



Australians' Attitudes to Music

A Market Research Report
to

The Australian Music Association

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1. Summary & Conclusions

Context:

This report presents results from a study of Australian households which was commissioned by the Australian Music Association. The objectives of the exercise were to;

- Provide a foundation for adapting/implementing US market development programmes in Australia
- Provide a platform for an advocacy programme promoting the value of music in the community
- Supply the data to NAMM for them to include in an international report that compares and contrasts results in different countries.

The results are based on 1,000 interviews with households randomly selected across all of Australia.

Market Size:

The survey found that 36% of households contain at least one person who now plays a musical instrument. This equates to a rough estimate of 4 million people of all ages (5+ yrs) who play.

Music players have a young profile. It was found that 35% are aged 5-17 yrs and a further 28% are aged 18-34 yrs. That is, almost two-thirds of music players fall within the 5-34 yrs age bracket – compared to just under half of the total population (5+ yrs).

Starting & Stopping Playing:

The majority of people (63%) start playing a musical instrument when they are aged 5-11 yrs. The main influences on taking up an instrument were parents, the development of one's own interest and school teachers (- in that order).

Schools would appear to play an important part in exposing young people to music; although those who have had private, one-to-one teaching are more likely to continue playing in later life. Some 49% of current players have had such private lessons.

Almost a third of those ceasing to play do so before they are teenagers. A further 30% drop out by the age of 15 yrs. It would seem that a material proportion of this relates to the cessation of compulsory lessons at school; although there is a material element of waning interest and presumably increasing interest in other attractions.

It is estimated that there are now some 5.5 million people who are lapsed players.

Musical Instruments:

The most popular instrument now played, according to the survey, is the upright piano (by 29% of current players). The next most popular instrument is the acoustic guitar (25%) and also the electric guitar (10%). The recorder is currently played by 10% of players (with an obvious youth bias) and drums by some 9%. After these, a variety of keyboards are relatively popular.

It appears that about 4 million households own at least one musical instrument, equivalent to around 55% of the total households in Australia. (This compares with 36% of households containing current players – there are many neglected instruments about). Victoria appears to have a slightly lower incidence of instrument ownership (at 49%).

General Beliefs:

The majority of the population (55%) believe that music is a good hobby. This view is understandably more strongly held amongst those who themselves play (71%) compared to those who do not (43%). Just over half the population would also completely agree that music is a good means of expression (56%) and can provide a sense of accomplishment (55%). These views provide some of the strongest common ground in developing an advocacy programme promoting music in the community.

With regard to young people, almost two-thirds of the population (64%) would completely agree that music is an activity that a child can enjoy all their life. Furthermore, music was viewed as being able to develop a child's creativity (58%) and that a school band was a good way of developing such skills (56%).

In consequence, the majority of the population (57%) believe that all schools should include instrumental music instruction as part of their regular curriculum.

On the other hand, only a minority (c.20%) completely agree that learning a musical instrument helps one do better in other subjects such as maths, science or languages. A similarly small minority were in complete agreement that teenagers who play an instrument were less likely to have discipline problems. Even so, if partial agreement is included, these proportions reach about 50%.

The following pages provide more analysis and interpretation of the results. After these, the detailed tables and a copy of the questionnaire are provided.

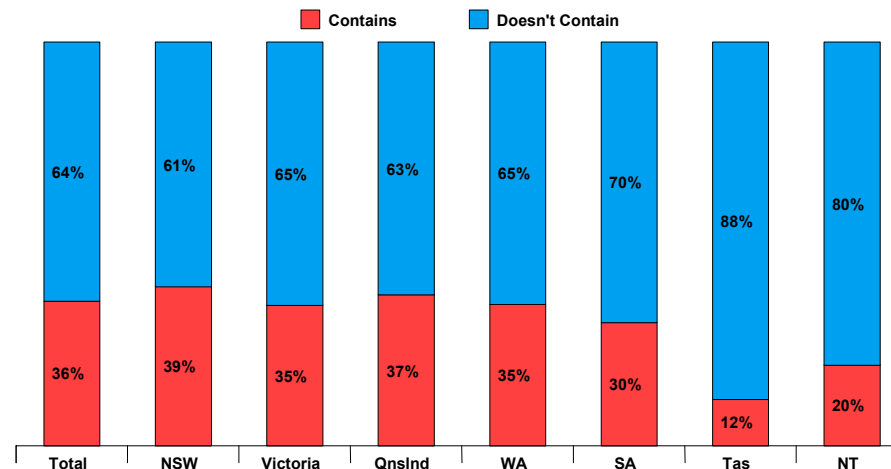
2. People who Play Music

2.1 Currently Playing Households

At the beginning of the interview, the fieldworker asked to speak to somebody who knew whether the people in the household played musical instruments or not. This person's help was then sought in conducting an audit of all people aged 5 yrs or older regarding their playing.

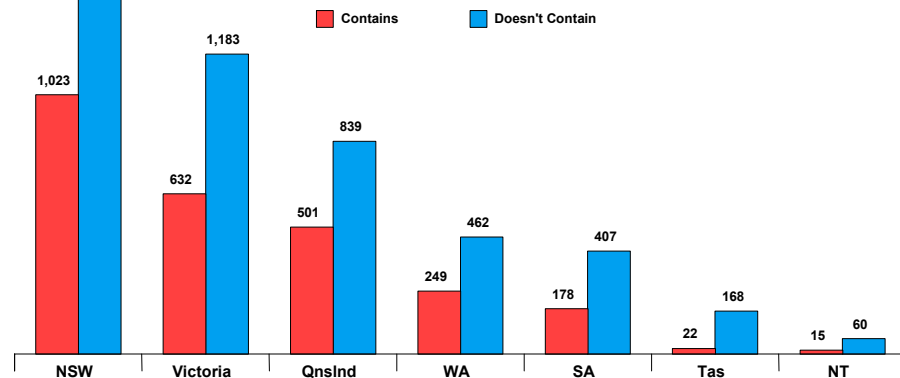
The chart to the right indicates the percentage of households found to contain at least one person who plays a musical instrument. Results are weighted so that the total more accurately reflects the national situation. Overall, it was found that some 36% of households contain at least one player. This compares with a figure of 50% found in the USA in 2000 but a figure of 28% found in Australia in 1996.

Chart 108: Households containing at least one person who plays a musical instrument



The reader is cautioned that the samples for Tasmania and the Northern Territory, at 26 and 10 respectively, are only broadly indicative. In later sections, these are often amalgamated with Victoria and WA respectively.

Chart 108: Households containing at least one person who plays a musical instrument (ooo's households)



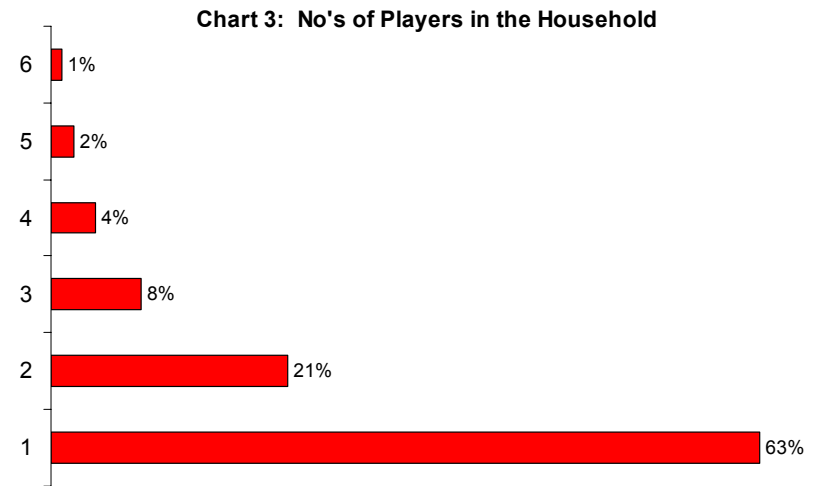
The same information can be presented in terms of estimated numbers of households containing players or not. The figures relate to a total of 7.3 million households now extant in Australia. (For clarity, the graph quotes figures in thousands).

The chart to the left is useful indicating the importance of NSW with its one million households containing an instrument player compared to Victoria and Queensland whose numbers approach half of this.

Overall, some 2.6 million households in Australia are estimated to contain at least one player.

The adjacent chart shows the distribution of the number of people playing an instrument within instrument-playing households. The mean figure is 1.6, which compares with a mean of 2.7 household residents in total. (See detailed tables).

The chart is also useful in confirming that little information was lost in terminating the audit after the fifth member of the household (5+ yrs).



2.2 Playing Individuals

The interview next progressed to conducting an audit of the first five people in the household, starting with the youngest, in relation to their music playing. When results are aggregated across all people enumerated, the numbers indicated by the adjacent graph emerge. That is, the survey estimates that there are almost 4 million people who now play a musical instrument.

The figure again reinforces the importance of NSW where there are approximately 1.5 million players, compared to Victoria and Queensland with around 0.9m and 0.8m players respectively.

Chart 13: People who Now Play a Musical Instrument - by State

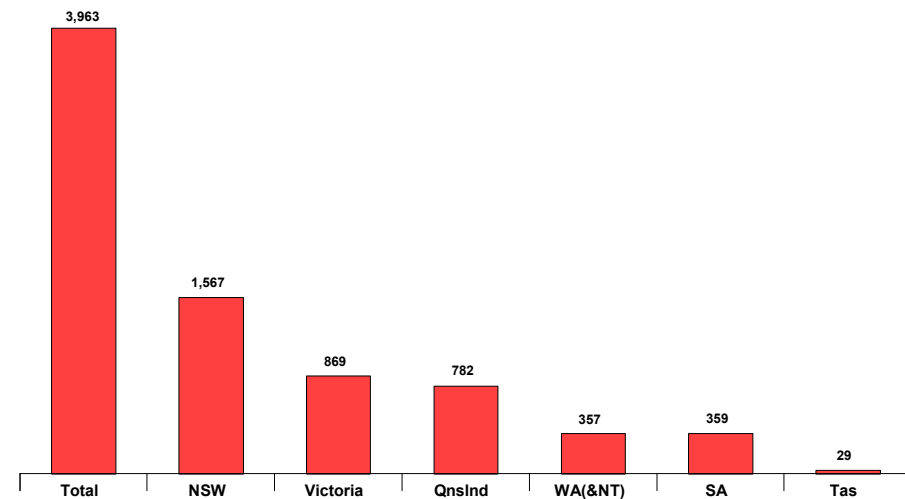
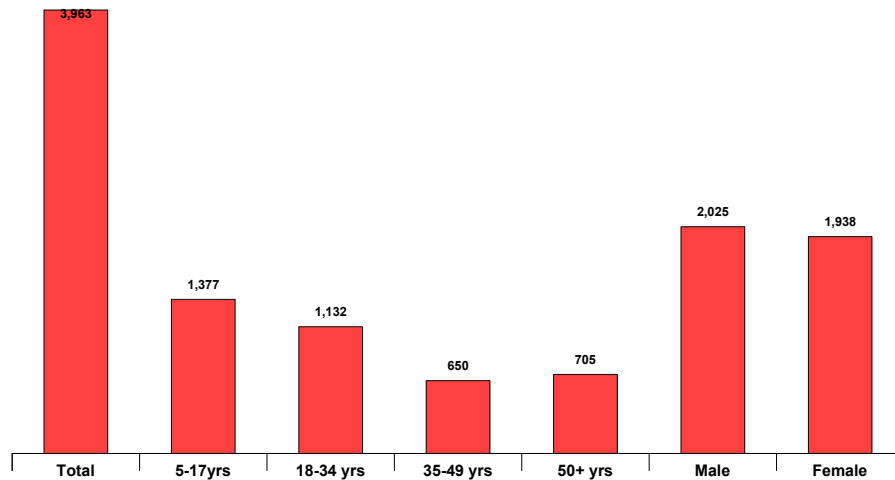


Chart 13: People (5+ yrs) who Now Play a Musical Instrument - by Demographics



The chart to the left breaks out the same information; but by demographics. The reader is reminded that the audit of household members was only conducted for those aged 5+ yrs.

It can be seen that the 5-17 yrs age group is very important, accounting for some 35% of all people playing a musical instrument. If the full age range of 5-34 yrs is considered, this accounts for some 2.5 million players, or 63% of total players. Clearly, the target market for musical instruments is relatively young.

The chart to the right breaks out the same information as the previous chart but in proportions by age group.

The figure confirms that is the high proportion of people aged 5-17 yrs who now play (39%) which contribute to the segment's importance – rather than the total segment's population size.

In contrast, only about one in seven people aged 35+ yrs now play a musical instrument.

Chart 13: People who Now Play a Musical Instrument or Not

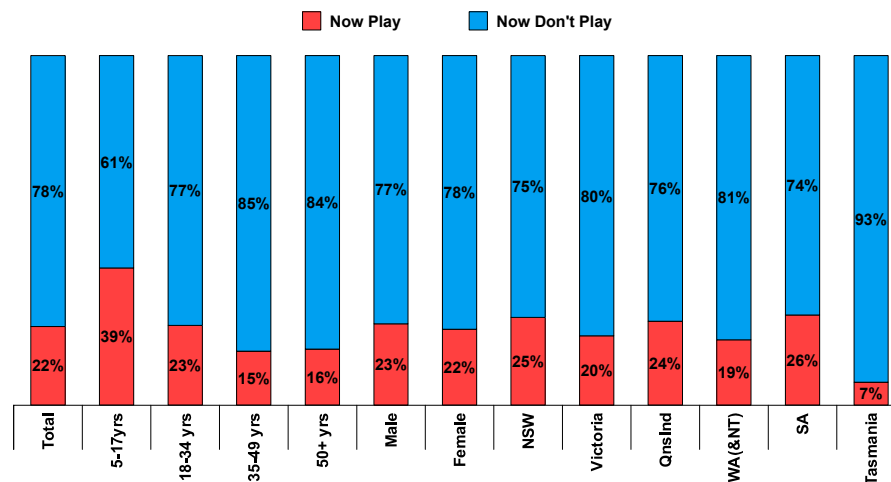
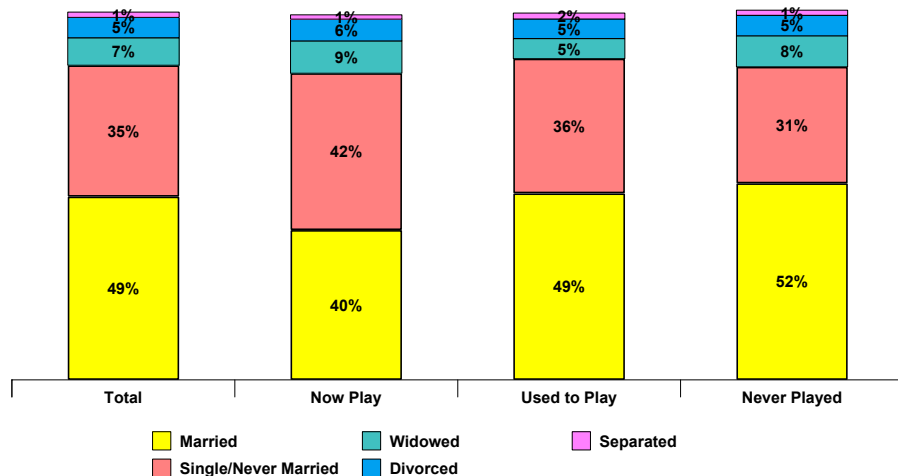


Chart 100: And what is your current marital status? (All Individuals 18+yrs)



Later in the interview, after the audit of household members had been undertaken with a responsible adult, an individual was randomly selected by age from amongst all those eligible (i.e. 12+ yrs old). This individual interview also included a check on whether the respondent played a musical instrument, used to play one or had never played. From this section, the following chart has been derived. It compares the marital profile of instrument players against lapsed players and those who have never played. (Since most individuals aged less than 18 yrs may be expected to be single, these have been omitted from the chart).

Interestingly, it can be seen that only around 40% of those now playing a musical instrument are married compared to about 50% of lapsed or never players.

A similar analysis on the highest level of education achieved by individual respondents reveals a much higher level of tertiary education amongst current players (56%) than amongst those who never played (33%).

