Music Professionals Survey Data

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The data collection period was April-July, longer than originally planned, because the in some countries, the data collection by local partners were not well prepared on time. In Czechia, the data collection was very late and the total replies collected was significantly lower than in Austria, Hungary, Slovakia, where the author's societies were involved in the data collection, and asked their members to fill out the questionnaire.

The master questionnaire was provided to SoundCzech's translator in English and Slovak language. Unfortunately, there was no significant testing of the Czech survey, and this may have resulted in lower completion rates than in Slovakia, for example, where the survey was extensively tested by stakeholders and musicians.

In Czechia, almost all responses arrived after the final deadline to fill out the questionnaire, in July and August 2019. OSA appears to have sent out the questionnaire to a very limited number of artists, because the answers received from their entry link (17) is only a fraction received from similar Austrian, Hungarian, Slovak, Slovenian societies. SAI reached out to 37, and SoundCzech to 22 music professionals. Compared to the Austrian, Hungarian, Slovak samples, which contain 400-700 answers, the Czech subsample is rather limited.

Various Czech stakeholders, including SoundCzech itself, Intergram, SAI and smaller partners distributed the questionnaire with a short background information in Czech language and extensive linked English background information and data protection guidance.

The information sent out by SoundCzech and its partners made it clear to the respondents that no data will be provided to a third party, neither to SoundCzech or anybody else.

> Music professionals can decide to fill out the survey anonymously or semi-anonymously. In either case, the individual answer will never be shared with anybody except with the respondent. Any statistical reports created for collective management societies, granting agencies and music export offices will not contain individual answers or any answer elements that could identify the music professional personally.

The problems with the data collection are partly understandable. In Croatia this was the second data collection, in Slovakia the third, and in Hungary the 6th. The trust in the survey and the trust among research partners is higher in these countries, and this results in hundreds of questionnaires filled out each year. The first Czech collection was less successful in the number of responses collected than the first Austrian, Bulgarian and Slovenian collection, but more successful than the Armenian, Estonian and Serbian, and roughly equally successful to the Lithuanian collection. The credibility of such a research can be improved year by year, partly with more focus on quality (test surveys, translation checks) and partly by extending the partners who distribute the survey.

For the exploitation of the information, SoundCzech, state51 and CEEMID formed a research consortium. In the Phase I of the project, SoundCzech, like all research partners, receives statistical summaries, that were created

a) for the preparation of a stakeholder workshop on 8-9 October, 2019,

b) for the Study planned in Phase I and

c) for the final pesentation of the Phase I of the project on Nouvelle Prauge on 8 November, 2019.

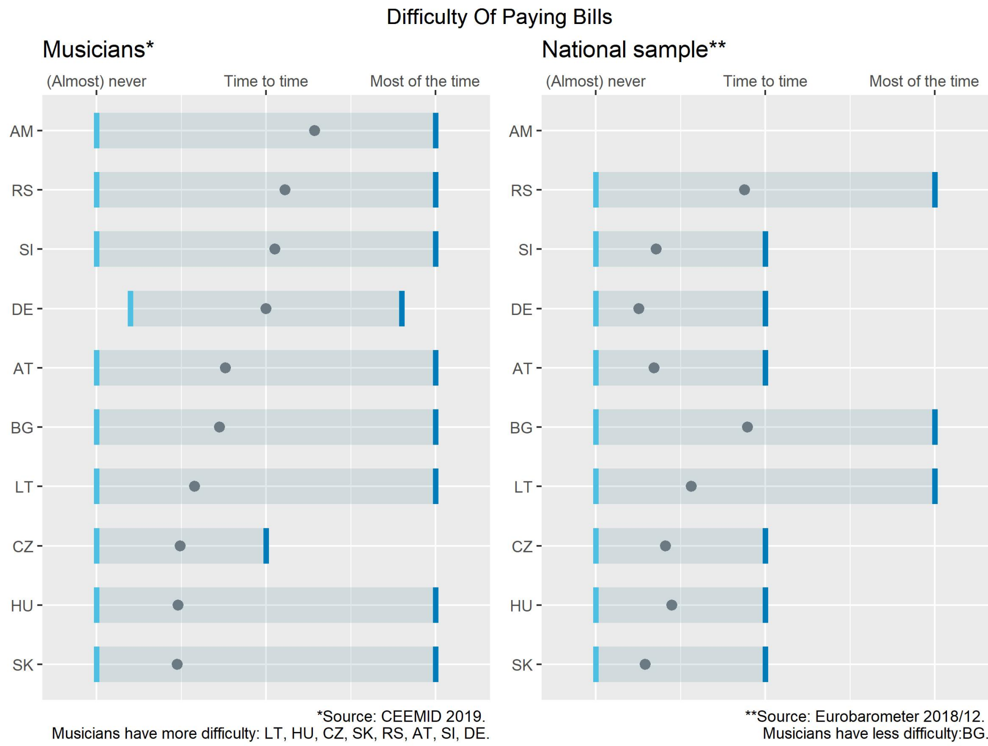
The Phase II of the Project, subject to a grant application for Creative Europe, would create analytics and predictive analysis for the semi-anonyomous answers, which will be analysed against the state51 anonymized streaming dataset.

Subjective Situation Assessments

The subjective situation assessments follow standard EU survey questions for comparability across countries and with other professional groups.

