



**Working as a Traditional  
Musician in Scotland  
FULL REPORT**

**June 2019**

*Traditional Music forum*

We'd like to thank to all of the musicians across Scotland who gave their time and effort to complete this survey and for providing such detailed and considered responses

**Researched and produced by Rachel Blanche**  
Produced with funding from Creative Scotland



ALBA | CHRUTHACHAIL

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# Contents

<b>Introducing this Study</b>	<b>4</b>	Representation by an Agent	43
Context for this study	4	Being Signed to a Label	44
How data was gathered	5	Main ways of selling recorded music	44
Whose experiences are we reporting?	5	Use of Aggregator sites for online distribution	45
What our sample shows of sector diversity	7	Effects of digital consumption on careers	46
Headline points	10	Headline points on Recording and Selling	49
<b>1 Working as a Traditional Musician in Scotland</b>	<b>11</b>	<b>5 Collecting Royalties</b>	<b>51</b>
Professional working status	11	Membership of collecting societies	51
Qualifications held by respondents	12	What royalties are received for	51
Income Patterns from Traditional Music	13	Levels of Royalty income	52
Length of time working in the sector	15	Submitting returns to collecting societies	53
Proportion of Working Time spent	15	Headline Points on IP and Royalties	53
Employment status in Traditional Music	17	<b>6 Support for Making, Producing and Promoting Traditional Music</b>	<b>54</b>
Traditional Music as a Primary or Secondary Source of Income	17	An Interdependent Ecosystem	54
Working multiple jobs	18	Need for & Access to Professional Services	55
Headline points on Working in the Sector	19	Key business and industry skills desired	63
<b>2 Income from Traditional Music Careers</b>	<b>21</b>	Access to CPD	66
Activities most relied on for income	21	Access to Business and Enterprise Support	67
Income levels of people working in the sector	22	Headline points on Professional Support in the sector	68
Portion of income from Traditional Music	23	<b>7 Developing the Sector</b>	<b>69</b>
Key findings at range of income levels	24	Keys to increasing income from Traditional Music	69
Financial vulnerability in the sector	27	Barriers to careers in Traditional Music	72
Performing for free	28	Support currently desired for careers	77
Unpaid/voluntary contribution to sector development and the community	30	Enhancing the existing environment in Scotland for Traditional Music	80
Personal time devoted to the artform	31	Inspiring examples from other countries	82
Access to and use of external funding	32	Headline points on developing the sector	85
Headline points on Sector Income	32	<b>8 A Vibrant Artform</b>	<b>87</b>
<b>3 Performing Traditional Music</b>	<b>34</b>	Instruments played in Traditional Music	87
Performing as a source of work and income	34	Styles and influences	88
Nature and volume of Traditional Music performances	35	<b>9 Reflections and Next Actions</b>	<b>90</b>
Performance opportunities	36	<b>Appendices: Full Findings</b>	<b>92</b>
The Profile and Reach of Scottish Traditional Musicians	37	Appendix ONE. Barriers to careers in Traditional Music in Scotland	
How respondents market and promote their Traditional Music	39	Appendix TWO. Support currently needed in Traditional Music careers	
Headline points on Performing	40	Appendix THREE. Enhancing the existing environment in Scotland for Traditional Music	
<b>4 Recording and Selling Traditional Music</b>	<b>41</b>	Appendix FOUR. Inspiring examples from other countries or contexts	
Characteristics of the Recording Artists segment	41	Appendix FIVE. How respondents describe their traditional music	
		Appendix SIX. Full list of survey questions	

# INTRODUCING THIS STUDY

This study was commissioned by the Traditional Music Forum to generate a snapshot of the economic conditions and realities experienced by people currently working in the sector in Scotland. A key driver for this research was to understand the effects of increasing digitalisation on the livelihoods and careers of Traditional Musicians in Scotland, and to establish the extent to which Traditional Music can generate a living wage for its practitioners.

The Traditional Music Forum (TMF) is a network of individuals across Scotland and over 100 organisations, many of which employ traditional musicians themselves. Its role includes advocating the economic and cultural case for Traditional Music and to open up ways for the network to better support musicians and music-making. It commissioned this study with the aim of generating evidence and insights to inform policy on how best to support the Traditional Music sector and community, and to further underline the importance of Traditional Music to Scotland’s culture.

## Context

This study provides a timely situation report twenty years after the first major piece of consultation and advocacy for Traditional Music (and Traditional Arts) in Scotland, and ten years after a Ministerial Working Group on Traditional Arts reported its findings. Key insights into the working lives of musicians across all genres have been generated in 2012 by the Musicians Union (MU) across the whole of the UK, and Creative Scotland in its Music Review published in 2014. Data points from these reports are presented alongside our findings where relevant for benchmarking purposes.

This study seeks to shed light on the reality of the economic situation for the Traditional Music sector in Scotland and to explore how the disruption of established music industry business models has impacted performers and recording artists in this sector. Key changes recognised through the MU and Creative Scotland research include: a loss of record label investment and support for musicians; the decline of offline music retail opportunities; the rise of digital streaming and playlists with parallel collapse of paid downloads – all affecting income streams from music sales and royalties. The evidence from this study is intended to inform Creative Scotland’s approach to delivering the goals in its *Creative Industries Action Plan* to support the growth of sustainable businesses.

### *Key reporting of relevance to this study*

1999	2009	2012	2014
Traditional Arts Steering Committee is set up by SAC to advise on how best to support the sector, added to SAC remit in 1993	Ministerial Working Group on Traditional Arts commissioned by Scottish Government to recommend support measures	The UK Musicians’ Union undertakes major survey of working conditions looking at pay, income and career challenges	A major situation analysis of the Music Sector is undertaken by Creative Scotland including Traditional Music
<i>Traditional Music in Scotland: Education, Information, Advocacy</i> published by SAC March 1999	<i>Traditional Arts Working Group Report</i> published by Scottish Government, January 2010	<i>The Working Musician</i> by DHA Communications published by the Musicians Union in 2012	<i>Music Sector Review: Final Report</i> by EKOS published by Creative Scotland, March 2014 (revised)

This study coincides with a major study of music education across Scotland, *What's Going On Now?* commissioned by Creative Scotland and published in January 2019, which covers Traditional Music education within its scope highlighting issues of equity of access and infrastructure for supporting music in schools, communities and non-formal settings.

## How data was gathered for this study

A survey was designed, created and managed via the online provider Survey Monkey. Consisting of 66 questions, the survey took a thorough look at musicians' careers in the sector, earnings and work opportunities, availability of and access to key professional support services, their individual needs and broad sectoral requirements. A full list of the survey questions may be viewed in Appendix Six.

The survey ran for four weeks from 28 February - 29 March 2019. A weblink to the survey was disseminated nationwide to the membership of the Traditional Music Forum and other sector organisations (listed below) as well as via social media and respondent champions.

- Creative Scotland
- Fèis Rois
- Fèisean nan Gàidheal
- Glenlivet and Inveraron Community News
- Harry McFadyen Entertainments
- Making Music Scotland
- Musicians Union (MU)
- Scottish Culture and Traditions
- Scottish Music Industry Association (SMIA)
- Traditional Arts and Culture Scotland (TRACS)
- Traditional Dance Forum
- Traditional Music and Song Association (TMSA)
- Traditional Music Inverness

## Whose experiences are we reporting?

The survey was targeted specifically to people making, playing and teaching Traditional Music in Scotland as part of their career. A statement on the front page made clear that we wished to hear from anybody who is currently working as a Traditional Musician in Scotland, and the first two qualifying questions in the survey asked respondents to define their working status within the sector (as Professional, Semi Professional or Amateur) and to state whether or not they earn income from their music.

A total of 184 people engaged with the survey; all but one are performers of Traditional Music in Scotland and the vast majority (83%) earn income from their Traditional Music work. The survey was designed to enable the following profiles to be drawn out in our reporting and analysis:

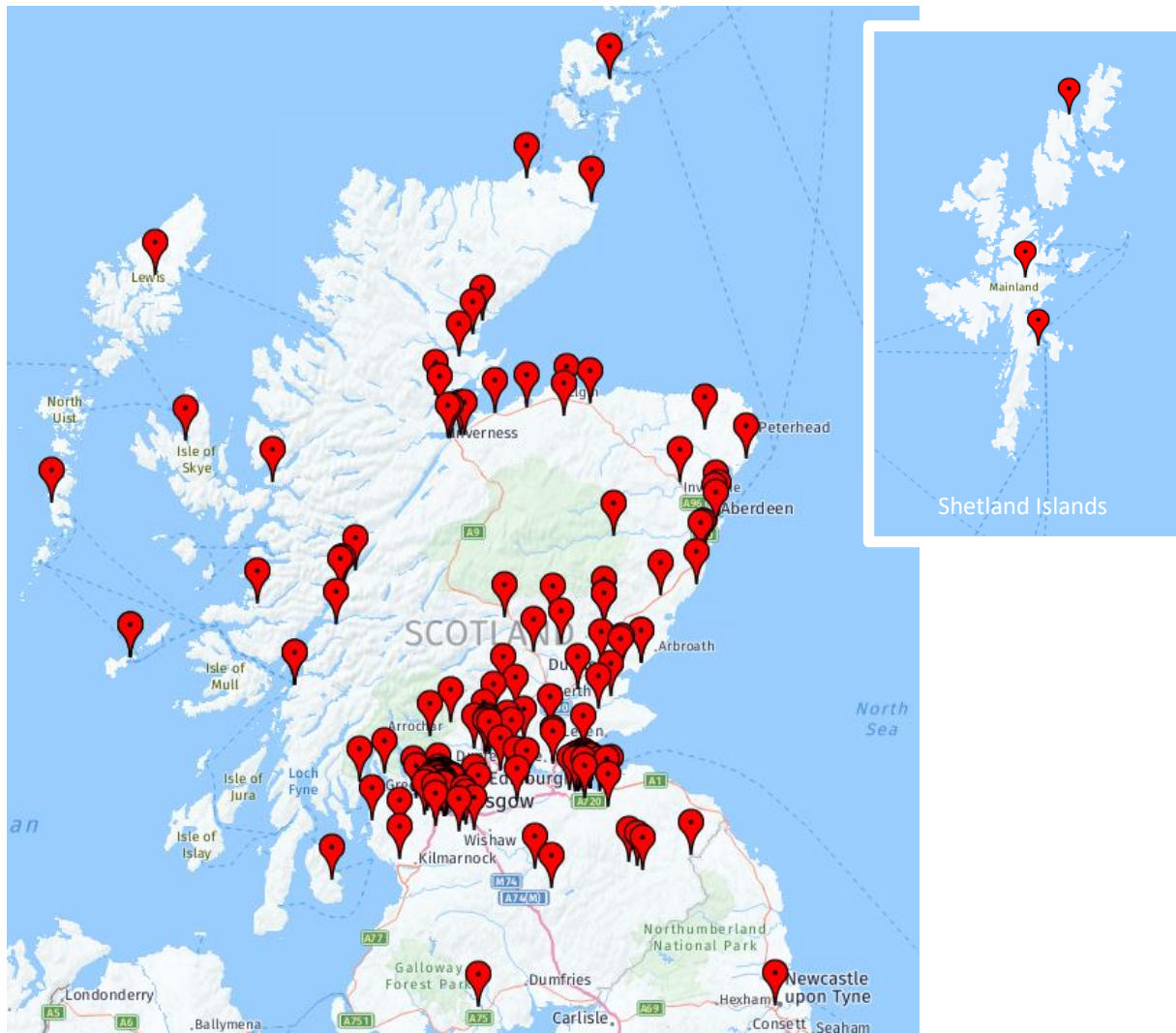
- Experiences and data of people at different career stages (Early, Established and Advanced)
- Experiences, data and needs of those who perform Traditional Music
- Experiences, data and needs of those in the sector who record and sell their Traditional Music
- Those who rely on Traditional Music for 100% of their earnings
- Distinctions relating to those working in a Professional, Semi-Professional or Amateur capacity
- Issues raised by female Traditional Musicians

We found, in trying to capture working life as a Traditional Musician in Scotland, a range of profiles crossing over and between those identifying their work as Professional, Semi-Professional or Amateur. Our respondents include those seeking to develop a professional career from their music as performers and recording artists; other, very talented traditional musicians are earning money on the

side of another professional career not related to music; and others contribute traditional music services as part of the cultural heritage, playing regular local pub sessions and ceilidhs, teaching young musicians, and running and participating in Fèisean.

### Where the respondents are

The respondents to the survey are widely situated around the Scottish mainland and the islands, as shown on the map below. Their locations are pinpointed on the basis of postal codes sought for this purpose (of 184 respondents, 182 provided postcodes). Only one respondent was based outside Scotland; though based in Newcastle this individual performs Traditional Music work in Scotland.



Postcode locations of respondents (n182)

The largest numbers of respondents are situated in Glasgow (n44) and Edinburgh (n24) – accounting for 37% of the survey - and elsewhere across the Central Belt. However significant responses have been gathered from across the Highlands and Islands: 12 people in Aberdeen and Aberdeenshire, 10 people across Perthshire, 9 people in Inverness and Inverness-shire, 4 each in Moray and Ross-shire, as well as people located on the Islands of Arran, Lewis, Skye, South Uist, Tiree, Orkney and the Shetland Islands. Together with respondents from Sutherland and Nairnshire, these respondents account for 29% of the survey sample. Five people responded from Argyll and 4 people from across the border regions (Melrose, Galashiels and Castle Douglas).

### Location of survey respondents (n184)

Aberdeen	4	Glasgow	44	Orkney	1
Aberdeenshire	8	Inverness	4	Perthshire	10
Angus	7	Inverness-shire	5	Renfrewshire	3
Argyll	5	Isle of Arran	1	Ross-shire	4
Ayrshire	3	Isle of Lewis	1	Roxburghshire	2
Berwickshire	1	Isle of Skye	1	Selkirkshire	1
Caithness	2	Isle of South Uist	1	Shetland Islands	3
Clackmannanshire	3	Isle of Tiree	2	Stirlingshire	9
Dunbartonshire	2	Kirkcudbrightshire	1	Sutherland	2
Dundee	3	Lanarkshire	5	West Lothian	3
East Lothian	3	Midlothian	1	<i>Tyne &amp; Wear</i>	1
Edinburgh	24	Morayshire	4	Not known	2
Fife	7	Nairnshire	1	(total n184)	

### What our sample shows about sector diversity

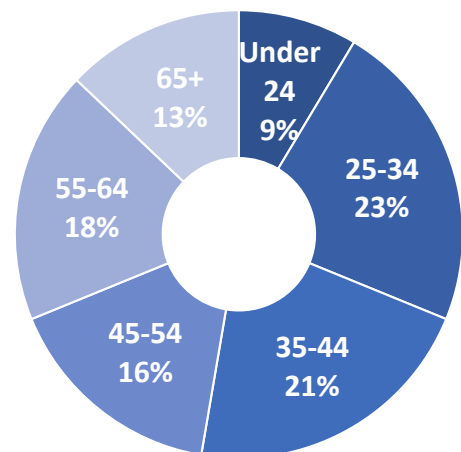
#### Age range of respondents

From the 93 respondents in the survey who indicated their age, the range in this sample is shown below. The largest demographic represented is aged between 25-44 (44%). People aged 45-64 comprise 34% of the survey population (n93). These are consistent with the core of people expected to be engaged in working life.

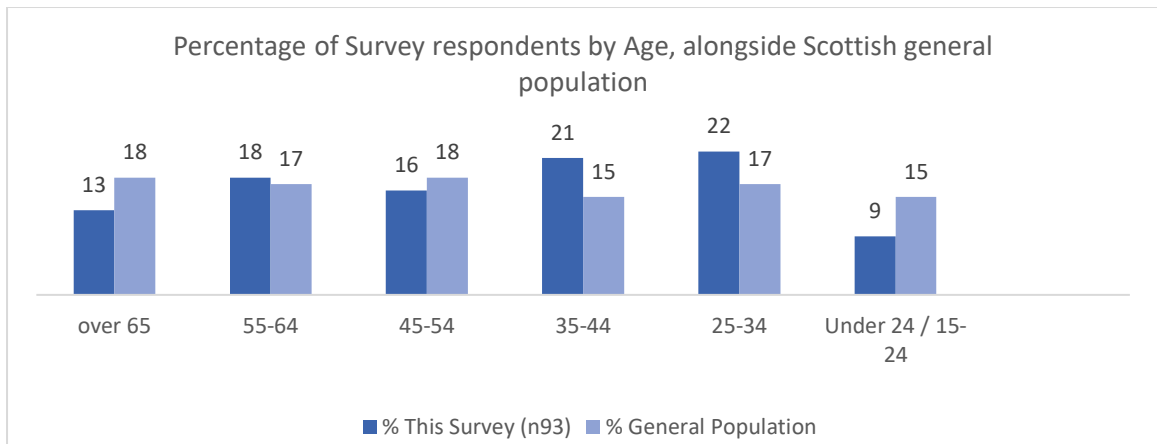
In comparison with the general population of Scotland<sup>1</sup> below, our survey shows a higher rate of return than the baseline population for the 25-34 and 35-44 age groups.

Although over-65's appear slightly under-represented, the Scottish population figures being benchmarked include up to the age of 79. What our survey shows is that a significant proportion of the Traditional Music workforce (13%) is over the age of retirement. Likewise the survey sample for people Under 24 working in the sector appears below the national average, but the national figures have been calculated intentionally to include people aged 15-24, which explains a possible gap.

#### Age range of respondents (n93)

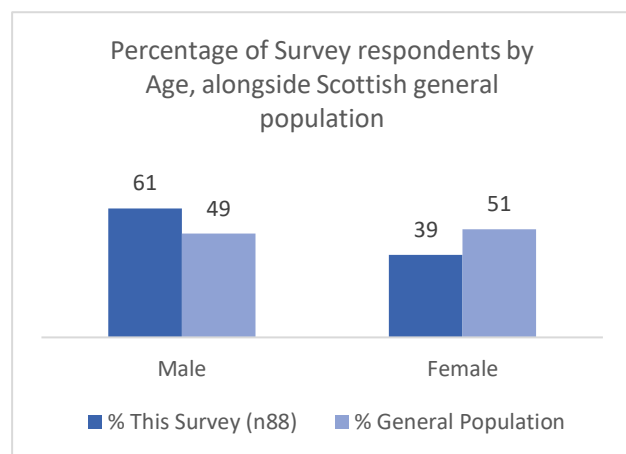


<sup>1</sup> Mid 2017 Population Estimates Scotland, National Records of Scotland, <https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates/mid-2017>



### Gender

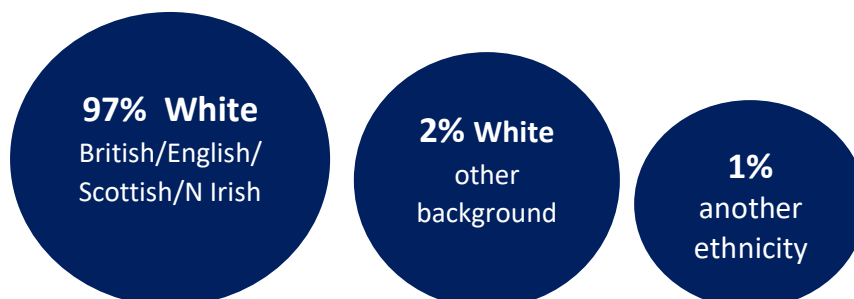
Only 88 of 184 respondents in the survey told us their gender identification, with 61% stating Male gender, 39% stating Female gender, and 0% selecting Transgender or Another gender identification. These statistics diverge from those of the general population, which is recorded as 51% Female and 49% Male.<sup>3</sup>



Our survey results suggest that the Traditional Music sector in Scotland has a disproportionate number of Male musicians, or else that Female Traditional Musicians are under-represented in the data collected.

### Ethnic diversity

As of the last Scottish Census in 2011, the percentage of the population from minority ethnic groups was 4%.<sup>4</sup> In this survey of the Traditional Music sector in Scotland, the vast majority of respondents were White British, with only one respondent indicating any 'other' ethnicity (not stated). The sample suggests that the sector is not ethnically diverse.



<sup>2</sup> Mid 2017 Population Estimates Scotland, National Records of Scotland

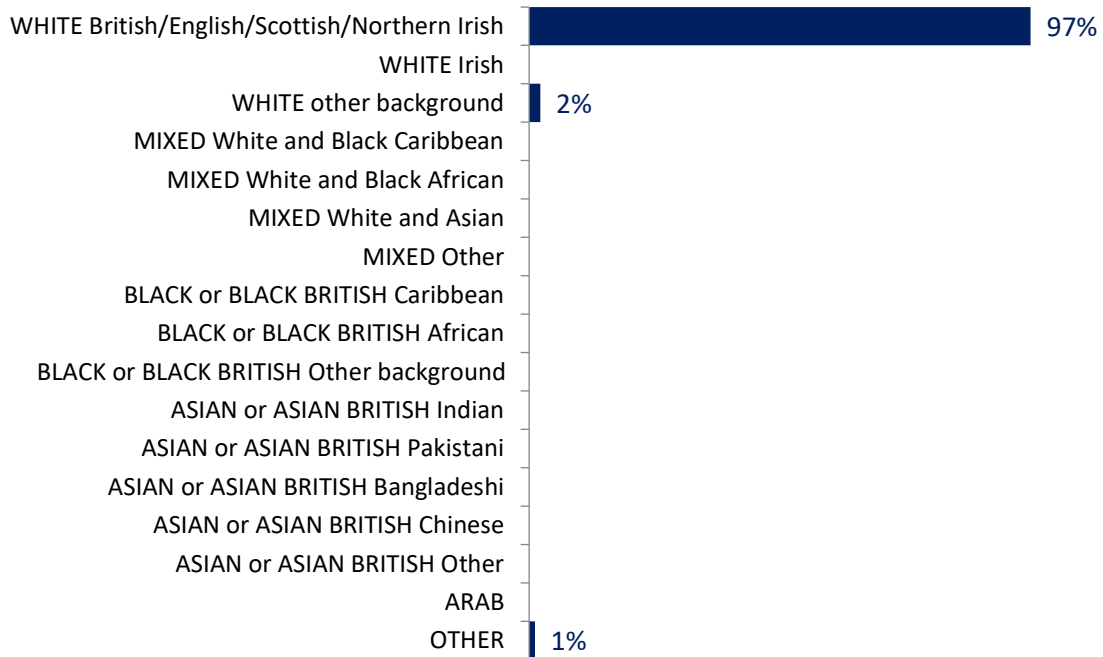
<sup>3</sup> Mid 2017 Population Estimates Scotland, National Records of Scotland

<sup>4</sup> Scotland's Census: Ethnicity, Identity, Language and Religion (2011)

<https://www.scotlandscensus.gov.uk/ethnicity-identity-language-and-religion>



Which of these options best represents your Ethnicity? n92



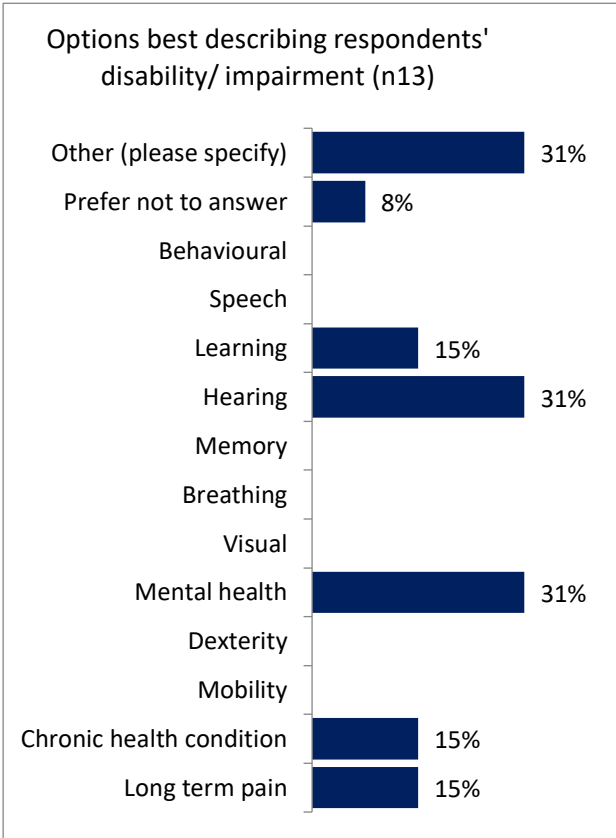
Disability or impairment in Traditional Music

In terms of the Scottish population, in 2017 a third (32%) of adults in Scotland reported living with a long term limiting condition or disability including mental and physical conditions.<sup>5</sup> Around one-fifth of Scotland’s population (approximately one million people) define themselves as ‘disabled’.<sup>6</sup>

Of the 92 respondents in this survey of the Traditional Music sector who provided information on this, 9 people (10%) considered themselves to be disabled or impaired. However 13 people provided details of conditions, the prevalence of which is shown by the percentages opposite.