Chart 96: What is the highest level of education that you have completed?
(All individual respondents 18+ yrs)

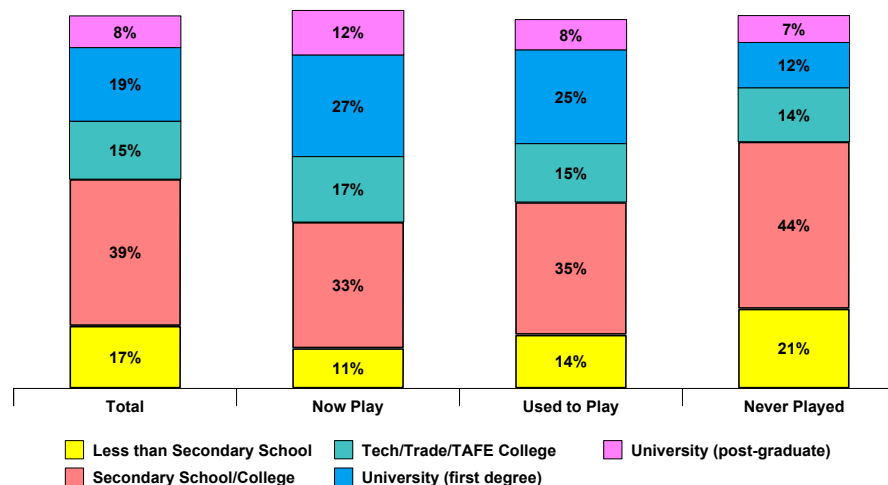
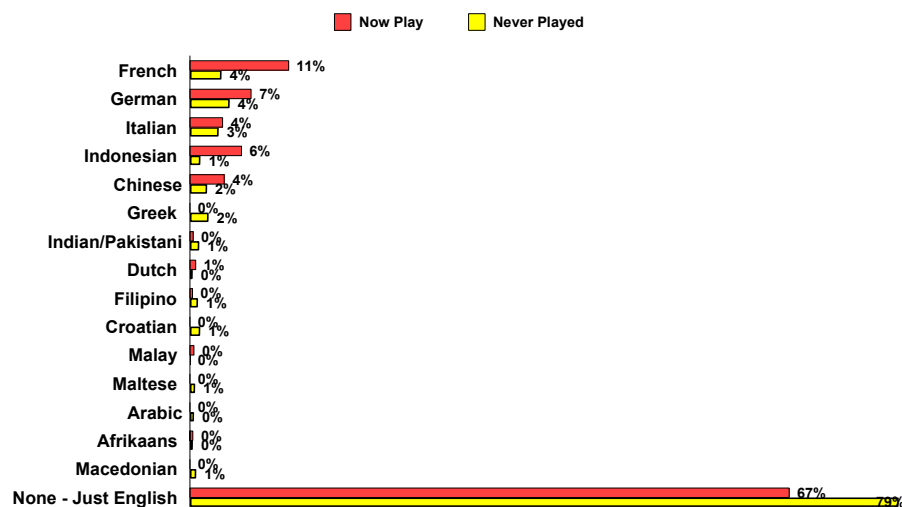


Chart 98: And do you speak any other languages apart from English? ... What languages?



For clarity, the adjacent chart just contrasts those who now play against those who have never played. (See detailed tables for the full results).

Significantly more instrument players (33%) speak more than one language than do those who have never played (21%).

This result would seem to hold across the individual language groups to a very large extent. Of course, there is no way to determine the direction of causality from this data.

The chart to the right breaks out the current occupation of current players, lapsed players and those who have never played.

There would seem very little difference in occupational profile between these three segments.

Chart 99: What is your current occupation? (Individuals 18+ yrs)

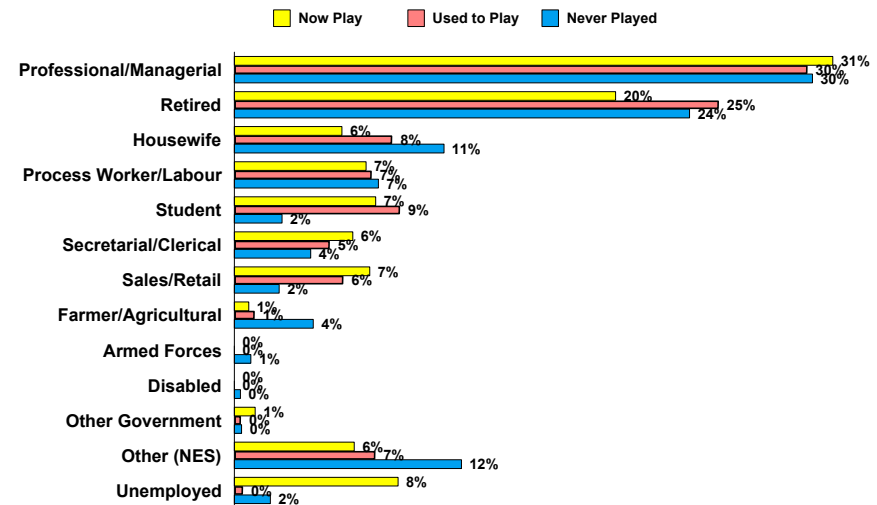
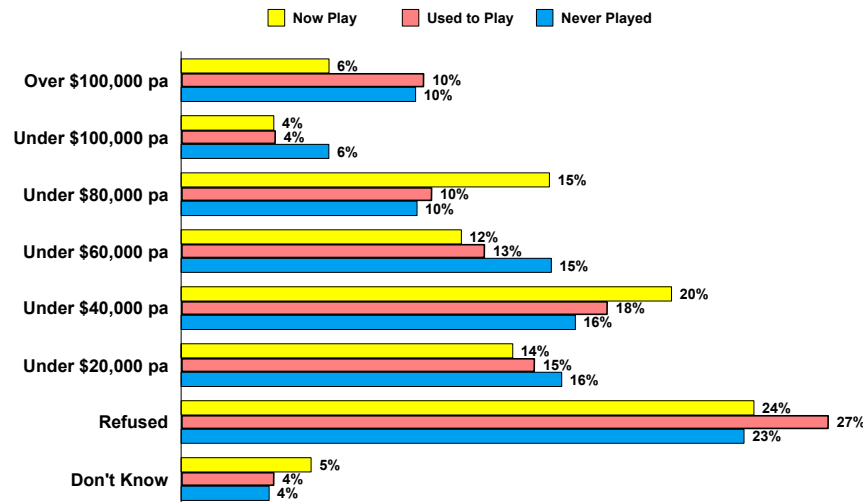


Chart 101: Do you know whether your household's total income is .. (Individuals 18+ yrs)



Towards the end of the interview, individual respondents were asked to indicate for classification purposes in which bracket their household's total income stood. The chart to the left summarises results and it should be noted that about a quarter of respondents refused to supply an indication.

Amongst those providing an answer, it is interesting to note that just 10% of players live in households earning over \$80,000 p.a. compared to 14% and 16% for lapsed players and non-players respectively. Music playing would thus not seem a consequence of privilege although the youthful bias of players may correlate with this.

3. Lapsed Players

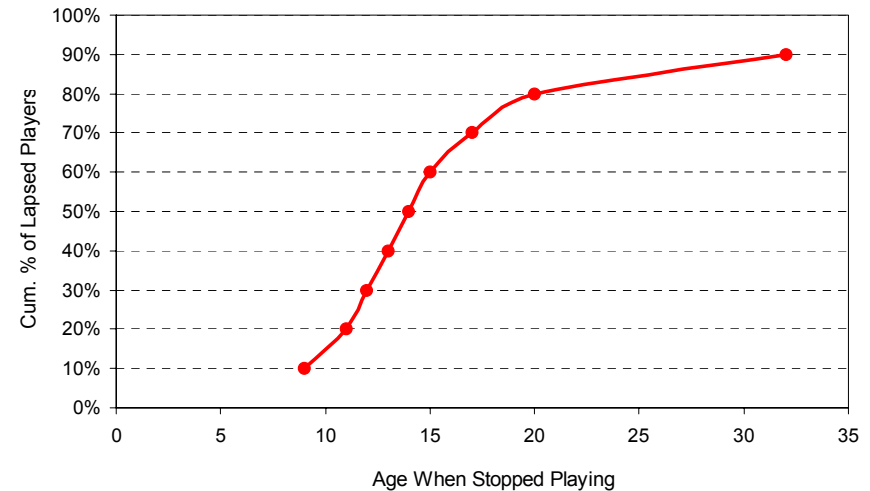
3.1 Age When Stopped

To provide more understanding, the adjacent chart plots the cumulative drop-out rate. It shows that about 30% of lapsed players dropped out by the age of 12 yrs; but that a further 30% dropped out by the age of 15 yrs.

Clearly, the early teenage years are the most vulnerable time when people stop playing musical instruments.

As the detailed tables from the household audit show, the mean drop-out age for lapsed players was 17 years; but the mode (most common age) was 12 years.

Chart 10: At what age did ... stop playing? (Cumulative)



3.2 Reasons for Stopping Playing

Those respondents who helped with the audit of household members were also asked, where relevant, why some members had stopped playing. The answers for members aged 5-34 yrs are summarised in the adjacent graph.

Overall, the somewhat non-specific reason of losing interest would seem the main explanation (by 37%) – perhaps partly reflecting that this was often a third party answering.

However, more specific reasons emerge in the explanations of respondents changing school or finishing a compulsory period of play (11% + 10% respectively).

Chart 11: Why did ... stop playing? (q12 verbatim) - Reasons given for people 5-34 yrs

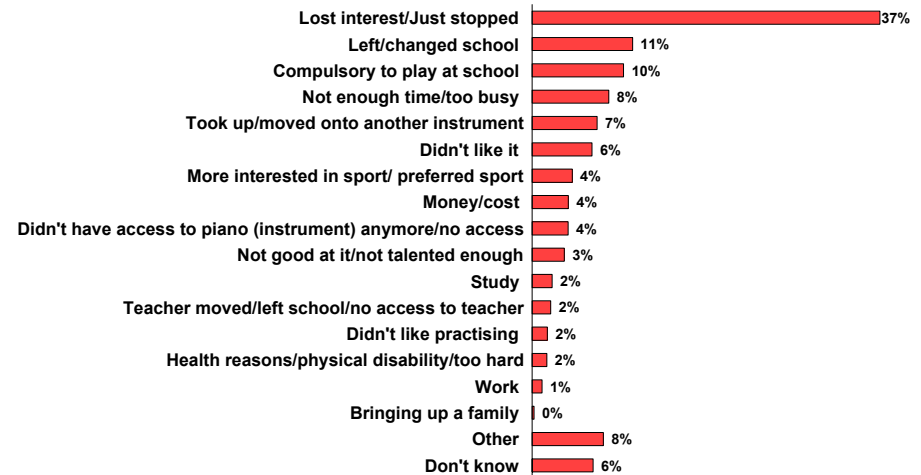
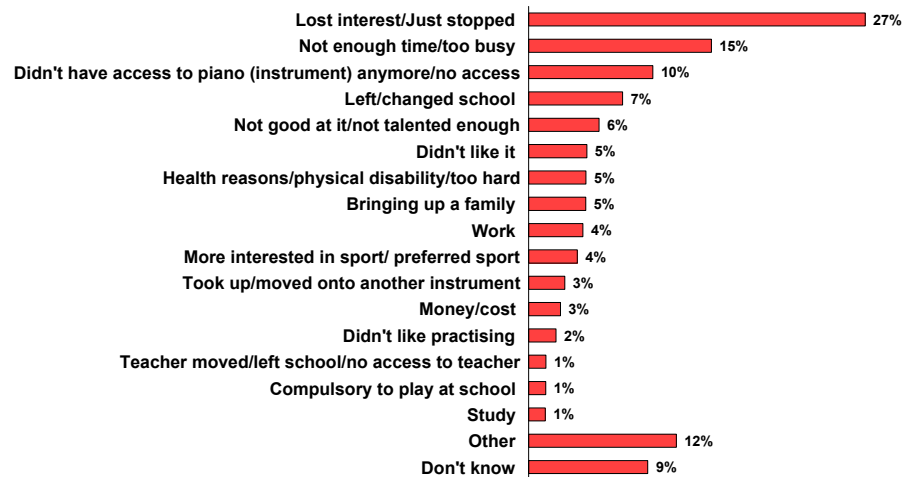


Chart 11: Why did ... stop playing? (q12 verbatim) - Reasons given for people aged 35+ yrs



Amongst older respondents (35+ yrs), the general reason of just losing interest was also the most common (by 27%).

However, more specific explanations now relate to lack of time (15%) as well as lack of access to an instrument (10%).

There would seem a few older players who did learn by music school – and again changes in this aspect resulted in discontinuation of playing.

4. The Learning Process

4.1 The Initial Steps

In the detailed interview with an individual randomly selected from the household, one question checked at what age did the respondent think children should be exposed to music. The adjacent graph summarises the distribution of answers.

It can be seen that the most common view was at one year old (41%), followed by 5 years old (19%). In fact, the mean was 3½ years.

Chart 62: At what age did you first learn to play a musical instrument?

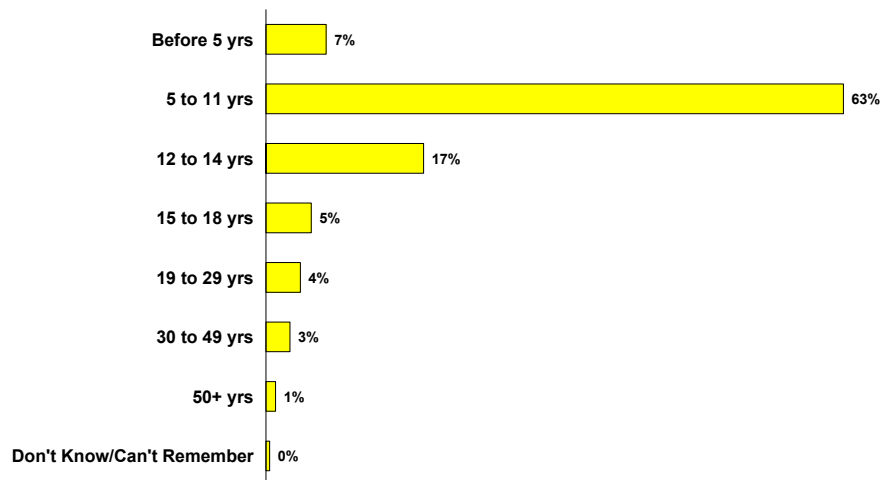
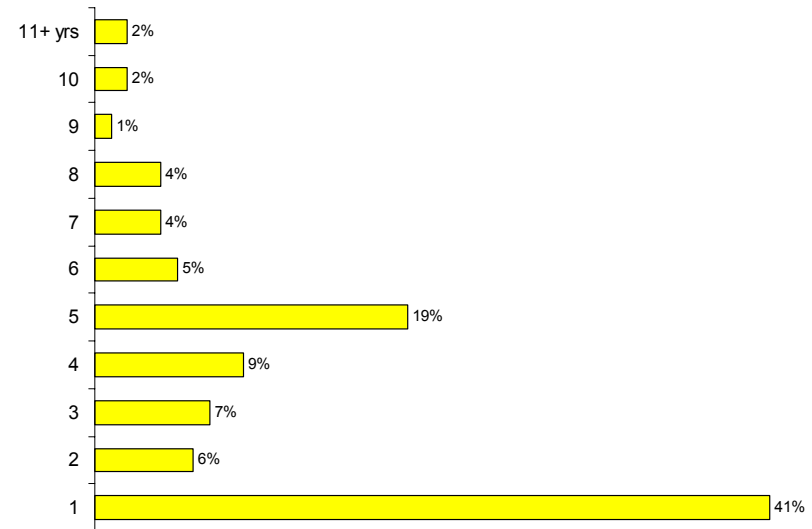


Chart 53: At what age should be exposed?



A later question checked amongst those individuals who had learnt to play a musical instrument at what age they themselves started. Here, by far the most common age bracket is 5-11 yrs.

There are however some differences between the sexes. Some 71% of females started playing in the age range 5-11 yrs; but only 55% of males.

In contrast, 30% of boys started playing in the range 12-18 yrs; but only 15% of girls. (See detailed tables).

Individuals were also asked to what extent they agreed with a number of contentions. The chart to the right reflects levels of agreement with the view that “*Music plays a significant role in pre-school development*”.

As the chart shows, just over half (53%) of all individuals interviewed said that they strongly agreed with this view.

However, those aged 12-17 yrs were significantly less likely to be so much in agreement (25% v. 53%). Males too were a little less likely to strongly agree (43%).