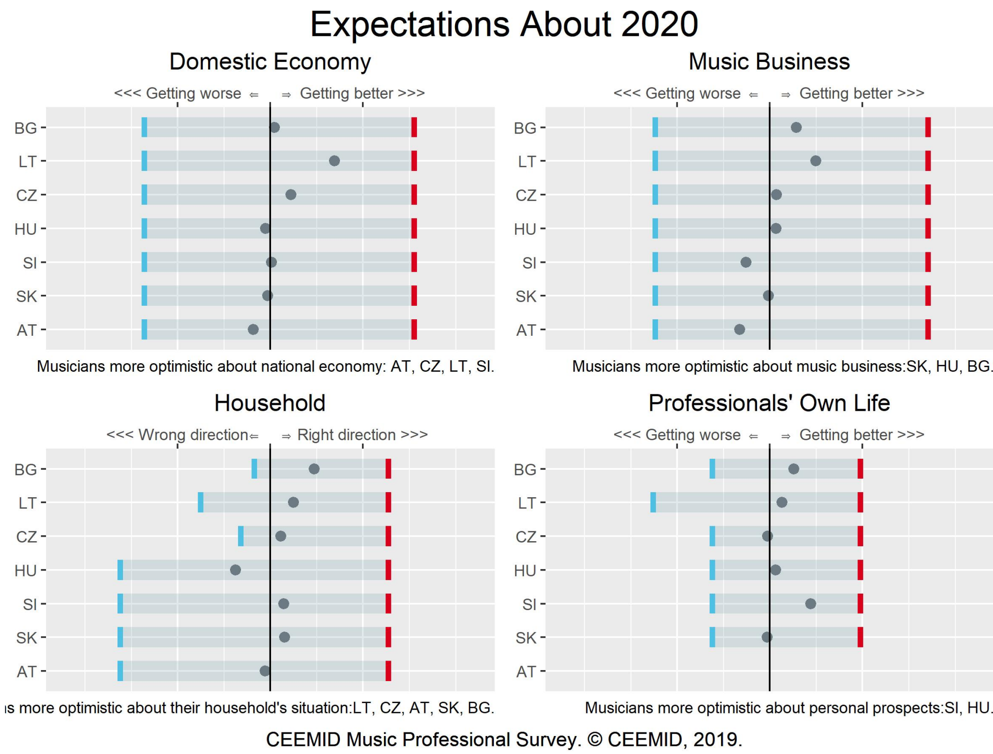
Subjective Income

The CEEMID Music Professional Survey compared the relative income of Czech music professionals with the surrounding countries similar artists, technicians and managers. The way the survey was designed allowed comparison with the general public, or the 'average person', too.



In almost all countries that were surveyed, music professionals had more difficulties with paying bills at the end of the month than most people in the population.

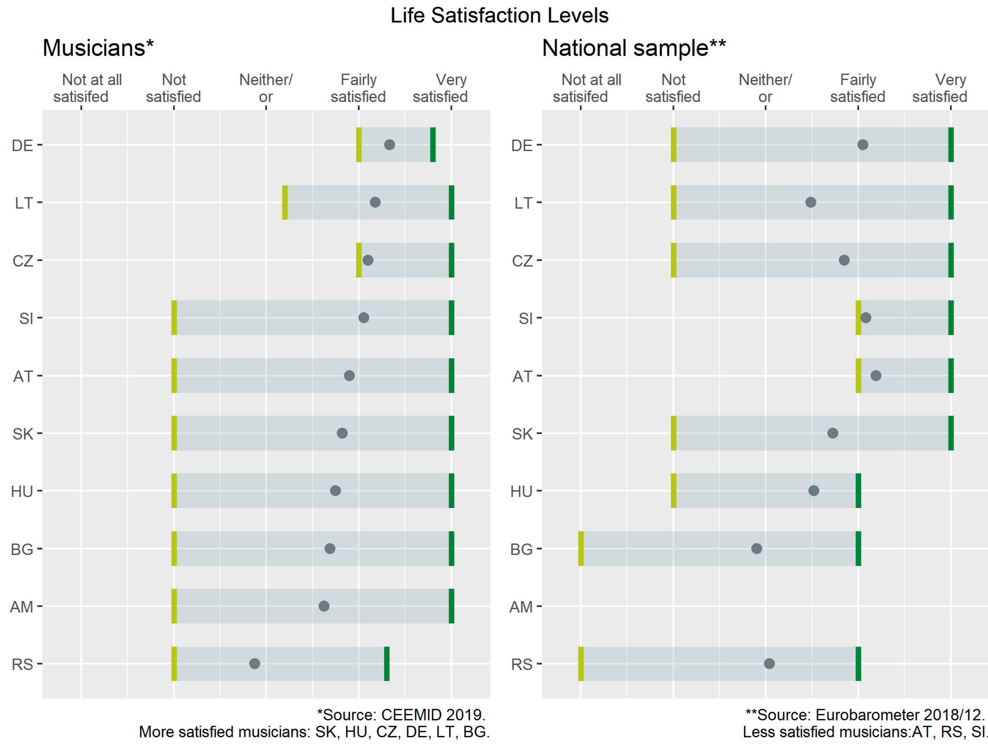
Expectations



The musicians, technicians and managers who participated in this research are a bit pessimistic - they have lower expectations about the music industry in Czechia than about the Czech economy as a whole, and they see their personal prospects a bit more negative than those of their families. The reason why we started this work is that we would like to draw a more positive future for the next year.

Life satisfaction

The music industry has a fantastic economic potential, but currently it is in its infancy in Czechia. Working conditions are chaotic, people are fulfilling several jobs. Public understanding of how creative industries work, and why royalties are important for musicians is low. Musicians and their support teams feel that the appreciation of music, particularly popular music is low in Czech society and in Czech general education. Nevertheless, the industry is full with positive people.



CEEMID is asking similar questions than standard EU surveys to understand how satisfied are musicians with their work, their careers and their life in general. In spite of material difficulties and lack of public appreciation, Czech music professionals on the average are more satisfied with their lives. The difference is mainly due to the fact that while there are many unsatisfied people in the country, music gives at least a fair level of satisfaction for the artists, technicians and managers working in this field.