*Other* conditions were stated as: partial deafness requiring a hearing aid; dyslexia and depression.

The figures in this survey suggest that the Traditional Music sector in Scotland is not representative of the population as a whole in terms of disability or limiting conditions. Elsewhere in the survey, one respondent reported receipt of Disability Allowance.



<sup>5</sup> Scottish Health Survey 2017, p22 <https://www.gov.scot/publications/scottish-health-survey-2017-volume-1-main-report/>

<sup>6</sup> Facts on Disability, University of St Andrews, 2019, <https://www.st-andrews.ac.uk/hr/edi/disability/facts/>

## Headline points: what the survey sample suggests about the sector

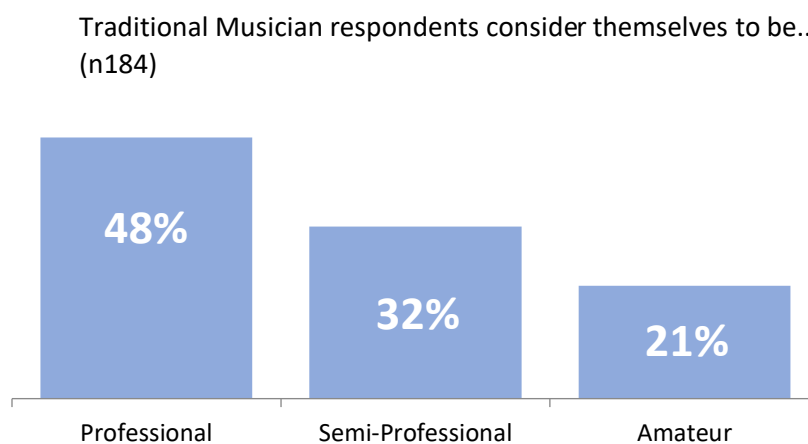
- On the basis of our sample there appears to be a higher proportion of men in the Traditional Music sector than represented in the population at large
- There is a significant proportion of people aged over 65 working in and performing Traditional Music in Scotland (representing 18% of this survey sample)
- The sector is predominantly White Scottish/British and does not seem to reflect the ethnic diversity of the population-at-large
- People with a range of limiting mental and physical conditions and disabilities are working in the Traditional Music sector, though not in numbers representative of the disabled population-at-large

# 1 WORKING AS A TRADITIONAL MUSICIAN IN SCOTLAND

The chapter reports how people are working within the Traditional Music sector, their levels of training and related qualifications, employment patterns and trends, and where their main work opportunities lie.

## Professional working status

Among the 184 respondents who self-classified their working status in Traditional Music, almost half considered themselves to be 'Professional' Traditional Musicians, with another third considering themselves 'Semi-Professional', meaning that 80% of our sample is working in a professional or semi-professional capacity. A fifth of respondents classified themselves as 'Amateur' Traditional Musicians.



Whether Professional, Semi-Professional or Amateur, the overall majority of Traditional Musicians in the survey earn income from their activities in Scotland. Overall, across all groupings, 83% of respondents (n184) said that they earn income from their music.

## Characteristics of Semi-Professional and Amateur Traditional Musicians

All but one of the musicians identifying as Professional and four Semi-Professional report that they earn income from their work. Conversely 68% of those identifying as Amateur do *not* earn money from their Traditional Music activity, suggesting that generating income is a major determinant for musicians to consider themselves as working in a Professional or Semi-Professional capacity.

Time spent working as a Traditional Musician also seems to be a factor in respondents self-identifying as Semi-Professional or Amateur, with 64% and 87% respectively spending less than 25% of their working time as Traditional Musician, and only three Amateur musicians spending as much as 50%-75% of their working time in Traditional Music. The opposite holds true of 'Professional' Traditional Musicians, of whom 66% of the respondents spend all of their working time and none spend less than 25% of their time working in Traditional Music.

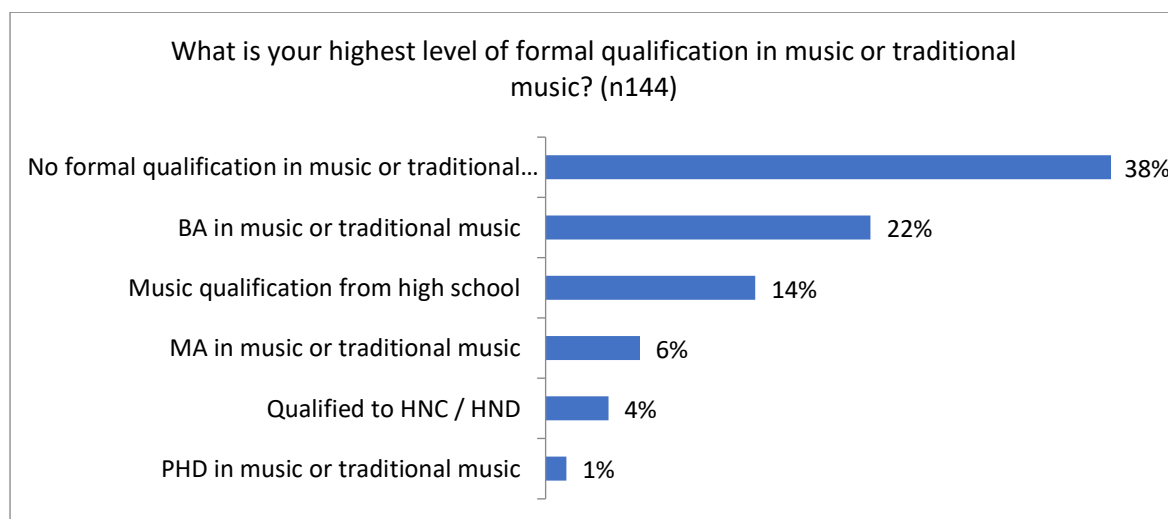
Amateur and Semi-Professional Traditional Musicians are also less likely to have any formal qualification in music or traditional music, with the majority reporting no formal qualifications and only 19% and 16% respectively having a high school music qualification. Only a single Amateur respondent reports holding a related MA qualification.

### Qualifications held by respondents

A significant proportion of sector as represented in this survey (38% of n144) has no formal qualification in music or Traditional Music, showing its strong roots in the grassroots and community culture. Of the respondents self-identifying as Amateur or Semi Professional, 62% and 55% respectively report having no formal qualifications and these two groupings also represent the largest proportions of people whose highest music qualification is from high school (another 19% and 16% respectively). However it is worth noting that 1 in 5 of the musicians who consider themselves as Professional have achieved their high level of skill in the absence of a formal qualification.

**2 in 5 Traditional Musicians** have no formal qualification in music, showing strong roots in grassroots culture

Around a third (29%) of respondents have a BA, MA or PhD in music or traditional music: all but six of these individuals consider themselves Professional musicians, and five of those six regard themselves instead as Semi-Professional.



These figures show a sector comprising both formally-trained and grassroots musicians operating at a high level of musical skill. Respondents provided additional details of music attainment and study including:

- Grade 8 in piano, singing, violin
- Training at Trinity College
- BMus (Hons) in Traditional Music
- Joint Honours, Music with Engineering
- BA in Applied Music

- SQA Level 8 Piping and Drumming as well as “private tutoring from rural tradition-bearers”

## Income Patterns from Traditional Music

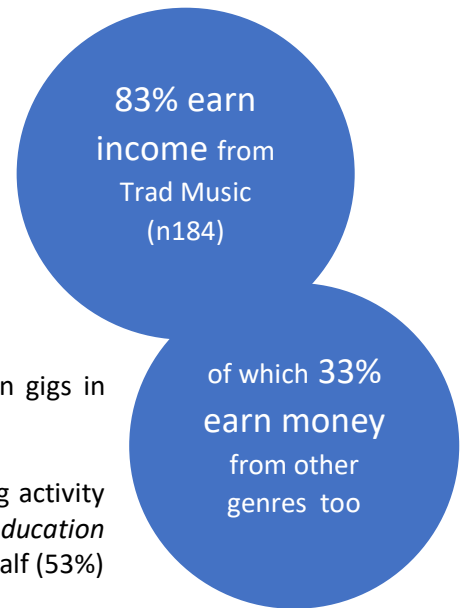
83% of all 184 respondents earn income from Traditional Music in Scotland. Of these a third earn money from other music genres as well.

### Activities generating the most work opportunities

Respondents were asked to rank which activities from a list generate the most opportunities for paid work in their current Traditional Music practice. **The most popular number 1 activity is *Tuition or education work***, ranked 1 by 45% of respondents, followed by *performing at Private Functions* like weddings, parties or conferences (ranked 1 by a quarter of respondents) and *small-scale public performances* (session gigs in pubs, clubs, hotels or restaurants), ranked 1 by 21% of the musicians.

When viewed in the Table below, the predominant income-generating activity selected as Number 1 by the most respondents (n51) is *Tuition or education work*, which when viewed as a Top 3 choice is important for just over half (53%) of the 143 musicians who answered this question.

However the most prevalent *overall* income-generating opportunities are seen to be *Performing at Private Functions* and *Small scale public performances*, which have been ranked in the top 3 by two thirds (66%) of respondents, with strong majorities reporting these as their primary and secondary working opportunities. Within the ‘Performance’ category, *Large-scale public performances* (concerts, festivals) are ranked 1, 2 or 3 by a total of 43% of the musicians. **These figures make clear that Performances generate the most opportunities for Traditional Musicians to earn money.**



	(n143) Most work opportunities Are generated by...	Ranked 1 by # respondents	Ranked 2 by # respondents	Ranked 3 by # respondents	Picked in Top 3 by % all respondents
1	Performing at private functions (weddings, parties, conferences, dinners)	32	36	27	66%
2	Small-scale public performances (session gigs in pubs, clubs, hotels, restaurants)	27	48	20	66%
3	Tuition or education work	51	13	12	53%
4	Large-scale public performances (concerts, festivals)	21	21	20	43%
5	Management and Administration	5	6	17	20%
6	Other (* see below)	5	3	6	10%
7	Session musician for recording	0	2	8	7%
8	Live or Studio Production	0	1	4	3%
9	Commissioned Arranging or Composition work	1	0	4	3%

*Management and administration* generates an additional opportunity for earning money for a fifth (20%) of the musicians in the survey. *Session gigs for recording* create income opportunities for a smaller group of musicians (7%), and *Composition or arranging work* seems to represent a niche source of income for only a handful (5) of respondents, as does *Live studio production*. These categories feature more predominantly as fourth, fifth or sixth sources of work.

*Other* income generating opportunities that were listed by individual respondents include, in order of prevalence:

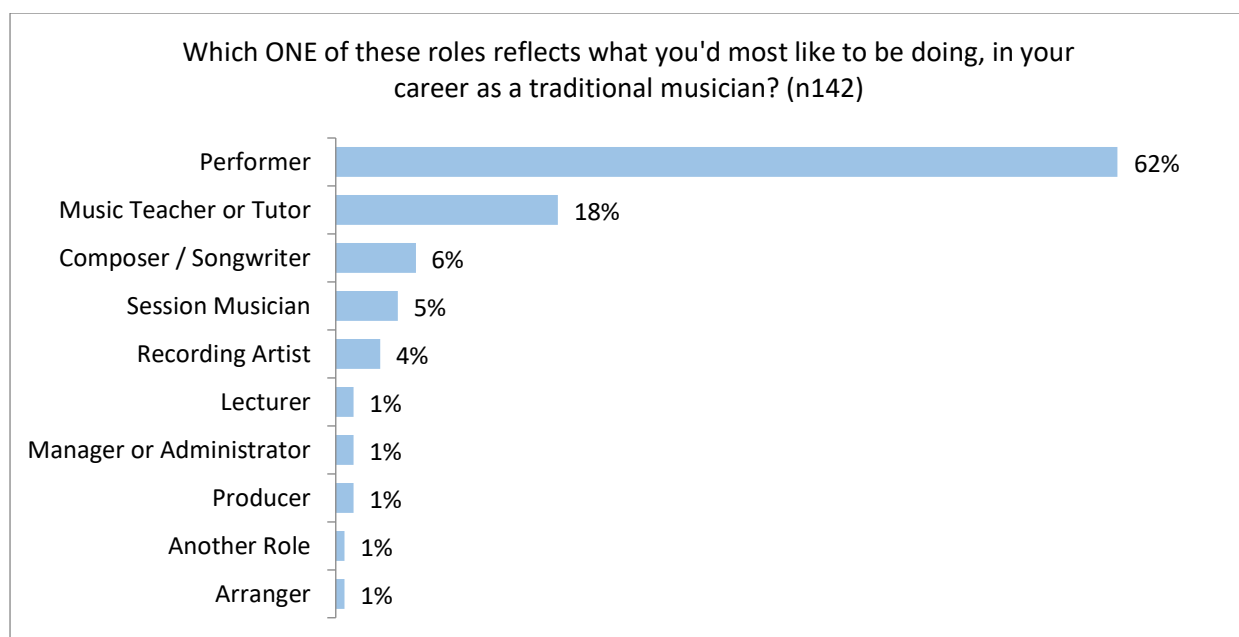
- performing in hospitals, care homes or lunch clubs
- making traditional musical instruments
- instrument set up and repair
- research

A MU survey in 2010 of Scottish musicians (across all genres) confirmed that the great majority earn much of their living from gigs and small-scale public events like those listed here. Equally important for working musicians are “the innumerable private functions where music is required for general entertainment or dancing”. The MU notes that such events are often absent from analyses of live music and highlights their importance “as a very significant part of the music ecology”.<sup>7</sup>

Gigs and private functions are “very significant part of the music ecology. They not only offer access to live performance for the widest possible cross section of the public but also make an important, sometimes hidden, contribution to the music economy “  
 (MU 2010 cited by EKOS)

### How income aligns with what respondents would most like to be doing in their careers

In terms of how this relates to what these musicians would most like to be doing, *Performing* is the main activity and the main career motivator, which matches how respondents predominantly generate their income. *Teaching music* is the second main career driver, though the numbers who seem to be doing it (the 53% who list this as one of their Top 3 income-generators) are greater than those identifying teaching as what they’d most like to be doing (only 18% of the sample).

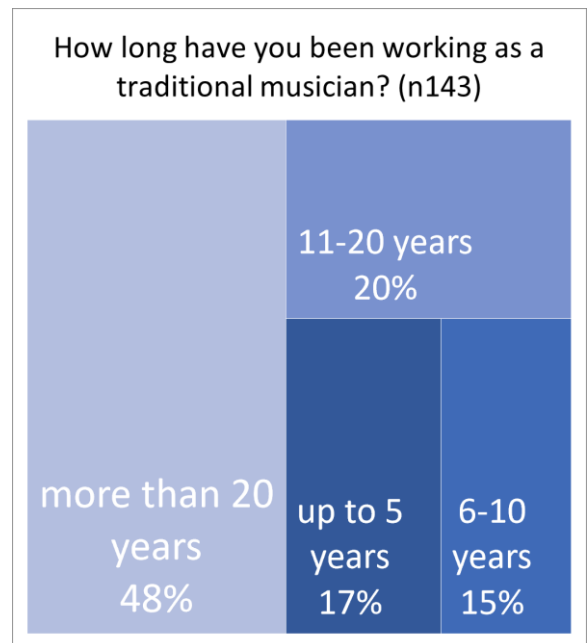


<sup>7</sup> MU survey 2010 cited in Creative Scotland Music Review by EKOS 2014: p20

## Length of time working in the sector

The current workforce in Traditional Music in Scotland is highly experienced, with almost half of the survey respondents (48%) having worked in the sector for more than 20 years. A further 20% have worked in the sector for 11-20 years, leaving only a third (32%) of respondents less than 10 years into their career as a traditional musician.

For the purposes of this study, those less than 5 years into their Traditional Music career (n25) are considered 'early career' musicians. Those with 6-10 years of experience (n21) are considered 'established' and those with 10 or more years of experience (n97) are considered to be 'advanced career' musicians. These groups will be profiled during this study to provide more targeted insights into income levels and key career development needs and barriers.

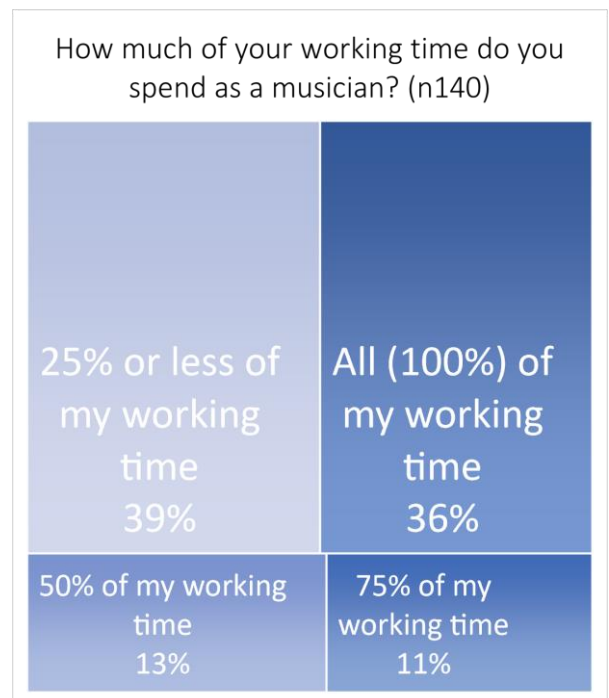


## Proportion of Working Time spent as a musician

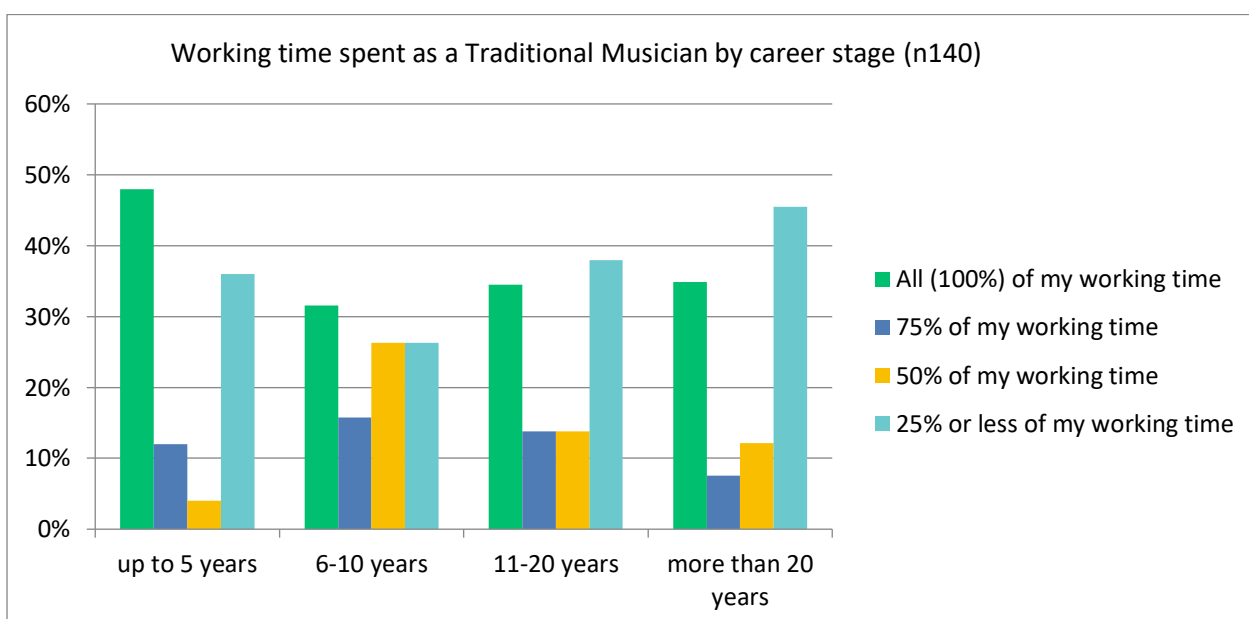
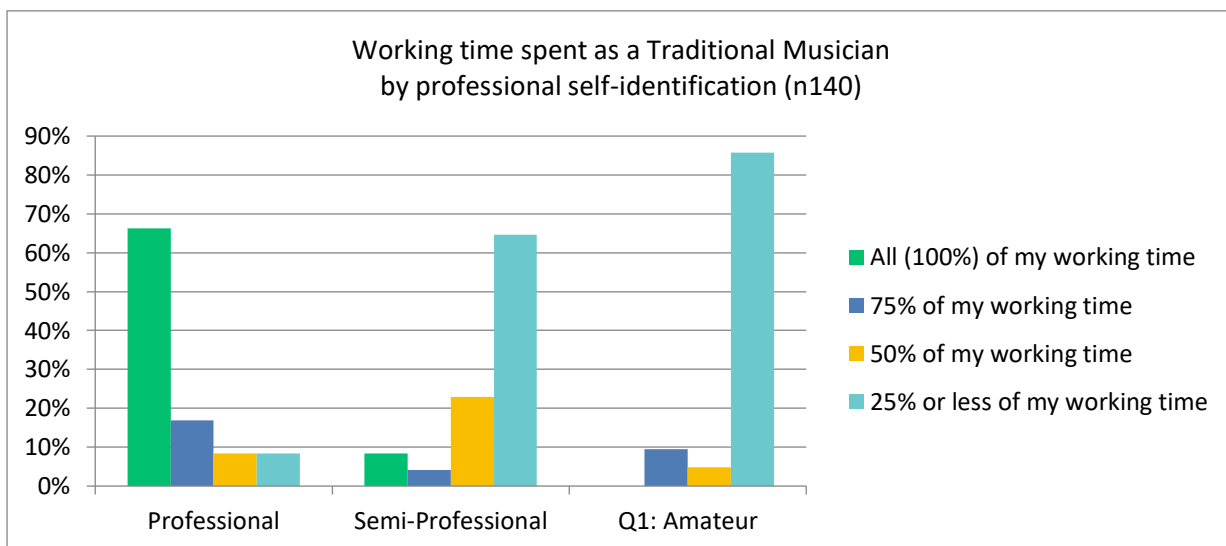
Respondents predominantly spend either all (100%) of their working time as a Traditional Musician, or 25% or less of their working time (36% and 39% of respondents respectively), with fewer people spending 50-75% of their work-time in Traditional Music.

From closer analysis across segment groups, the following trends may be observed:

- Professional musicians are more likely to spend 100% of their working time in Traditional Music (66% of professional respondents).
- The vast majority of those devoting less than 25% of their working time to Traditional Music are Amateur or Semi-Professional (85% and 65% of those groups respectively).
- People who have worked in Traditional Music for more than 20 years predominantly work less than 25% of the time (45%) or 100% of the time (35%)
- People less than five years into their Traditional Music career are predominantly spending 100% of their working time in the sector (48%).
- Of people who are 0-5 or 6-10 years into the Traditional Music career, more tend to commit 'all of their working time' to the sector (a combined total of 70%) than 'less than 25%' of their time (a combined total of 62% from these two groups).



These data trends are demonstrated in the charts below showing working time patterns by professional self-identification and by career stage.



To place this in the context of the UK’s music sector at large, according to the Musicians Union (MU) as of 2012 just over half (59%) of musicians were working full-time with 52% spending all (100%) of their working time as musicians.<sup>8</sup> For the Traditional Musicians in this survey, 36% spend 100% of their working time in the sector, rising to 66% among those working in a Professional capacity.