Chart 54: Using a scale from 1 to 5, where 1 stands for Strongly Disagree upto 5 standing for Strongly Agree, how would you score your level of agreement with..
“*Music plays a significant role in pre-school development*”

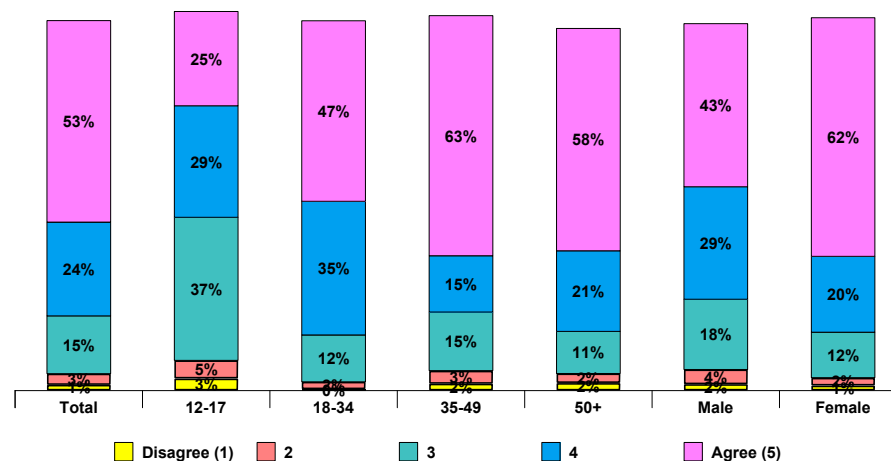
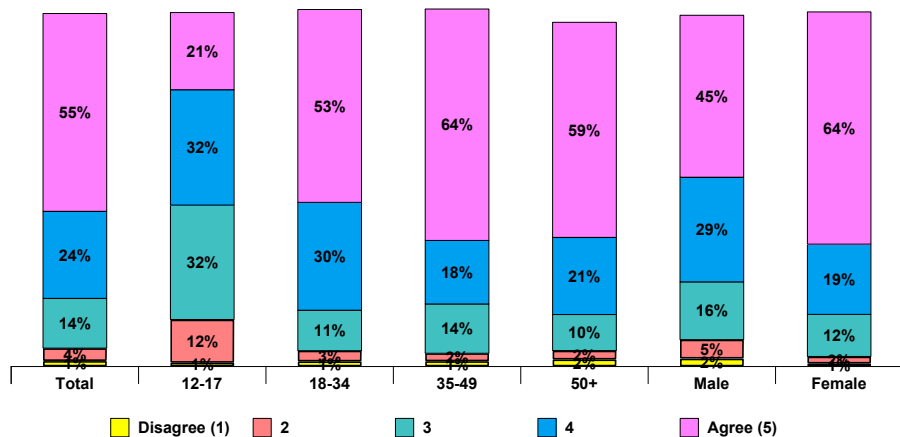


Chart 55: And using a scale from 1 to 5, where 1 stands for Strongly Disagree upto 5 standing for Strongly Agree, how would you score your level of agreement with..
“*It’s important for children to engage in musical activities in daycare or pre-school*”



A similar question elicited levels of agreement with the view that “*It’s important for children to engage in musical activities in daycare or pre-school*”.

Again, the majority (55%) of individual respondents strongly agreed with this view.

However, again, this was less the case with those aged 12-17 yrs (21%) and with males (45%).

It would seem that such arguments are more likely to be effective when targeted at mothers.

All individual respondents were asked who, if anybody originally motivated them to play a musical instrument. As the adjacent chart shows, this was not relevant to the 41% who never started playing.

Amongst the remainder, parental influence would seem the more likely factor – something quite consistent by age group. However, males appear slightly more likely to have made up their own minds – a result probably correlated with a significant proportion starting later in their teens.

Chart 61: Who, if anybody, originally motivated you to start playing a musical instrument? Did ...

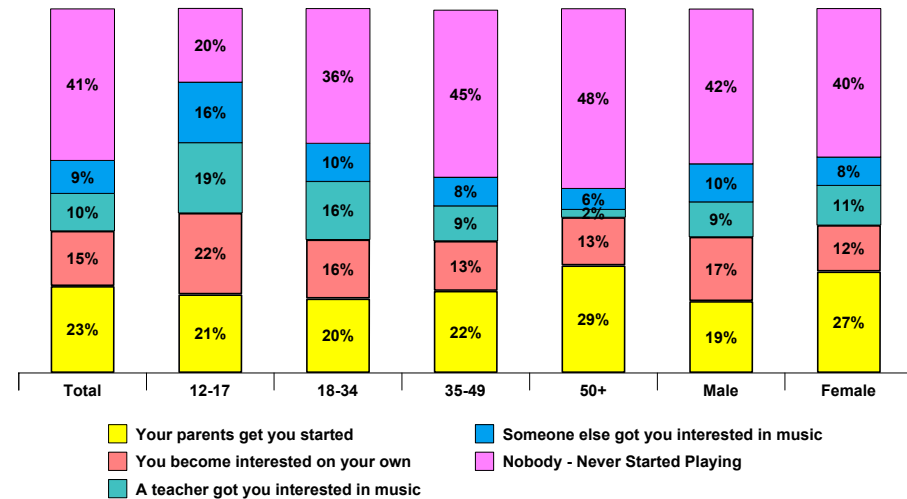
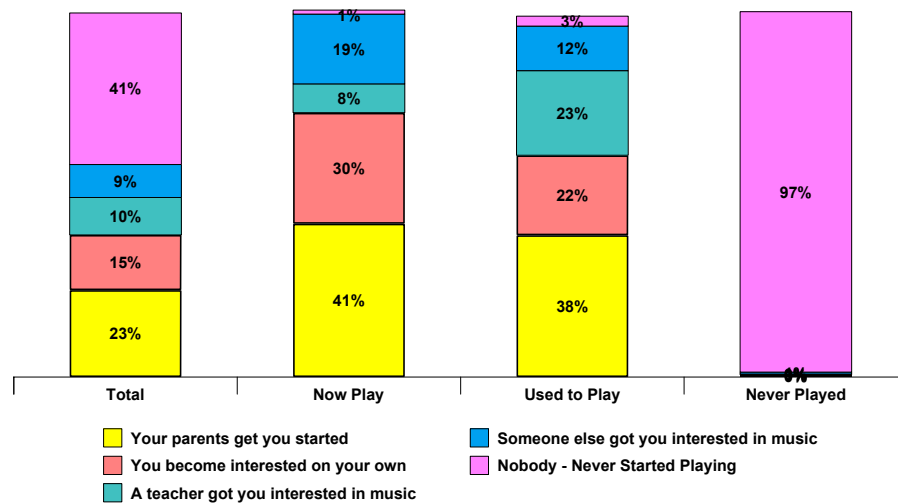


Chart 61: Who, if anybody, originally motivated you to start playing a musical instrument? Did ...



The same information can be analysed according to whether respondents now play, are lapsed players or never played.

It can be seen that people are a little more likely to persist with playing if they became interested on their own – and a little less likely if their interest was instigated by a teacher, presumably at school. (Of course, it could well be that natural ability correlates with being a self-starter).

Those who now play, or used to, were asked how they had first learnt. Answers are summarised in the adjacent figure.

It is an interesting statistic that almost half of those now playing (49%) commenced with private lessons from a paid teacher – one-to-one.

On the other hand, those who had lessons as part of their school curriculum are more likely to be lapsed players, as previous results have suggested.

Chart 63: There are a number of ways to learn to play a musical instrument. How did you first learn to play? .. Any other ways?

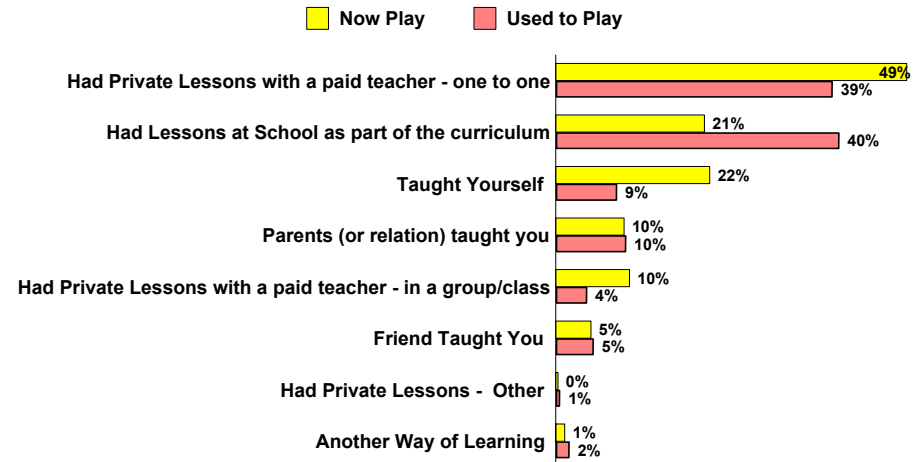
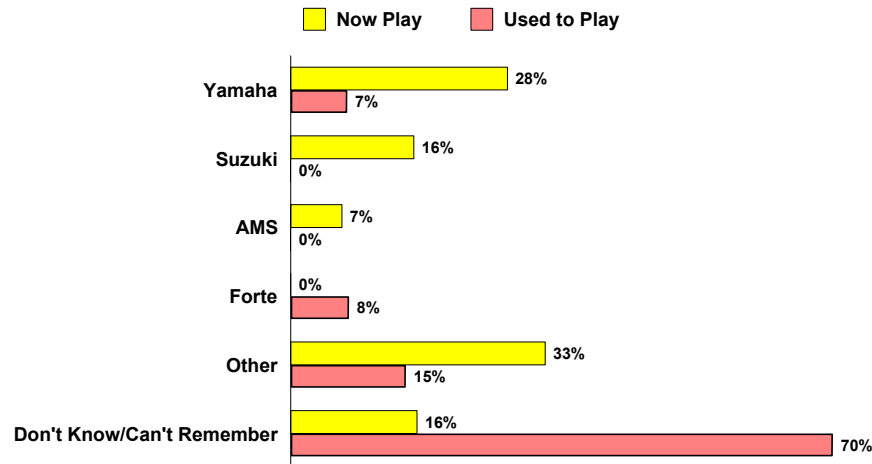


Chart 64: Were the private lessons that you had in a group one of the following types ...



Those (34) respondents who had taken private lessons with a paid teacher in a group or class were subsequently asked which type this was.

As the chart to the left shows, Yamaha was the marginally more popular, particularly amongst those who are still playing.

4.2 Current Practice

During the audit of household members, information was sought on those who still play regarding their current methods of practice. Answers are analysed by demographics in the chart to the right.

The importance of participation in a school instrumental music programme for those aged 5-17 yrs is clearly demonstrated. Over half (53%) of current players in this age bracket participate in such an activity.

On the other hand, those aged 18-34 yrs are heavily self-reliant (49%) or learn some other way, perhaps by emulation.

Since respondents may learn by more than one method, the chart reflects multiple answers. In this respect, those aged 5-17 yrs are more likely to access more than one means of practice – as evidenced by the bar for this segment being taller than others in the chart.

Chart 9: Does (household member who plays) now ...

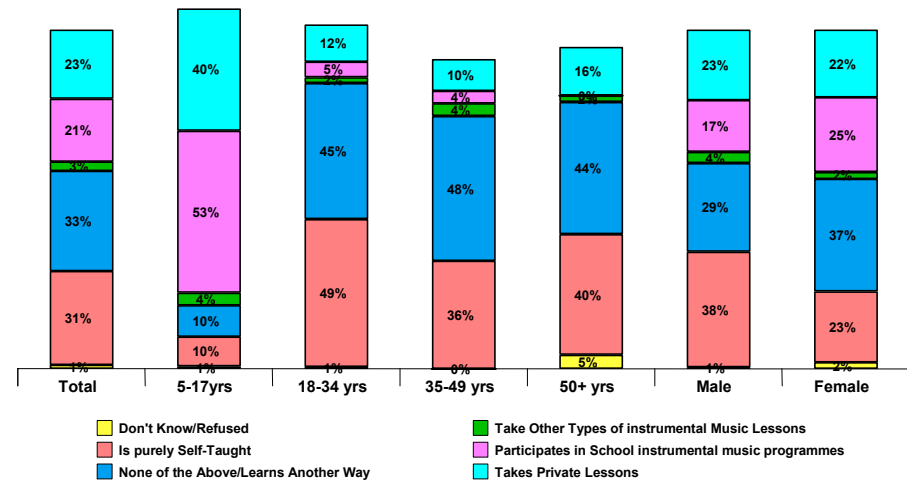
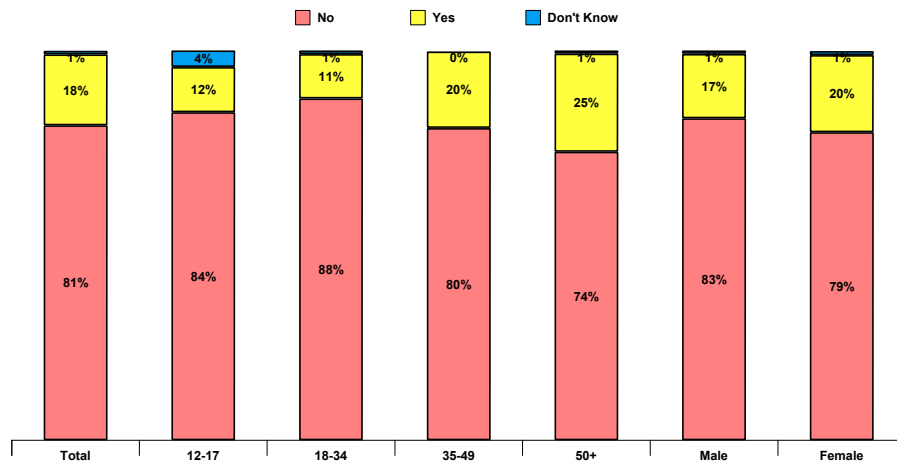


Chart 56: Some recent studies have shown that being involved with music is a very positive experience for senior citizens. Do you know of any senior citizens that have recently become involved or re-involved with music and playing an instrument?



Later, when individual respondents were being interviewed, it was contended that recent studies have shown that being involved with music is a very positive experience for senior citizens. Respondents were then asked whether they knew of any such citizens who have recently become involved or re-involved with music and playing an instrument.

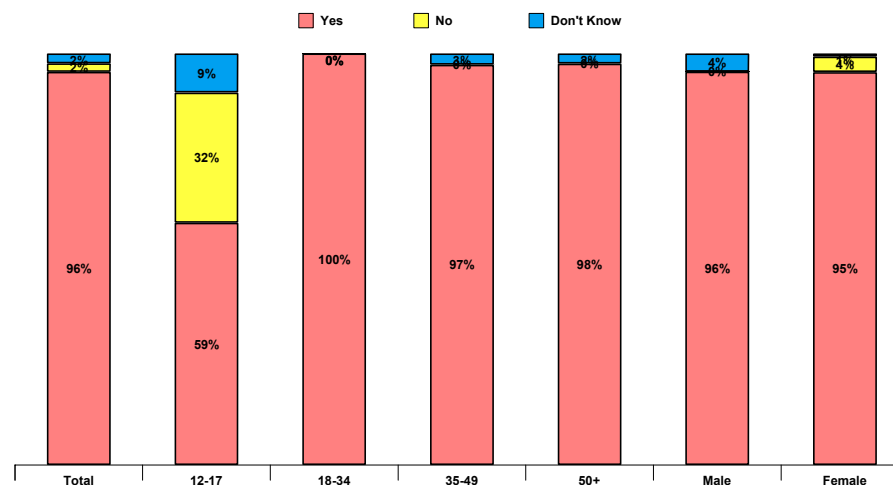
As the adjacent chart shows, about one in five (18%) of all respondents were aware of such a situation. Amongst those aged 50+ yrs, the proportion rises to one in four.

Those who were aware of such senior citizens programs were asked whether they believed this to be a positive experience.

As the figure to the right shows, the overwhelming viewpoint (by 96%) is that involvement in music by senior citizens is indeed a positive experience. (The reader is cautioned that the preceding question, which uses the NAMM wording, probably influenced this result).

The only segment of dissent from this view is amongst those aged 12-17 yrs – perhaps partly through lack of experience.

Chart 57: Do you believe this [ie. involvement in music by senior citizens] is a positive experience?



5. Instruments Played

5.1 Instruments Now Played

As part of the audit of household members (5+ yrs), information was collected on what instruments were now played. The adjacent chart summarises this information and provides the percentages of players using each of the more common instruments.