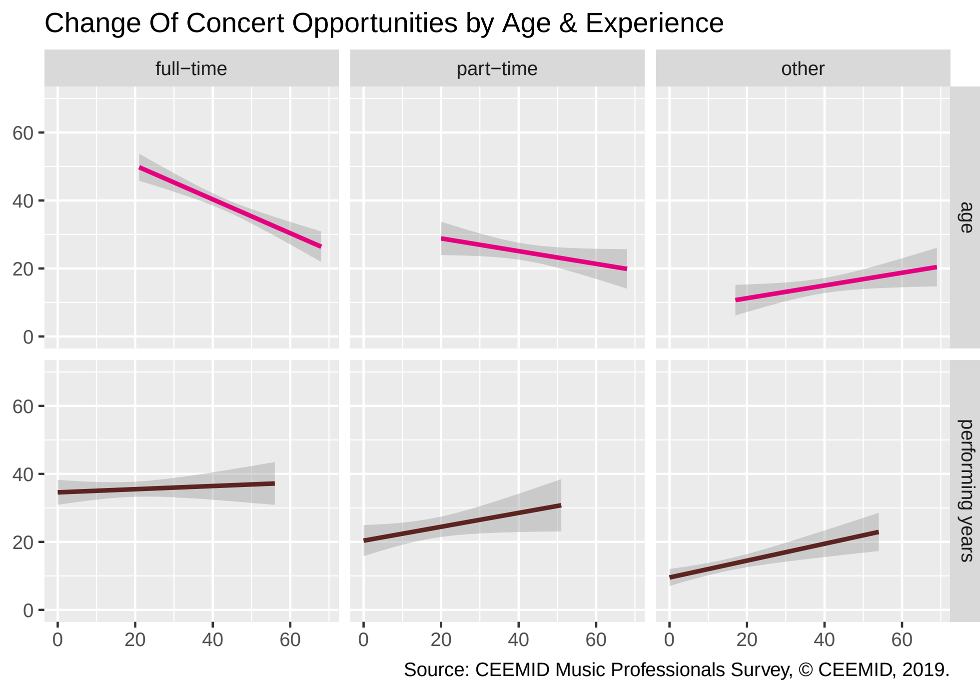


Figure 1: Change Of Concert Opportunities by Age And Experience

Events

It is true that in the 21st century, most musician income is expected from concerts. But the performing opportunities of musicians are decreasing with age, even if there is a positive influence from long performing histories. This may be partly caused by the fact that audiences like to see mainly artists from their age group, and concerts visits are declining with age.

The two charts show the effect of artist age and experience on stage. Artists' annual performances are declining from about 50 shows in the age of 25 to about 40 in the age of 40. There is no significant difference in this regard among Czech and non-Czech artists. Years of perfoming experience have a positive effect, but mainly among part-time musicians and amateurs.

The only way to sustain a long musician career is to build up a portfolio of evergreen compositions and recordings that keep add more and more revenues from the recorded performances as the artist is aging. Or to specalize on recording and composing, and focus on assignments from the advertising, video games, television and film industries.

Indeed, we see that full-time artists who remain in the business report higher and higher number of compositions. (We do not see a similar relationship with recordings, because currently recordigns are necessary for both compositions and getting live performance opportunities.) The low value of royalties and the market problems of publishing still keep this revenue source at a rather low level.

Ticket prices

The current price level of concert tickets more or less reflects the differences in purchasing power in the regional countries. (Some quickly depreciating currencies may over or understate the value of the concert tickets in euro, depending on the seasonality of the local markets.) Concert ticket prices are very similar in Czechia and Slovakia, with a slight advantage to the Czech countryside and a slight advantage of ticket prices in Bratislava in comparison with Prague. This also reflects the local purchasing strength.

In the comparison we excluded free concerts and ticket prices above 40 euros.