Across the UK (as of 2012) only one in five were working less than 50% of their working week as musicians, leading MU to state that “for a sizeable minority of working musicians, earning money outside the music industry is necessary to maintain an income”. Among the Traditional Musicians in this survey, the proportion of those working 50% of their week or less in the sector is 52%. However among Professional Musicians this shrinks to 16%, or one in 6 people.

<sup>8</sup> Musicians Union 2012: p14



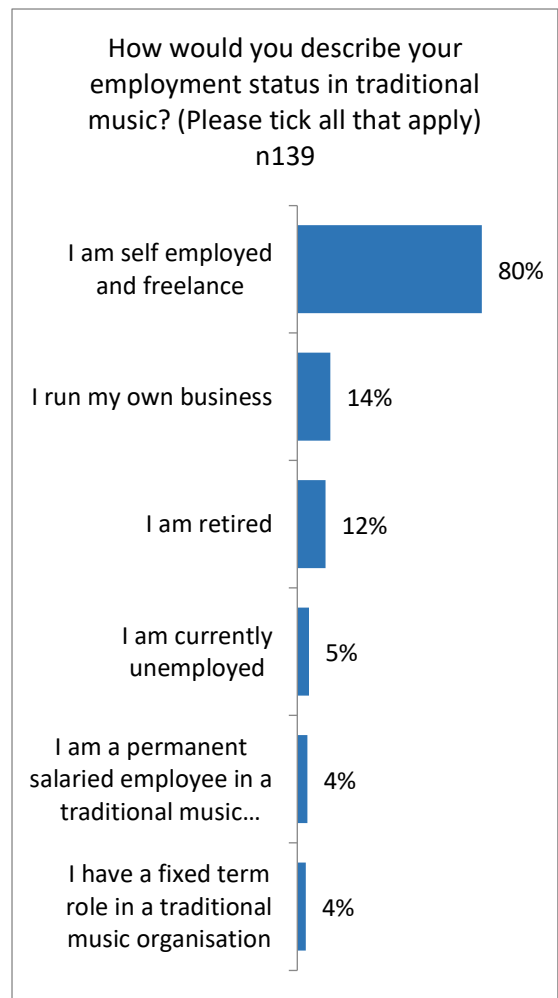
## Employment status within Traditional Music

The Traditional Music sector in Scotland is characterised by self-employed and freelance musicians (80% of 139 respondents) and many musicians who run their own businesses. The vast majority (17) out of the 20 people in this survey running their own businesses are established musicians who have been working in the sector for more than 10 years.

A small proportion of respondents in this survey (11 people representing 8% of the respondents who provided data on this question) are employed in sector organisations.

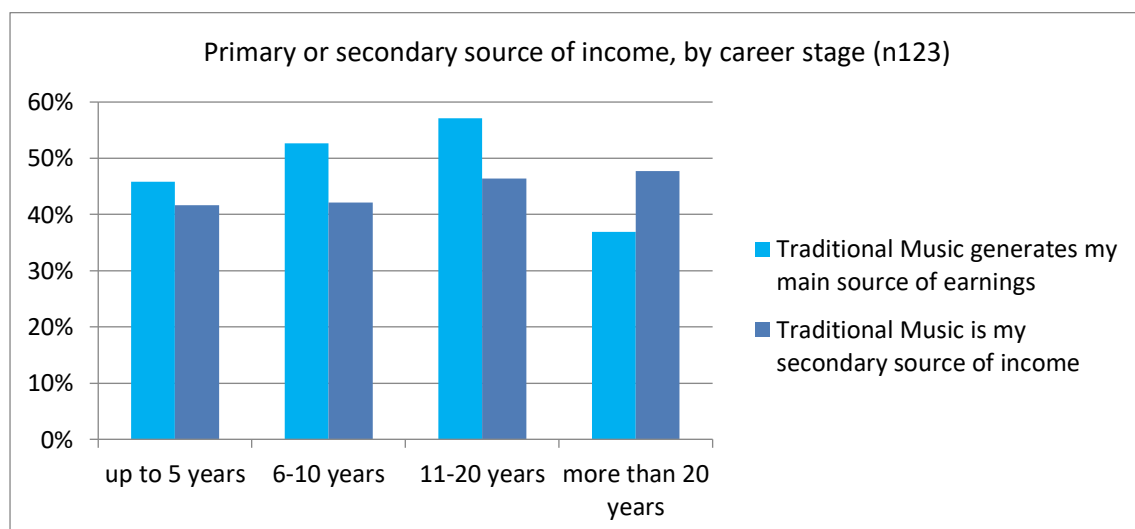
Of the 7 respondents who report that they are currently unemployed, five are people who have been working less than five years in the sector.

An eight (12%) of the respondents for this question are retired though still active performers, and are involved in voluntary and community activity.



## Traditional Music as a Primary and Secondary Source of Income

The survey as a whole reveals a 50-50 split between whether Traditional Music represents a respondent's primary or secondary source of income for the 123 people who answered this question. Looking a little closer however, as can be seen in the chart below, Traditional Music represents the primary source of income at all career-stages *except* for those who have worked for over 20 years.



It is of note that a significant majority of those musicians who record their music (a grouping of 69 people within the dataset – see Chapter Four) consider Traditional Music to be their primary source of income (59% of recording artists), as opposed to a secondary source of income (38% of recording artists).

It is also interesting to note that a significant proportion (1 in 5) of those who answered that they devote ‘all of their working time’ to Traditional Music also report that it represents their secondary source of income. Needless to say, among those who state that they spend ‘less than 25% of their working time’ in Traditional Music, the majority (72%) report it as a secondary source of income, or that they earn no income from their Traditional Music activity (21%).

Our findings seem to diverge slightly from the wider context of the music sector at large: the survey for Creative Scotland’s Music Sector Review of 2014 found that music was *not* the primary source of income for more than a third of musicians (36%), and that 12% reported no income at all from music.<sup>9</sup> Our survey suggests that Traditional Musicians rely even less on their music as their primary source of income: 45% of the 137 Traditional Musicians who answered this question say that Traditional Music generates their secondary source of earnings.

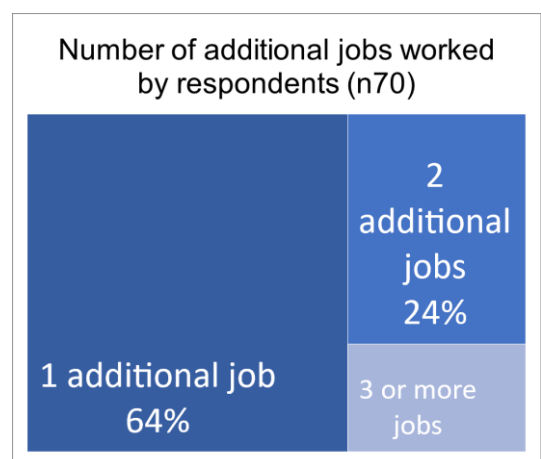
Creative Scotland’s Music Review states: “Many musicians are struggling to make a living in Scotland. More than one-third reported that music related activity was not their primary source of income (36%).” For the Traditional Musicians in this survey, this figure is 45%.

Do you consider traditional music to be your primary source of income? (n137)	
	Responses
Traditional Music generates my main source of earnings	44% n61
Traditional Music is my secondary source of income	45% n62
I have no income from Traditional Music	11% n15

### Working multiple jobs

Of 138 respondents who answered our survey questions about employment patterns, just over half (51%) confirm that they have additional employment parallel to their Traditional Music work. Of these, a quarter have *two additional jobs*, and 1 in 9 work *three or more jobs* in addition to their paid Traditional Music activity.

In the majority of cases among our respondents, additional employment is reported by those who devote less than 25% of their working time to Traditional Music (with 68% of these people having other jobs). What is notable is that of 16 people who devote 75% of their working time to Traditional Music, five have one other job, four have two other jobs and one person works 3 or more other jobs, showing a very busy work portfolio. Among the 18 people who report devoting 50% of their time to Traditional Music are eight working one additional job, 3 working two



<sup>9</sup> Creative Scotland Music Review, EKOS 2014: p99

extra jobs and 1 with three or more additional employments. It seems clear, then, that the Traditional Music sector is characterised by so-called ‘portfolio’ careers; through a necessity to generate additional income (as shall be shown in the next Chapter studying income levels). This aligns with findings across the UK’s music sector reported by MU, who state: “Developing a portfolio career, made up of a number of different jobs, is a necessary characteristic of many musicians’ careers; this invariably involves developing non-music skills such as business, marketing, teaching and community engagement”.<sup>10</sup>

For the respondents who provided details of their employment (n50), 35% of their additional jobs are in Music and 15% in other artforms. But the majority (65%) of these additional jobs are in sectors unrelated to music. These include, in order of prevalence:

- Professional services (marketing/PR/consultancy)
- Education (lecturing, teaching)
- Third sector (charity, social enterprise)
- Public service (social work, government)
- Accommodation/home B&B services
- Gardening and outdoor services
- Building & Construction
- Retail
- Food and Bar Work

Individual responses list a range of other professional services such as Engineering, Telecommunications, Quantity Surveying, Energy, Tourism and Print/Publishing.

Contextualising this alongside the UK music industry as a whole, a third of the musicians surveyed by MU in 2012 (34%) worked additional jobs not connected in any way to their music careers.<sup>11</sup> For our Traditional Music respondents this figure is 65%.

## Headline points on Working in the Sector

- The vast majority of those represented in this survey (83%) earn income from their Traditional Music activities; of these a third earn money from other music genres as well.
- The data from the Traditional Musicians in this survey shows a largely professional/semi-professional sector earning income predominantly from performances on a small-scale and private functions. In parallel with these activities, teaching is an important mainstay for people working in the sector. Our findings reinforce the MU’s statement that gigs (in pubs, clubs, restaurants) and private functions (ceilidhs, weddings, parties conferences) represent “a very significant part of the “music ecology” and make an important contribution to the music economy.
- The sector comprises both formally-trained and grassroots musicians. Around a third have a university degree in music or traditional music. That 38% have no formal qualification, including 1 in 5 of those who are working in a Professional capacity, shows the sector’s strong roots in grassroots traditional culture.

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<sup>10</sup> Musicians Union 2012: p5

<sup>11</sup> Musicians Union 2012: p14

- The current workforce in Traditional Music in Scotland is mature and experienced, with almost half of the survey respondents having worked in the sector for more than 20 years and 68% for more than 10 years.
- The sector is characterised by self-employed and freelance musicians (80% of respondents).
- Respondents predominantly spend either all (100%) of their working time as a Traditional Musician, or 25% or less of their working time. Correspondingly, there is a 50-50 split between whether Traditional Music represents a respondent's primary or secondary source of income. One in 10 respondents report no income at all from their Traditional Music.
- More than half of the respondents have at least one job in addition to their Traditional Music work, showing the challenges of generating a sustainable income from work in the sector.

## 2 INCOME FROM TRADITIONAL MUSIC

A core focus of this economic survey is the sector’s ability to generate income from Traditional Music. This chapter explores the earnings by those working in the sector looking in detail at overall working patterns, how much working time people devote to Traditional Music and what proportion it contributes to their total annual income. The circumstances of musicians in distinct income bands are explored, generating insights on the sustainability of careers in the Traditional Music sector in Scotland.

### The activities most relied on for Traditional Music income are performance and teaching

As well as income-*generating* opportunities profiled in the previous chapter, the survey also sought to highlight which activities are *most relied on by the sector for income*. A total of 114 respondents ranked the following where ‘1’ represents the activity that generates the most income for them. By collating results to identify respondents’ Top 3 activities for earning money (as presented in the table below), it becomes clear that *Performance fees and/or box office receipts* are not only the most prominent Number 1 response (with 54% of the 114 respondents ranking that First), but when factored in as a second and third most important income-generator, performing is the most important source of income for 88% of Traditional Musicians in this survey.

The other main source of income for the musicians responding to this survey is *Teaching or education work* which is ranked First by 36% of all respondents and second by a further 18%. Overall it represents a Top 3 income source for 65% of the respondents. *Session fees* also emerge as a key secondary or tertiary source of income for two fifths (41%) of the musicians in this survey. Likewise *Direct sales of music and merchandise* feature as a notable income strand for 27% of respondents, along with *Royalty payments* which are listed in the Top 3 by just under a fifth (18%) of respondents.

	(n114) The activities most relied on for income are...	Ranked 1 by # respondents	Ranked 2 by # respondents	Ranked 3 by # respondents	Picked in Top 3 by % all respondents
1	Performance fees and/or box office receipts	62	30	8	88%
2	Teaching or education work	41	21	12	65%
3	Ad hoc or regular session fees	5	27	15	41%
4	Direct sale of original work and merchandise (CD/vinyl, digital)	1	12	18	27%
5	Royalty payments	1	4	16	18%
6	Other traditional music income (* see below)	3	4	3	9%
7	Grants from funders	1	2	4	6%
8	Arrangements or Composition commissions	0	1	2	3%
9	Crowdfunding	0	0	0	0%

*Grants* and *Commissions* are less prominent as core (Top 3) income sources, though respondents have accorded them a lower ranking; and likewise *Crowdfunding*.

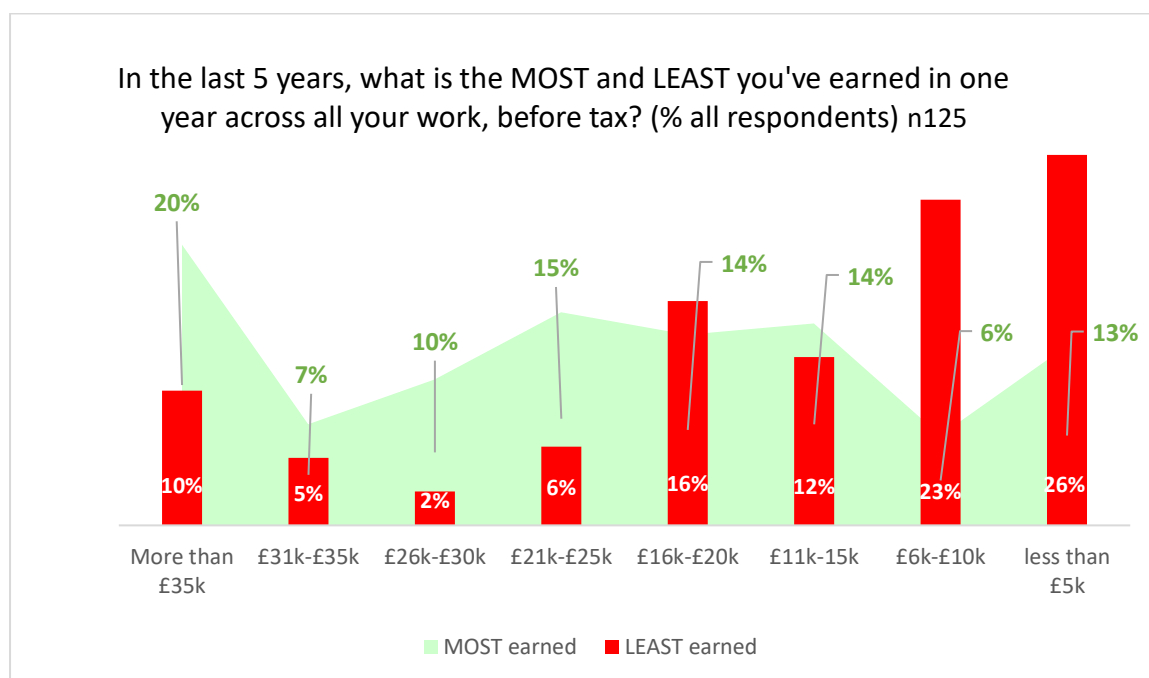
*Other* activities cited by respondents include:

- Working as a Promoter (running gigs)
- Project management
- Research
- Paid Mentoring
- Running a festival
- Conducting large Trad bands
- Administration
- Music in hospitals and care

### Income levels of people working in the sector from all of their work

Traditional Musicians in this survey were asked to indicate the income brackets of the most and least they have earned in one year before tax in the last five years, from all their work (i.e. Traditional Music *and* other jobs). The purpose of this question was to show what overall income levels musicians working in this sector survive on annually.

The chart below shows the proportions of respondents reporting each income bracket as the *Most* (the shaded area) or the *Least* (the bars) that they have earned in a year during the last five years.



The chart shows that for half of the respondents, their low-end annual earnings come in at £10,000 or less. For 19% of all of the respondents, their *maximum* income is no more than £10,000 (with the majority of this group coming in at less than £5000 per year as a maximum income).

At the other end of the scale are some 27% and 15% of respondents whose respective *maximum and minimum annual earnings* are more than £30,000 across all their work, including Traditional Music activities.

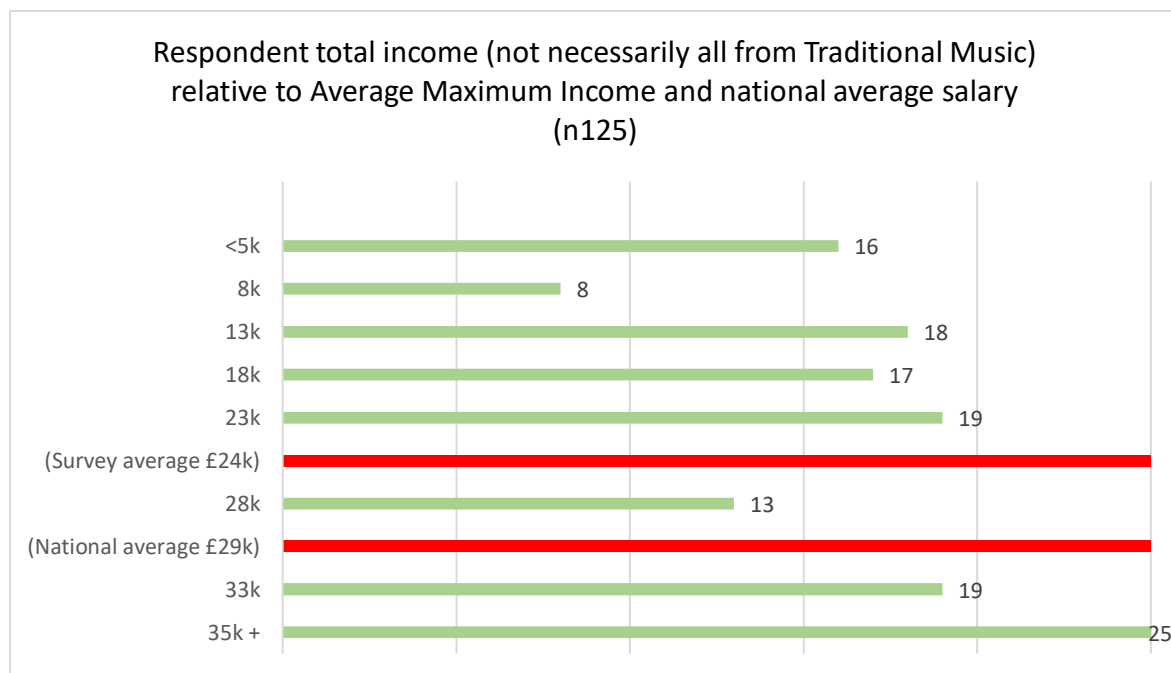
In the £11,000-£20,000 income bracket are 28% of respondents for whom this is a maximum and 28% for whom this is their minimum level of annual income. And in the £21,000-£30,000 bracket are a quarter (25%) of respondents for whom this represents their highest level of income.

These groupings and their circumstances shall be explored in more detail in this Chapter. The average income across all 125 respondents, based on the middle (median) value in each income bracket, may be calculated as follows:<sup>12</sup>

**Average Maximum income: £23,896**

**Average Minimum income: £14,520**

The proportion of respondents earning above and below the survey average maximum income and the national mean salary is indicated in the chart below.

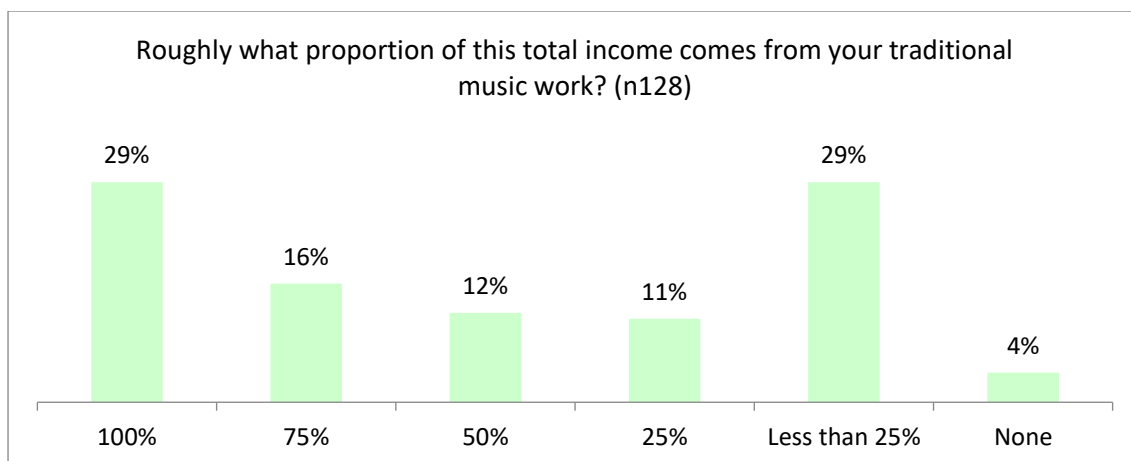


This chart shows that a significant proportion of respondents are earning well below both this survey's average of £23,896 (approximately 62% of respondents) and the national salary average of £29,588 (approximately 73% of respondents).

### Proportion of overall Income from Traditional Music

After asking about maximum and minimum income levels, this survey asked respondents to indicate what proportion of their total income is contributed by their Traditional Music work.

<sup>12</sup> The average (or mean) is calculated by adding up all the figures and dividing by the number of respondents. The median is the middle value in a list of numbers.



The chart shows that of the 128 respondents who provided an answer for this particular question, 29% generate *all of their annual income* from their Traditional Music work. However for 44% of the respondents, Traditional Music brings in 25% or less or none of their annual earnings. One eighth (12%) of our sample generates half of their income from Traditional Music work. The data provided by respondents on this question is discussed further below in the context of specific income bandings.

Taking a closer look within the range of income bandings it is possible to nuance all of these findings in a clearer context.

### Higher income: £30,000 and above

A significant number of respondents (27% of the 125 people who answered this question) indicated maximum earnings of over £30,000 in the last 5 years and 15% stated that their lowest earnings during this period were over £30,000 also. At face value this might suggest that people working in the sector can enjoy a living wage above the national average wage in the UK (£29,588 as of 2018).<sup>13</sup> However, of the 34 people who indicated maximum earnings above £30,000:

- 20 out of 34 (59%) *have other jobs* including many in professional capacities not related to the arts (company director, engineering, lecturing), revealing that *in most cases the bulk of these earnings are coming from other sectors*.
- The majority (62%) consider Traditional Music to be their *secondary source of income*, and it brings in *25% of their earnings or less* for 68% of this grouping.
- Only 9 respondents in this earning bracket stated that Traditional Music represents 100% of their total income, while 17 respondents in this bracket stated that they earn less than 25% from their Traditional Music activities
- The vast majority are *established in their careers*, with 29 out of 34 respondents having worked in Traditional Music for more than 10 years, of which 19 have been in the business for more than 20 years
- A large proportion (25) are *self-employed or freelance*, with 11 running their own business. Seven respondents in this bracket are also retired
- A third (35%) *also earn money from other genres* of music in addition to their Traditional Music work
- 50% spend less than 25% of their working time on Traditional Music and 70% spend less than half their working time
- Revealingly, one respondent commented “I can only afford to play professionally because I have an alternative income”

<sup>13</sup> Office for National Statistics, Employee Earnings in the UK 2018



In terms of income generation, the people in this bracket highlight performance and box office fees as their major source of income (27 respondents ranking it in their top 3). They also register tuition as a prominent source of income (19 respondents). People in this category also generate income from ad hoc or regular session fees (11), direct sale of original work or merchandise (8), and royalty payments (9).

