education to young people about the different avenues now for making money in New Zealand might help too; it might spark some new ideas, creative thinking of how people can tap into making movie soundtracks or – I've made a few soundtracks for TV commercials… Every TV ad has a jingle but who is making them? North Island people. It's like radio voices too – commercial voices. We've got good voices down here but if you watch TV it's all the same voices: North Islanders. Ladi 6 – she's on heaps of ads now and you hear her voice straight away. It's not down here though. I guess that's probably an important one: money income streams – where they actually can come from now. It's really challenging for young people trying to step into the music industry now."

> "You almost don't need a record label anymore. The power of the independent artist these days is if you are really smart with your social media marketing – my problem is, is that I'm not – I don't even use Facebook, I use messenger but I don't use Facebook, so I'm kind of too old for that. I just can't do it. I can't do the social media thing. That holds me back though. So it's like – I think for young people having some clear kind of ideas of where and how the music industry is working because again it's not like you can just go and sell CDs in the record shop and expect to be able to make some money that way. Everyone's got to be really smart. You have to be really smart."

Both of these points reflect a need to network effectively in order to access new opportunities - using effective promotion, and finding new ways of working. This last quote relates to a consistent theme through the focus groups and survey about the challenges of managing social media promotion.

Promotion

Promotion is clearly a necessary aspect of contemporary music practice, but many participants in the survey identified it as something they struggle to keep up with. Survey participants do spend money on promotion, but it is difficult to determine from the survey results how much is spent on what kinds of promotion, and what avenues are the most effective. In the focus groups there was some specific discussion of promotion among the female musicians. One identified this as something she specifically no longer wants to do,

> I'm a hobby musician, so like, I can't call myself a musician, but I've decided I hate promo, and I'm not doing it any more. If I ever play a show again, someone else can do all that stuff.

Others observed that promotion is important, but needs investment, as in this exchange:

> I think there is a real lack of PR agents and the good ones are fully booked so I think that people don't realise how much a PR agent costs...
>
> And how important it is to actually do promotion like people just think making a Facebook event is fine…
>
> I guess that's it when you're starting out, you've gotta be active on your socials and it's the best way forward but it takes money, you need money.

However, in practice several of the participants pointed out that just doing promotion doesn't necessarily guarantee audiences or support from others; that audiences and other musicians can be unpredictable:

> …with the whole social media thing, so you share it, or whatever, and you want a bunch of your mates to share [it] too, and then they scroll on by, and you're like […] I shared your gig, where's your share of mine! … it gets a little bit tit for tat, you know - like scratch my back and I'll scratch yours.
>
> It's haaard. I mean I do that as a job as well, I've always done it. I understand the importance of it, but, it's expensive. There are a lot of barriers. People don't know how to do it and connect with audiences. And then you do all this advertising sometimes, and no one turns up, and so you get disheartened… sometimes you can do a little bit of advertising and it'll pack out, and then sometimes... you'll tell every single person you meet, walking down the street, you'll wear a billboard, or a banner or whatever, and you'll get 5 people.

When artists have funding to do some promotion the results can be very tangible, especially in building an international profile, as in this example, which demonstrates the value of international promotion to extend radio play opportunities:

> National Radio every now and then plays [my label], which is cool. But it's mostly just B Net [SRN]. I get much more radio play overseas. [Album], we got funding for it, so we had a budget for promotion and I put most of my promotional budget into marketing overseas. So, I had a radio publicist who essentially serviced – who does specifically reggae – he's got a database of like 20,000 people. So, our last tune got played in something like eighty different countries, like 450 separate plays and if it got playlisted it only counted as one. With help obviously from the government, I would consider that a pretty large international reach, that was bigger than anything I've produced has had. But locally: three radio stations. A couple of iwi stations, RDU, Radioactive, and Palmerston North student radio. So, way more in Australia – Australia played it way more than kiwi stations. And this is a Māori artist, vocalist, and then myself producing it – more play overseas.

Opportunities for support arising from focus groups

- Venues, spaces, festivals that are able to advocate specifically for female musicians

- Greater recognition for reggae music from funding and other support agencies

- Support for more all-ages, family-oriented spaces for performing.