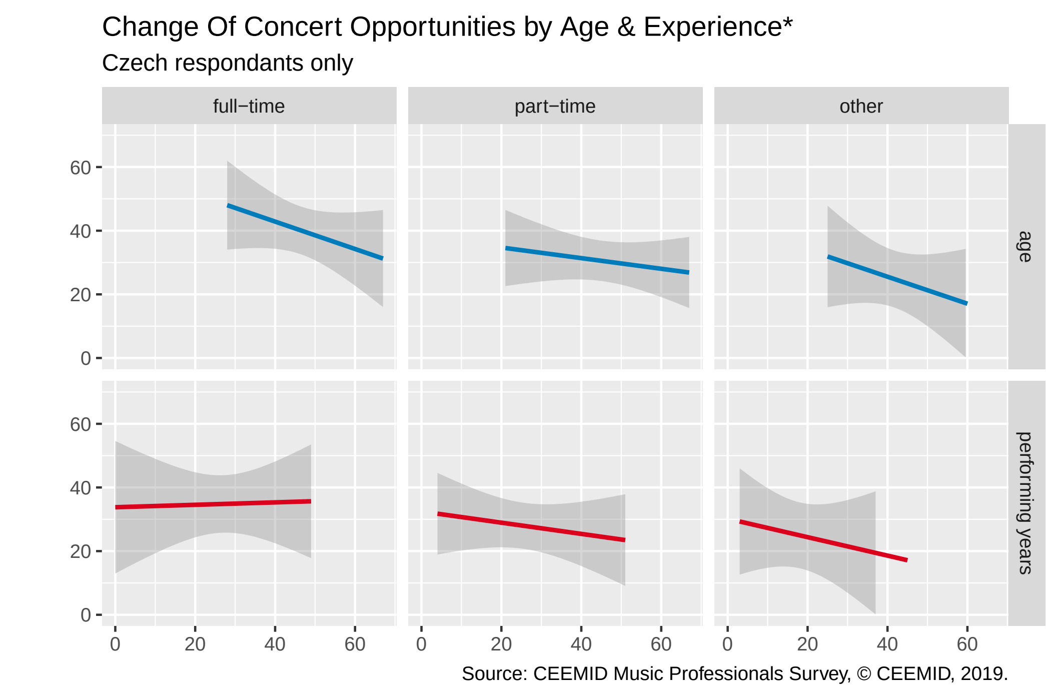


Figure 2: Change Of Concert Opportunities by Age And Experience in Czechia

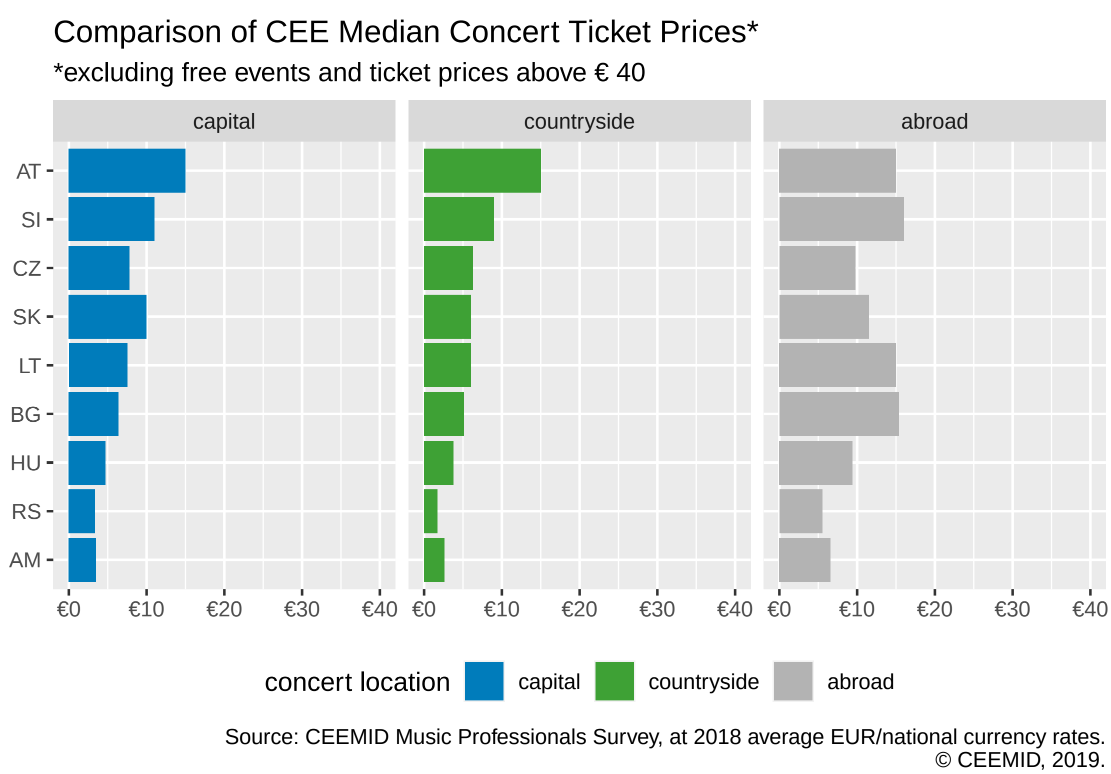


Figure 3: Comparison of CEE Median Concert Ticket Prices

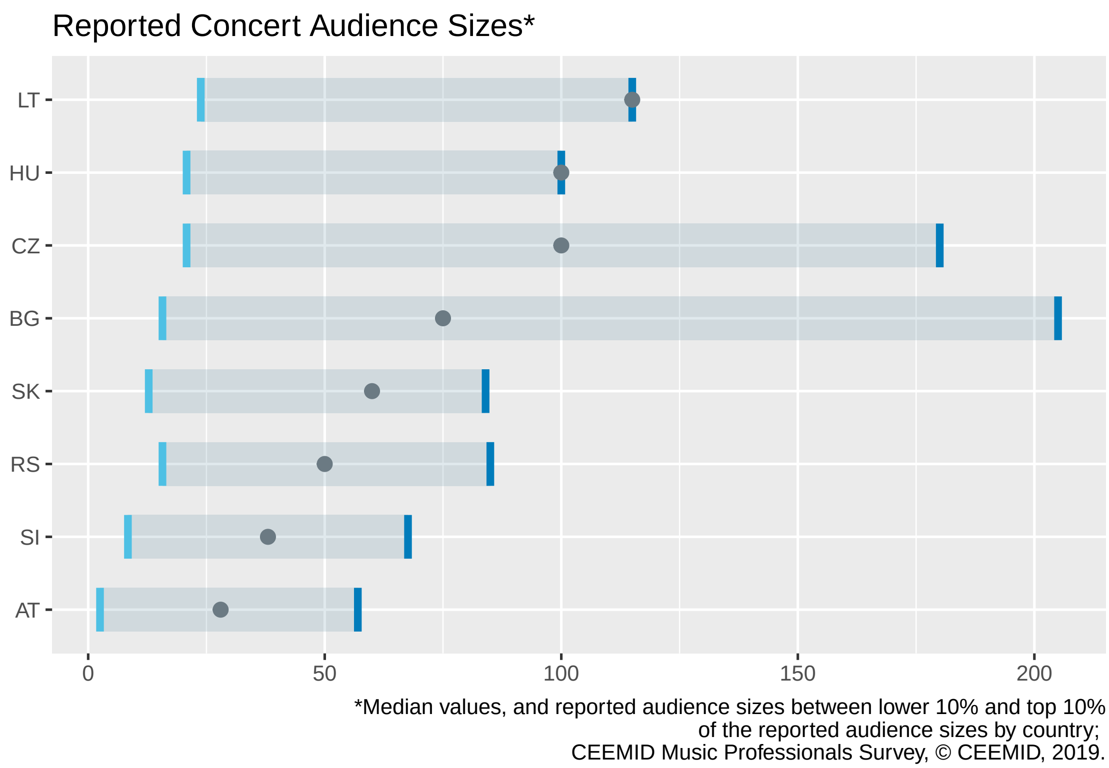


Figure 4: Reported Audience Sizes in CEE countries

There seems to be no simple solution to increasing the concert prices. On the sales side, the typical audience size in Czechia is relatively big, around 100 people, and the distribution of usual audiences is wider than in the region. This means that Czech concerts yield typical around 800-900 euros, which is a higher value than in Austria and Slovenia, and in fact, apart from reported Lithuanian values, higher than the typical values of the region.

The ticket price data was calculated from answers set in national currency units (in Czechia, in CZK) and translated with average annual exchange rates set by the European Central Bank and published by Eurostat.

Tour destinations

Our research data shows that Bratislava is the strongest "exporting city" in the region, while Prague is the "strongest destination". In the case of Bratislava, all nearby larger towns are beyond the border of Slovakia (Vienna, Brno, Győr), and Slovak towns are generally small. For Czech bands, Bratislava is the most important foreign destination, which is also the richest city in the Visegrad region.

While for Hungarian and Slovak bands Vienna is the most important point of orientation, Czech bands, if they do not go to Bratislava, go into the direction of Berlin. They can benefit from the proximity of a dense and rich German tour network that gives further access to France and the Benelux. Besides, Vienna and Linz are obvious targets for them.