### Low income: less than £10,000

A similar proportion (19%) of the respondents reported earning less than £10,000 as their maximum income, of whom **two thirds bring in less than £5,000** in a year across all of their paid work.

A total of 24 respondents out of 125 people who provided this information reported earning less than a maximum of £10,000. Key findings relating to this group are that:

- The majority considered themselves to be Professional (7) or Semi-Professional (11)
- 18 **earn no money from other music genres** in addition to their Traditional Music work
- The biggest proportional groups (9) are **early career**, having worked for less than five years in the sector, and **advanced career** (9), having worked for more than 20 years.
- They are less likely than the highest income musicians to earn money from other music genres in addition to Traditional Music, and **75% earn money just from Traditional Music**.
- The majority within this group (13) don't have any paid employment from another job.
- Of the 11 respondents who do have other employments, this small income is what is generated alongside one other job (in the case of 7 people), two jobs (3 people) or three jobs (in the case of one person). All but two of these other jobs are unrelated to music or the arts.
- They predominantly spend **less than 25% of their working time** on Traditional Music (12 people) and do so in a **self-employed** capacity
- Only 6 people out of 24 in this bracket say that they spend all of their working time in Traditional Music

In term of income generation, the activities most predominant in this bracket are performance fees and box office receipts (ranked in their Top 3 by 17 respondents), and tuition (11 respondents). Ten of these respondents highlighted session fees as one of their top 3 sources of income and six respondents reported direct sale of original work or merchandise.

Five respondents in this bracket said they earn no money from Traditional Music activity and five (presumed to be the same individuals) report their employment status as 'unemployed'. Four people in this grouping draw support from a state pension.

**The only respondents across the whole survey confirming receipt of the following state benefits are from this low income category:**

- Working Tax Credit (2 people)
- Employment and Support Allowance (1 person)
- Universal Credit (1 person)

However it is worth noting that 12 out of 17 people in this bracket who provided information about their receipt of state benefits confirmed that they claim/receive no benefits.

### Middle income ranges

Some 28% of the respondents report a maximum income in the bracket **£11,000-£20,000** (n35). Within this grouping:

- The majority classify themselves as Professional (30) and Semi-Professional (4).
- All earn income from Traditional Music activity
- Only 37% earn money from other genres of music as well as Traditional Music
- The majority (20) spend all of their working time as a musician or 75% of their time (8) and the majority (24) consider Traditional Music to be their primary source of income.
- They are predominantly self employed and freelance (33)
- 20 out of 35 have no other employment. Of the 15 who have additional jobs, six have 2 jobs and 3 have 3 or more jobs. Only five of these people are working in fields unrelated to music or the arts.

They report relying predominantly on performance and box office fees (29) as a top 3 income-generator within Traditional Music as well as Teaching and Education work (32). Significant numbers of respondents in this bracket (15) indicate Ad Hoc or Session Fees as a top 3 source of income.

A quarter (26%) of the respondents report their maximum income as £21,000-£30,000 (n32). Within this grouping:

- All but three people earn income from their Traditional music activity
- 34% earn money from other genres of music as well as Traditional Music
- Only 15 spend all of their working time as a musician, and two spend 75% of their time. This means that almost half of this group devotes less than 50% of their working time to Traditional Music work, and half of this grouping considers Traditional Music to be their secondary source of income.
- They are predominantly self employed and freelance (26)
- 20 out of 32 have other employment that contributes to their income: 13 have one other job, 3 have 2 jobs, 3 have 3 or more jobs.
- Roughly half of these other employments are outside the arts and music and where respondents have provided details, there is a higher incidence of professional services and education roles.

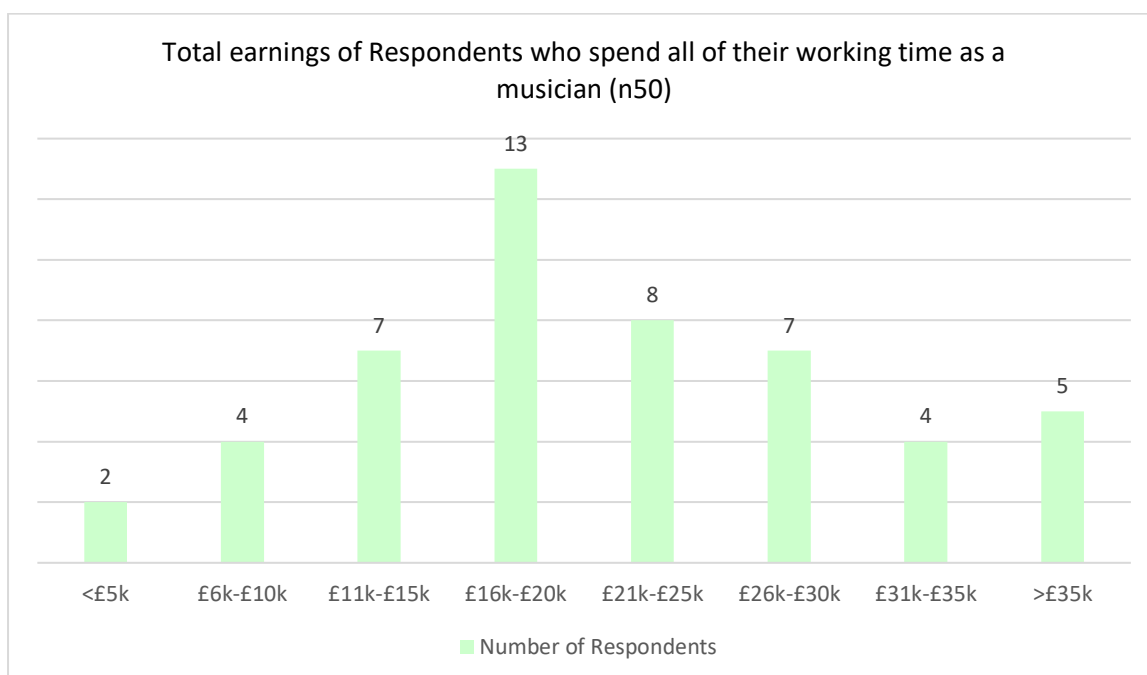
They report relying predominantly on performance and box office fees (24) for income within Traditional Music as well as Teaching and Education work (20). Nine respondents indicate Ad Hoc or Session Fees as a top 3 source of income in this bracket. Five respondents rank 'direct sale of original work and merchandise' as one of 3 top income-generators in their Traditional Music work.

It is worth noting that within these two middle income categories, the group that considers Traditional Music more of a secondary source of income and devotes a smaller proportion of time to Traditional Music work, is the one that earns in the upper category. This distinction becomes even more marked in the highest income category.

### Income levels for people spending 'all their working time' as a musician

Extracting data from just the respondents who devote 100% of their time to their music career reveals the following earning patterns, with a peak in the £16,000-£20,000 income range visible in the chart below.

It can be seen that the large group of respondents with a maximum income of above £35,000 are reduced to a much smaller grouping of those able to generate these earnings from music or Traditional Music alone. It should also be noted that this category of 50 people who work fully in the music sector includes a total of 7 respondents who have a fixed term or permanent salaried position within a traditional music organisation, along with their freelance music practice.



Of the 50 full-time musicians represented in this survey (i.e. those who state that they *spend 100% of their working time* as musicians):

- The majority (60%) say that **all of their income comes from Traditional Music work** (30 people)
- Traditional Music generates 75% of total income for 8 people (or 16% of this group)
- Traditional Music generates 50% of total income for 6 people (or 12% of this group)
- Six people (12%) in this category of full-time working musicians generate only 25% or less of their income from Traditional Music

It is clear that Traditional Music is a major component in the music careers of these people spending all of their working time as a musician, with 88% of these respondents generating 50% or more of their music income from Traditional Music. **What is notable is that only 6 in 10 of the musicians who devote all their time to Traditional Music are able to generate all of their earnings from Traditional Music alone**, suggesting either that there are insufficient employment opportunities to sustain a full career, and/or that revenues are so low that Traditional Musicians generally need to supplement their music activities.

### Financial vulnerability in the sector

According to the survey responses, reliance on state benefits in the sector is low considering the low levels of income reported by a significant number of respondents. Of the 105 people who answered whether they receive any of the following state benefits, 81% said no.

Receipt of state benefits by respondents	Number who ticked 'yes'	
Working Tax credit	2%	2
Child Tax credit	3%	3
Working Families tax credit	0%	0

Receipt of state benefits by respondents	Number who ticked 'yes'	
Housing Benefit	0%	0
Disability Living Allowance	1%	1
Employment & Support Allowance	1%	1
Universal Credit	1%	1
Job Seekers Allowance	0%	0
Carers Allowance	1%	1
Council Tax benefit	0%	0
State Pension	14%	15
None of the above	81%	85
Other (* see below)	2%	2
		n105

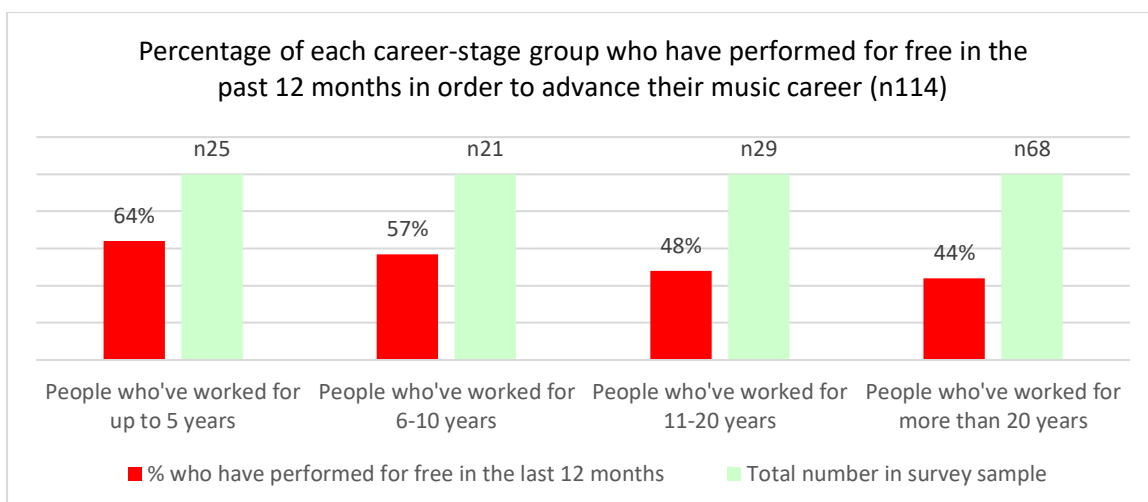
The two people who selected 'other' listed child benefit and a company pension.

### Many Traditional Musicians find themselves performing for free to advance their music career.

Of 114 people who answered the question 'have you performed for free in the past 12 months in order to advance your music career?', 63% report that they have.

Examining these responses according to how long respondents have been working in the sector, it can be seen that performing for free under these circumstances is prevalent across all career stages, though the incidence of doing this decreases the longer that people have been working in the sector. Perhaps inevitably, performing for free is most pronounced for those who have been working in the sector for less than 5 years.

Two thirds of respondents performed for free in the last year to advance their music career (n114)



\* Note, the data used to identify career stage comes from 143 respondents of whom only 114 (80%) answered the question about performing for free. It is therefore possible that the number of people performing for free in the sector is higher than represented in these figures.

One in four of the respondents (26%) said that, aside from performing, they had delivered **other music-related services for free** which they felt should have been paid for.

Among the 30 people who say they have delivered *other music services* for free, 19% may be considered 'early career' (less than 5 years' experience in the sector), 12% are more 'established' being 6-10 years into their career, and 69% are at an 'advanced' stage in their career (having worked for more than a decade in the sector).

	Number of respondents providing information on this question	
People who've worked <b>up to 5 years</b>	4	19%
People who've worked <b>6-10 years</b>	3	12%
People who've worked <b>11-20 years</b>	7	23%
People who've worked more <b>than 20 years</b>	16	46%
	(n30)	100%

Details of the kind of unpaid services delivered by these Traditional Musicians include:

- Floor spots and "short 30 minute sets"
- Teaching and music workshops
  - Band management and administration
  - Organising events, project management
- Fundraising ceilidhs and gigs for bands or for charity
- Arrangements for other people
- Tutoring, mentoring
- Performances related to education work i.e. putting on pupil concerts or showcases
- Research
- Writing funding applications - very time consuming and often unsuccessful

Respondents also cite details of a variety of circumstances in which they provide unpaid services.

*[Music] for Gaelic arts or films, where often a friend will ask for a track or a live recording for free*

*I played for free for a couple of colleagues who were recording albums but hadn't got much money*

*I'm new to being full time professional, so am bad at drawing the line to be paid*

Late night showcase at a large festival

*Rehearsing and writing arrangements for bands and albums. Often the composer is the sole beneficiary of the royalties, but they just compose the melody, and it's left to*

*Sometimes I do fundraiser gigs and I think the charity should pay the band*

*other band members to fully arrange the harmony*

*[I do] above and beyond what I'm paid for - the organisation couldn't afford it, so I do it anyway*

*[I'm] constantly being asked to research or hand over songs for other professional singers*

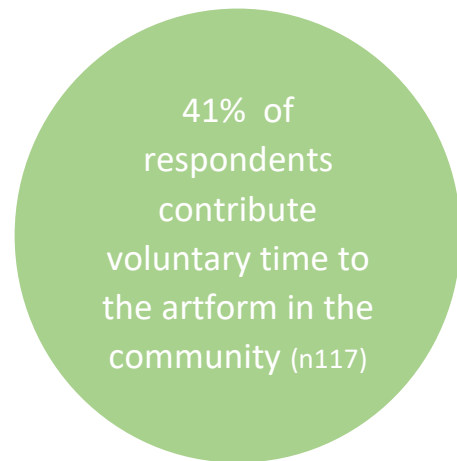
*I often play for events without being paid. Fortunately, as I am in receipt of the state pension and no longer have rent or mortgage to pay, I don't mind. I do this to keep the traditional repertoire and style of playing and singing alive and accessible*

## Unpaid/voluntary contribution to sector development and the community

Beyond providing unpaid music services, the musicians reflected in this survey contribute a significant amount of time and expertise in a voluntary capacity to support young people, and community or amateur music activity. Of 117 musicians who answered this question, 41% are presently involved in such activities.

The majority of musicians who answered this question are working in a Professional or Semi-professional capacity in the Traditional Music sector, with only 8 respondents (13%) classifying themselves as Amateur.

The volunteer activity is present across all of the income brackets represented in this survey. Details provided by respondents show a range of voluntary activities contributed by working Traditional Musicians comprising:



### Informal public performances

- “Unpaid regular session”
- “Leading a local session, putting on local gigs”
- “Organising a local pub session”
- Sessions & organising support slots

- “I go to music sessions/sing around and folk clubs at least once a week. I used to do it 3 or 4 times but focusing on paid work”
- Weekly Folk club performances
- “playing in sessions and with neighbours”
- “Glasgow Fiddle Workshop, folk sessions, online blogs and videos”
- “Local friendship cafe entertainment”
- “I run workshops and put them on for others”
- Helping bands that tour in our area
- “I run a pub session”

### Organising community music

- Local fiddle groups, recording
  - “I help to organise a large community music organisation”
- “I organise and play in Shetland Mandolin Band”

- Running a community choir
- Being a Choir tutor
- Conducting a Gaelic Choir
- “[I perform] numerous Community and charity functions, both at home and worldwide”
- “Until fairly recently I ran a choir but I don't have enough free time to keep it going”

### Education & development for Young People

- Playing in schools for dancing
- Teaching kids with local pipe band

- “Running Ceilidh Bands in the schools in which I teach”
- “Free lessons for kids and junior pipe band”
- Piping and drumming academy
- Voluntary fundraiser for local youth pipe band

### Music in community settings

- “I occasionally play in care homes for a charity”
- “I play in residential homes for free”
- Playing at local hospice

### Fèisean & Festivals

- “Organising festivals and smaller events”
- “Sutherland Sessions promotions and Fèis Rois”

### Committees & boards

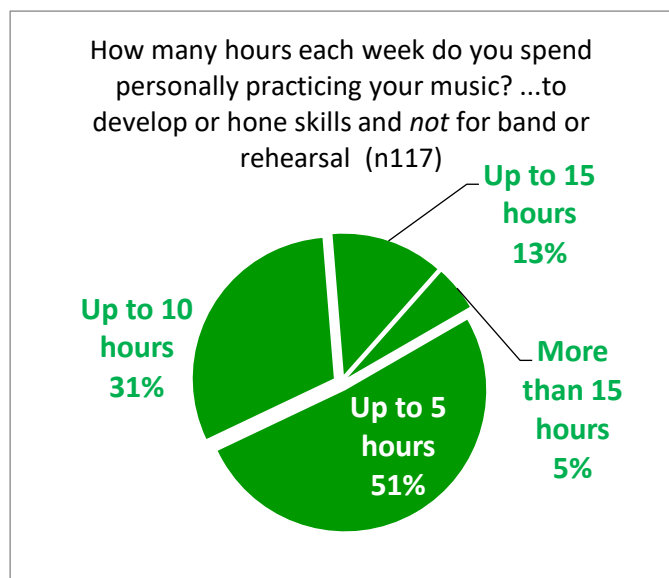
- “I am on a Fèis committee”
  - Folk club committee

- “Chairperson of my local fèis: [mostly] admin related, writing grant forms and organising the annual fèis”
- Committee of the local arts festival
- Secretary of the Traditional Dance Forum of Scotland
- Treasurer of the Clarsach Society
- “I am on the committee of a major festival”

In terms of the time contributed for these activities, where respondents have provided details this is generally 2-5 hours per week. Some people volunteer 8 hours or more per week (in the case of the respondent who helps run a community music organisation, and a respondent running workshops). At busy periods associated with Fèis the hours increase dramatically. For a local choir tutor “towards Mod time it can be 20 hours per week”.

### Traditional Musicians devote significant personal time to their artform

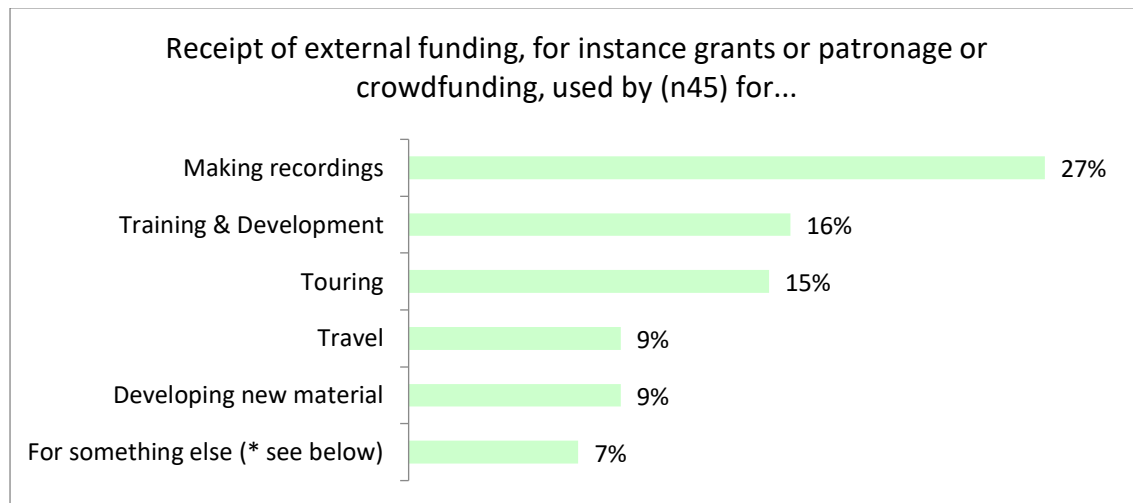
In addition to the paid and unpaid working time devoted by our respondents to the sector, the personal time devoted each week by the Traditional Musicians in this survey is significant, with all respondents practicing to hone their skills for at least 5 hours per week, on top of band practice or rehearsal. Half of the respondents practice for more than 5 hours per week, with a third devoting up to 10 hours per week, and 18% practicing for up to 15 hours or more.



## Access to and use of external funding

Of 111 people who answered our question about external funding in the form of grants, patronage or crowdfunding, the majority (59%) have not received any external funds to support their work.

45 respondents report having received money from these external sources, with 27% using it predominantly for making recordings. Training and development is the second most common benefit derived from external funding, followed by financial support for touring, travel and developing new material.



Further benefit from money granted from external sources was listed by individual respondents as:

- Money for purchasing instruments (2 people)
- National Lottery funding to form and equip a new pipe band
- Community-based projects
- Mentoring
- Providing training in the sector
- Grants to organisations to fund the respondent's paid and freelance employment

## Headline points on Sector Income

What the data from this survey shows is a sector that relies heavily on employment beyond the Traditional Music or music sector in order to generate a living wage. Yet Traditional Musicians still devote a significant proportion of their working time and personal time to this artform.

The figures suggest that the more working time respondents devote to Traditional Music, the lower annual income they are able to generate. The higher-earning musicians are, for the most part, earning at these levels because they are undertaking additional work, often outside the arts sector.

The majority of people working in the Traditional Music sector are earning low income and the situation is exacerbated by numerous unpaid aspects including being expected to perform for free, some people being asked to tutor or teach for free, unpaid time for band administration or organising



events, and writing arrangements for other musicians. Despite this, there are very few respondents in the survey claiming any form of state benefit.

The musicians in this survey nevertheless contribute greatly to the Traditional Music culture through their engagement with voluntary, community and amateur work. The data paints a picture of a sector that is passionate about Traditional Music and devotes a significant amount of unpaid time to “keep the traditional repertoire and style of playing and singing alive and accessible”, in the words of one respondent. The musicians in this survey contribute in a variety of important ways to community music and the development of the artform, working with young people and other musicians and performing the music publicly and with the community as much as possible. Many hours per week are devoted to practicing and honing skills, and the survey also shows that Traditional Musicians routinely help each other out for free as session players and band members.



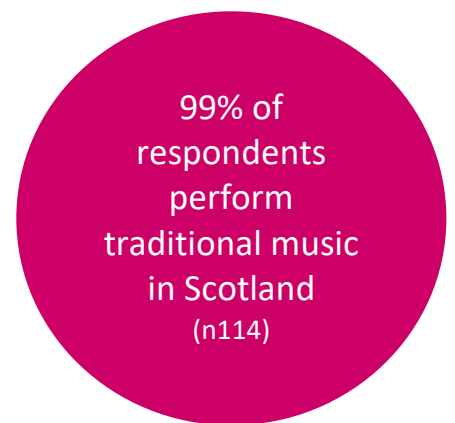
## PERFORMING TRADITIONAL MUSIC

This chapter examines the profile and reach of the Traditional Musicians in this survey through Scotland and beyond to the world, capturing the nature and volume of performing and how paid performance opportunities are generated in this sector.

Performance is the mainstay of Traditional Music in Scotland. All who answered this part of the survey (n114), except for one respondent, perform traditional music in Scotland.<sup>14</sup> This figure shows that performing is central to a career in Traditional Music, alongside teaching and all the other roles undertaken by respondents.

### Performing is a significant source of work and income

Performances (whether large or small, public or private, formal or informal) are the most significant source of paid work and income for 56% of the respondents in this survey (with tuition and education work the Number 1 source for another 36%). Only 9 respondents who say they perform Traditional Music in Scotland don't earn income from it.



As can be seen in the table below, both *small scale public performances* and *performing at private functions* are among the top 3 income-generating activities for two thirds (66%) of the 143 musicians who answered this question. *Large scale public performances* are one of their three most significant work opportunities for two fifths (43%) of the respondents. The table also shows that, for those who have another top income-generating source (i.e. tuition and education), performing is still their important Number 2 source: 73% of respondents list one of the forms of performance as their second most important source of paid work.

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<sup>14</sup> There were a total of 116 people answering the previous section about working for free, voluntary work, etc. Ten questions later when we ask about performing, 114 people are still engaged with the survey, of whom 113 say they perform traditional music in Scotland. So the sample (n114) who answered the question about Performing is consistent with the entire population of the survey: almost everyone who is still going through the survey at this point Performs.