- Funding and support for promotion - access to advice, assistance, funding to grow profile earlier on in careers

- Support for youth development spaces for music

- Potentially small amounts of money to facilitate higher production values, mastering, etc, to create higher quality recordings for Spotify etc to build profile before being able to apply for larger amounts of money

- Support for Student Radio, RNZ and Iwi radio as proactive supporters of local music

- Funding for international radio promotion

- Support for venues that can cultivate new and diverse musics without being tied to specific business models - Support for the individuals who run venues for the music.

Appendix

Demographic tables

Q 67 Gender:

Gender	%	Count
Male	73.55	203
Female	21.01	58
Non-binary	2.17	6
Would rather not answer	3.26	9
Total	100	276

Q68 Ethnicity:

Ethnicity	%	Count
NZ European	74.92	236
Māori	8.89	28
Would rather not answer	5.08	16
Other European	4.76	15
Other	4.13	13
Pasifika	2.22	7
Total	100	315

Q69 Age:

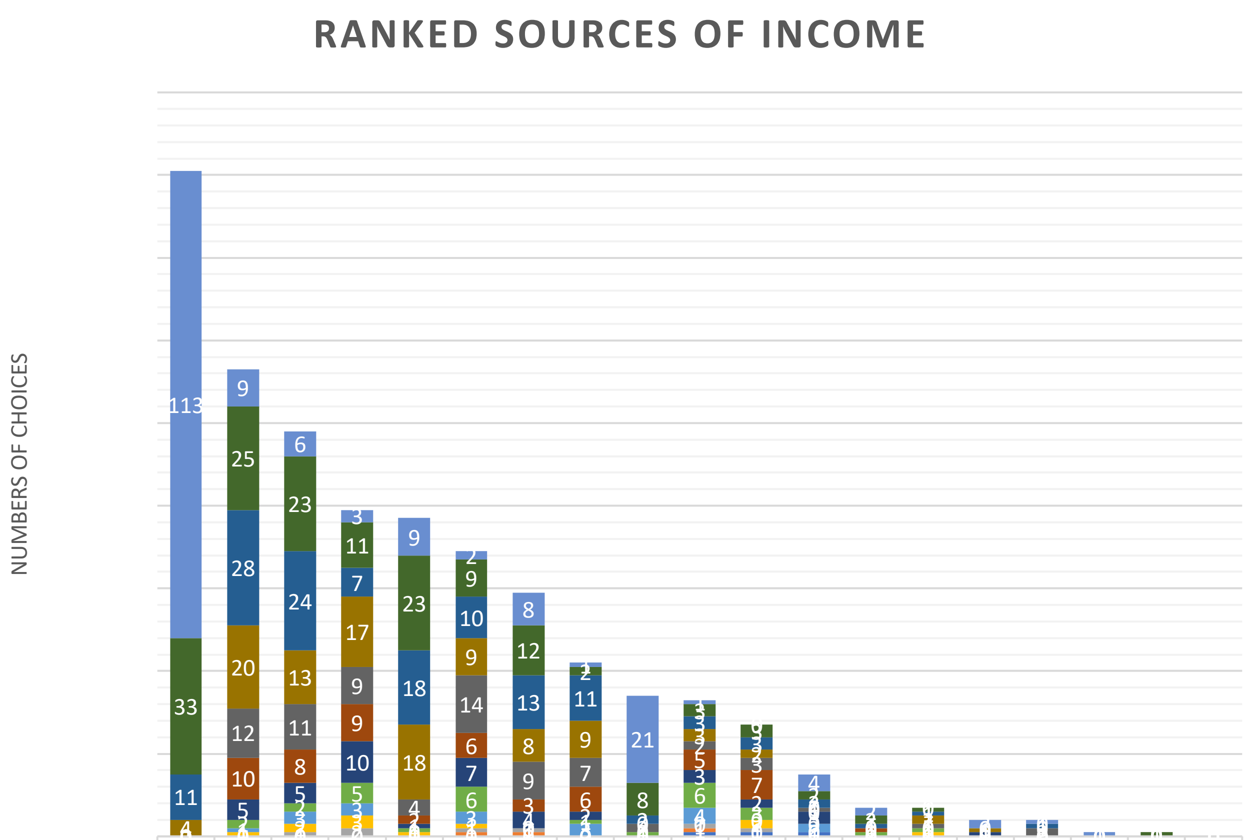
Age	%	Count
16-17	1.09	3
18-24	18.18	50
25-34	33.82	93
35-44	22.18	61
45-54	14.55	40
55-64	8.36	23
65-74	1.45	4
75 or older	0.36	1
Total	100	275