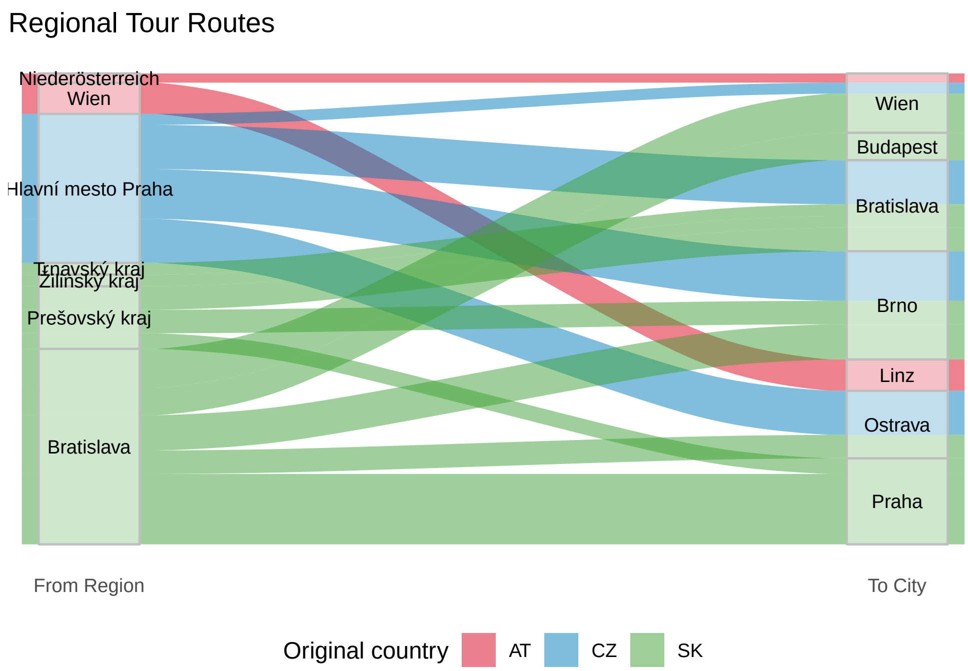


Figure 5: Strongest Regional Tour Connections

Grants

The CEEMID Music Professional Survey 2019 has shown a very low level of grant availability for Czech musicians in comparison with the region. Because of the small sample size, it is difficult to judge suitability, but the our data does not support a negative view on suitability.

Recordings & Compositions

Only a very limited number of artists filled out the survey, and we the planned research partners have not joined yet the Research Consortium. In Hungary and Slovakia, the collective management societies not only sent out the survey to their members, but they also provided comparative data for the survey. For example, they gave us the anonymized payouts of all artists (apart from the top 10 or so artists), so we could measure how well the survey represented the total amounts, and how the survey results can be made proportional to the national royalty payouts.

For example, in Hungary and Slovakia, about every 20th artist filled out our survey, and the known payout average values, distribution shape were 95-955% similar to the surveyed, anonymous data. This way we know that the survey is representative, and we can also infer that the total reported amounts in segments not known to collective management societies should be multiplied by 20 to get the missing national data. We also know the total number of works or recordings registered in these countries, and therefore we can understand who is not reporting to the national catalogues of works and recordings.

The data collected in 2019 without further cooperation with OSA and Intergram cannot be meaningfully presented.

However, the data is sufficient in combination with Austrian, Hungarian, Slovak and other data to understand broad differences from the well-covered national subsamples. Examples are shown in the Career segment.