Which activities generate the most PAID WORK OPPORTUNITIES for you at present in traditional music? (Select all that apply and rank so that 1 is your most common activity) (n143)					
Category	Ranked 1 by <i>n</i> respondents	Ranked 2 by <i>n</i> respondents	Ranked 3 by <i>n</i> respondents	Total <i>n</i>	Total % (of n143)
Large-scale public performances (concerts, festivals)	n21	n21	n20	= n62	43%
Small-scale public performances (session gigs in pubs, clubs, hotels, restaurants)	n27	n48	n20	= n95	66%
Performing at private functions (weddings, parties, conferences, dinners)	n32	n36	n27	= n95	66%
Total <i>n</i>	= n80	= n105	= n67		
Total % (out of n143)	56%	73%	47%		

In terms of *reliance on income*, ‘performance fees and/or box office receipts’ are identified as the most important source of income for 62 out of 114 respondents in that question (53%) and they are the second most important source for another 30 respondents (26%), making performing a top 2 source of *income* (as opposed to a source of work, above) for a total 79% of respondents (n114).

### Nature and volume of Traditional Music performances

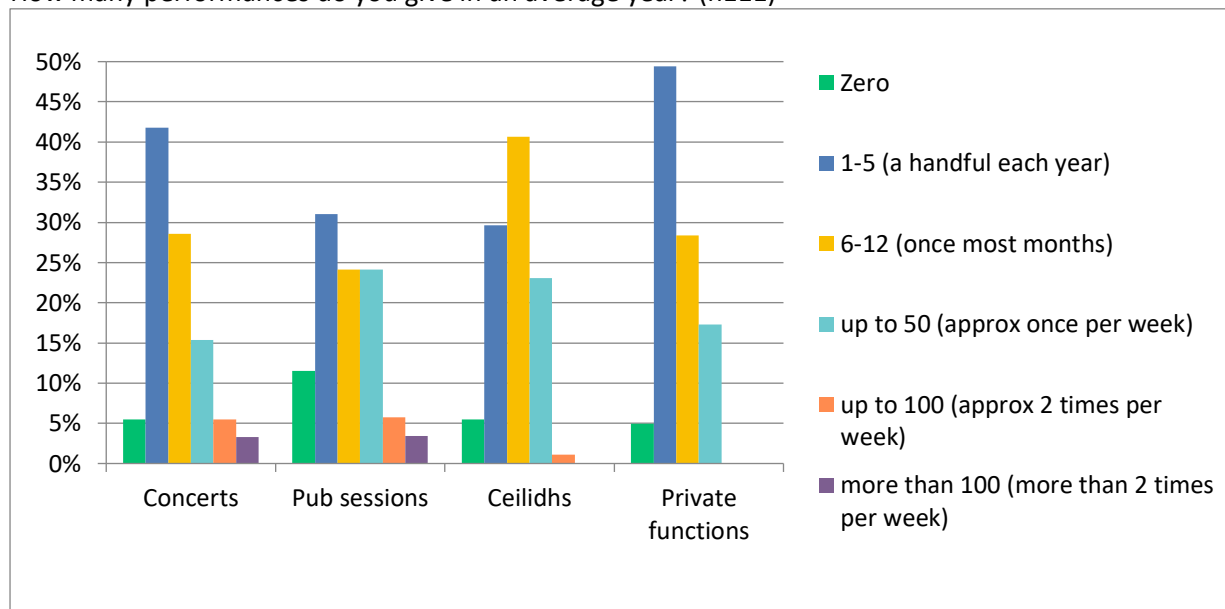
The survey sought details the range of performance types and frequency in order to capture a sense of the volume of Traditional Music being performed on a regular basis by Scottish musicians. The chart below shows the frequency of respondents’ performances by different type: concerts and festivals, pub sessions, ceilidhs and private functions.

What is immediately visible from the chart is that for the largest number of respondents - between a third and half in each category - the frequency of private functions and concerts, pub sessions and ceilidhs is a handful each year (1-5 performances), or else once most months (6-12 times per year).

However the survey reveals a sizeable core within the sector that is performing regularly within these categories:

- Around a quarter (24%) of the respondents perform once a week at pub sessions, with another 6% performing pub sessions twice each week and some (3%) more than 2 times each week.
- A similar proportion (23%) perform ceilidhs once a week, and 40% of the musicians perform ceilidhs once most months.
- Concerts and festivals are performed weekly by 15% of the musicians in the survey, twice each week by 5% and more than two times per week by 3% of the respondents.
- Private functions (weddings, parties, conferences, dinners) represent a weekly performance opportunity for 17% of the musicians, though 28% do these once most months (6-12 times per year).

How many performances do you give in an average year? (n111)



*Other* performance types reported by the musicians are listed below and include some very regular employment opportunities:

- **Music in hospitals and care** (4 respondents, variously 10-15 gigs per month / 8 per month/ up to 100 per year)
- **Performing in restaurants** (2 respondents: once a month / 25 per year)
- **Hotel and bar 'residency' gigs** (2 respondents, one of whom quantified c200 per year)
- **TV and radio performances** (1 respondent who reported a handful each year)
- **Performances for voluntary sector social groups**
- **Performances for competition**
- **Performances as part of projects with community groups**

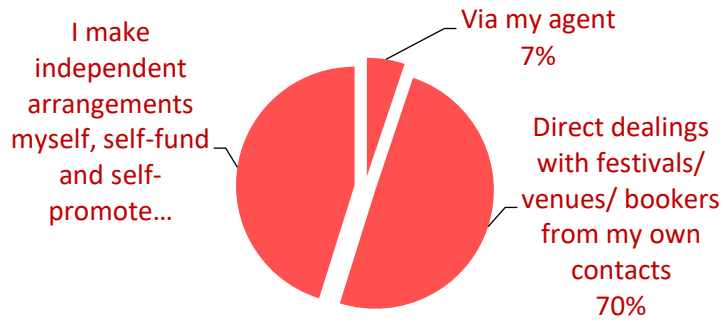
Respondents comment that:

- Performance opportunities are not spread evenly through the year and may be concentrated all in one or two weeks at a time
- "There are no average years with project-based work - can be a touring year or a creative/recording year or a mix of different projects"

### Performance opportunities are mainly self-generated and self-managed

When asked how the performance work listed above is generated, only 7% of Traditional Musicians report having a third party involved in booking any of their work. **The majority of the 110 respondents who provided this information usually arrange this work themselves**, handling festivals, venues and bookers directly from their own contact-base (in the case of 77 respondents, or 70% of this group). In addition, 70 respondents (64%) report that their performance opportunities also arise from their own independent arrangements which may involve self-financing venue booking and promotions.

How do you usually generate live performance opportunities? Please tick all that apply (n110)

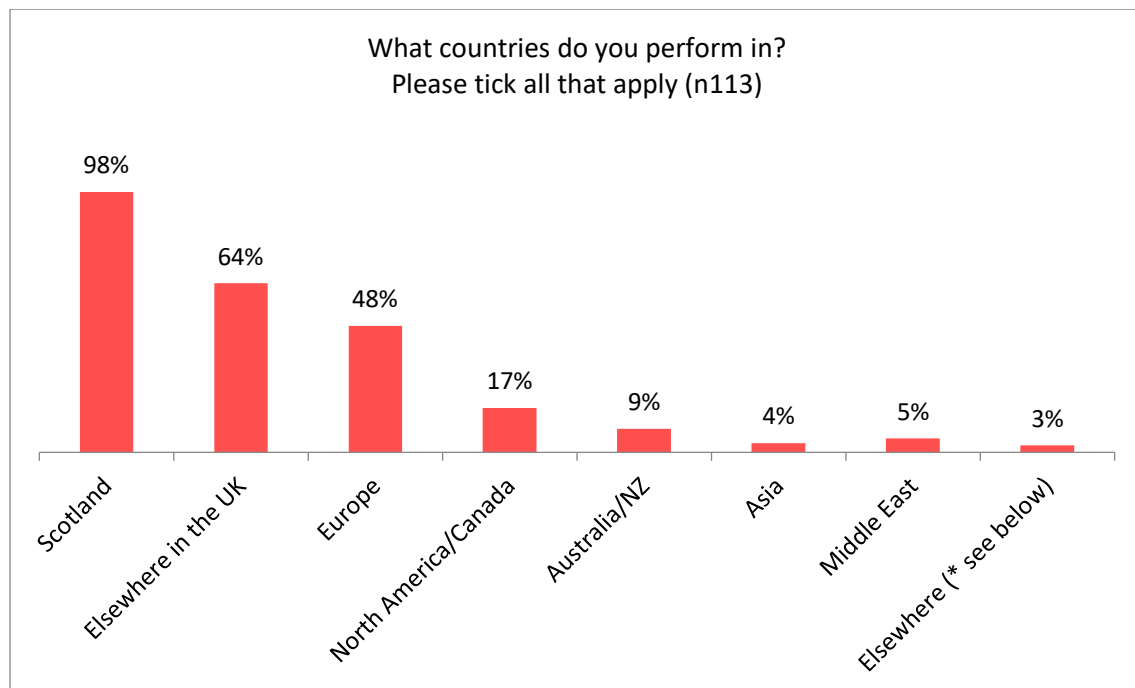


This shows that most Traditional Music performances in Scotland are arranged by the musicians independently, on the basis of their own networks and often with their own money staked upfront, suggesting that this part of Scotland's culture relies heavily on the musicians continuing to make it accessible and being in a position to continue to perform / create performance opportunities.

## The Profile and Reach of Scottish Traditional Musicians

### Performing in Scotland and beyond

Respondents in the survey were asked what countries they perform in. All but two of the 113 musicians who answered this question perform in Scotland, and 64% perform elsewhere in the UK. Almost half of the respondents perform in Europe. Respondents perform in USA/Canada, Australia and New Zealand, Asia and Middle East.



*Other* parts of the world listed are North Africa, West Africa and the Falkland Islands. Locations listed by one respondent are Russia and Belarus, and within Europe respondents specify Ireland, Bulgaria, Slovakia, Czech Republic, Serbia, France and Italy.

One respondent notes: “I am a member of several ceilidh bands and dep in other and have played all over the UK and in Ireland, Germany, Poland, Spain, Azerbaijan, Egypt, Angola, Nigeria and Oman” – illustrating that **Scottish Traditional Music can and does travel very widely**.

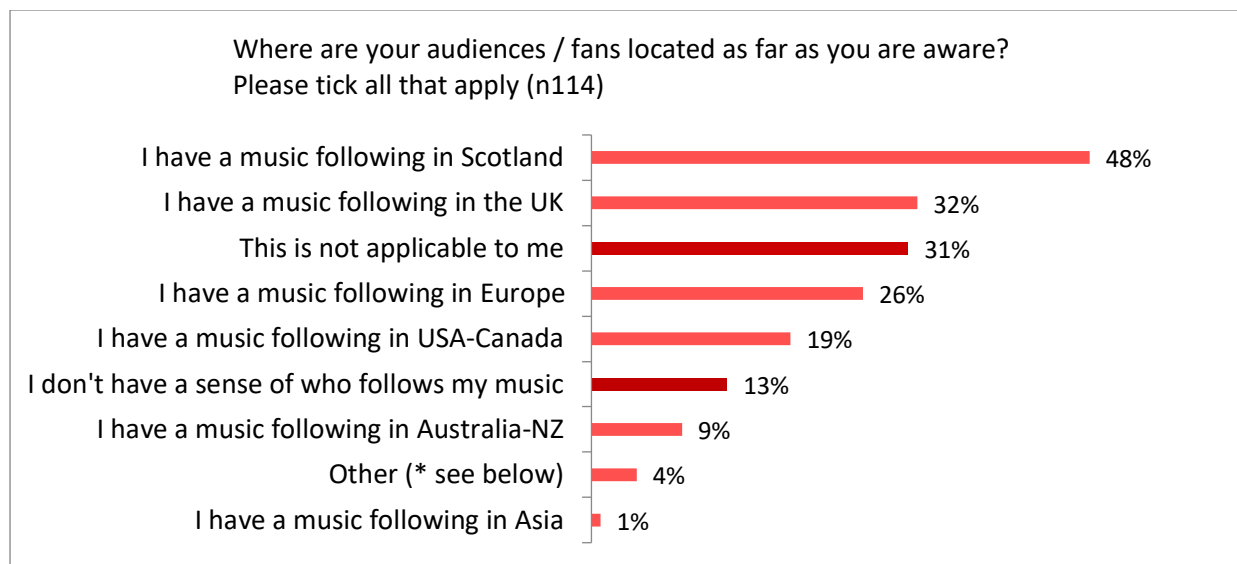
As part of a separate question about representation by an agent (see Chapter Four), respondents name specific agencies for Denmark, Germany and USA associated with performing in those countries.

### Reach of respondents’ fanbase and their music following

When asked for information about the fanbase of their Traditional Music, 31% of the respondents at this point in the survey (n114) report that the question is *not applicable* to their circumstances, although they do perform music in Scotland. It is surmised that in these cases their profile is community-based or their performances informal, as reflected above within the range of performance settings mentioned by respondents. Of these respondents, 7 self-identify their practice as ‘Amateur’ and 28 are ‘Professional’ or ‘Semi-Professional’.

However, **almost half of the sample (48%) report that they have a ‘music following’ in Scotland**, and a third of respondents have fans and audiences through the UK.

As can be seen from the chart below, a quarter of the Traditional Musicians who answered this question have a profile in Europe. A fifth of the musicians in this survey are followed in USA-Canada and 9% have a following in Australia and New Zealand, **showing the global profile of many Scottish Traditional musicians**.



Fifteen respondents (13% of this group) answered ‘*this question is applicable to me but I don’t have a sense of who follows my music*’, suggesting that some musicians are not able to track their fanbase. Some explanatory comments include: “this is not really applicable to me as I have no personal following or fans” and “my band have a small following in Scotland, not me personally”.

It is worth noting that of the 15 musicians among this group who self-categorise their practice as ‘Amateur’, several each have music followings in Europe, USA/Canada and Australia/New Zealand as well as Scotland and the UK, showing that **it is not just the professionalised part of the sector that has international appeal**.

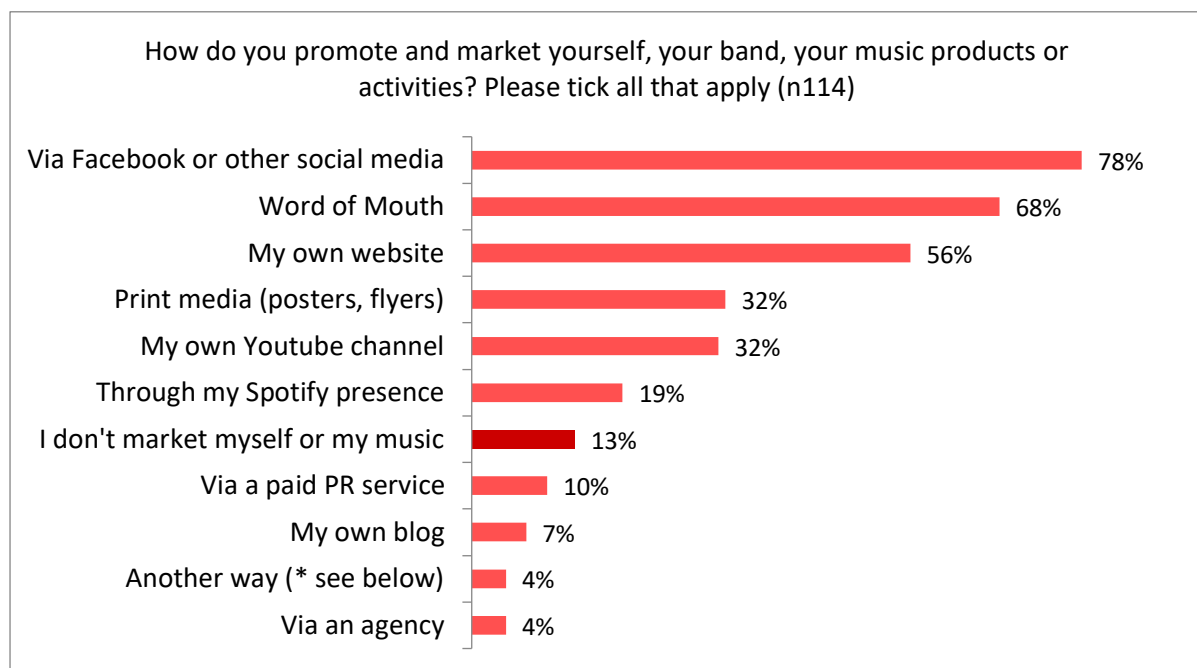
## How respondents market and promote their Traditional Music

Respondents were asked how they promote themselves, their band or their music products or activities.

Of the 114 musicians who responded on this topic, 15 people (13%) report that they *don't market themselves* or their music. Examining this group according to how the respondents self-categorise their practice, they are equally split between 'Amateur', 'Semi-Professional' and 'Professional' Traditional Musicians. The majority (9 out of 15) have been working in the sector for more than 20 years, with only 3 respondents having worked for less than 10 years. It might be reasonable to presume that this has more to do with the nature of their practice which is perhaps community-based or informal.

Of the musicians who do market and promote themselves and their music, the majority make active use of online tools, with 78% utilising *social media*. A third (32%) have their *own YouTube channel*, and 7% publish their *own blog*. More than half (56%) use their *own website*, and a fifth (19%) market their music via their *Spotify* profile.

Aside from social media, the next most prevalent marketing tool seems to be *word of mouth*, which is cited by 68% of the respondents as an important way of marketing and promoting themselves and music. It may be presumed that some of this takes place online.



Another way in which respondents promote and market themselves includes *by mailing list* (mentioned by 2 people), again presumably online.

Posters, flyers and other *print media* remain a key marketing tool for the Traditional Musicians in this survey, with a third (32%) stating that they use these to promote their music.

A total of 16 respondents report using a *paid PR service* (n11) or *an agency* (n5) to promote themselves, their band, their music products or activities. These respondents spanned all career stages, including those who have worked in the sector for less than five years. They all considered their practice to be Professional (n15) or Semi-Professional (n1) however.

Contextual comments provided by respondents on this topic include:

- *I've been around for so long that I have supporters from decades ago who invite me to festivals and events which they direct.*
- Formerly by website but now mostly by word of mouth. I have never really done any marketing
- *The bands I work for use paid PR service, agency and printed media. I advertise their work and my own music through online platforms and my own presence at gigs / events / meet-ups / teaching weekends etc.*

## Headline points on performing traditional music

Performing is central to a career in Traditional Music, alongside teaching and all the other roles undertaken by respondents, with only 9 respondents who say they perform Traditional Music in Scotland not earning income from it.

In terms of volume and frequency of performances made by the respondents, for between a third and half of Traditional Musicians the frequency of private functions and concerts, pub sessions and ceilidhs is a handful each year, or else once most months.

However a significant part of the sector is performing regularly: a quarter of respondents performing pub sessions and/or ceilidhs once a week; another 2 in 5 perform ceilidhs once most months. Concerts and festivals are performed weekly by 15% of the musicians in the survey. Private functions (weddings, parties, conferences, dinners) represent a weekly performance opportunity for 17% of the musicians, and another 28% do these once most months.

That these performance opportunities are largely self-generated and self-managed (with only 7% of respondents having a third party involved in their bookings), shows the extent to which Traditional Music in Scotland relies on the musicians themselves to make it accessible and possible.

Furthermore, the data shows a sector performing and with a fanbase not only across Scotland but through the UK, Europe and internationally.

Of those who market their music large proportions are making use of online tools including websites, social media and digital platforms like YouTube. Traditional tools like posters, printed materials and word of mouth remain popular approaches too. Only 10% pay for a professional PR service and 4% hire in professional marketing expertise. A total of (15 out of 114) say that they don't market themselves or their music at all. At various points in the survey, marketing and PR come up as one of the main areas identified by respondents as a major business need, and one in which they require further development and training (see Chapter Six).



# 4 RECORDING AND SELLING TRADITIONAL MUSIC

One of the key drivers for this survey is to generate insights on the effects on the Traditional Music sector in Scotland of increasing digital consumption of music and the resultant shifts in industry practice. Consequently an aim of the study is to profile Recording Artists in particular, to analyse issues in depth relating to their income and perspectives on these issues. This chapter draws out the data from the group of respondents who make and sell recorded music as a part of their Traditional Music career.

Within the survey, a total of 69 respondents state that they make recorded music, representing 62% of the survey population engaged at that point in the survey (n112).

## Characteristics of the Recording Artists survey segment

Of those who make recorded music, the majority are ‘Professional’ (n49) and ‘Semi-Professional’ (n11), with only 9% (n6) describing their status as ‘Amateur’.

The musicians who record and sell their music are represented across all career stages, in proportions consistent with the whole survey sample. As with the whole survey sample, the biggest group of respondents has been working for more than 20 years (49% of the recording artists; in whole survey 48% of respondents have been working this long) and 20% have been working for more than 10 years. Among the recording artists, 19% have been working for 5 years or less (broadly consistent with 17% in the full survey).

How long have you been working as a traditional musician?

	Recording Artists		Full survey	
up to 5 years	19%	n13	17%	n25
6-10 years	12%	n8	15%	n21
11-20 years	20%	n14	20%	n29
more than 20 years	49%	n34	48%	n68
		<b>n69</b>		<b>(n143)</b>

The musicians who record their music represent a greater proportion of those who spend ‘all of their working time’ as a musician (49% compared to 36% in the main survey sample). Only 20% of the recording artists spend ‘25% or less of their working time’ in music, compared to 39% in the main survey.

How much of your working time do you spend as a musician?

	Recording Artists		Full survey	
All (100%)	49%	n34	36%	n51
75% of working time	14%	n10	11%	n16
50% of working time	16%	n11	13%	n18
25% or less	20%	n14	39%	n55
		<b>n69</b>		<b>(n140)</b>

Respondents in the Recording Artists group are **less likely to have other employment** in addition to their Traditional Music career (only 40% have other paid employment, compared to 51% of the full survey).

In addition to your traditional music activity do you have other paid employment from an additional job?

	Recording Artists		Full survey	
Yes	40%	<b>n28</b>	51%	<i>n71</i>
No	60%	<b>n41</b>	49%	<i>n67</i>
		<b>n69</b>		<i>(n138)</i>

Consequently the Recording Artists are more likely to consider Traditional Music as their **primary source of income** (59% of recording artists compared to 44% of the musicians in the full survey group)

Do you consider traditional music to be your primary source of income?

	Recording artists		Full survey	
It's my main source of earnings	<b>59%</b>	<b>n41</b>	44%	<i>n61</i>
It's my secondary source of income	<b>38%</b>	<b>n26</b>	45%	<i>n62</i>
It generates no income	<b>4%</b>	<b>n3</b>	11%	<i>n15</i>
		<b>n69</b>		<i>(n137)</i>

### Income and Earnings

As in the main survey group, **Performing** (n35) and **Teaching** (n25) are the top income sources for the majority of Recording artists; however for the Recording Artists, **Royalties** feature more prominently as an important income source: one respondent in this group lists Royalties as their number 1 income source, 3 people place it at number two, 14 people cite Royalties as their 3<sup>rd</sup> most important income source and 12 people place them fourth.

As can be seen from the table below, Recording Artists make up a significant proportion of the musicians in the survey who **earn £30,000 or above**, with the people who record and sell music slightly more likely to be in this income category than the proportion across the whole survey. Likewise a smaller proportion (6%) of recording artists earn less than £5,000 compared to 13% in the full survey sample.

In the last 5 years, what is the MOST you've earned in one year across all your work, before tax?

	Recording Artists (n66)		Recording artists as % of whole survey group		Full survey (n125)	
£35k +	20%	<i>n13</i>	52%		20%	<i>n25</i>
£31k-£35k	9%	<i>n6</i>	67%		7%	<i>n9</i>
£26k-£30k	5%	<i>n3</i>	23%		10%	<i>n13</i>
£21k-£25k	18%	<i>n12</i>	63%		15%	<i>n19</i>
£16k-£20k	14%	<i>n9</i>	53%		14%	<i>n17</i>
£11k-15k	20%	<i>n13</i>	20%		14%	<i>n18</i>
£6k-£10k	9%	<i>n6</i>	9%		6%	<i>n8</i>
< £5k	6%	<i>n4</i>	6%		13%	<i>n16</i>

Of the musicians across the whole survey who have **received external funding** (i.e. grants, patronage, crowdfunding), the majority are those who record and sell their music. This would be expected for the category of 'making recordings', where people in the Recording Artists survey group represent 28 out of 30 answers (93%). Of those across the whole survey (n111) who have received funding for developing new material, 100% of them are Recording Artists. As can be seen in the table below,

people who record and sell their music also make up a very high proportion of all the musicians in the survey who have ever received funding for Travel, Training and Development or Touring.