Q6: Genre - Full breakdown of genres summarised in report:

Genre	%	Count
Rock	14.77	134
Indie	14.55	132
Other	9.48	86
Pop	6.39	58
Experimental	6.28	57
Funk - Soul	4.41	40
Electronic - Indie	4.41	40
Improvised	4.30	39

Electronic - House, Breaks	3.97	36
Jazz	3.53	32
Hip Hop	3.42	31
Electronic - Drum n Bass	3.10	28
Folk	2.87	26
Metal	2.76	25
Noise	2.54	23
Electronic - Trap, Electronica, Future Bass	2.43	22
Dub - Reggae	2.32	21
Alternative country	2.32	21
Downbeat - Instrumental	2.21	20
Electronic - Dubstep, Two Step	1.65	15
Country	1.32	12
Electronic - Glitch Hop, Grime	0.99	9
Total	100	907

Q12 Ranking of income sources identified in Q11: full chart as summarised in Figure 1.



	Performing	online music sales	APRA	Streaming	Physical music sales NZ	Royalties NZ	Merchandise sales NZ	Physical music sales int.	Paid employment	Royalties int.	Merchandise sales int.	NZ on Air	NZ Music Commission	Other rights agencies	Creative New Zealand	Crowd funding	Other Government agency	Other non-government agency	Te Māngai Pāho
Ranking 01	113	9	6	3	9	2	8	1	21	1	0	4	2	0	2	1	1	0	0
Ranking 02	33	25	23	11	23	9	12	2	8	3	3	2	2	1	0	0	0	1	0
Ranking 03	11	28	24	7	18	10	13	11	2	3	3	2	1	1	0	1	0	0	0
Ranking 04	4	20	13	17	18	9	8	9	0	3	2	0	0	2	1	0	0	0	0
Ranking 05	0	12	11	9	4	14	9	7	2	2	3	1	0	1	0	2	0	0	0
Ranking 06	0	10	8	9	2	6	3	6	0	5	7	0	1	0	0	0	0	0	0
Ranking 07	0	5	5	10	1	7	4	2	0	3	2	3	0	0	1	0	0	0	0
Ranking 08	0	2	2	5	1	6	0	1	1	6	3	0	1	1	0	0	0	0	0
Ranking 09	0	1	3	3	0	3	0	3	0	4	0	2	0	0	0	0	0	0	0
Ranking 10	0	1	2	3	1	1	0	0	0	0	2	0	0	1	0	0	0	0	0
Ranking 11	0	0	1	2	0	1	1	0	0	1	1	0	0	0	0	0	0	0	0
Ranking 12	0	0	0	0	0	1	1	0	0	1	0	0	0	0	0	0	0	0	0
Ranking 13	0	0	0	0	0	0	0	0	0	1	1	1	0	0	0	0	0	0	0

Cross Tabulations

Table 15: Music releases (Q39) by income (Q12)

Music released in past 12 months	**Total %**	**Total Count**	**Performing**		**Music sales online**		**Music physical objects sales NZ**		**Music physical objects sales OS**		**Streaming service**		**Sales of merch NZ**		**Royalties NZ**	
On bandcamp or similar	26.03	145	25.66	116	25.76	85	25.00	51	24.75	25	22.97	48	24.38	39	24.04	44
Self-released	22.80	127	23.01	104	22.73	75	24.02	49	20.79	21	22.97	48	25.62	41	20.22	37
On a streaming service:	16.88	94	17.26	78	16.97	56	18.63	38	16.83	17	21.53	45	20.63	33	16.94	31
On Soundcloud	15.44	86	13.94	63	13.33	44	10.29	21	8.91	9	12.92	27	10.63	17	13.66	25
On an independent label run by myself	8.44	47	8.41	38	10.30	34	10.78	22	13.86	14	9.57	20	8.13	13	13.66	25
On an independent label run by someone else	9.52	53	10.84	49	10.00	33	10.29	21	13.86	14	9.57	20	10.00	16	11.48	21
On a major label:	0.90	5	0.88	4	0.91	3	0.98	2	0.99	1	0.48	1	0.63	1	0.00	0
Total	100	557	100	452	100	330	100	204	100	101	100	209	100	160	100	183