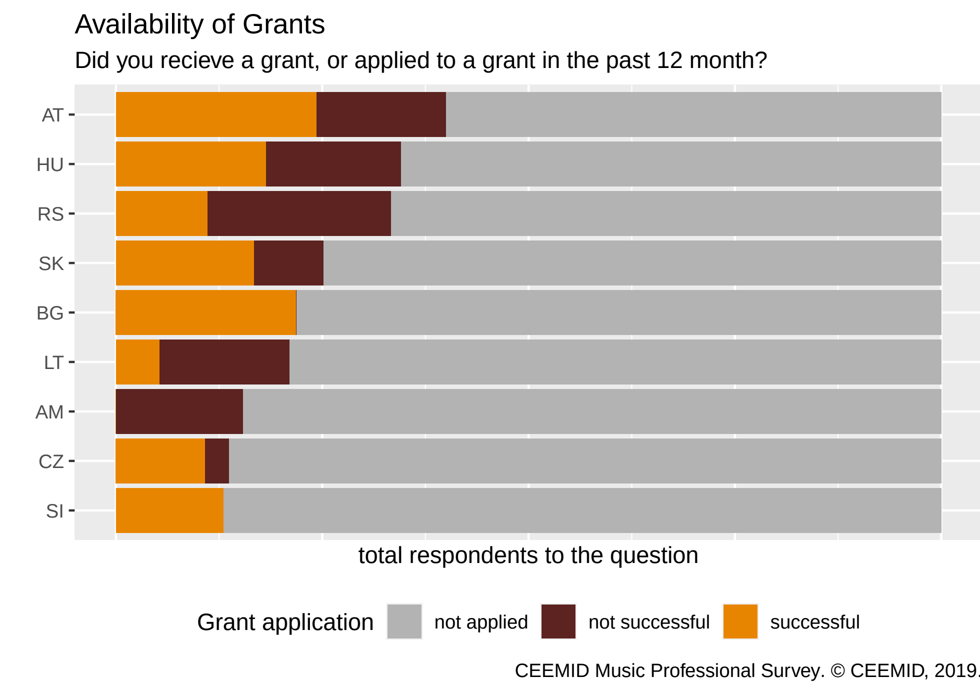


Figure 6: Musician Grant Availability in the CEE

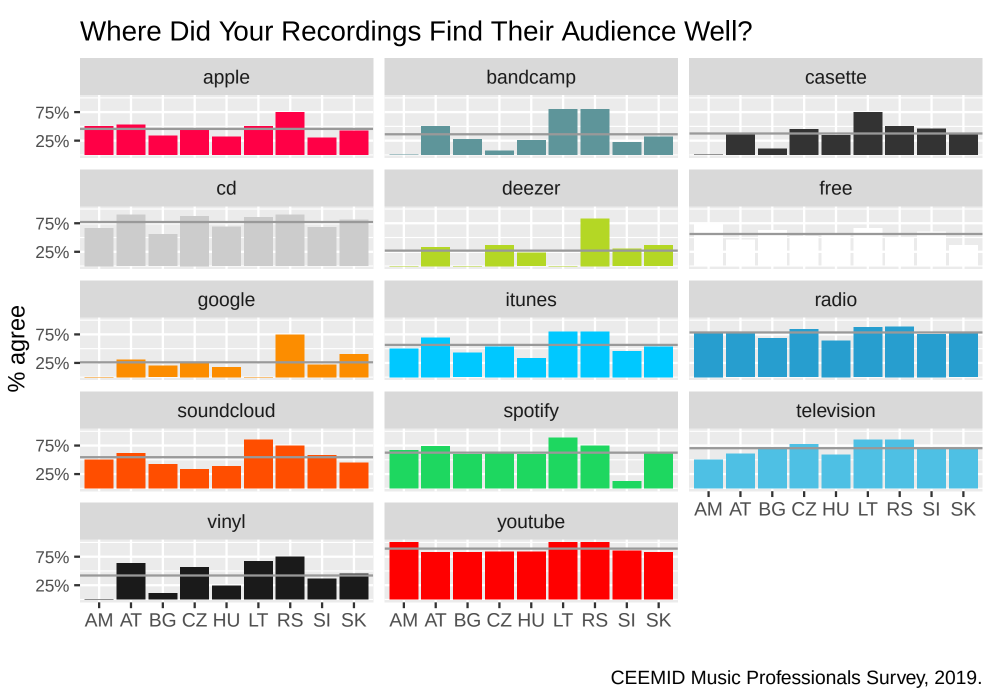
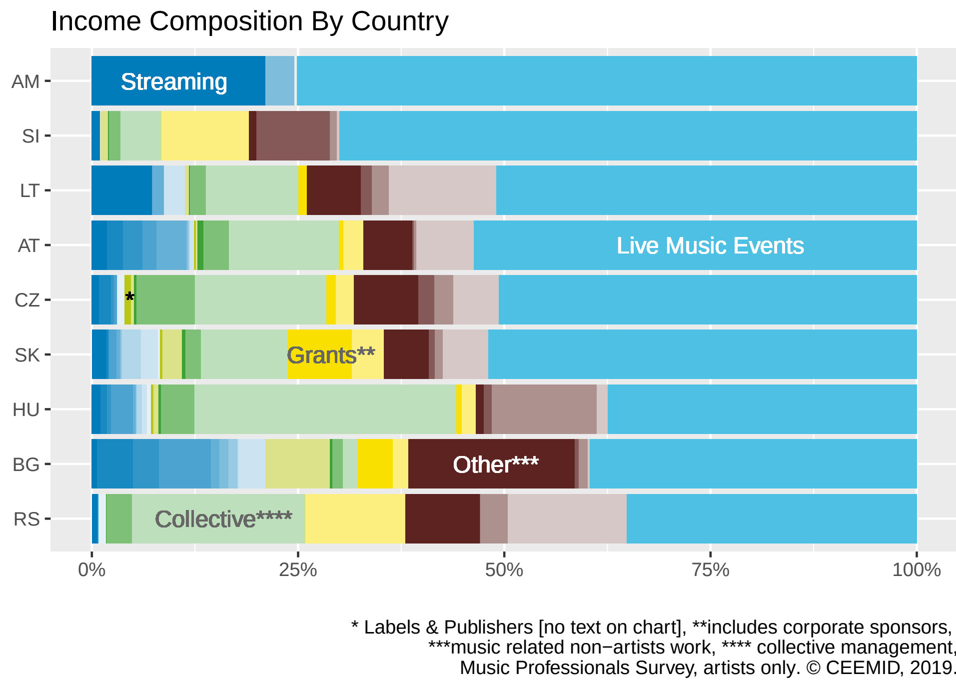


Figure 7: Strongest Regional Tour Connections

Income

The most imporant data from our collection is the income composition of artists in various countries. Because of the aforementioned problems, it is not really possible to answer the total royalty payouts or their absolute levels in Czechia. However, the data is rich enough for relative comparison.



For the chart above, we compared all income data in the dataset, adding each respondents income up to 100%. For this calculation, we did not need to use exchange rates, because the total composition adds up to 100% in all currencies.

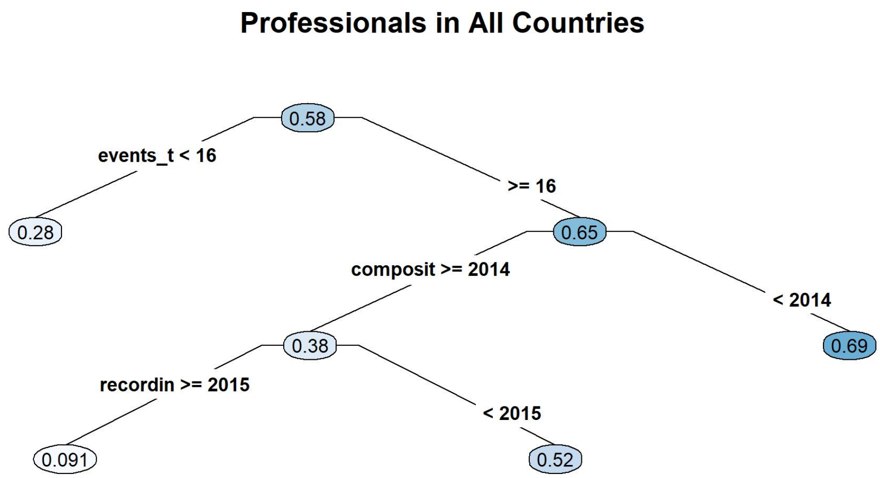


Figure 8: Decision Tree: What is Needed in the CEE to Sustain a Full-Time Music Career

Career

The general career equation in the region is simple: artists who have at least 5 years of composing experience, a recent recording and they play at least 15 shows a year can become full-time musicians. However, if we compare the Czech and the Austrian answers, we can see striking differences.