Have you ever received external funding, for instance grants or patronage or crowdfunding, for...?

	Recording Artists (n65)		Full survey responses (n111)	% of full survey responses from Recording Artists
Touring	20%	n13	n17	76%
Making recordings	43%	n28	n30	93%
Developing new material	15%	n10	n10	100%
Travel	12%	n8	n10	80%
Training & Development	22%	n14	n18	78%
I have not received any external funds	48%	n31	n66	47%
For something else? (* see below)	6%	n4	n8	50%

Within the Recording Artists group sample on this question (n65), 43% have received external support for making recordings. A fifth (20%) of the Recording Artists have received external support for Touring and 15% of them have been funded to develop new material. However almost half of this Recording Artists group (48%) have not ever received any external funding.

### Representation by an Agent

In answer to the question ‘Do you have an agent?’ only nine respondents from 114 have answered ‘Yes’ (8%), with 7 people saying this isn’t applicable to their career and the rest responding ‘No’ (86%). All nine of the people who have an agent are also Recording Artists. This means that of the musicians in the survey who perform but don’t record their music – representing the majority (60%) of the respondents who answered this question - none have agent.

**Only 9 people in the whole survey have an agent. They are all recording artists**

Ten respondents provide details of their agency representation as follows:

- TRJ (3 people)
- Twenty Two (2 people)
- Active (2 people)
- Dave Tench (one person)
- Ali Say (one person)
- Alan Bearman (mentioned in a comment).

“I work for acts who are affiliated with Active, TwentyTwo, TRJ and Alan Bearman. Sadly, I have never met or discussed my work in the bands with these agents; I feel as an accompanist they don't really care”

## Being Signed to a Label

Only a small number (10) of the musicians in this survey are signed to a record label; needless to say they are all from the Recording Artists segment. Of the 69 Recording Artists in this survey, these ten signed artistes represent 14%; some have deals with more than one recording label. The Labels cited in the survey are presented listed opposite ( \* indicates that the musician runs the label themselves).

One respondent highlights specific challenges with being signed to a certain record label (kept anonymous here): “They do not fund any element of the making of an album, but they keep the majority of income to cover 'their costs'. Your own costs (the money spent to record the album, run the band, make the videos etc.) are not reimbursed from sales income”

The Labels cited in the survey are:

Greentrax (4 people)

Distrokid (1)

Culburnie (1)

\*Rickety Rackety Records (1)

March Hair Records (1)

Navigator (1)

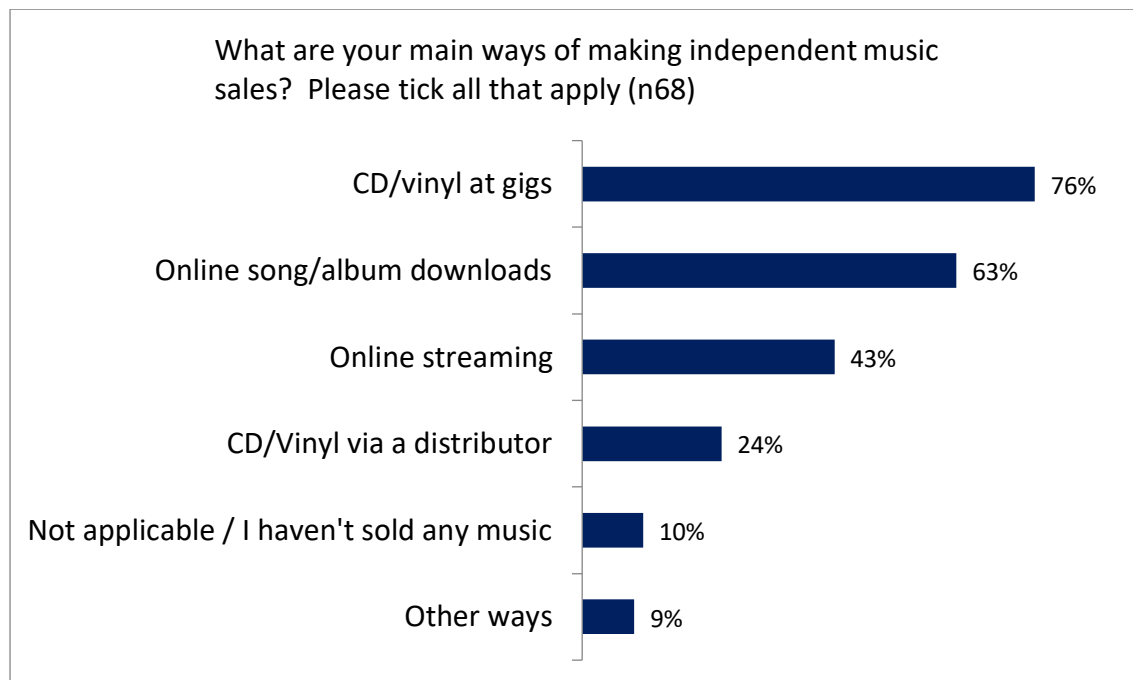
\*ISLE Music Scotland (1)

Okraina Records (Belgium) (1)

\*an unnamed own label (1)

## The main way of selling recorded music is still CD/vinyl at gigs

Beyond representation by a record label, the main way of making music sales for the musicians in this survey who record their music appears to be through [hard copy recordings of CD or vinyl sold at gigs](#) (cited by 76% of the Recording Artists).



Looking further at sales of hard copy recordings, only a quarter (24%) of the musicians who sell their music report [selling CDs or records via a distributor](#), meaning that sales direct to fans at gigs are currently represent the main opportunity to sell music. Another means of making physical music sales mentioned by one respondent is [via 'sale or return with music shops'](#).

Worthy of note is that of the musicians in this survey who have recorded music for sale, [10% haven't made any sales](#).

## Online digital music sales are also made by the majority

Parallel with hard copy sales, [online downloads of albums or songs](#) are the second main means of selling music for the Traditional Musicians in this survey (63%). In addition to downloads, [online streaming](#) is indicated as a way of making music sales by 43% of the recording artists. Other means of making online music sales are [via musicians' own websites](#) (mentioned by two respondents).

Of the respondents who record their music for sale (n69), only 4 people (6%) say they 'don't sell online'. This suggests that majority of the sector is actively trying to exploit digital platforms to sell recorded music.

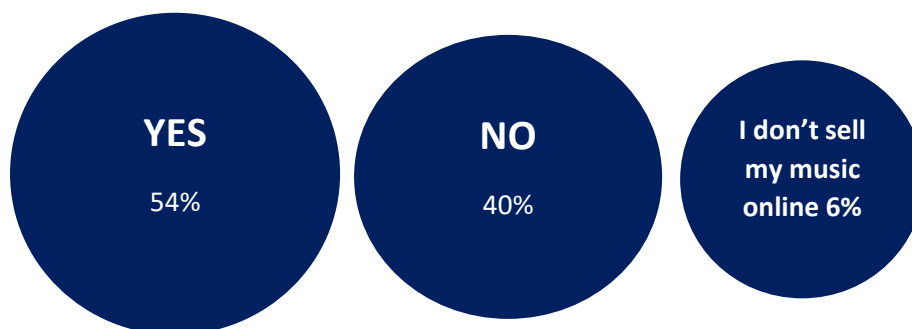
The same respondent who highlighted challenges arising from their deal with a certain record label (above) states that they are [not allowed by their record label to sell music independently](#) under the terms of their agreement.

## Use of Aggregator sites for online distribution

Aggregator sites act provide digital distribution services for artists as intermediaries. Under this service model, in return for commissions and/or fees from artists and labels, aggregators prepare material for delivery to online retailers, and in some cases to physical retailers. The aggregators collect revenues from these retailers and distribute them back to the artists and labels. Aside from music distribution, premium services can also be purchased including marketing and publicity, radio plugging, and direct-to-audience sales. Typical commissions charged on sales are around 10%<sup>15</sup>; however, there are some digital music aggregator sites with no annual fees or sign-up fees. Though some do take a commission from sales, others are entirely free.<sup>16</sup>

The survey shows that, of the respondents who record their music (n69), [over half \(54%\) use aggregator sites to sell or distribute their Traditional Music online](#). However 1 in 4 of the Traditional Musicians in this survey who record their music for sale don't use aggregator platforms.

Do you use an aggregator site to sell or distribute your music online? (n69)



Among the 'best free music aggregator sites' listed for 2018/2019 for the music sector in general are Soundrop, Awal, Routenote, Bandcamp, Amuse, Fresh Tunes, Level Music and Distrokid.<sup>17</sup> The sites most commonly by the Traditional Music respondents in this Scottish survey are [Bandcamp](#), [Emu Bands](#), [Threads of Sound](#) and [CD Baby](#).

<sup>15</sup> Value chain report (December 2011) BY Philip Graham published as a special extension of "Music Forum", Vol. 18, No.2, February 2012

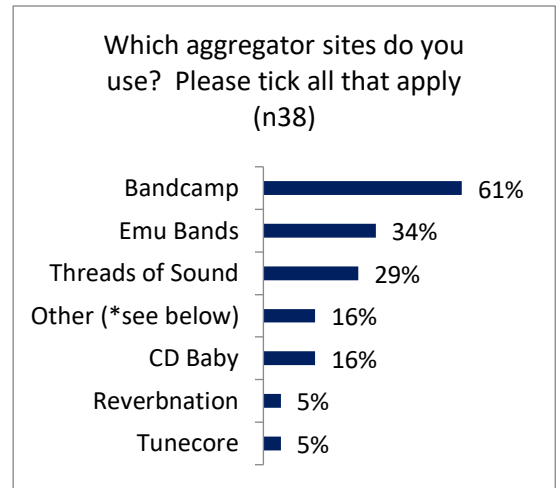
<sup>16</sup> *How to Sell My Own Music Free*, webpage at <https://www.mastrng.com/how-to-sell-my-own-music-free/>

<sup>17</sup> *How to Sell My Own Music Free*, webpage at <https://www.mastrng.com/how-to-sell-my-own-music-free/>

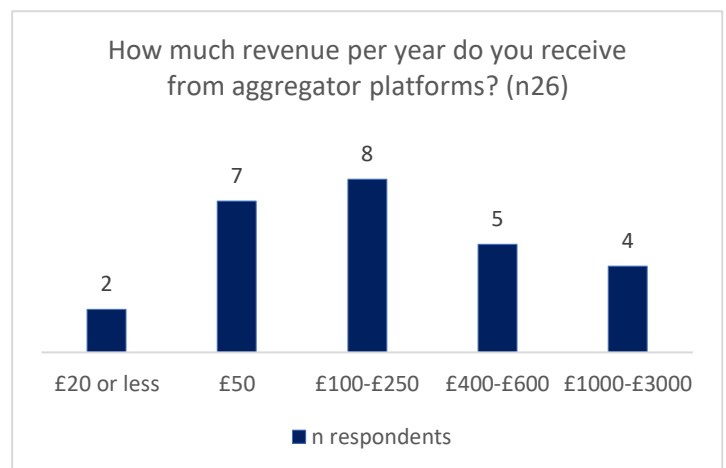
Aggregators used by smaller numbers of respondents include [ReverbNation](#) and [Tunecore](#) (2 respondents each). 'Other' sites reported by respondents are [Distrokid](#) (2 people), [The Orchard](#) (1), [Songcast](#) (1) and [Spinnup](#) (1).

43 survey respondents indicated whether or not they receive revenues from their aggregators: [only 72% report that they earn income from music sales via these platforms.](#)

Figures provided by respondents for their annual revenues are wide ranging: from as little as £5 to as much as £3000 (for an album, in its first year of release, shared between band members).



A total of 26 respondents provided a figure for their annual income from aggregator sites, of which [the majority \(65%\) earn £250 or less, suggesting that earnings from music sales via these platforms tend to be extremely modest.](#) Indeed, four respondents who answered this question without providing a figure state that their revenues are 'not much!', 'minimal', 'not very much at all' and 'not sure but minimal'. [Only four respondents record earnings breaking into four-figures,](#) reporting '£1000', '£1000', '£1-2k' and the '£3000' mentioned above.



## Effects of increasing digital consumption on traditional music careers

A total of 103 respondents answered our survey question on whether increasing digital consumption in the music industry has affected their music career or income. Of these, 65 are Recording Artists.

What can be seen from the table below is that [a significant majority of Traditional Musicians in the survey who are performers and tutors but not recording artists feel that digital consumption 'hasn't really affected' them](#) (30 out of the 38 respondents (79%) who aren't recording artists). Among the non-Recording Artists who feel they HAVE been affected by increasing digital consumption, reports of positive and negative effects are evenly split and reported by 13% each of respondents.

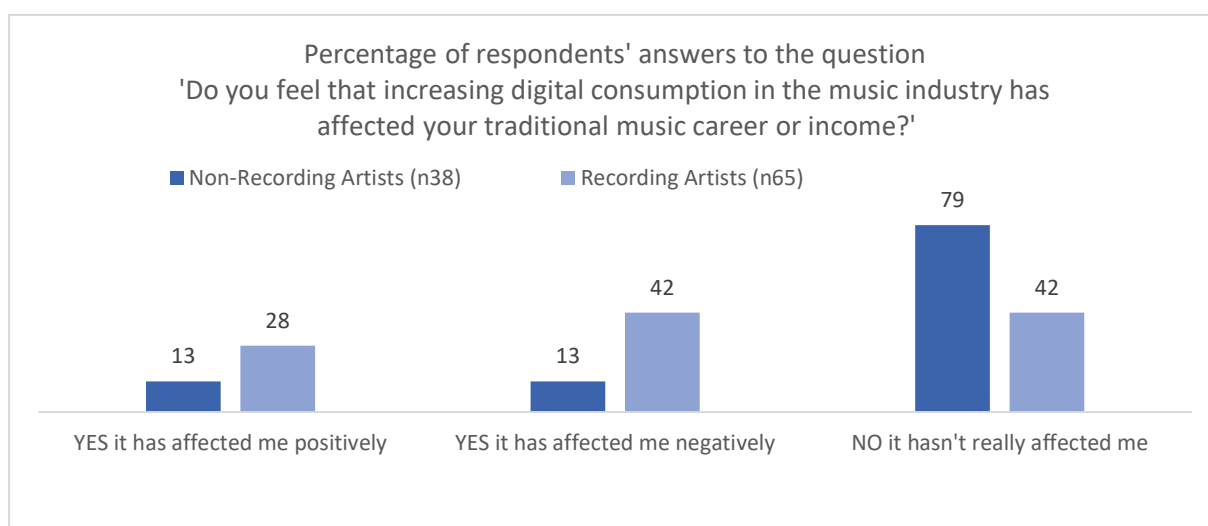
Do you feel that increasing digital consumption in the music industry has affected your traditional music career or income?

	Responses by Recording artists	(Responses across full survey)	Responses from Non-Recording Artists
YES, it has affected me positively	28% n18	21% n22	13% n4
YES, it has affected me negatively	42% n27	30% n31	13% n4
NO, it hasn't really affected me	42% n27	55% n57	79% n30
	<b>n65</b>	<b>(n103)</b>	<b>n38</b>

*NB: Several respondents selected both 'YES positive' and 'YES negative', resulting in totals greater than 100%*

When these figures are presented as a comparator chart (below), it can be seen clearly that:

- A far greater proportion of Recording Artists perceive a **NEGATIVE** effect on their career and income as a result of increasing digital consumption in the music industry (42% of recording artists compared to 13% of respondents who don't record their music).
- Recording Artists are also **twice as likely to recognise POSITIVE** effects on their careers and income (28% of recording artists compared to 13%), suggesting that digitalisation has created additional opportunities for them to gain profile, promote their music and make online sales.
- 42% of the recording Artists feel that increasing digital consumption hasn't affected their careers or income in a significant way.



Further insights onto these answers can be gained from the qualifying comments provided by 28 respondents, of whom 21 are Recording Artists.

### Comments by Recording artists (n21)

#### **POSITIVE effects** (cited by 5 people)

- + *CD sales are down but it makes your music more accessible to people abroad. I've had gig opportunities overseas of the back of it.*
- + Easier to connect with multiple audiences/individuals
- + *[The negative effects have] been offset by putting out more original material- tunes and songs- which has increased royalties*
- + On balance streaming and downloads show reasonable returns and there is the advantage of being able to sell single tracks.
- + *Streaming has given my back catalogue a new lease of life - I'd be unlikely to repress CDs or vinyl*

#### **NEGATIVE effects** (cited by 15 people)

- *I notice that some of my music appears in media sites, you tube etc for free. I don't feel I have control of my music sales.*
- It costs us about £10,000 per album we record. We used to sell enough to pay this off and start saving for the next album, but streaming for free has diminished these sales. We can't stop

recording though, as it is very hard to set up tours without a new album. Venues and promoters of arts centres mostly expect it

- *A lot more people stream music and don't buy it, companies like Spotify and YouTube don't pay proper royalties to musicians*
- CD sales dropped through the floor
- *I feel there is a lot less paid studio work.*
- Audience members have commented that they have already listened to an album online so don't need a CD copy.
- *I've noticed a dramatic decline in CD sales over the past five years, making income from sale of music difficult as digital doesn't pay as well.*
- Music released online is mainly streamed, not bought. Cost of releasing online far outweighs any gain.
- *I feel physical sales of albums have dropped, and people are relying on streaming. People will ask me on gigs if my albums are on Spotify. That's essentially asking 'can I have your album for free?'*
- Streaming pays very little, but even if it does pay, it only pays those who have rights to the royalties. When I create albums, I write a lot of the arrangements, and often end up acting as unofficial co-producer. I am rarely paid for this work. Album reviews often congratulate the song composer for an amazing album, but they're being drawn in equally (if not more at times) by the arrangements.
- *As an accompanist, I feel I spend a lot of time working to shape an album (many of these albums have been nominated for or won awards), but I'll probably never get the credit or the payment.*
- Market for CDs has fallen markedly leaving us with a lot of unsold stock.
- *People download rather than buying CDs (which are an outmoded format). Downloads generate far less money than CD sales. - Downloads discourage people from buying CDs at gigs. The public doesn't yet understand the impact of digital on musicians, so are unable to help*
- The record company that put out (but did not fund) my award winning album have now uploaded all the songs to youtube (without my permission), which means that already low income from Spotify/Amazon/Itunes streaming is reduced further
- *Record companies working in the folk / trad world do not seem to be very much 'further ahead' in their marketing strategies than individual musicians. There seems to be a real lack of imagination in terms of new ways of marketing, new ways of sustaining sales over a long period, an absence of understanding that 'building a community' around a project or a band is key. There needs to be a far higher level of expertise in record companies, in terms of expanding digital markets for music.*
- Direct cd sales at concerts has dropped significantly.
- *Streaming income is negligible.*
- CD sales were a significant earner ten years ago. Sales have dropped by 60% and downloads/streaming income has not replaced that.
- *My sales have increased with higher profile/higher quality work but income from the sales has not kept up.*

### Commentary

For Recording Artists the chance to engage with wider audiences is the biggest benefit of digitalisation in the music industry. However this is heavily outweighed by lower revenues possible from digital music sales, making the costs of recording an album unfeasible. The digital culture has discouraged



fans from buying physical recordings through retailers or at gigs. Respondents also mention a lack of recognition for accompanists or session musicians, as well as a lack of control over where one's music ends up online.

## Comments by people who don't record their music (n7)

### POSITIVE comments (2 people)

- + *The opportunity to put music out there is more appealing now that streaming and downloads are a "thing". It seems like something I might look into in future.*
- + Live music events have increased in number.

### NEGATIVE comments (3 people)

- *We're increasingly expected to provide digital tracks or videos online, but I'm [not] in a place financially to afford to produce these.*
- It has not affected me but I am aware that professional musicians need to do more live work to sell CD's etc.
- *I have grown to dislike playing in public places such as pubs or open-air events because so many people simply point their smart-phones at me and film or record. ...They don't ask permission to record me, don't thank me, don't even make eye contact. ...I feel like a zoo animal when they do this and I'd rather not play at all ...Consequently, I am playing less and less frequently now*

### Commentary

For those Performers who don't record their music, the online marketplace represents a promising opportunity. However the costs and logistics of producing digital content is seen as a challenge to overcome. One respondent highlights the problem of not being able to control live recordings made by audiences.

Creative's Scotland Music Review (2014) notes that "for many, the digital environment remains a poorly understood market in which engagement is limited to downloads and promotion via social media. Even then, the extent to which Scottish artists are fully exploiting the promotional opportunities of digital media is debatable and may be an area of as yet under-realised potential".<sup>18</sup>

It is evident that the Traditional Musicians in this survey are attempting to exploit digital marketplaces; however this is an area that is highlighted by many respondents later in the survey as a key to increasing their income and a development/training need.

## Headline points on recording and selling music

Recorded music represents a significant part of a career in Traditional Music, with 62% of the survey population engaged at that point in the survey saying that they record their music. The majority (91%) are Professional and Semi-Professional, with only 9% describing their status as Amateur.

The 69 musicians in this survey who record and sell their music are *represented across all career stages*, in proportions consistent with the whole survey sample, as well as *all income brackets* (though they make up a slight majority of those who earn more than £30,000). Respondents who are Recording Artists are less likely to have other employment in addition to their Traditional Music career and more likely to rely on Traditional Music as their primary source of income.

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<sup>18</sup> Creative Scotland Music Review, EKOS 2014: pp55-56

Only a small number (ten) of the musicians in this survey are signed to a record label; however the disadvantages raised with being contracted to a label represent serious challenges to making income from recorded music. The main way of selling recorded music remains direct sales of CD/vinyl to fans at gigs, and then via online downloads and streaming, showing that the sector is actively trying to exploit digital platforms for selling music. Over half use aggregator sites, though only 7 in 10 of these people make any revenues and the majority of these people make £250 or less each year. Only four respondents report earnings breaking into four-figures, showing that this is not a significant source of income.

The fact that, across the whole survey population, respondents perceive both negative and positive effects on their careers from the increasing digitalisation of music shows that there are opportunities inherent in the current consumer environment. These are mainly recognised as gaining profile, promoting music and making online sales. 42% of the Recording Artists feel that increasing digital consumption hasn't affected their careers or income in a significant way. For people who are not Recording Artists, 79% feel that there has been no discernible effect on their career.

# 5 COLLECTING ROYALTIES FROM TRADITIONAL MUSIC

The importance of intellectual property and collection of royalties has become especially pronounced in the age of digital music and major changes in the way it is distributed and consumed. This chapter explores the extent to which people working in the Traditional Music sector in Scotland are leveraging royalty revenues and how much income is generated in this way.

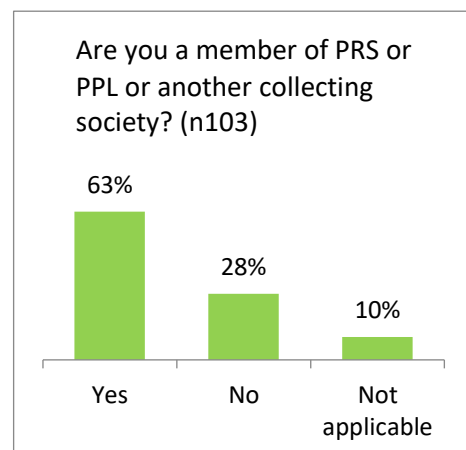
## Membership of collecting societies

According to the Musicians Union (2012), half of all musicians belong to one of the major collecting societies.<sup>19</sup> Two thirds (63%) of the Traditional Musicians who responded on this issue (n103) are members of a collecting society such as PRS or PPL.