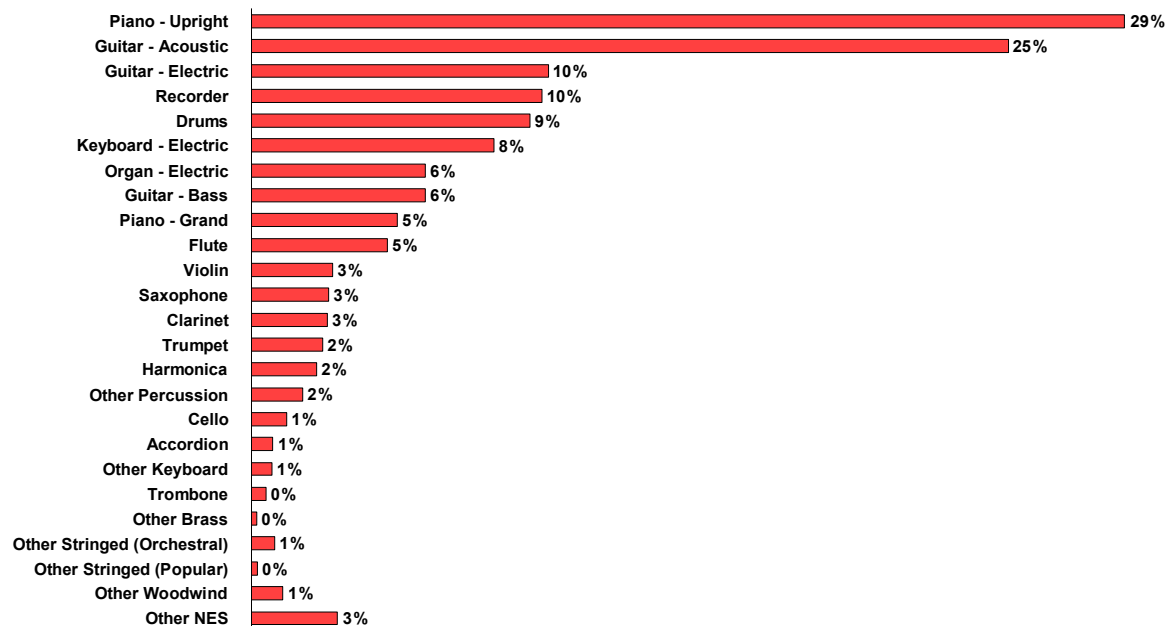
As the chart shows, upright pianos are the most popular instrument, used by almost a third (29%) of players. However, this average hides some significant differences by demographics. The proportion of female players playing a piano is over twice that of male players (42% v. 17%). Also, those 50+ yrs are much more likely to be piano players than those aged 5-17 yrs (42% v. 22%).

The second most popular instrument – the acoustic guitar – has reverse bias. Here, male players (37%) are much more common than female players (14%). Interestingly, the proportion of players by age peaks in the 35-49 yrs sector (at 43%); but is relatively low at the younger and older edges of the population (5-17 yrs – 12%, 50+ yrs – 17%). A similar distribution occurs for electric guitars.

Perhaps predictably, recorders are much more likely to be played by those aged 5-17 yrs (20%) than older players (<6%).

Other types of keyboards and guitars tend to echo the preceding biases (– see detailed tables).

Chart 6: What musical instruments does .. play? (Base: All Players)



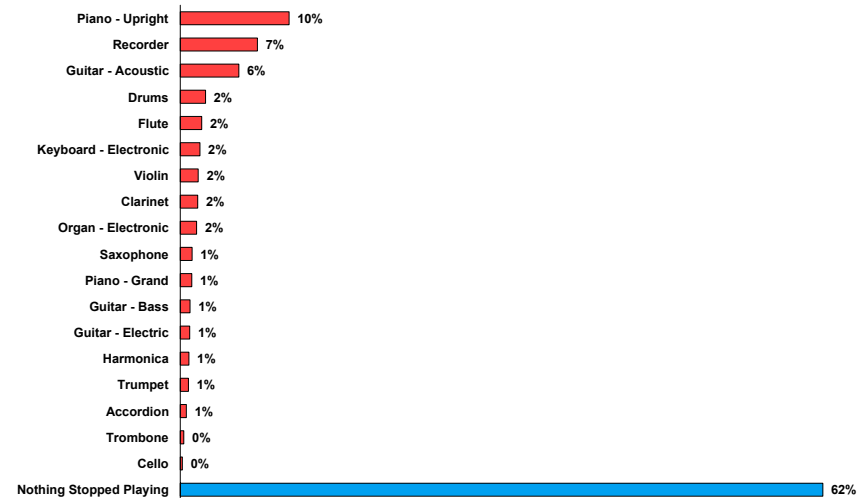
5.2 Instruments Previously Played

In checking household members, regardless of their current playing status, further questions probed the instruments that had now been put aside. The adjacent chart summarises instruments no longer played. In this case, percentages apply to the total population (5+ yrs).

In line with its current popularity, the upright piano was also the most common instrument amongst lapsed players. The detailed tables indicate similar demographic biases towards older, female lapsed players.

A cross-tabulation of reasons for no longer playing against type of instrument no longer played reveals approximately 21% of lapsed players explaining their status by no longer having access to a piano.

Chart 9: What musical instrument(s) does .. no longer play?



5.3 Ownership & Purchase

Later in the interview, the individual respondent was asked whether anybody in the household owned a musical instrument of any kind.

As the adjacent chart summarises, it appears that the majority of Australian households (55%) do possess at least one musical instrument of some kind.

The only exceptions to this norm are Victoria (marginally) and Tasmania – although the latter result probably reflects the small sample size for that state (26).

Chart 58: Do you, or does anyone in this household, own a musical instrument of any kind?

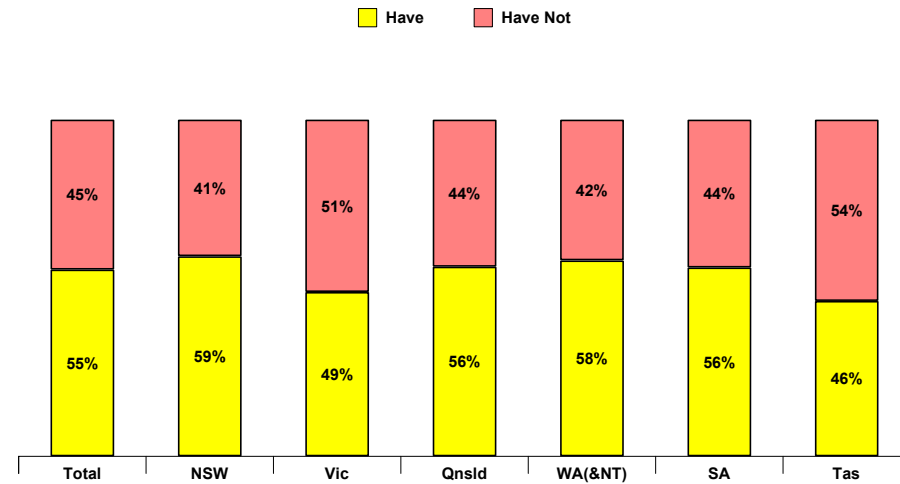
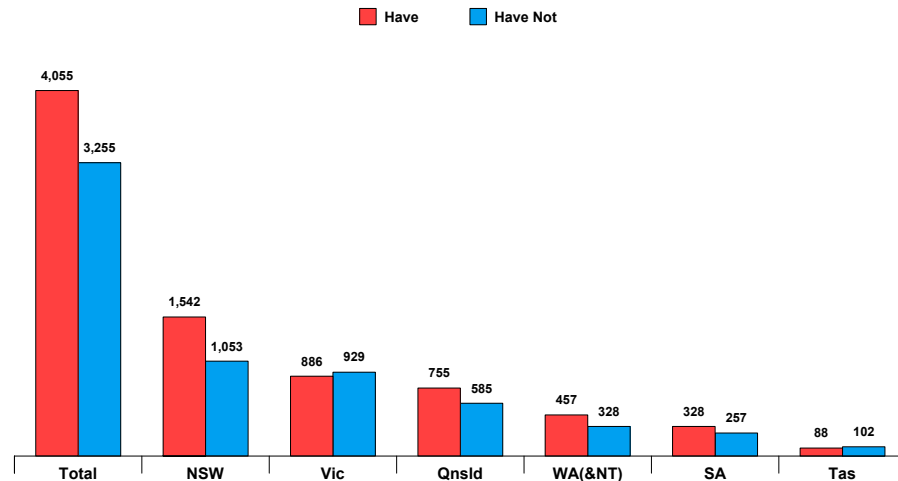


Chart 58: Do you, or does anyone in this household, own a musical instrument of any kind?



The adjacent chart breaks out the same information but in absolute numbers (- expressed in 000's for the sake of clarity on the chart).

Overall, it can be seen that some 4 million Australian households are estimated to possess at least one musical instrument. However, this leaves approximately 3.3 million households yet to own one.

When absolute numbers are considered, Victoria again stands out as having relatively low ownership of musical instruments.

Individual respondents were asked, if they were going to shop for or buy a musical instrument, where would they go.

The most popular destination was a specialist music retailer, cited by two out of three individuals (67%). This rose to three-quarters (76%) of those now playing (see detailed tables).

Classified ads were a little more popular with older respondents, perhaps because of their greater experience. On the other hand, one in eight of those who had never learnt to play an instrument considered going to a mainstream retailer such as Target.

Chart 59: If you were going to shop for or buy a musical instrument, which of the following sources would you be most likely to consider ..

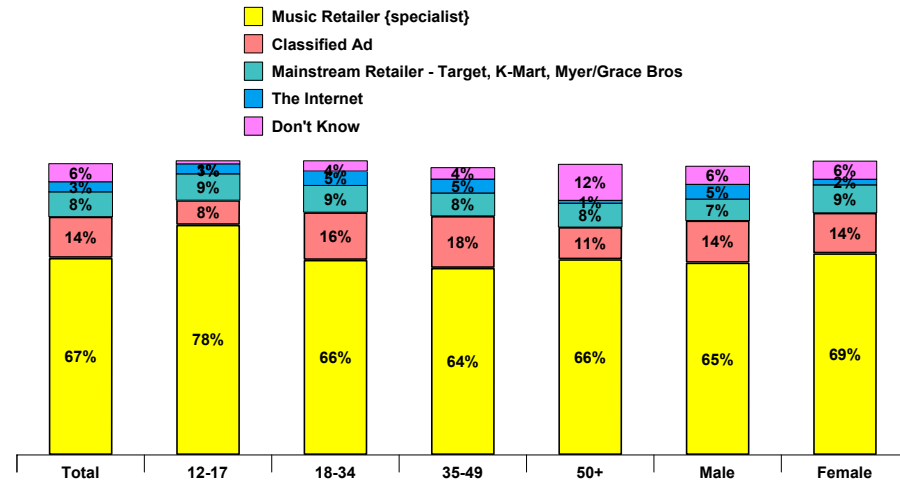
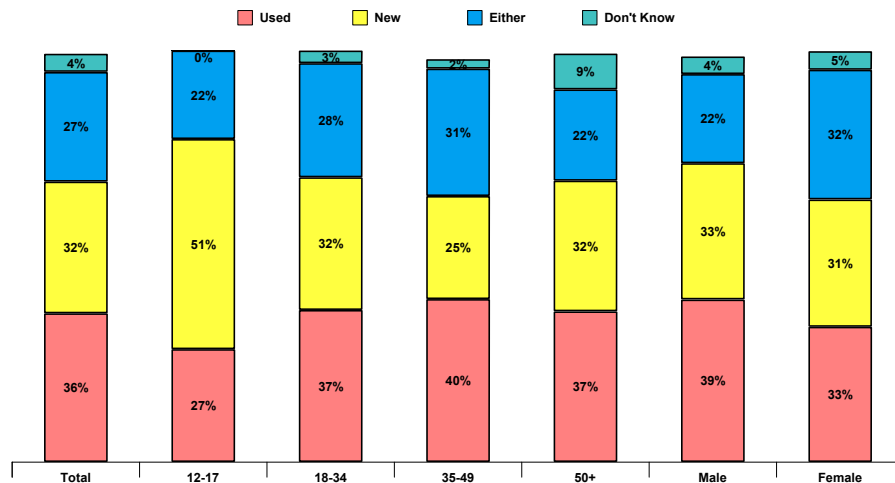


Chart 60: If you were going to buy a musical instrument, would you look for one that is new or used?



A follow-up question asked all individuals, if they were going to buy a musical instrument, would they look for a new or used one.

In broad terms, it appears that about a third of the population would look for a new instrument, a third would look for a used one and a third would be content with either.

The main exception is amongst those aged 12-17 yrs, where over half (52%) would like a new instrument.

The slightly greater inclination by older respondents to buy a used instrument correlates with their greater inclination to scan the classified ads.

6. Attitudes & Beliefs

6.1 Messages Received

The randomly selected individual in the household (12+ yrs) was asked whether they had read, seen or heard anything about the benefits of playing a musical instrument and its positive effect on health, wellbeing or education.

As the chart to the right shows, about a quarter (24%) of respondents replied that they had received such a message.

This proportion rises materially to 35% of those aged 35-49 yrs. However, it falls back a little amongst those aged 50+ yrs (to 21%).

Chart 51: In the last year, have you read, seen or heard anything about the benefits of playing a musical instrument and its positive effect on health, wellbeing or education?

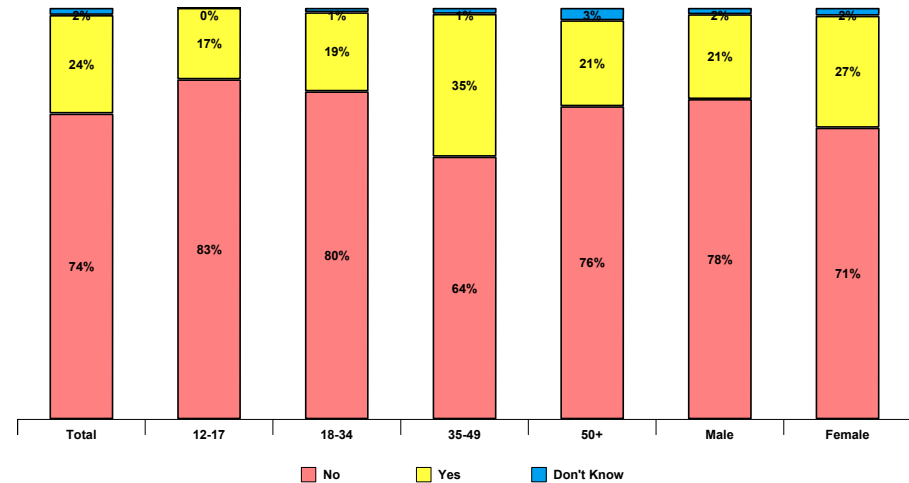
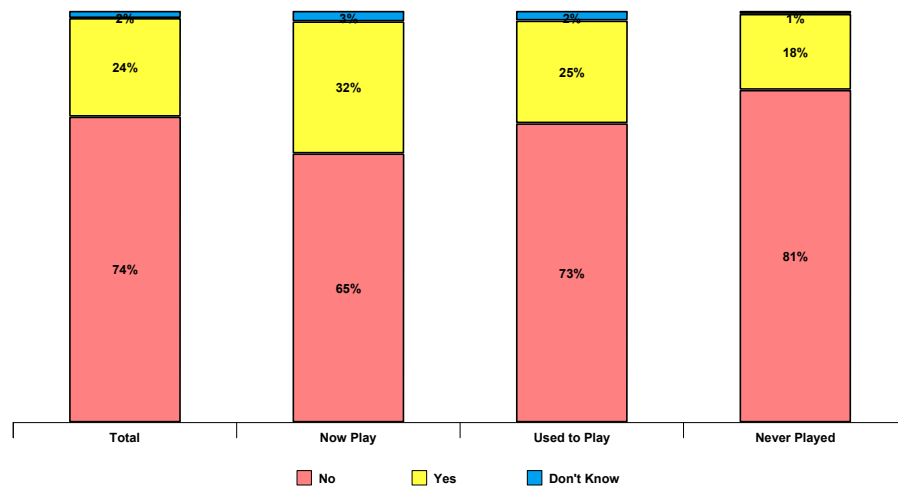


Chart 51: In the last year, have you read, seen or heard anything about the benefits of playing a musical instrument and its positive effect on health, wellbeing or education?



The same information can be cross-tabulated by whether the individual respondents were now playing a musical instrument, used to play or had never played.