In Austria, a musician has a 68% chance to make a full-time living as a musician with at least 16 shows a year and 7 years of recording experience, or 6 years of recording and composing experience. In Czechia, at least 46 shows or 13 years of composing experience is necessary to have similar chances for a full-time musician role. Compared to Hungary, a bit more composing experience is necessary.

All in all, the total survey respondents (not only Czechs) include amateurs, young students, young, middle-aged and older artists and professionals. Concentrating on artists alone, we can see that the sample is not balanced, because participation in music varies over the life cycle, too.

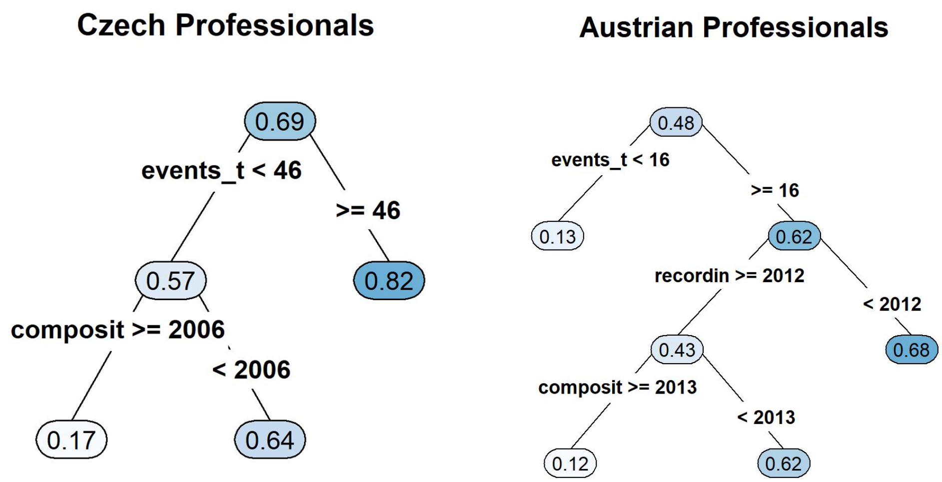
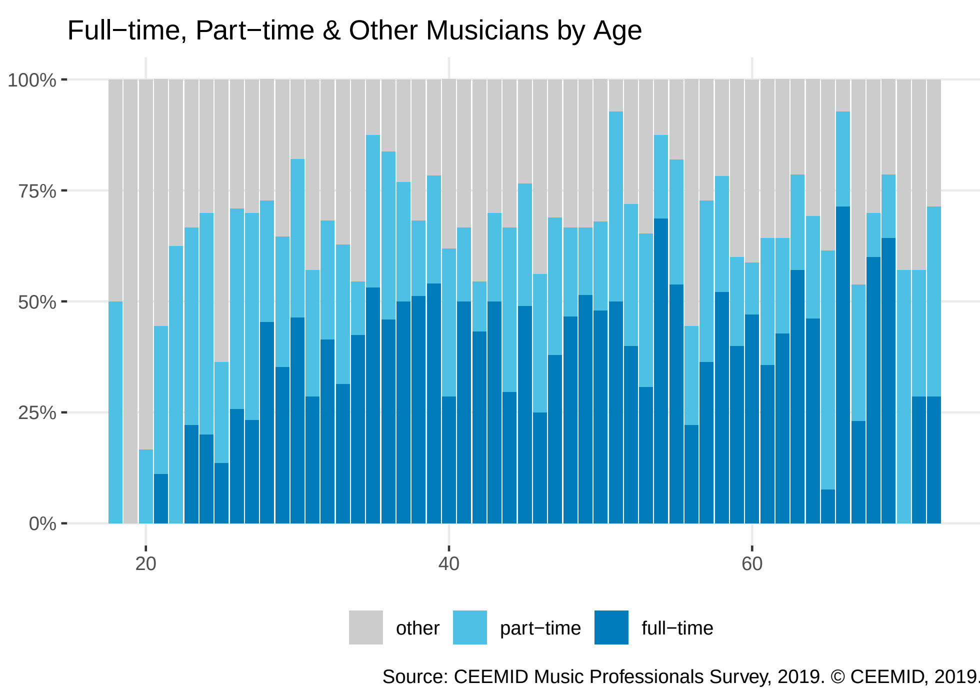


Figure 9: Decision Tree: What is Needed in Czechia and Austria to Sustain a Full-Time Music Career



In the begining, students and amateurs dominate the sample, below the age of 20. By the age of 30-35 ages full-time and part-time musicians dominate the sample, as many amateurs become either at least part-time musicians or give up on playing music. Becoming part-time musician is a dominant model in the late career stage when artists start to retire.

Entrepreneurship

The nature of the creative jobs is that they contain a wide range of activities. For example, musicians often perform music (NACE group 90), compose music (NACE group 90), and at the same time do sound recordings (NACE group 58) and teach music (NACE group 85). This is the main reason why music is not well represented in governmental statistics, which is mainly based on tax returns data from 'clear' activity

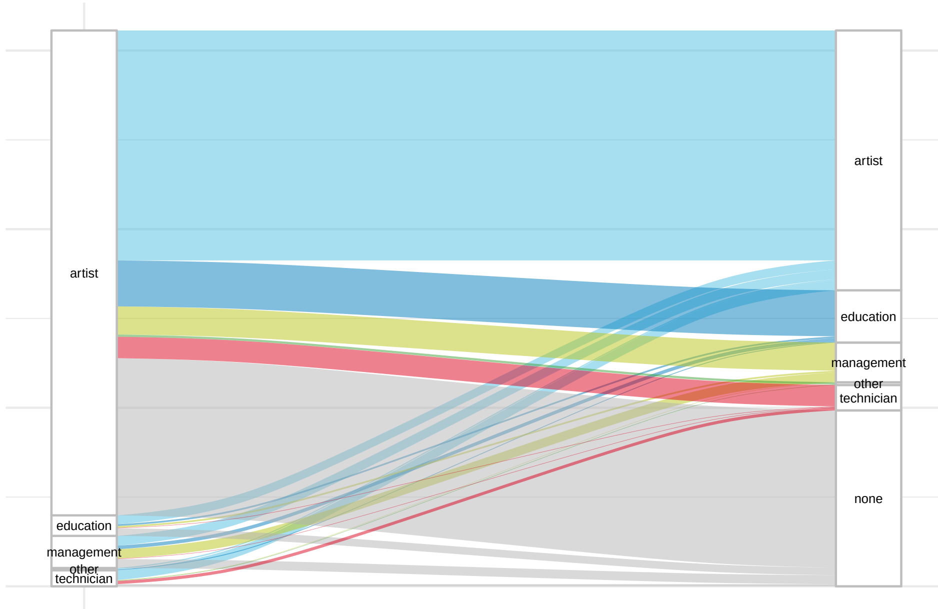


Figure 10: Primary And Secondary Professional Roles in the CEE Music Industry

groups, such as sound recordings only. To add to the difficulty, the music industry do not have a NACE code, so any calculations have to be based on a combination of at least data about NACE 58 and NACE 90 activities.