PRS for Music is the collecting society for songwriters or composers of songs/music, and Phonographic Performance Ltd (PPL) is the collecting society for performers on sound recordings. Collecting societies license music and collect royalties from i.e. TV and radio broadcasts and music performed live at gigs or concerts or in theatres. They also collect royalties from businesses that use music i.e. bars, nightclubs, shops, hotels, offices, factories, gyms. They distribute the royalties to the members who hold the rights to the music and compositions in question.<sup>20</sup>

Of the 103 respondents who provided information on this in this survey, 10% clarified that this is not applicable to them but a further 28% state that they are NOT a member of a collecting society.

Among the survey respondents who record their music, ten people have said that they are NOT members and one states that this is not applicable to them. *It is not clear under what circumstances this would be the case, suggesting that some recording artists do not have a full appreciation of the role of collecting societies and are not protecting their intellectual property interests.*



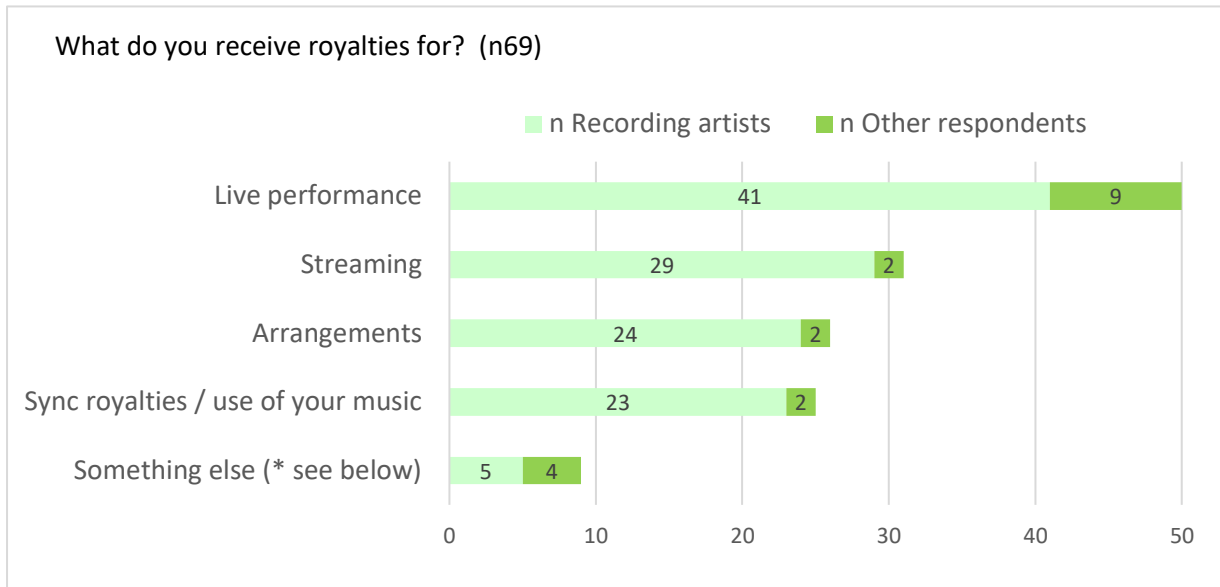
## What royalties are received for

Across the whole survey group 69 people provide details of what they receive royalties for. Of these 54 are people who record music (comprising 78% of the respondents on this question). The chart below shows that the predominant source of royalties for the performers and recording artists in this survey is **Live Performance**, cited by 50 (72%) of the 69 respondents on this issue. Streaming, Arrangements and Sync royalties constitute three other major generators of royalty dues. **Streaming** is listed by 45% of the respondents, of whom the vast majority record their music. **Arrangements** and

<sup>19</sup> MU 2012: p18

<sup>20</sup> MU 2012 pp18-19

**Sync royalties** for use of music are cited by 38% and 36% of the respondents respectively; again Recording Artists make up all but two people receiving these kinds of royalty.



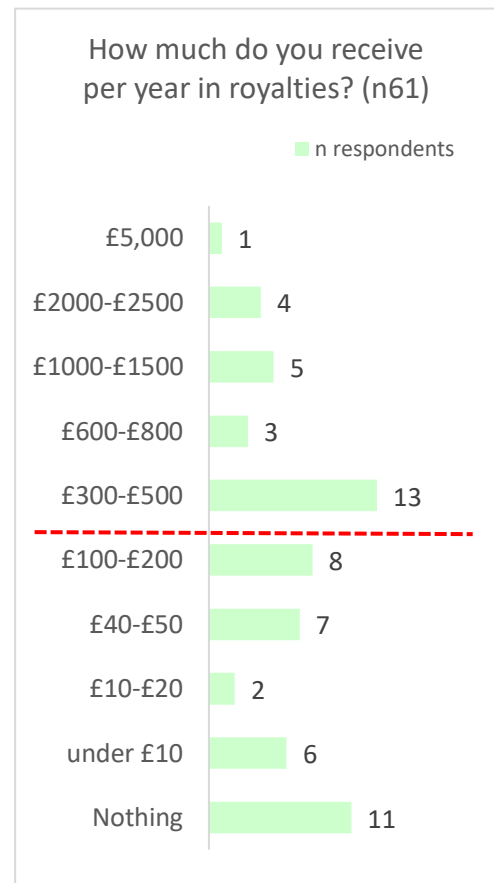
The only other royalty generator mentioned by respondents is **radio play** (two respondents).

### Levels of Royalty income

A total of 61 respondents provided a ballpark figure for their annual royalty receipts; of these 47 (77%) are Recording Artists.

As can be seen from the chart, the level of royalty income is wide ranging between respondents, with the highest figure cited by one respondent at £5000 in a year, while 15 respondents receive less than £50 per year and 11 respondents generate nothing in royalties.

In the Musicians Union survey (2012), over half of the musicians who received royalty payments reported them as being 'economically valuable'.<sup>21</sup> Taking the proportion of respondents earning more than £500 per year from royalties (as a subjective measure of what might be considered to 'economically valuable'), only 21% of the Traditional Musicians in this survey receive an annual payment of more than £500. Lowering the bar to more than £200 per annum, the proportion of Traditional Musicians in this survey is still only 47%. To find a majority of just 'over half' in our Traditional Music sample to compare with the MU's finding, the bar needs to be lowered to £50. Just over half (56%) of the respondents in this survey generate more than £50 per year, though this is unlikely to be considered economically valuable to these respondents.



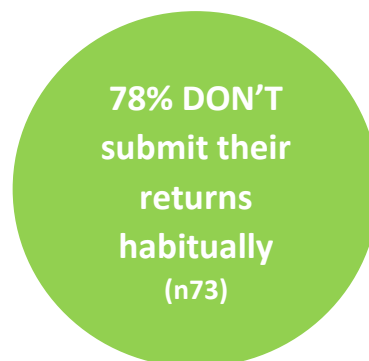
<sup>21</sup> MU 2012 p19

Indeed, the levels of return for the Traditional Musicians in this survey seem very modest, particularly given the volume of performing reported by respondents and the prevalence of Recording Artists in this sample.

### Submitting returns to collecting societies

In order to collect royalties, artistes are required to inform the collecting societies of performances and recordings made. This survey prompted respondents to consider whether they are leveraging their maximum royalty revenues by making habitual, complete returns.

Of 73 respondents who answered the question ‘Do you habitually submit your returns, or in other words do you feel you are leveraging your maximum possible royalty payments?’, only 16 people (22%) answer ‘Yes’ with the remaining 57 people (78%) answering No, of whom 42 are recording artists.



### Headline Points on Intellectual Property and Royalties

Of 105 people who responded on this topic, the majority of respondents (65 people, or 63%) are members of a collecting society; however 57 people say that they do not submit their returns habitually, suggesting that people working in the sector are not maximising their possible royalty payments.

That aside, annual revenues from royalties are extremely modest for those in the sector represented in this survey, far below what is suggested from MU figures for the UK music industry as a whole.

The biggest source of royalties for the performers and recording artists in this survey is Live Performance, followed by Streaming, Arrangements and Sync royalties. Given the volume of performances reported by the respondents in this survey, it would suggest some value in promoting to the sector the advantages of submitting regular returns to the collecting societies. Indeed, a number of respondents express a need to understand more about how royalties work as part of their professional development.



## SUPPORT FOR MAKING, PRODUCING & PROMOTING TRADITIONAL MUSIC

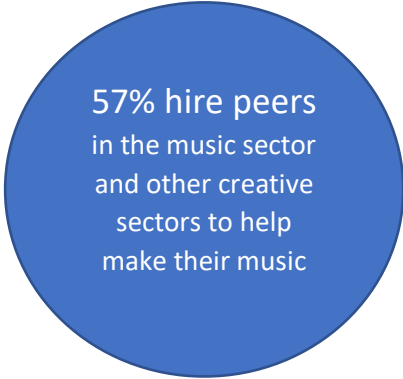
As noted in Creative Scotland's Music Review (2014), both live music and the recording industry depend on a supporting infrastructure that includes artist and organisational managers and agents, promoters, producers, publishers, broadcasters, performance and rehearsal venues, recording studios, sound engineering and technical other facilities and services; and professional services in areas including marketing/ PR and legal services.<sup>22</sup> This chapter presents views from the Traditional Music sector in Scotland on how important such sources of professional support are for their career, and to what extent they are able to access them. Key industry skills desired by those working in the sector are identified.

### An Interdependent Ecosystem

The Traditional Music sector in Scotland is highly interconnected, with musicians employing others from the sector where possible to make, produce and promote Traditional Music.

Of the 114 Traditional Musicians in this survey who provided information on who else in the sector they pay to help make their music, the majority (57%) affirm that they do hire in support from peers in the music sector and from other creative sectors.

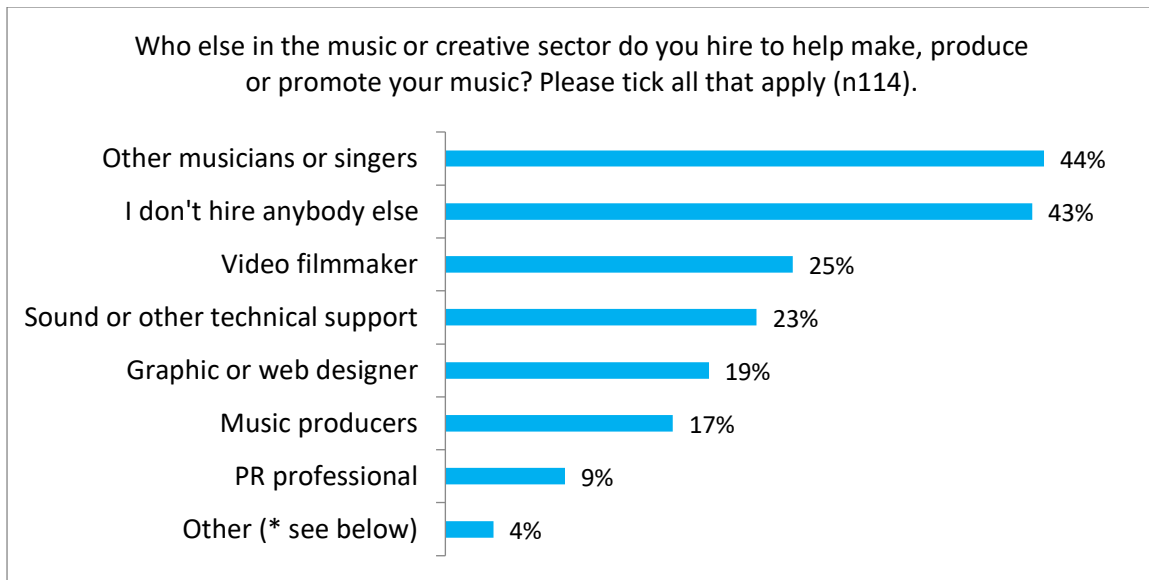
The predominant activity is to employ **other musicians or singers** (mentioned by 44% of the respondents). As can be seen in the chart below, **Video filmmaking** and **sound or other technical support** are bought in by a quarter of the musicians (25% and 23% respectively). **Graphic or web designers** are also hired by a significant proportion of the respondents (one fifth). **Music producers** and **PR professionals** are also employed.



57% hire peers  
in the music sector  
and other creative  
sectors to help  
make their music

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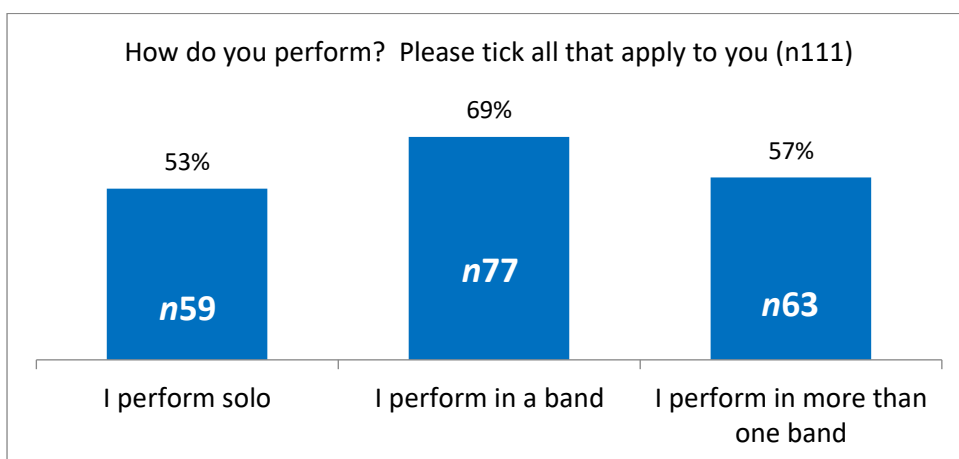
<sup>22</sup> Creative Scotland Music Review, EKOS 2014: p5



*Other* people employed to create Traditional Music in Scotland were listed by respondents as [Photographers](#) (2 people), [artists and designers](#) and [printers](#).

This shows that the sector exists within its own ecosystem of skills and services, which is certain to deliver a form of economic impact. However, as highlighted earlier, in Chapter Two in relation to artist income, many in the sector also feel obliged to undertake a significant amount of unpaid work to help friends and associates as session players for recordings, in arranging material, organising events, etc. This is seen as the only way to get music made in some cases.

A further indication of high connectivity within the sector is the proportion of respondents who play in [more than one band](#). Within the survey, 63 out of 111 respondents who provided information on this perform in more than one band, in addition to their own band or solo music.



### Need for and Access to Professional Services

Despite this evidence of mutual employment and support within the sector, the survey highlights gaps in what the musicians are able to afford, especially in relation to their own careers and development.

The survey asked to what extent respondents feel that they need certain services to support them in their career, and then whether Traditional Musicians are able to access and pay for these services.

The services are: Agent, Manager, Promoter, Music Publisher, Distributor, Sound engineer/technical support, Studio facilities, Broadcasters, Marketing and PR services, Legal and accounting services, and Unions. The full findings can be viewed in the two large charts overleaf, and each service is discussed individually below.

## Overview

	Top 'expert services' that respondents pay for	Roles respondents tend to 'do for themselves'	Top things that people 'need but can't access'
1	Union services, (n51)	Promoter (n58)	Music Publisher (n10)
2	Studio facilities (n48)	Agent (n57)	Agent (n9)
3	Sound Engineer /Other Technical support (n43)	Manager (n57)	Distributor (n8)
4	Legal and accounting services, (n26)	Marketing/PR (n57)	Manager (n5)
5	Distribution (n21)	Legal and accounting (n40)	Promotor (n5)
6		Sound Engineer / Technician (n32)	Studio Facilities (n5)
7		Music Publisher (n32)	Sound Engineer/ Technical support (n4)
8		Distributor (n30)	

## Having an Agent (n95)

Of 96 respondents on this topic, 95 indicated how important an 'Agent' is in their career. For more than half of the respondents (56%), an Agent is not important, and only quite important for another 20%. Having an agent has been deemed not important for almost half of the 58 Professional Musicians who answered this question (48%) and 61% of the 31 Semi-Professional Musicians who answered this question.

An Agent is considered Critical to success by only 7 people (all of whom are recording artists), and very important for another 16 people (all but one of whom are recording artists). Overall then *only 26% of the respondents on this question feel that having an Agent is of high importance for them, and they are almost all recording artist-performers*. These respondents are also all Professional or Semi-Professional Traditional Musicians.

In terms of how they access Agents, 57 respondents out of 95 (60%) feel they have to do this role for themselves. Nine people feel that they need agency representation but can't access it: they are all from the 'Professional' category and 7 of them are Recording Artists.

In a separate part of the survey it was revealed that only 9 respondents (out of 113 answering that question) have an agent, and they are all people who record their music (see Chapter Four).

The comments provided by respondents highlight the prevalence of working across several bands, some of whom may have an agent:

*I have to do this myself for my own work, but people I work for pay extra for the support.*

*[An agent is] important for some of the bands I work for, but for my own bands we don't have an agent.*



### Having a Manager (n95)

A significant proportion of respondents (68 people, 72%) signal that they DON'T feel they need management in their career, including 66% of Professional and 77% of Semi-Professional musicians who answered this question and 60% of the Recording Artists.

Ten people (all of them Recording Artists) feel that having a manager is Critical to their success or Very Important, with another 17 feeling it is Quite Important (of which 15 are Recording Artists). These are also all Professional and Semi-Professional musicians.

*Management is something that the majority of respondents are doing for themselves* (57 out of 95, or 60%). Only 5 people feel that they need management but can't access it; they are all Professional Traditional Musicians.

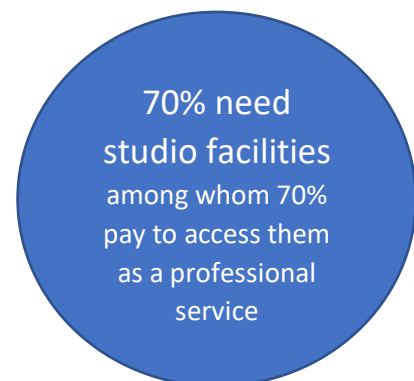
### Having a Promoter (n94)

Professional support for promoting their music is deemed Very Important by 23 respondents (representing 24% of those who scored this category) and Critical to the Success of another 16 people (17%). Another ten people feel it is Quite Important. This means that *Promoters are felt to have some degree of importance to the careers of 52% of the respondents* (with the other 48% saying this is not important to them).

The majority of respondents (58, representing 62%) say that they perform this role for themselves, with only 5 people buying Promotion in as expert support. Five people say that they need this service but can't access it; they are all Professional Traditional Musicians and three of them are Recording Artists.

### Access to Studio Facilities (n94)

Studio facilities are important to 7 out of 10 of the Traditional Musicians who scored this category (n94). The biggest proportion attaches Critical Importance to their career (27%) and another 21% deem Studio facilities as Very Important. They are Quite Important to another 21%. Unsurprisingly, the majority of these respondents are Recording Artists. *Only 8 of the 63 Recording Artists who scored this category feel that Studio Facilities are not important to them.*



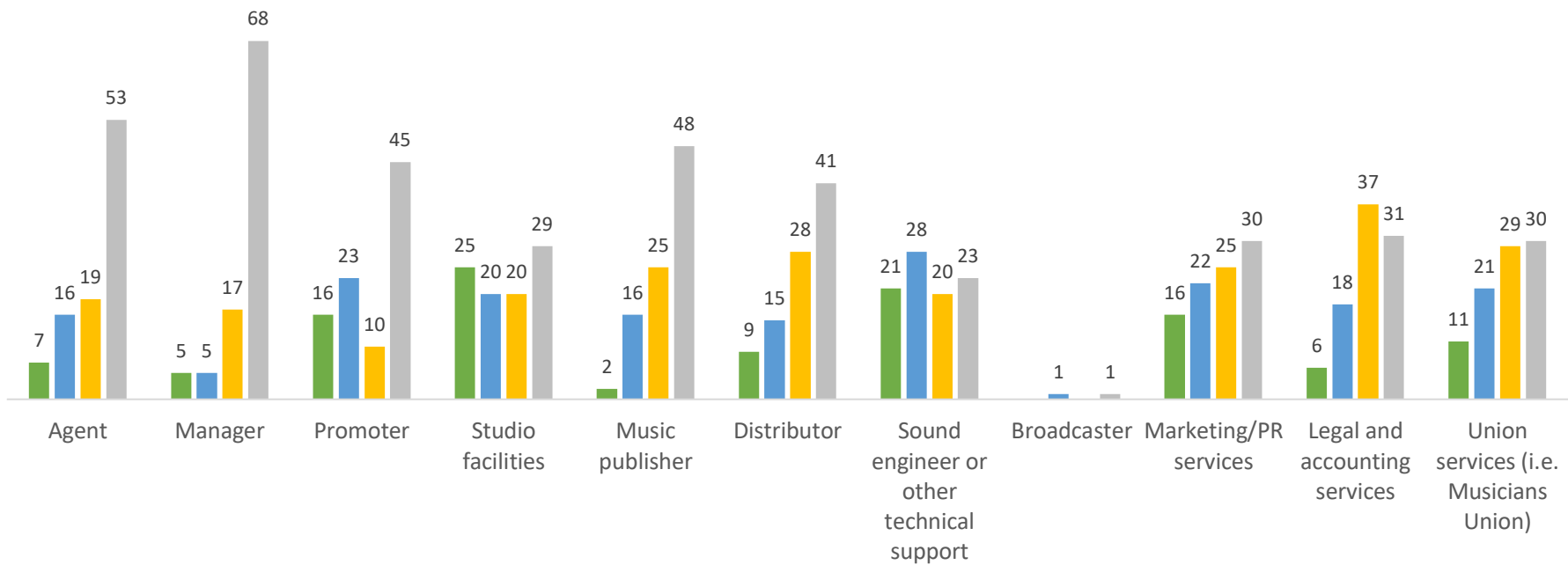
Studio Facilities are a service that the majority (70%) of those who need it (n69) report having to pay for rather than provide for themselves – although another *23% of the respondents say that they have to try to create such facilities for themselves.*

It is notable that *this is one category where Amateur Traditional Musicians register a need* (unlike with Agents, Managers and Promoters): three people who define themselves as Amateur make studio facilities for themselves and two pay to access professional facilities.

### To what extent do you feel these services are needed to support you in your music career?

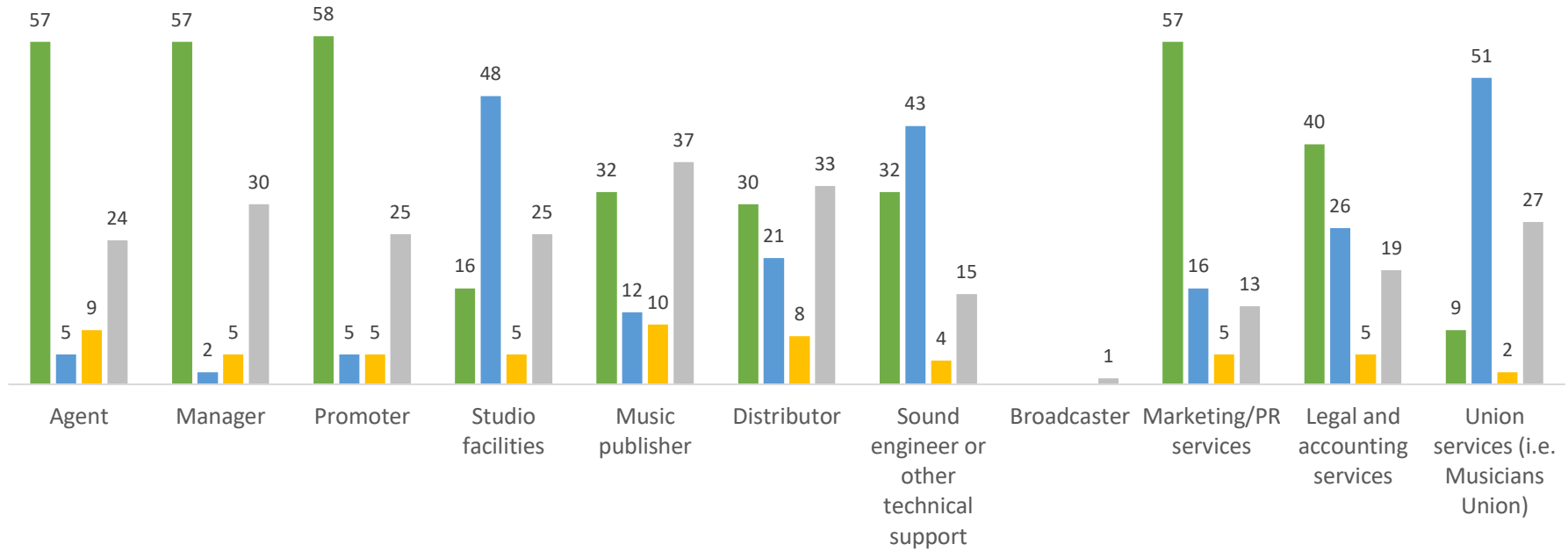
(All respondents, n96)

■ Critical for my Success  
 ■ Very Important  
 ■ Quite Important  
 ■ Not Important



### In practice how do you fulfil these needs? (All respondents, n96)

■ I have to do this for myself    
 ■ I pay for this as expert support    
 ■ I need this but can't get it    
 ■ I don't need this



### Music Publishing (n91) and Distributing (n93)

Out of 91 people who scored this category, *over half stated that music publishers are not important for their career* in Traditional Music. This includes 25 people who are Recording Artists.