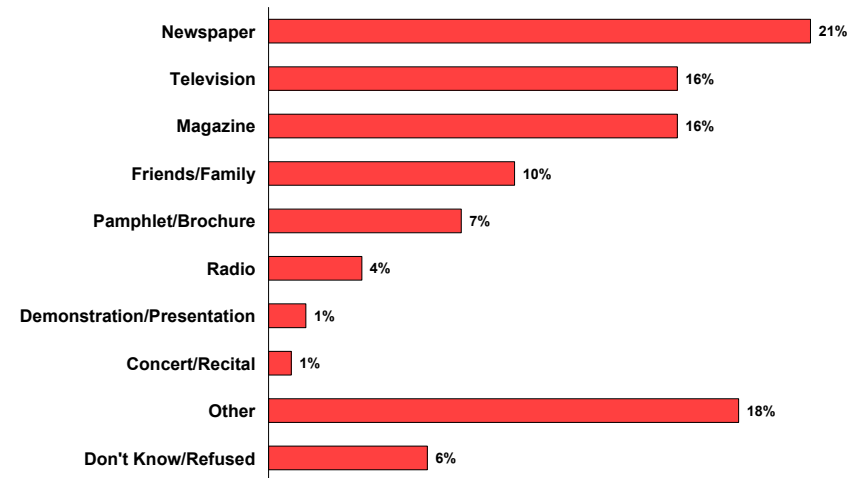
The adjacent chart reveals that about a third (32%) of those now playing a musical instrument have heard about these benefits.

However, the message has not penetrated to the same extent amongst those who have never played (18%).

Those who claimed to have read, seen or heard something about the benefits of playing a musical instrument were asked where this had been.

As the adjacent figure shows, the newspaper was the most commonly attributed source of information, followed by television and magazines.

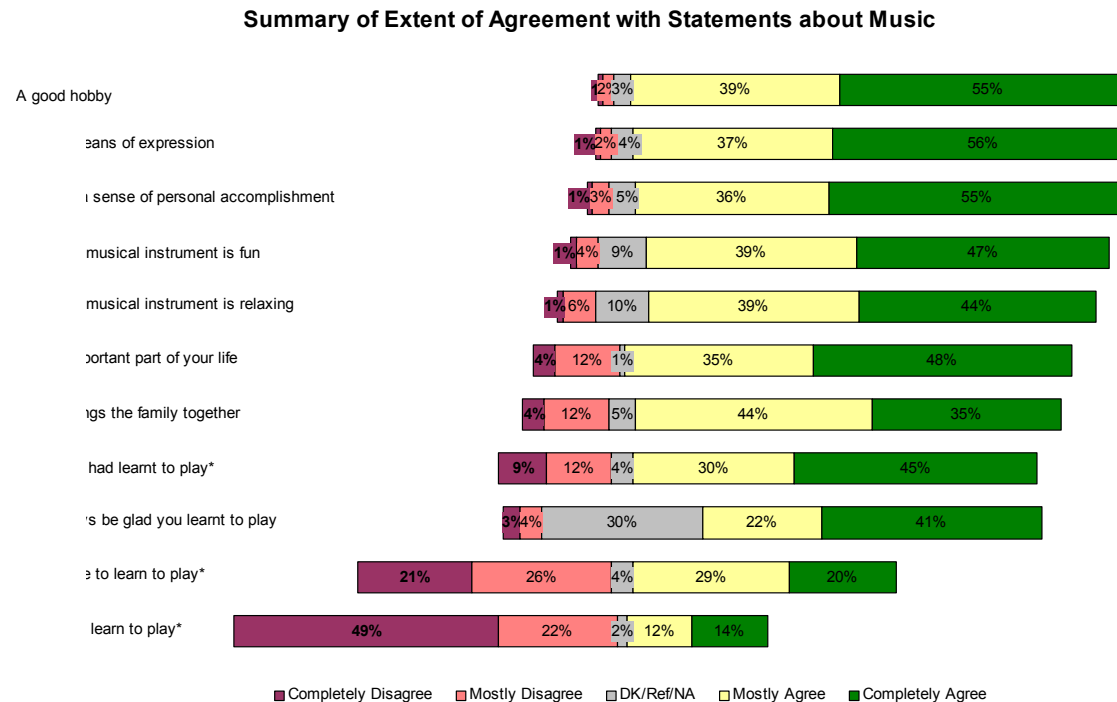
Chart 52: Where did you read, see or hear this information?



6.2 Attitudes

6.2.1 General Beliefs

All individual respondents were asked to indicate their level of agreement with a series of 11 statements about music generally. The following figure orders these for ease of reference according to the level of complete agreement that they elicited.



(* - non-players only)

Results thus imply that there is material common ground when approaching the general population with views such as that music is a good hobby, a good means of expression and provides a sense of personal accomplishment.

Of course, those playing a musical instrument tend to hold stronger views than those who have lapsed or have never played. The following pages break out the previous chart in more detail.

Chart 74: Playing a musical instrument is a good hobby

As the figure to the right shows, in fact, almost three-quarters (71%) of those now playing a musical instrument completely agree that it is a good hobby.

Encouragingly, even the 43% of those who have never played a musical instrument completely agree with this contention.

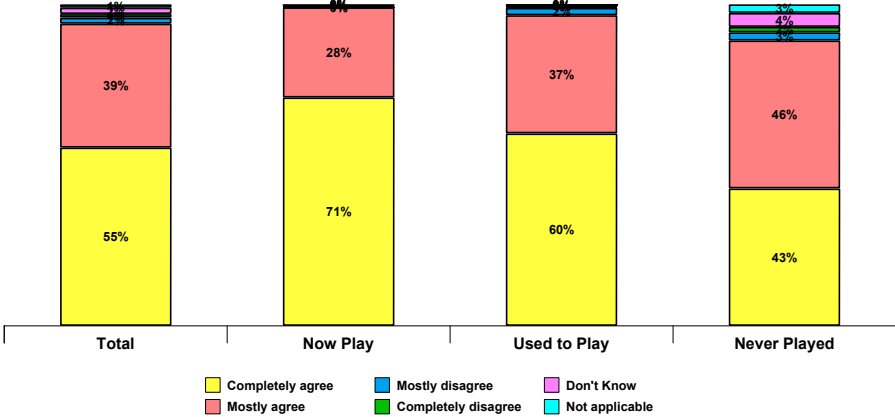
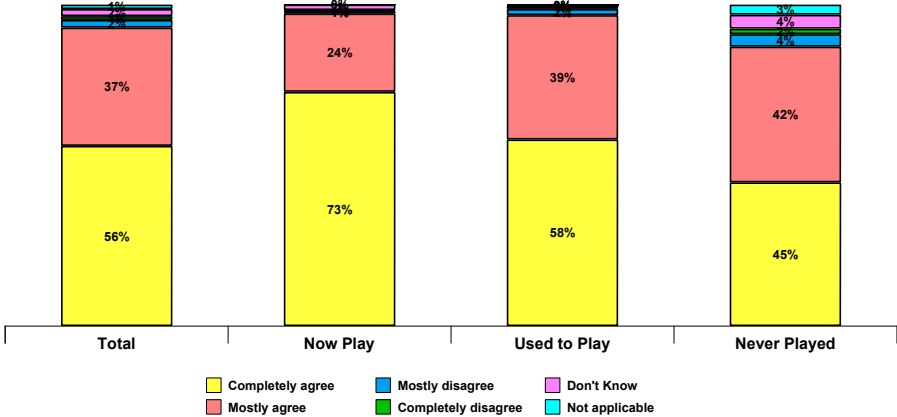


Chart 75: Playing a musical instrument is a good means of expression



Similarly, those now playing a musical instrument consider it a good means of expression (73% completely agree); although those who never played also tend to hold this view (- 87% completely or mostly agree).

Chart 76: Playing an instrument is fun

The majority of the population consider that playing an instrument is fun (86% mostly or completely agree).

Perhaps unsurprisingly this proportion leaps to practical unanimity (98%) amongst those now playing a musical instrument.

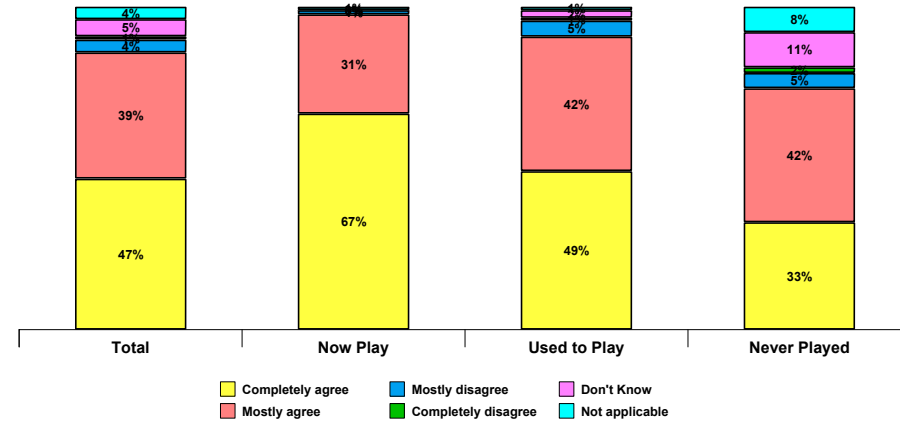
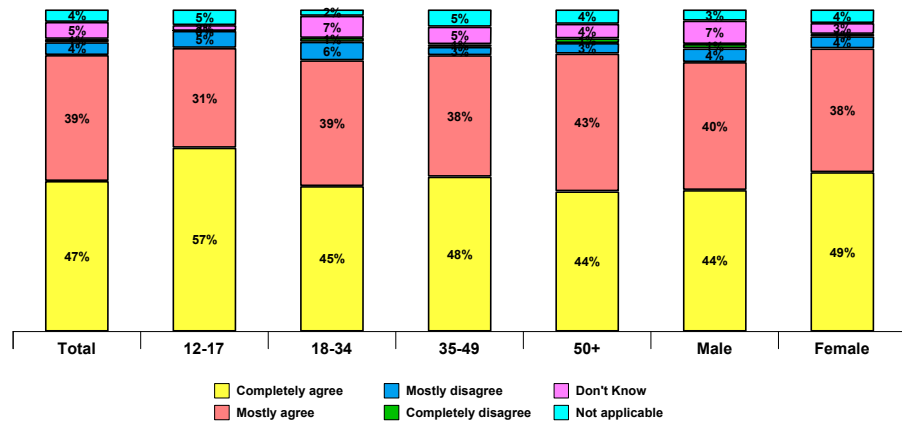


Chart 76: Playing an instrument is fun

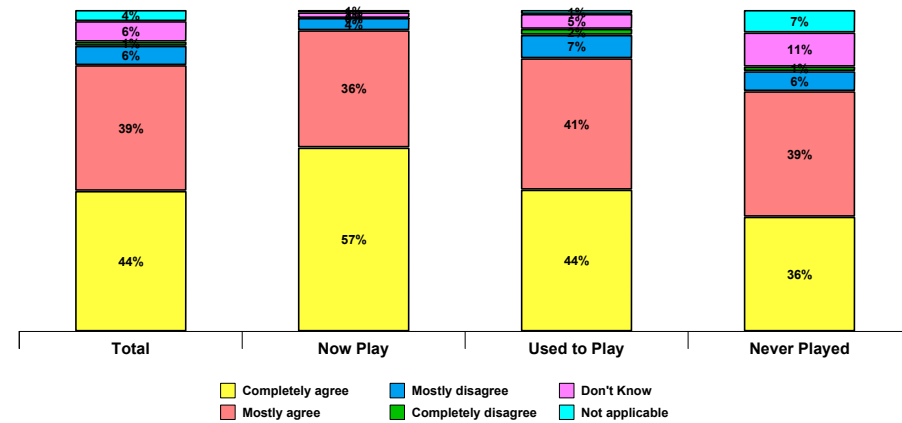


Encouragingly, agreement is also significantly high amongst the young (88% of those aged 12-17 yrs).

Slightly less than the majority (44%) would completely agree that playing a musical instrument is relaxing.

However, slightly more (57%) of those who now play would completely agree with this view.

Chart 73: Playing a musical instrument is relaxing



Almost half the population (48%) would completely agree that music is a very important part of their life.

The only dissenters are those aged 12-17 yrs, where just a third (31%) would completely agree.

Significantly more females than males completely agree with this view (52% v. 43%).

Chart 67: Music is a very important part of your life

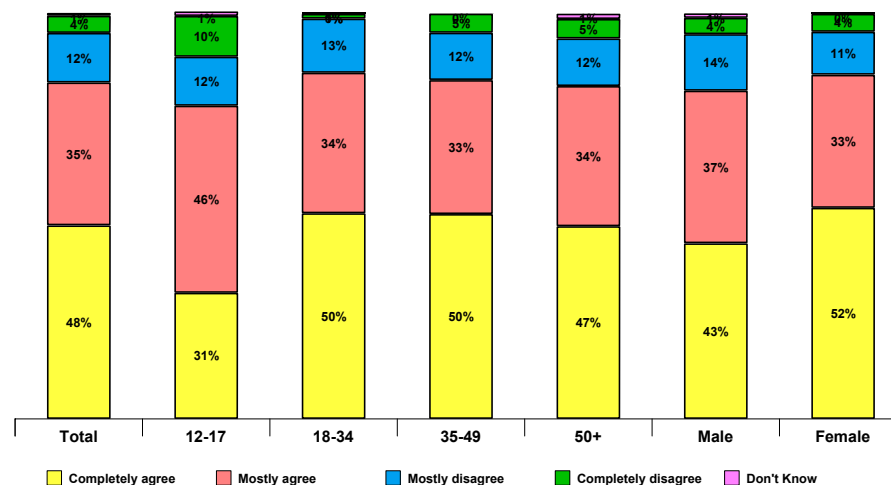
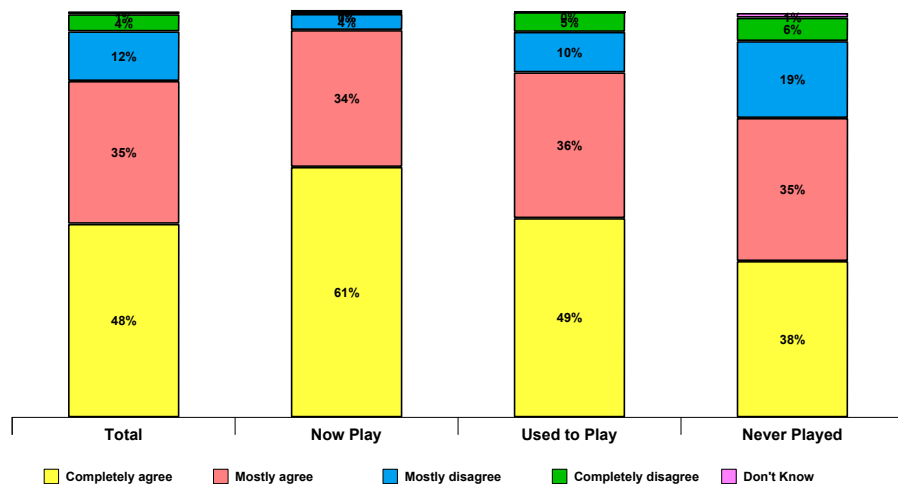


Chart 67: Music is a very important part of your life



When the same question is analysed according to respondents' playing status, predictably those now playing are much more likely to completely agree with the contention (61%).

About a third of people (35%) would completely agree that music brings the family together – and almost a further half (44%) would mostly agree with this statement.

The young again tend to be less in agreement (at 17% + 49% respectively for 12-17 yrs). Those aged 35+ tend to be commensurately more in agreement (42% + 41% respectively).

Chart 68: Music brings the family together

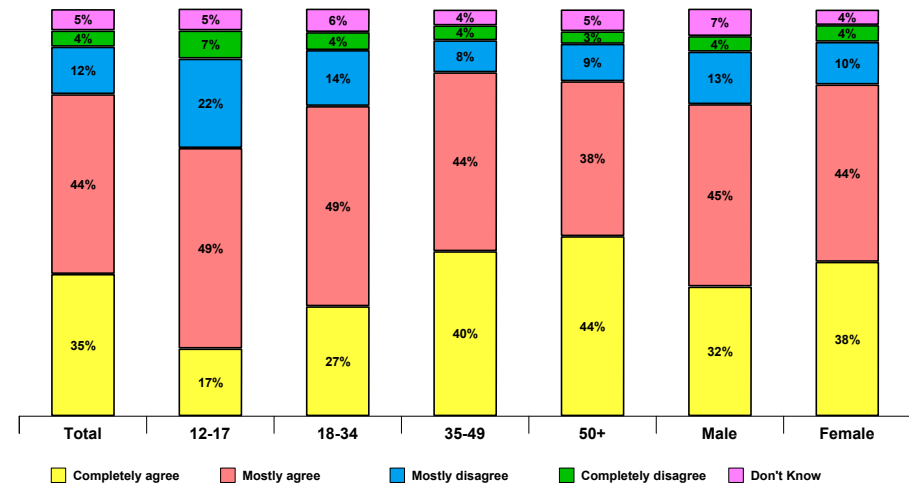


Chart 66: Playing a musical instrument is something you will always be glad you learnt to do

In contrast to the previous results, it is the young who are more inclined to agree that playing a musical instrument is something they will always be glad they had learnt to do (48% + 33%). Perhaps this partly reflects their situation of looking more forward than back.