To create a realistic approach for measuring the economic and employment capacity of the Czech music industry, we first have to map the activities of participants. In our survey, we always ask for a primary role in the music industry and an optional secondary role.

While we do not have a lot of repsondents in 2019 in Czechia, and we may have missed some groups, but the activity map is very simliar, with a bit more artists who do not have a secondary role compared to the larger CEE picture. Most Czech artists have a secondary role in another artistic field (for example, they perform music, work as producers), and in many cases a secondary educational activity. Very few managers and technicians filled out our questionnaire, but they are also involved in secondary artistic or educational roles.

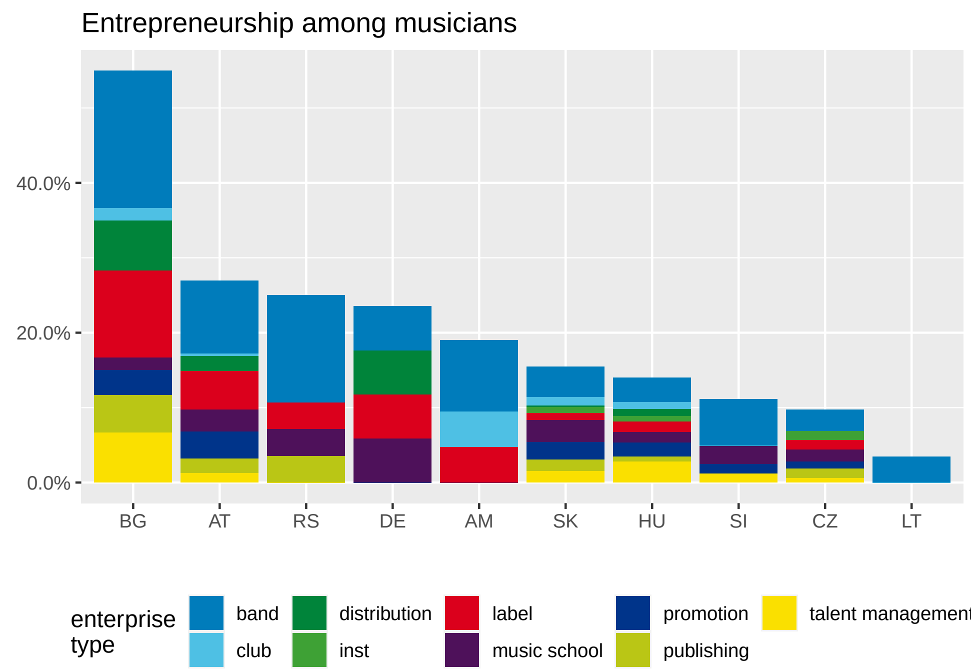
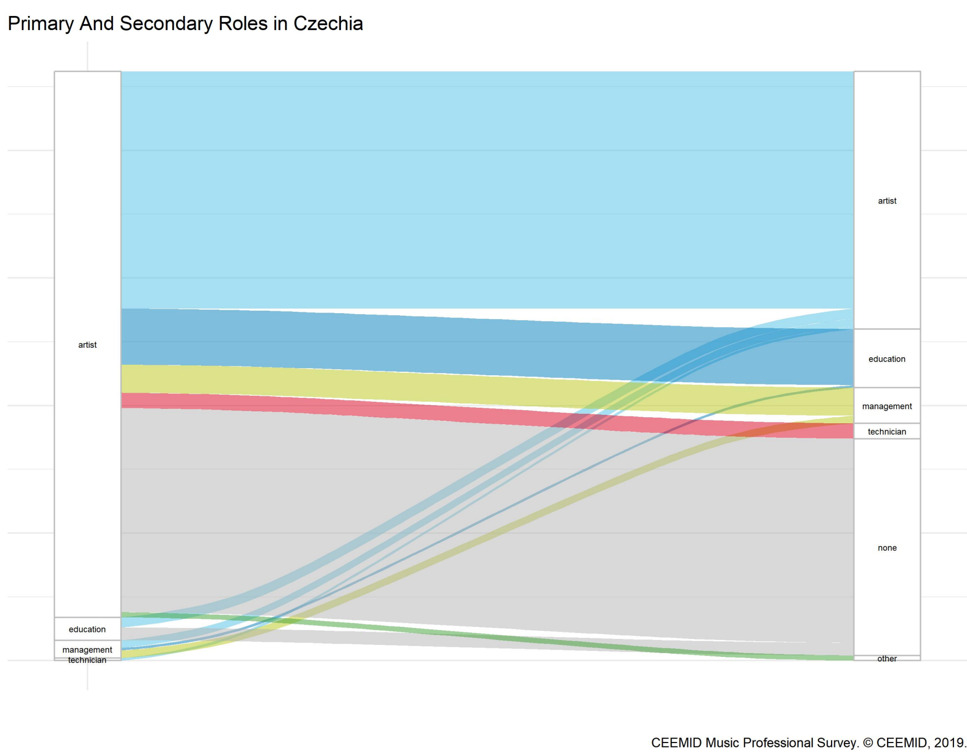


Figure 11: Enterprenurship Among CEE musicians



Because of the nature of these economic activities, musicians are often entreprenuers in micro enterprises, which also do not have a clear economic classification.

In our sample, only about 10 percent of the respondents were entrepreneurs, which is still high compared to the general population.