Table 15: Music releases (Q39) by income (Q12)

Table 29 (a): Support for music-related activities, cross tabulated with location, based on SRN station locations

I know who to ask for help with promoting my music											
#	Question	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
1	Yes	46.05%	35	43.59%	17	33.33%	33	43.48%	10	53.85%	7
2	No	50.00%	38	51.28%	20	61.62%	61	39.13%	9	38.46%	5
3	I don't think I need help	3.95%	3	5.13%	2	5.05%	5	17.39%	4	7.69%	1
	Total	Total	76	Total	39	Total	99	Total	23	Total	13
I know who to ask for help with recording music											
#	Question	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
1	Yes	77.63%	59	71.79%	28	67.68%	67	73.91%	17	92.31%	12
2	No	11.84%	9	20.51%	8	18.18%	18	13.04%	3	0.00%	0
3	I don't think I need help	10.53%	8	7.69%	3	14.14%	14	13.04%	3	7.69%	1
	Total	Total	76	Total	39	Total	99	Total	23	Total	13
I know who to ask for help with organising a gig											
#	Question	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
1	Yes	67.53%	52	58.97%	23	51.52%	51	60.87%	14	76.92%	10
2	No	27.27%	21	28.21%	11	37.37%	37	21.74%	5	15.38%	2
3	I don't think I need help	5.19%	4	12.82%	5	11.11%	11	17.39%	4	7.69%	1
	Total	Total	77	Total	39	Total	99	Total	23	Total	13
I know who to ask for help with organising a tour											
#	Question	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
1	Yes	41.56%	32	41.03%	16	28.28%	28	39.13%	9	61.54%	8
2	No	55.84%	43	51.28%	20	63.64%	63	52.17%	12	38.46%	5

3	I don't think I need help	2.60%	2	7.69%	3	8.08%	8	8.70%	2	0.00%	0
	Total	Total	77	Total	39	Total	99	Total	23	Total	13
I know who to ask for help with building an international profile											
#	Question	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
1	Yes	21.05%	16	15.38%	6	16.00%	16	13.04%	3	23.08%	3
2	No	73.68%	56	82.05%	32	81.00%	81	73.91%	17	69.23%	9
3	I don't think I need help	5.26%	4	2.56%	1	3.00%	3	13.04%	3	7.69%	1
	Total	Total	76	Total	39	Total	100	Total	23	Total	13

Table 30 (a): Support by Student radio (Q59, 60, 61, 62) by location: bold indicates strongest response

Student radio is relevant for me and my music										
	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
Yes	84.21%	64	**89.74%**	35	76.77%	76	81.82%	18	100.00%	13
No	13.16%	10	5.13%	2	16.16%	16	9.09%	2	0.00%	0
I don't know what it is	2.63%	2	5.13%	2	7.07%	7	9.09%	2	0.00%	0
Total	Total	76	Total	39	Total	99	Total	22	Total	13
I have had music played on a student radio station										
	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
Yes	76.62%	59	**89.74%**	35	65.66%	65	90.91%	20	92.31%	12
No	23.38%	18	10.26%	4	34.34%	34	9.09%	2	7.69%	1
Total	Total	77	Total	39	Total	99	Total	22	Total	13
I feel supported by student radio										
	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
Yes	65.33%	49	**65.79%**	25	61.22%	60	**59.09%**	13	91.67%	11
No	34.67%	26	34.21%	13	38.78%	38	40.91%	9	8.33%	1
Total	Total	75	Total	38	Total	98	Total	22	Total	12
I have been interviewed by a student radio station										
	Auckland		Wellington		Christchurch		Dunedin		Palmerston North	
Yes	59.74%	46	**74.36%**	29	51.52%	51	68.18%	15	92.31%	12
No	40.26%	31	25.64%	10	48.48%	48	31.82%	7	7.69%	1
Total	Total	77	Total	39	Total	99	Total	22	Total	13