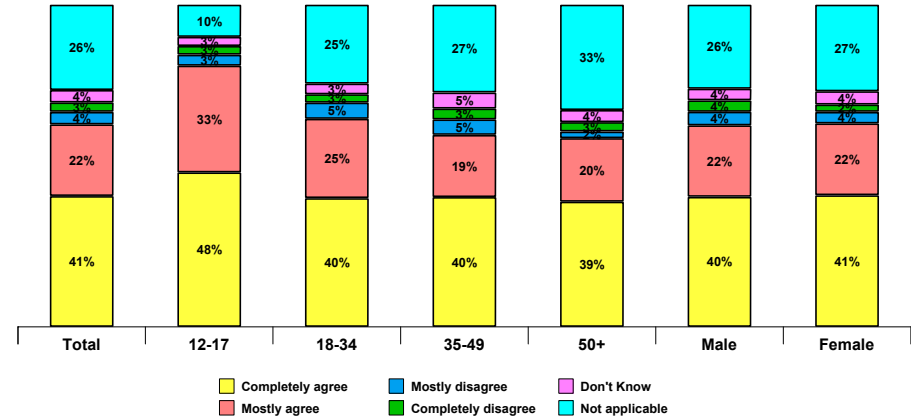
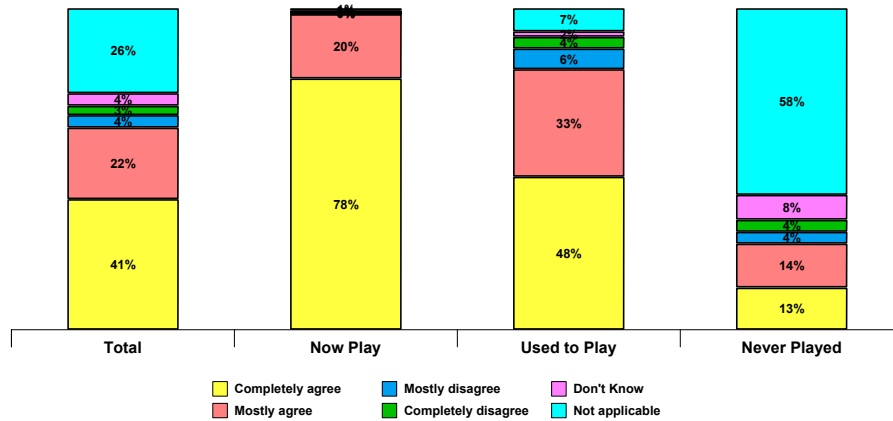


Chart 66: Playing a musical instrument is something you will always be glad you learnt to do



When the data is analysed by playing status of respondent, predictably practically all of those now playing agree that they were glad to have learned (78% +20%).

Interestingly, almost half (42%) of those who have never played felt able to address the statement, perhaps as a hypothetical question and, of these, most were also in agreement.

The majority of those who had never started to play also wished that they had done so (- 45% + 30%).

This would seem particularly the case amongst those aged 35-49 yrs – which may indicate a potential target market.

Chart 70: You wish you had learnt to play a musical instrument
(Base: All those who never started playing)

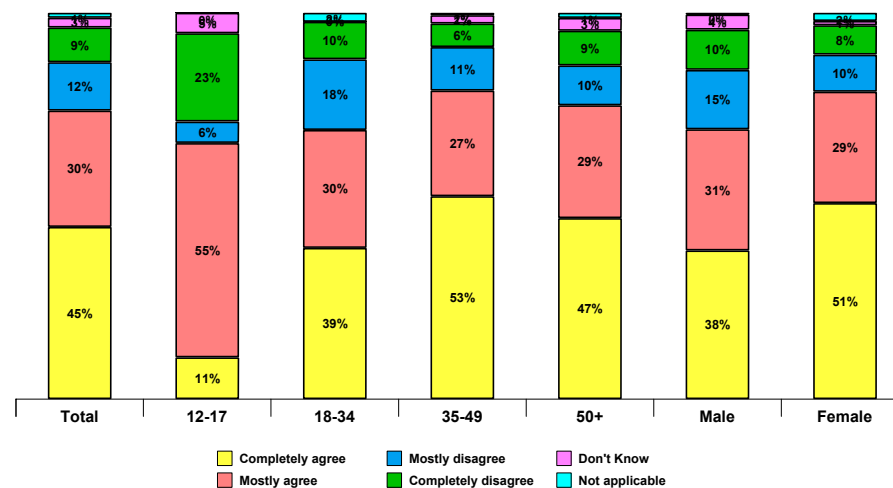
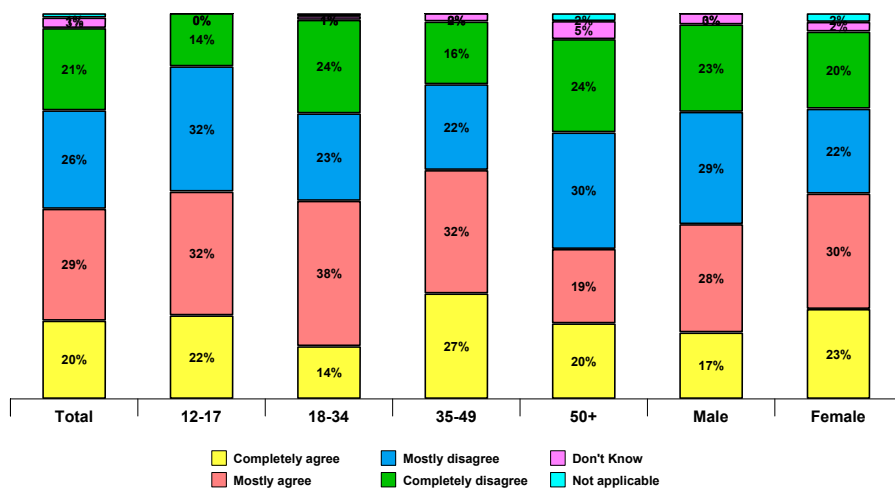


Chart 69: You would like to learn to play a musical instrument
(Base: All those who never started playing)

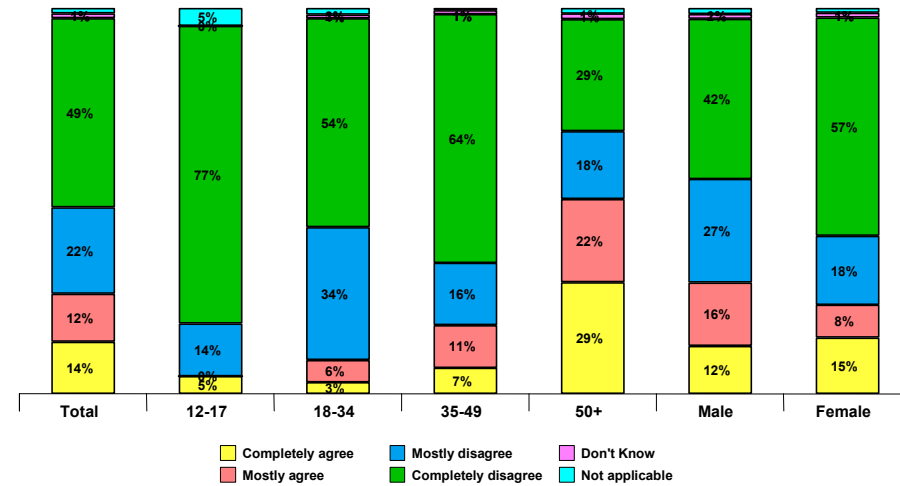


When a question specifically asked whether individuals would like to learn to play a musical instrument, it would seem significant that 20% of those who had never started playing said that they completely agreed and a further 29% said they mostly agreed. In other words, half of those who have never started playing say they would like to start.

A related question checked whether people considered they were too old to learn to play. In summary, about a quarter (14% + 12%) held this view whilst about a half (49%) completely disagreed.

Interestingly, almost two-thirds (64%) of those aged 35-49 yrs completely disagree that they are too old to learn – although just over half (51%) of those aged 50+ yrs do agree to some extent that this could be the case.

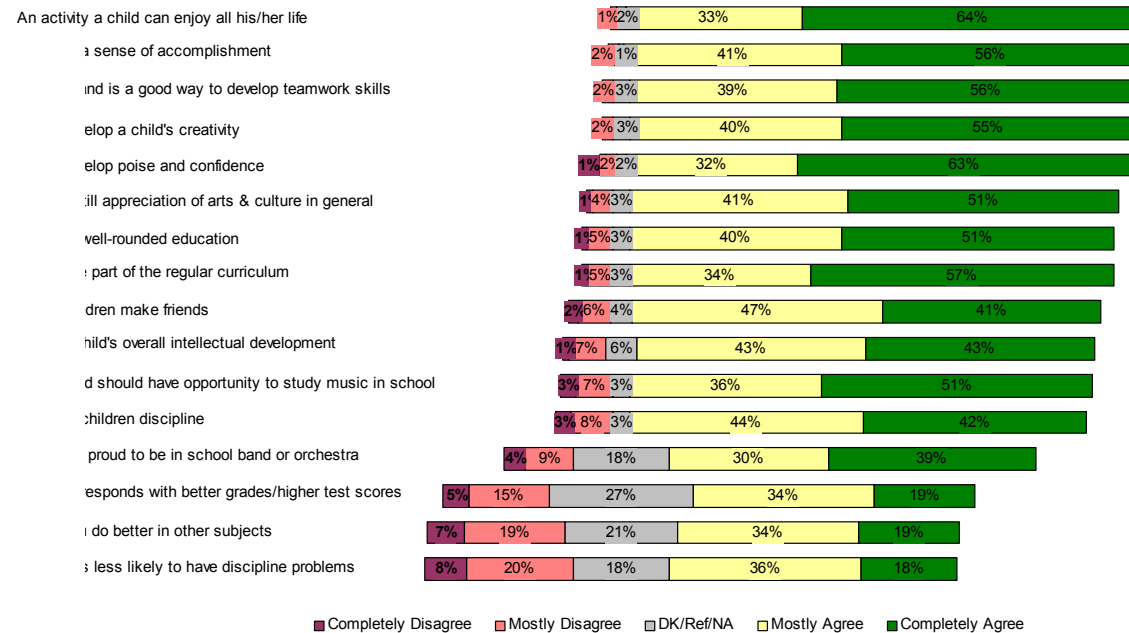
Chart 71: You are too old to learn to play a musical instrument
(Base: All those who never started playing)



6.2.2 Beliefs about Young People

Individual respondents were further asked for their degree of agreement with a series of 16 statements relating to music and young people. (These, as with much of the questionnaire, were in standard format so as to permit international comparisons).

Summary of Extent of Agreement with Statements about Young People and Music



It appears that almost two-thirds of the general population will completely agree with the contentions that music is an activity that a child can enjoy all his or her life and that performing in front of others helps develop poise and confidence (64% & 63% respectively).

On the other hand, only a minority (c.20%) would be completely receptive to the propositions that music helps young people do better in other subjects or helps with discipline problems.

Details relating to each statement were as follows.

Those who themselves play are more inclined to believe music is an activity that a child can enjoy all his or her life (74%).

Even those who have never played are quite likely to completely agree (57%).

Chart 89: It is an activity a child can enjoy all his or her life

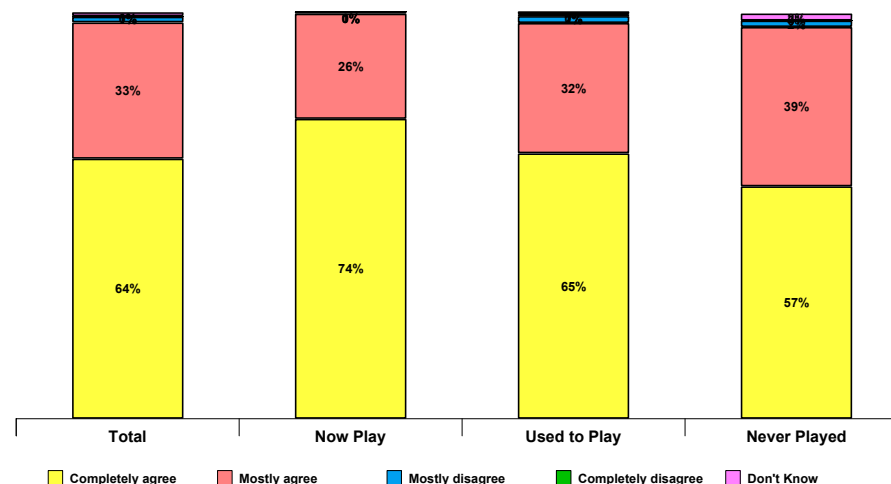
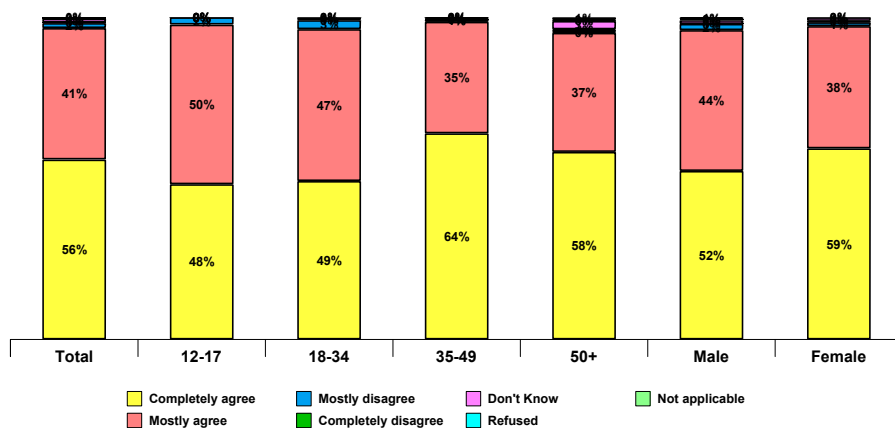


Chart 78: It provides a sense of accomplishment



As the detailed tables show, those who now play are more likely to completely agree that music can provide a sense of accomplishment than are those who have never played (66% v. 47%).

This belief appears more strongly held amongst those aged 35-49 yrs and amongst females (64% & 59% respectively). It would seem likely that this correlates with a greater interest and exposure to child development.

About half the population, but two-thirds of music players, would completely agree that playing in a school band can help develop teamwork skills.

The detailed data reveals that females are more likely to completely agree with this statement (63%) than are males (49%). Perhaps this reflects a male orientation towards team sports as an alternative approach.

Chart 87: Playing in a school band is a good way for young people to develop teamwork skills

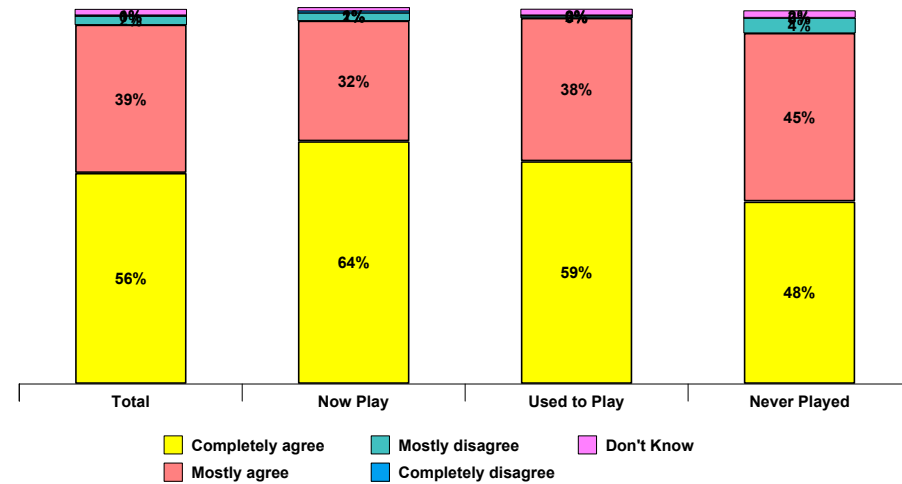
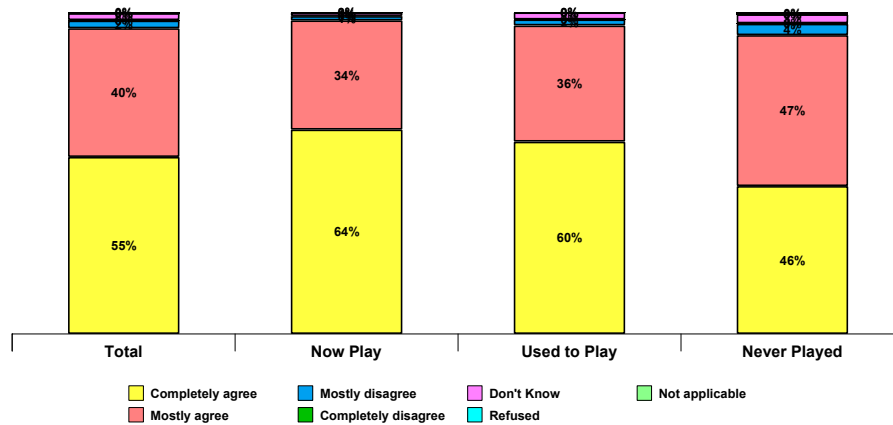


Chart 80: It helps develop a child's creativity



The majority (55%) also completely agree that music can help develop a child's creativity. A further 40% mostly agree with this contention, making it an available proposition if common ground is required.

Chart 79: Performing in front of others helps develop poise and confidence

The two-thirds of the population (63%) completely agreeing that performing in front of others helps develop poise & confidence provides further common ground.

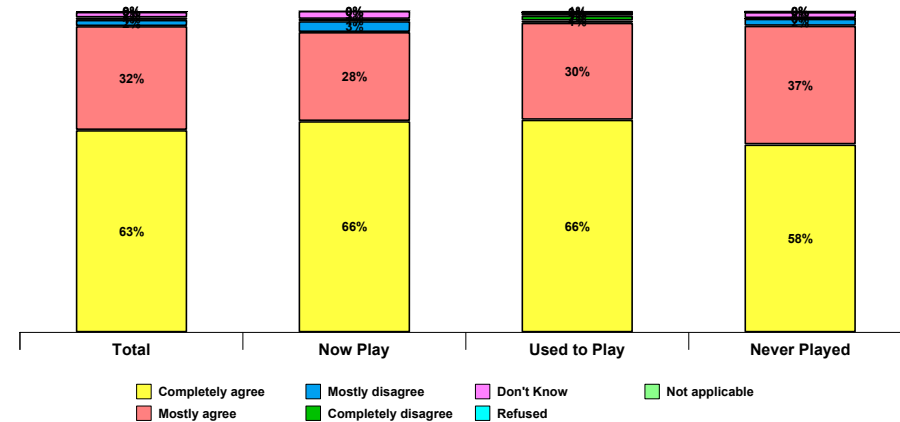
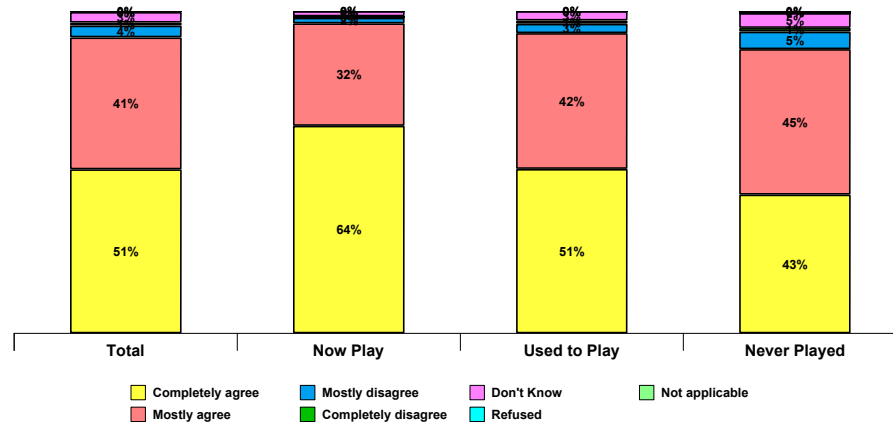


Chart 81: It helps instill appreciation of the arts and culture in general



About half (51%) of the population completely agree that music helps instill appreciation of the arts and culture in general.

Expectedly, this proportion rises to almost two-thirds (64%) amongst those who now play a musical instrument.

However, agreement remains high even amongst those who have never played (43% + 45%).

Similarly, just over half the population (51%) completely agree that music is part of a well rounded education.

The only significant dissent emerges from those aged 12-17 yrs (33% completely agree).

Chart 90: Music is a part of a well-rounded education

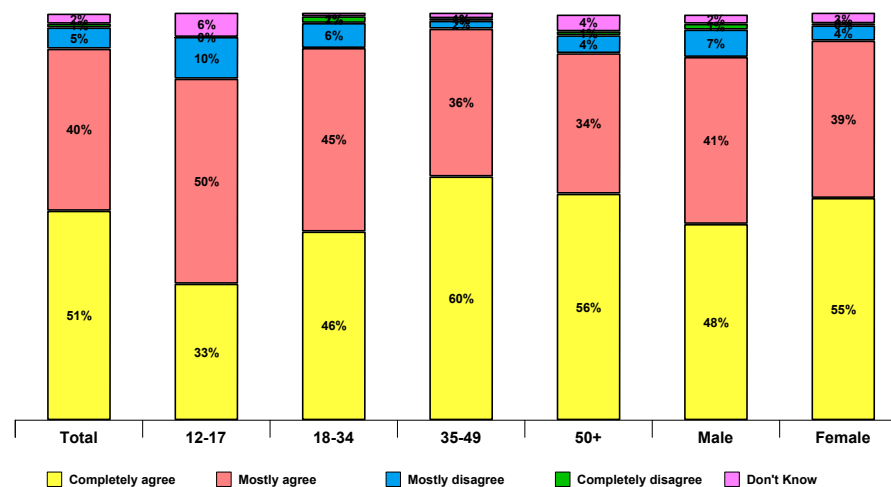
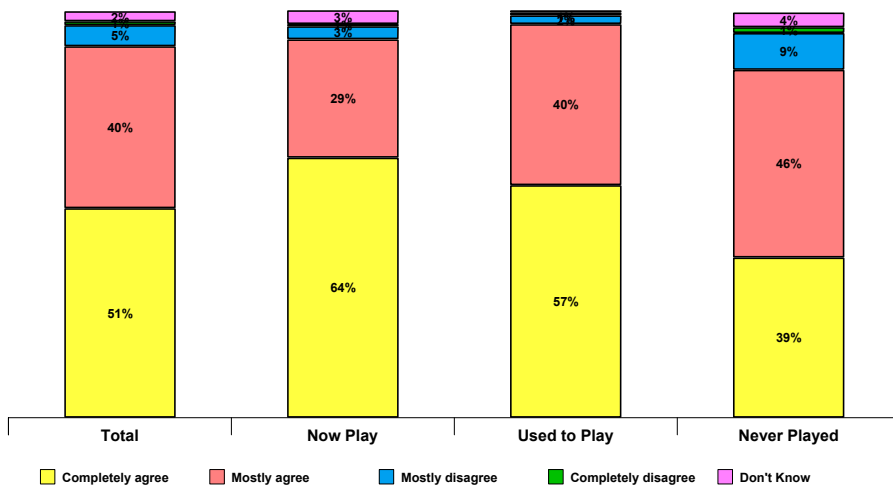


Chart 90: Music is a part of a well-rounded education



On the other hand, agreement rises (to 64%) amongst those who now play an instrument.

Most people would agree that all schools should offer an instrumental music education as part of their regular curriculum (34% + 57%).

The proportions completely agreeing are a little stronger amongst those in their teens and also those aged 35-49 yrs, which is the likely corresponding parental cohort. It thus appears that those with more direct experience with schools are more inclined to support this intention.

Chart 91: All schools should offer instrumental music instruction as part of the regular curriculum

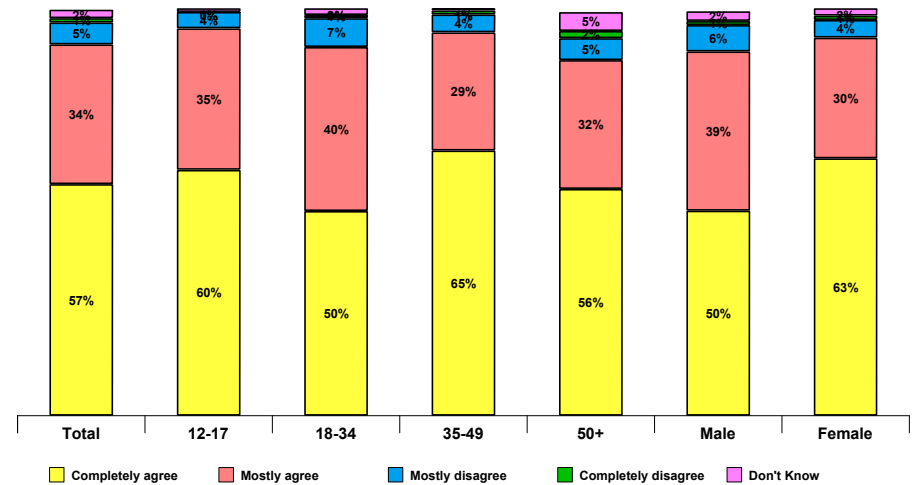
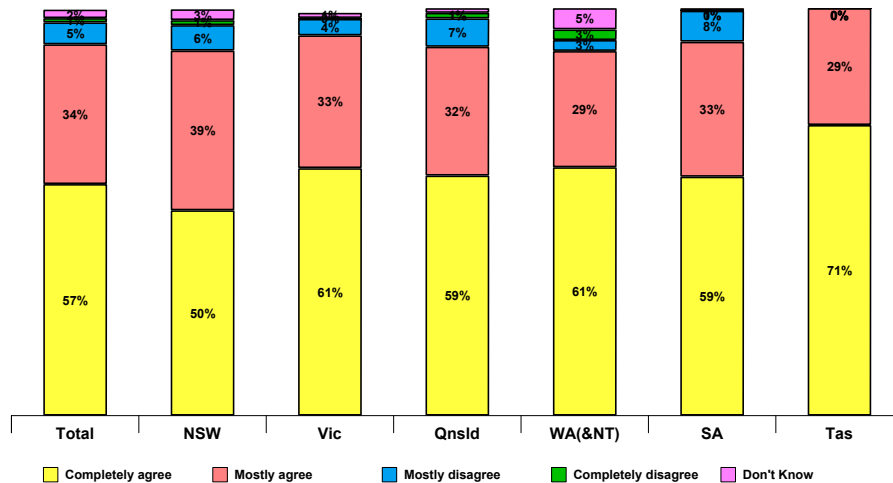


Chart 91: All schools should offer instrumental music instruction as part of the regular curriculum



When the results are analysed by state, NSW emerges as slightly less in complete agreement with this contention – although this is more a question of degree than direction.

Chart 84: It helps children make friends

Slightly less than the majority (41%) are in complete agreement that music helps children make friends. Presumably, this relates to consideration of individual play and tuition as well.

Furthermore, the proportion amongst current players who completely agree deviates from those who have never played (47% v. 37%).

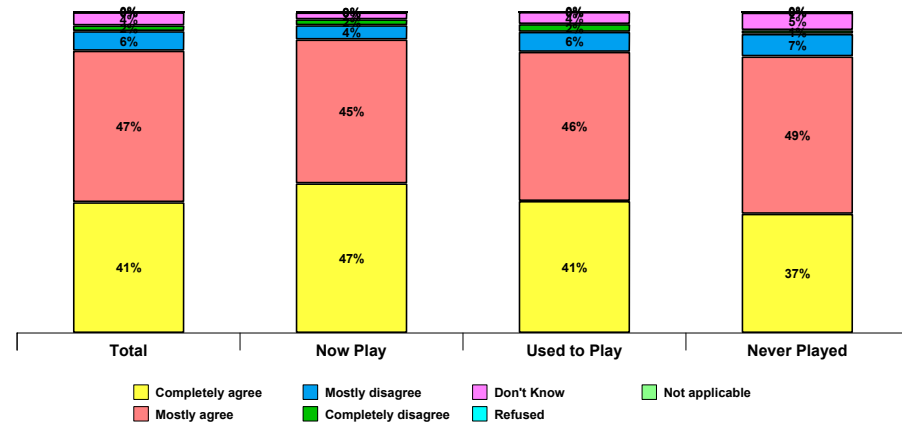


Chart 82: It helps a child's overall intellectual development

Overall, 43% of people (aged 12+ yrs) would completely agree that music helps a child's overall intellectual development.

However, this view is more strongly held amongst those aged 35+ yrs (47%) – not those most actively learning!

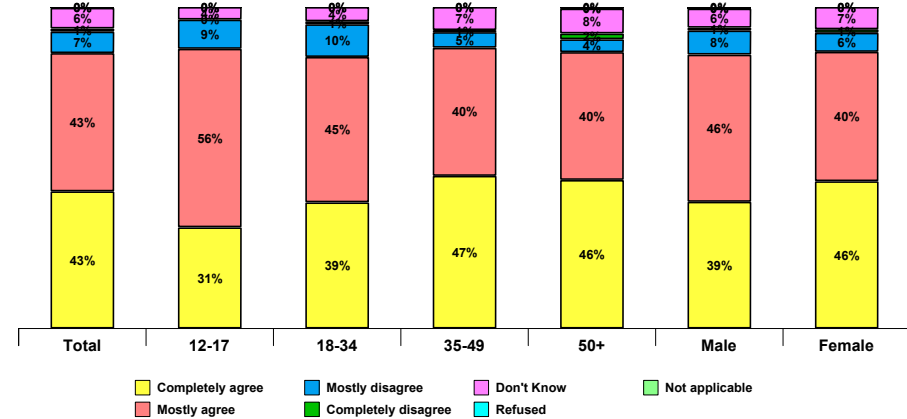
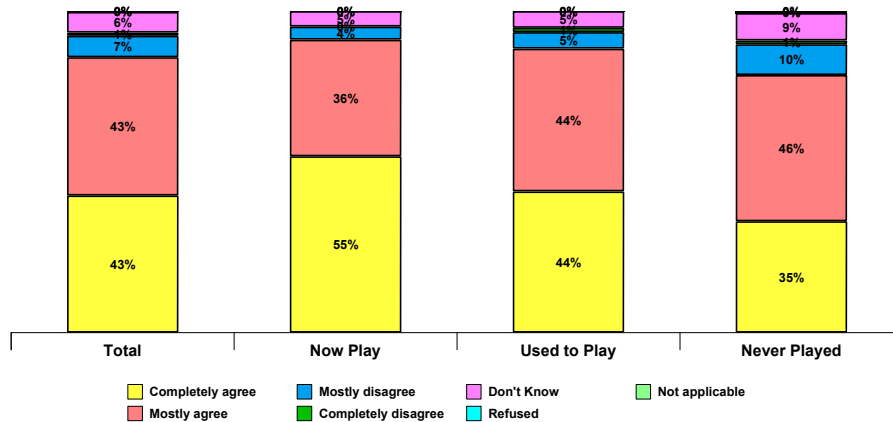


Chart 82: It helps a child's overall intellectual development



Certainly the majority of respondents who themselves play (55%) completely agree with this viewpoint.

Perhaps understandably, those who have never played are less inclined to completely agree (35%).

In line with the earlier finding of music being included in the school's curriculum, about half of people (12+ yrs) would completely agree that music education should be mandated by the states to ensure every child has an opportunity to study music in school.

Again, this level of agreement was significantly higher amongst females (58%) as well as amongst those of primary parenting age (54%).

Chart 93: Music education should be mandated by the states to ensure every child has an opportunity to study music in school

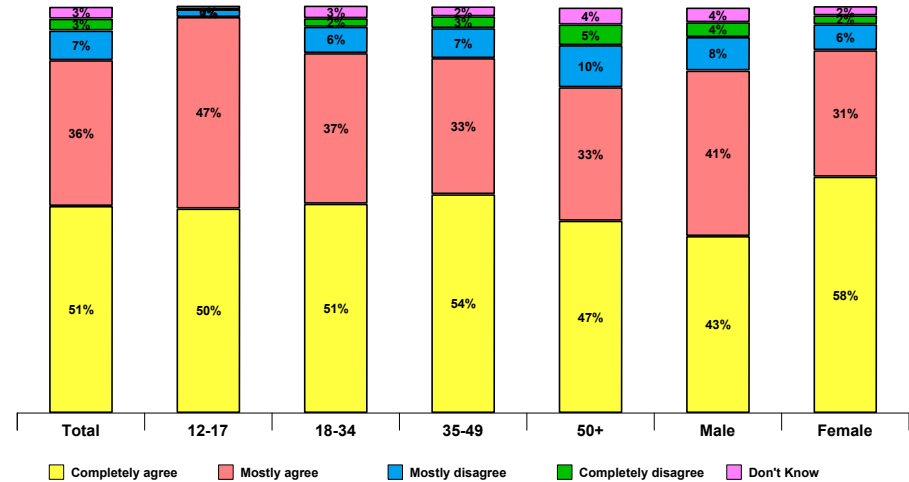
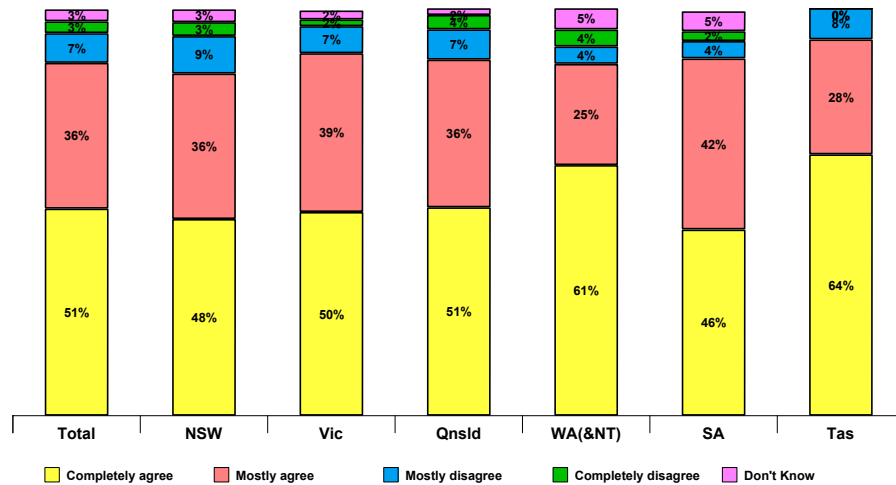


Chart 93: Music education should be mandated by the states to ensure every child has an opportunity to study music in school



When responses to the contention are analysed by state, there would seem relatively uniform support for this view – with slightly stronger agreement in WA (including NT).

The reservations in Victoria, reported earlier, about making instrumental music instruction part of the regular curriculum do not appear to extend to limiting the opportunity to take this up.

Perhaps understandably, there would seem less complete agreement amongst those aged 12-17 yrs with the suggestion that music teaches children discipline.

However, about half (50%) of those aged 35+ yrs would completely agree with this position.

Chart 83: It teaches children discipline

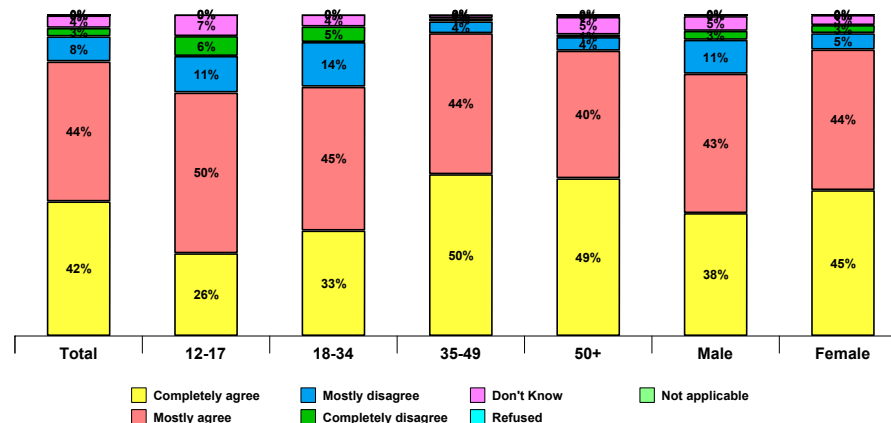
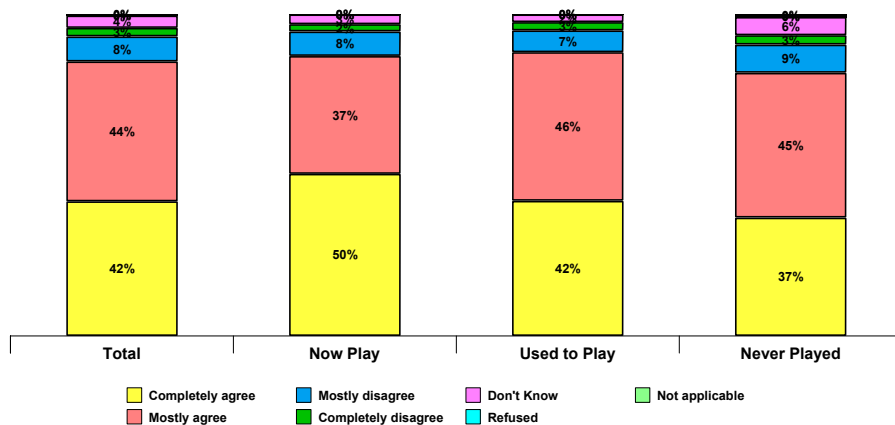


Chart 83: It teaches children discipline



When answers to this question are analysed by playing status of the respondent, it would seem that those who speak from experience are more inclined to support the contention (50% completely agree v. 37% amongst those who have never played).

Encouragingly, there is a higher level of complete agreement amongst those in their younger teenage years with the idea that one would be proud to be in school band or orchestra.

Chart 88: You would be proud to be in a school band or orchestra

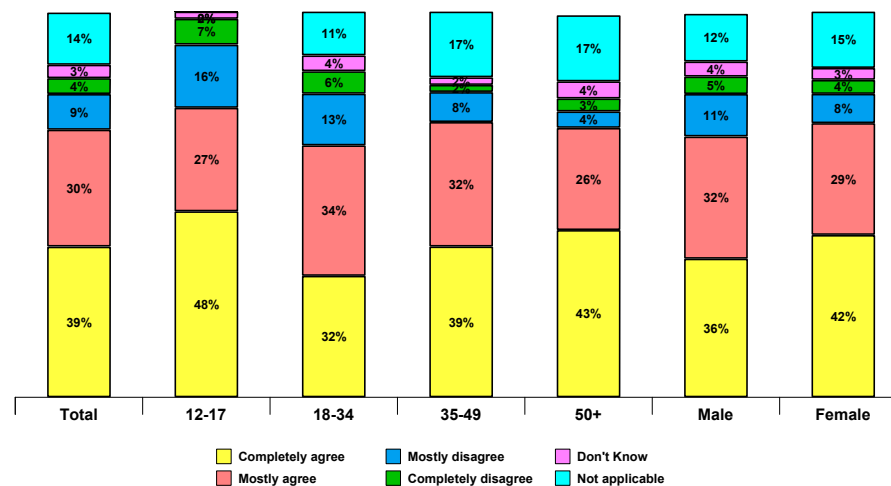
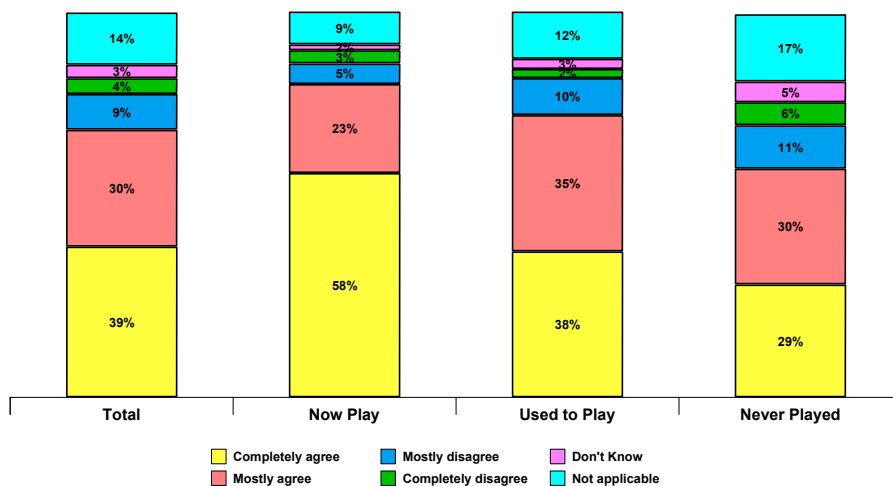


Chart 88: You would be proud to be in a school band or orchestra



The majority of those who now play an instrument also completely agree with this contention.

Even so, those currently at school are not particularly inclined to completely agree that participating in school music often corresponds with better grades and higher test scores (just 21%).

Even so, it may be significant that school attendees and their parents reflect a slightly higher level of complete agreement than those in other age groups.

Chart 92: Participating in school music often corresponds with better grades and higher test scores

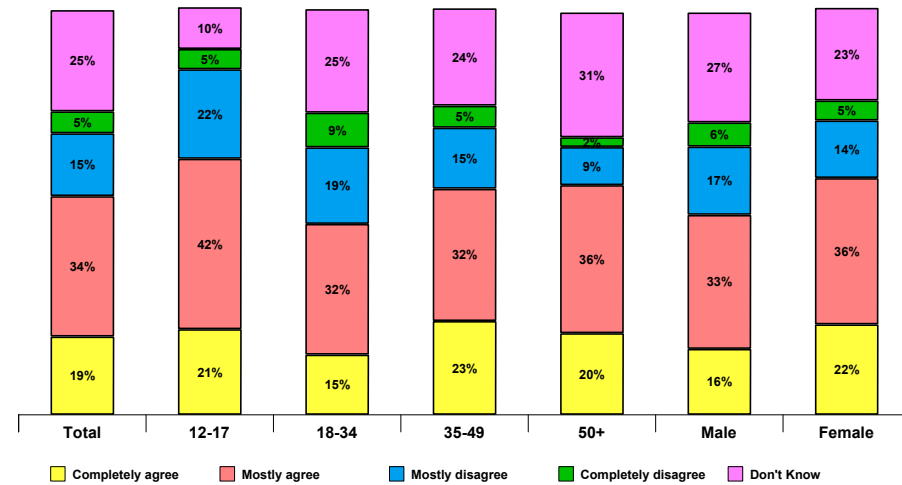
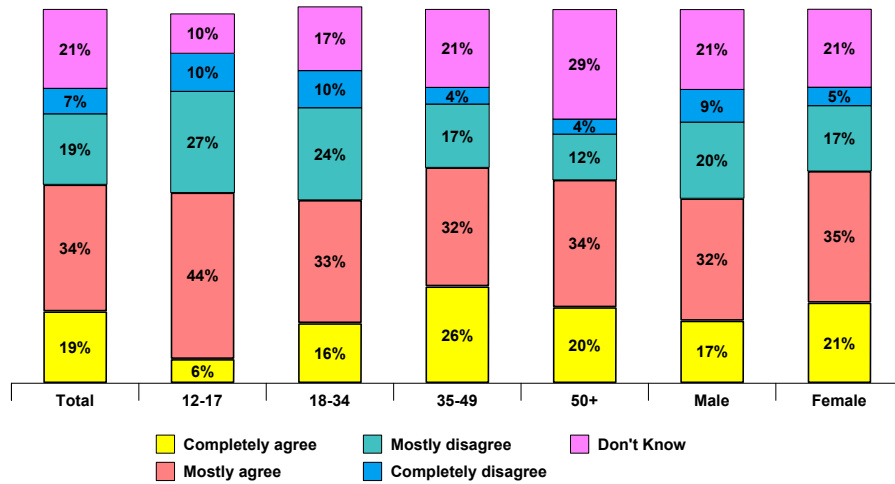


Chart 86: Learning a musical instrument helps you do better in other subjects, like maths or science or language

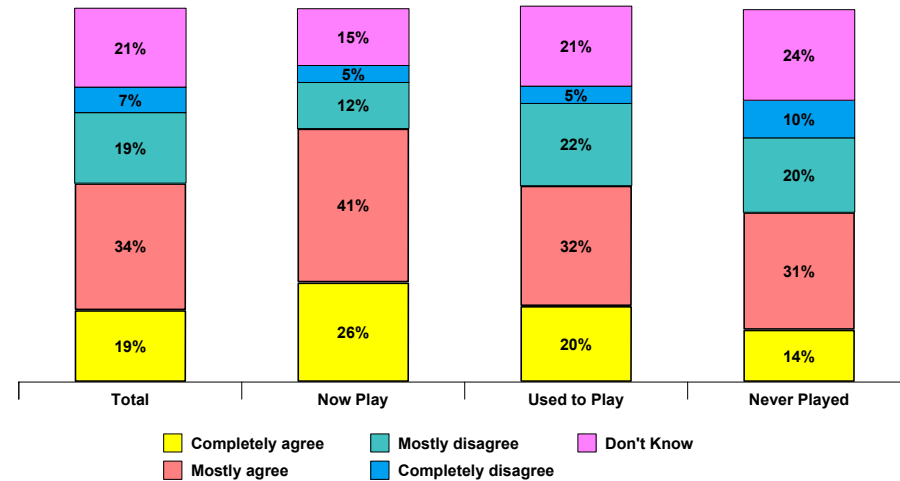


Similarly, those now at school are significantly less likely to completely agree that learning a musical instrument helps one be better in other subjects, like maths or science or languages.

In contrast, those of parental age are more inclined to this view (albeit with only 26% completely agreeing).

Those speaking from experience, who now play musical instruments, are however significantly more likely to completely agree than those who have never played (26% v. 14%). Even so, lapsed players (which may be construed as being more neutral) have only an average level of agreement with the contention.

Chart 86: Learning a musical instrument helps you do better in other subjects, like maths or science or language

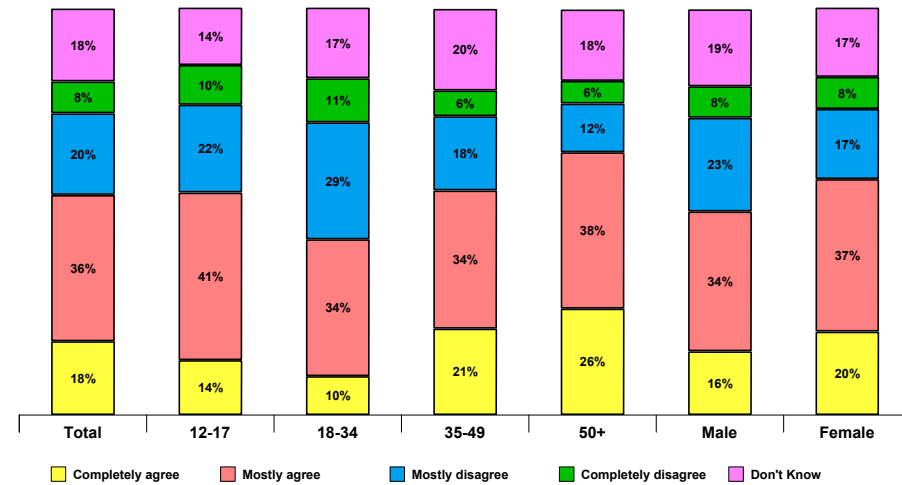


A lower level of complete agreement was also registered for the view that teenagers who play an instrument are less likely to have disciplinary problems.

Only about a quarter of those aged 35+ yrs completely agree with this view – and just 12% of younger respondents.

The detailed tables follow.

Chart 85: Teenagers who play an instrument are less likely to have discipline problems



Detailed Tables

Questionnaire

Note on Method

Note on Method

Households were randomly selected across Australia subject only to quota by state which essentially paralleled population size. The basic sampling frame for population distribution was a national electronic telephone directory. A total of six callbacks were made to non-answering numbers before these were replaced.

Fieldwork, which ran from March 21st to 29th, was conducted from Nexus' own telephone interviewing facilities in Richmond, Melbourne by our own IQCA accredited interviewers.

To provide comparability with similar surveys conducted elsewhere, the study used the NAMM questions as its basis. In this case, however, the CATI (computer assisted telephone interviewing) system employed was TSS by Creative Research Systems of California. Also, one responsible adult was sought first, to help with the audit of household members, and then a randomly selected individual was sought to answer the other questions, principally on attitudes. A copy of the questionnaire script is included, for reference, after the detailed tables.

To increase accuracy of results, the data was subsequently weighted to known population totals for the number of households by state or the numbers of individuals by age/sex within state. (Figures in the tables are generally expressed in thousands).

In most cases, Table numbers and Chart numbers are the same for ease of cross-reference.