It would be expected that people who record their music will have a higher need for music publishing and indeed, of the 25 people who feel that this is Quite Important for their career, 20 are Recording Artists, of the 16 who say it is Very Important 13 are Recording Artists, and both of the people who say this is Critical to their Success are Recording Artists.

The same applies for music Distributing, where 44% of the respondents feel that it is not important to them. Of the respondents who do attach importance, Recording Artists make up 8 out of 9 people who say that Distributors are Critical to their Success, 13 out of 15 of those for whom this is Very Important, and 26 out of 28 people for whom Distributors are Quite Important.

Of the 54 respondents who need Music Publishing services, 12 pay for this as a service (22%) while 32 do this for themselves (59%). *Ten respondents state that they need Music Publishing services but can't access them* (18%).

Likewise, of the 59 people who state a need for Distributors, 21 pay for this service as expert support (36%) while *30 (51%) perform a distributing role for themselves*. Eight respondents (13%) declare that this is something they need but can't access.

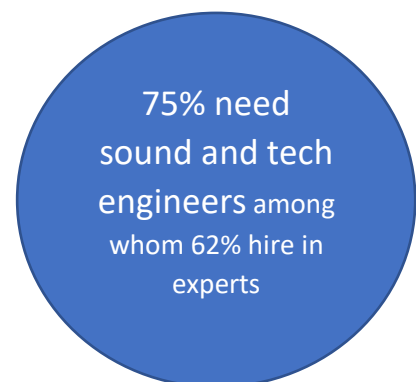
### Sound engineers and other technical support (n92)

*For the majority (75%) of the respondents (69 out of 92), sound engineers and other music technicians are deemed important to their music careers.* As all but one respondent in the survey are Performers, and a large proportion of the respondents on this question are also Recording Artists (n61), this would be expected. Indeed only 23 respondents (25%) feel that these services are not important for them, of whom only 9 are recording artists.

21 respondents state that sound engineers and technical support are Critical to their Success and a further 28 feel they are Very Important. The majority of these groups are recording artists (19 and 24 respectively).

Of the 20 respondents who score this category as Quite Important to them only nine are recording artists, the remainder being performers-only.

Of those who declare a need for these services (n69), almost two thirds (62%) say that they pay for these expert services, while another 46% perform these roles themselves. Four people (6%) say that they need these services but can't get them. Of these two are recording artists.



### Broadcasters (n2)

Only two people scored Broadcasting as a service in relation to their work, one of whom said it was Not Important. One person felt that this is Very Important to their career, a Professional performer.

### Marketing and PR services (n93)

Of the 16 people who feel that Marketing and PR are Critical for their Success, 15 are Recording Artists. Another 22 people feel it is Very Important and 25 Quite Important, of whom 16 and 15 are Recording Artists respectively. Marketing and PR are deemed important by 68% of the respondents who scored this category, and *a third (32%) of the respondents state it is not important*. Given that almost all of the respondents are performers, this suggests that many are performing in local sessions or setting-specific venues with less need for direct marketing on behalf of the artist.

Of the people who say this is not important for their music career (n30), over half (16) are Professional musicians and a third (10) are Semi-Professional, with 4 Amateur musicians. 15 people had stated earlier in the survey that they don't market themselves or their music.

*Of the 83 respondents who say they need Marketing and PR services, the majority (69%) do this for themselves.* Only 16 people (19%) pay for external marketing and PR services, 13 of whom are Professional musicians, 2 are Semi-Professional and one person is Amateur.



Five respondents state that they need these services but can't access them; they are all Professional Musicians, 3 of whom are recording artists as well as performers.

### Legal and Accounting Services (n92)

Legal and accounting services are deemed Very or Quite Important by the majority of the respondents (18 and 37 people respectively), together comprising 60% of the sample. Only six people feel that these are Critical for their Success; they are all Professional Traditional Musicians and all recording artists.

Tellingly, *a third of the respondents (34%) state that these services are of no importance for their music career*, suggesting either that people in this survey are adept at managing their own tax returns or that their incomes are too low to require accounting or tax administration. Six out of 7 Amateur musicians who answered this question scored this category as not important, as did half of the Semi-Professional musicians (14 out of 28). For Professional musicians these services are more likely to be of importance, with only 11 out of 57 (19%) saying they are not important.

Of the 71 people for whom these services are relevant, over a third pay for expert support (37%) while 56% do it for themselves. Five people say they need these services but can't access them: they are all Professional musicians.

### Union services (n91)

*A third of the musicians who scored Union services state that they are not important to their music career (33%). Of these the majority are Professional and Semi-Professional musicians, though among semi-professional musicians it is notable that half (14 out of 28) feel these services are not important to them, along with 4 out of 6 Amateur musicians.*

Within the majority for whom Union services are important (n61), the biggest proportion of people deem them Quite Important (29 people or 47%) and Very Important (21 people, 34%). Only 11 respondents (18%) declare Union services as Critical to their Success; ten of these respondents are recording artists and all 11 are Professional musicians.

Of the 62 people who afford some level of importance to Union services, not surprisingly 51 say that they pay for this as expert support (82%). Nine people say they perform this service for themselves, and 2 respondents (one Professional and one Semi-Professional) say they need this but can't access it.

Two respondents (both Professional) provided comments concerning the Musicians Union (MU) and its services for the Traditional Music sector, highlighting areas of disconnect:

*I have found the MU unable to support on several occasions. There is a real blindspot as to the realities of the folk world, and the hand-to-mouth aspects of the trad music industry.*

*The MU needs to catch up on 'how things work' in the folk world. They expect the sorts of practices seen in Classical and other genres, but folkies simply don't use contracts and don't like to talk about money. This means lots of people are falling foul of the norms of the industry, and the folk world is becoming a world where only musicians from certain socio-economic groups can survive. We all need to look at the 'norms' in our part of the music world, and agree that change is needed.*

### Other services

Several respondents commented on other services not listed above that they feel are important to their music career. These comprise:

- Networking support via organisations such as TMF
- A practice space: "Fortunately, I currently have use of a local church hall. In earlier years I really needed this but didn't have it."
- PL Insurance and Pat Testing

One Amateur respondent called for "more paid opportunities as a support to build up experience. Many supports do not get paid".

And a Professional respondent pointed out that: *To be successful in folk music and at the top you need at least some of the above. You have to compete at a rock music business level.*

To gauge how well equipped/competent the musicians feel in performing these roles for themselves, the survey next asked what key business or industry skills people would like to be trained in or feel more confident doing.

## Key business and industry skills desired by those working in the sector

Respondents in the survey were asked: *What key business/industry skill(s) would you most benefit from more training or confidence in?* A total of 57 Traditional Musicians provided answers, of which 38 are Professional (67%), 17 are Semi-Professional (30%) and two respondents are Amateur.



The comments have been segmented according to how long the respondent has been working in Traditional Music in Scotland as a means of highlighting specific needs by career stage (Early career, Established career and Advanced career).

### EARLY-CAREER TRADITIONAL MUSICIANS

People who have worked up to 5 years (n12)

*These musicians stated that they would most benefit from more training or confidence in...*

• <b>Self-promotion</b> (3 people)	• <b>Networking</b>
• <b>Marketing skills</b> (3 people)	• Advertising/Booking
• Tax returns (2 people) ... <i>“for when I need to start doing this”</i>	• <b>Approaching festivals/gig promoters</b>
• Career-specific Legal and Accountancy knowledge	• <b>Learning how to progress beyond pub gigs and Ceilidhs</b>
• <b>Performance skills</b>	• Composition skills
• “Admin”	

Marketing and promotion are common requirements for this segment (and indeed at all career stages). Navigating the world of bookings is also important at this stage, to learn how to build a career. Alongside this is a need for support in building professional performance and composition skills, and Networking is mentioned as a need. Practicalities like handling tax returns are also mentioned.

### ESTABLISHED TRADITIONAL MUSICIANS

People who have worked for 6-10 years (n9)

*These musicians stated that they would most benefit from more training or confidence in...*

• Promotional skills and support (6 people) ... <i>“Better publicity for more than just the central belt would be nice.”</i>	• <b>Becoming a solo musician - writing music/selling music.</b>
• <i>“Getting your music out there”</i>	• <b>Marketing skills (4 people)</b>
• <b>Technical aspects of internet promotion</b>	• Booking a tour, charging the right fee
• <i>“Music sync”</i>	• <b>Royalties and how they work</b>

<ul style="list-style-type: none"> <li>• Legal skills</li> </ul>	<ul style="list-style-type: none"> <li>• “Studio work”</li> </ul>
<ul style="list-style-type: none"> <li>• Injuries in work – <i>“I know musicians' union run courses on this though and also have access to BAPAM which is useful now I know about it.”</i></li> </ul>	<ul style="list-style-type: none"> <li>• “Agency”</li> </ul>

As before, marketing and promotion are common requirements for people at an established career stage, with one respondent asking for guidance on internet promotion. Legal knowledge, royalties, and health and safety are also areas highlighted as training needs. Support in building professional careers is mentioned.

## ADVANCED-CAREER TRADITIONAL MUSICIANS

### People who have worked for 11-20 years (n14)

*These musicians stated that they would most benefit from more training or confidence in...*

<ul style="list-style-type: none"> <li>• Promotion ( 2 people), including online self promotion</li> </ul>	<ul style="list-style-type: none"> <li>• PR and Marketing ( 2 people) ... “learning about any new social media features that are coming out”</li> </ul>
<ul style="list-style-type: none"> <li>• <i>“Skills in self promotion, marketing and PR would make sense from a career perspective. Often it's difficult for me as I'm marketing myself, but I work for bands and don't necessarily get a say in their own marketing campaigns.”</i></li> </ul>	<ul style="list-style-type: none"> <li>• Songwriting ...<i>“As a session musician with no music of my own, I make my living from helping other people record and perform songs. I'd like to write my own.”</i></li> </ul>
<ul style="list-style-type: none"> <li>• How to make better home recordings</li> </ul>	<ul style="list-style-type: none"> <li>• Sound engineering (2 people)</li> </ul>
<ul style="list-style-type: none"> <li>• <i>“Pitching myself at the right level to get sustainable work where I am not expected to subsidise the musician I am working for.”</i></li> </ul>	<ul style="list-style-type: none"> <li>• How to join sessions</li> </ul>
<ul style="list-style-type: none"> <li>• “Time / stress management”</li> </ul>	<ul style="list-style-type: none"> <li>• Studio skills ...<i>“would be very useful on a practical level”</i></li> </ul>
<ul style="list-style-type: none"> <li>• Accounting (4 people)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Networking</b></li> </ul>
<ul style="list-style-type: none"> <li>• How to create opportunities (through “on spec emails”)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>How to get gigs ...</b> <i>“I don't have a UK agent so I kinda wish I had advice more on how to go about getting gigs as so often I feel it's down to luck!”</i></li> </ul>
<ul style="list-style-type: none"> <li>• Royalties ...<i>“I really think people need to know about PRS, PPL and MCPS royalties more”</i></li> </ul>	<ul style="list-style-type: none"> <li>• <b>“Agenting”</b></li> </ul>
	<ul style="list-style-type: none"> <li>• “Distribution know-how”</li> </ul>

### People who have worked for more than 20 years (n22)

*These musicians stated that they would most benefit from more training or confidence in...*

<ul style="list-style-type: none"> <li>• Marketing (5 people)</li> </ul>	<ul style="list-style-type: none"> <li>• Promotion (5 people), including harnessing social media, getting radio play</li> </ul>
<ul style="list-style-type: none"> <li>• <b>“Pitching for gigs”</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Applying for funding</b></li> </ul>
<ul style="list-style-type: none"> <li>• Fee negotiations</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Collaboration opportunities</b></li> </ul>
<ul style="list-style-type: none"> <li>• <b>“General Online guide”</b></li> </ul>	<ul style="list-style-type: none"> <li>• Sound engineering (2 people)</li> </ul>
<ul style="list-style-type: none"> <li>• <b>How publishing works</b></li> </ul>	<ul style="list-style-type: none"> <li>• Video editing</li> </ul>
<ul style="list-style-type: none"> <li>• Songwriting</li> </ul>	<ul style="list-style-type: none"> <li>• Management</li> </ul>



<ul style="list-style-type: none"> <li>• Leadership</li> </ul>	<ul style="list-style-type: none"> <li>• Nothing (4 people) ... “I’m fine just now”; “None”; “I need nothing but believe all musicians should have an alternative trade/profession”</li> </ul>
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The same issues as in other career stages are raised by those Advanced in their Traditional Music careers: Marketing and Promotion, how to get more paid gigs, composition skills (songwriting) as well as technical skills like sound engineering and video editing. Self-management, self-agency and fee negotiation are raised by this segment as well, along with practical How To questions concerning understanding processes of publishing, royalties and distribution.

Among these respondents are two musicians who had classified themselves earlier in the survey as **Amateur**. The training needs above that they highlighted are Networking and Fee Negotiations.

### Additional Issues Raised

Some respondents’ comments highlight specific issues faced by Traditional Musicians, particularly in relation to expectations of professionalisation within the wider picture of the music industry-at-large.

One (Advanced-Career Professional) respondent points out that, due to the interconnected nature of Traditional Musicians in this sector, individuals often find themselves dependent on a peer’s skill-level and adeptness:

*[My concern is] pitching myself at the right level to get sustainable work where I am not expected to subsidise the musician I am working for. This is a common expectation (e.g. where someone runs their own band - e.g. The 'Joe Bloggs Band', brings in supporting musicians for touring and recording, but expects those supporting musicians to carry financial risk, e.g. recording for free and receiving 'a cut of sales income' (which is often very low), or touring for an 'undisclosed amount', which often means returning home with very little money! In this circumstance, a supporting instrumentalist is beholden to the person running the group, and this person's level of commitment to running their business well, and paying their team well.*

When asked what they’d most benefit from, another respondent answered “Most of them” [the support services outlined above], before raising the issue of the expectations that are attached to Professional musicians: *“you have to ask the question: if you’ve practiced music so hard for so long, should you then be expected to be an expert small business owner overnight??”* (Professional, Advanced-career respondent)

Finally, another (Semi-Professional) respondent highlights an expectation that Traditional Musicians must compete at a ‘rock music level’, or else accept that their career prospects are going to be limited:

*[I need] none [of the above] - you are simply going to make it in folk music at a good level and must "aim" to compete at a rock music level (Runrig and lesser bands)- or you must reconcile that the genre of music - similar to jazz/ blues etc - is not going to pay the bills. No one owes you a living playing Scottish trad music and this is exactly the same in England and Ireland and elsewhere.* (Semi-Professional respondent)

In summary, the predominant skills and training desired across all career groups include:

- marketing and promotion
- how to book gigs and performances
- career development beyond sessions and gigs
- understanding royalties

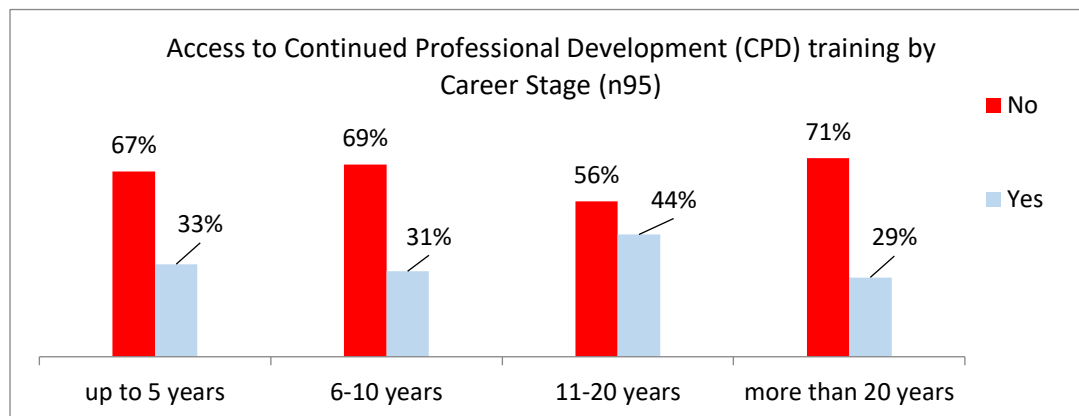
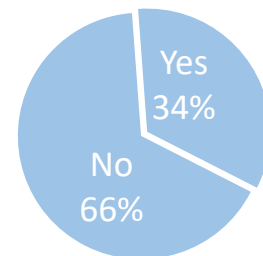
- writing and recoding music
- networking and making contacts

## Access to Continued Professional Development (CPD)

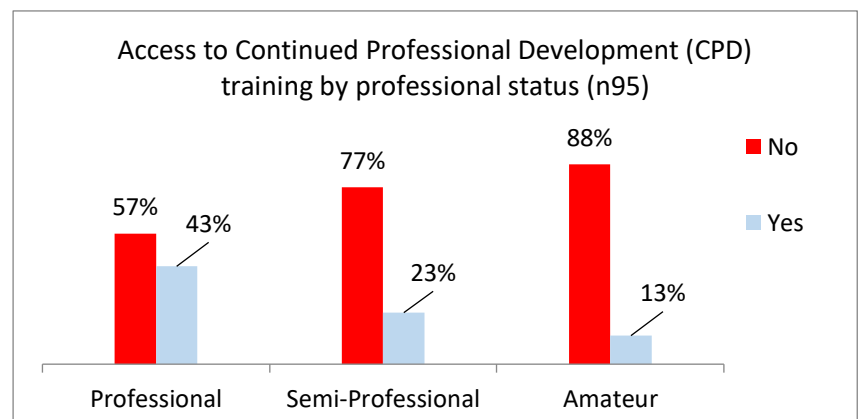
Of 95 respondents who engaged with the question on access to continued professional development, one third (34%) have accessed CPD while two thirds (66%) have not.

Looking at these figures by career stage, the people who do access CPD are *evenly distributed across all of the bandings*, with roughly a third of respondents in each category (those who have worked for up to 5 years, 6-10 years, 11-20 years, or more than 20 years) stating that they have received CPD. As can be seen in the table below, the proportion is slightly higher among those who have been working for 11-20 years.

Do you ever access Continued Professional Development (CPD) training? (n95)



Considering access to CPD according to respondents' self-classified professional status, it can be seen that *Professional Traditional Musicians are most likely to have accessed CPD training* (43% of that segment), followed by Semi-Professional (23% of that segment), and that far fewer Amateur respondents have accessed CPD opportunities (only 13%).



## How CPD is paid for

Among the 95 respondents, 32 report that they have accessed Continued Professional Development activities, and they also state how it was paid for. Half of the respondents (16 out of 32) always or sometimes pay for CPD themselves. For 28% of the respondents their CPD opportunities are

subsidised by organisations like TMF and MU or by their employer, while 31% of respondents gain funding for CPD from Creative Scotland, YMI and other sources.

How CPD is paid for (n32)		
Self funded (n16)	Subsidised (n9)	Funded (n10)
<i>i.e.</i> "I pay for it myself", "Sometimes myself"	<i>specifically...</i> Through the MU, through Fèis Rois, "funding via TMF", "through employer"	<i>via...</i> Creative Scotland, Youth Music Initiative, "council funded through teaching", other 'external funding'

### Access to Business and Enterprise Support

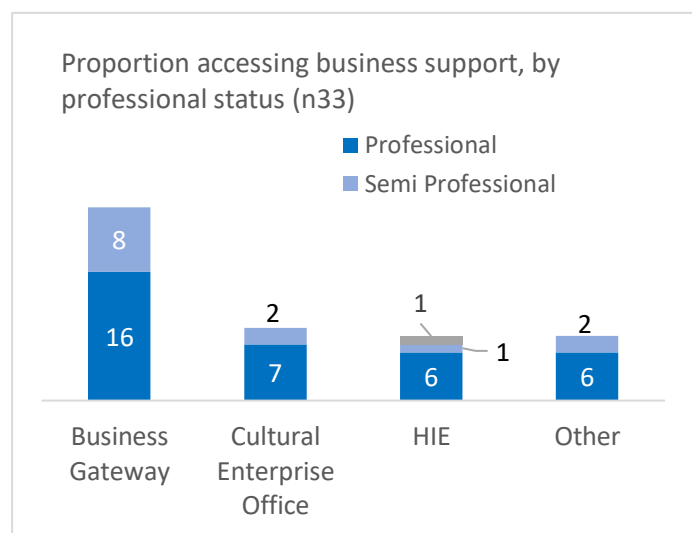
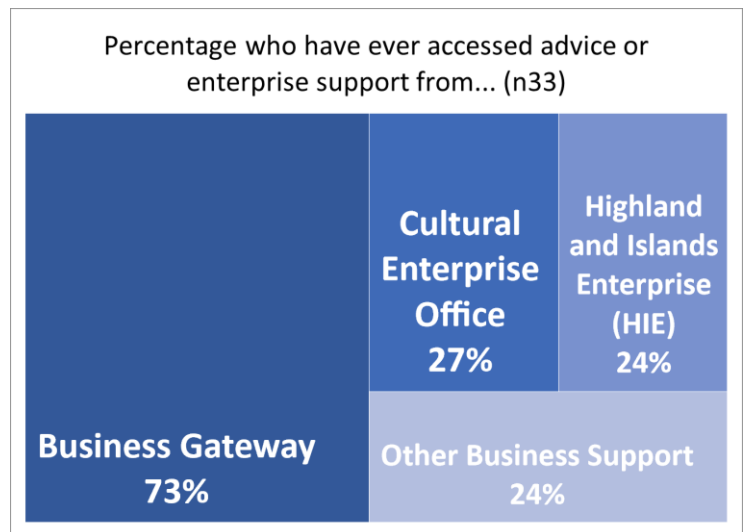
The survey asked respondents to indicate if they had ever accessed advice or enterprise support from Business Gateway, the Cultural Enterprise Office, Highland and Islands Enterprise or another business support agency.

A total of 33 people indicated that they had accessed one or more of these services. This should be contextualised by the fact that 70 people answered the next question in the survey, suggesting that 37 respondents (53%) engaged in the survey at that point hadn't accessed any of these services.

Of those who indicated having accessed services, the majority (73%) have received support or advice from Business gateway, and a quarter of respondents have engaged with the Cultural Enterprise Offices and HIE.

*Other* business support agencies accessed are recorded as: Hands Up for Trad, TMF, FSS, SMIA, SMC, Indie, Afterledge Accountancy and local sponsors.

Segmenting the same data according to respondents' professional status in Traditional Music, the sample (n33) on this topic comprises 22 Professional, 10 Semi-Professional and 1 Amateur. The only service accessed by an Amateur, as recorded in this survey, is from HIE.



## Headline points on Professional Support access and requirements in the sector

The data shows a sector that finds itself having to fulfil a lot of roles for itself, with many Traditional Musicians in this survey being their own Agents, Managers, Promoters, Distributors, publishers, Technicians and Sound engineers.

This is consistent with the findings of the Creative Scotland Music Review that skills are increasingly being pushed 'down the chain' particularly within the recording industry, with artists being required to perform many tasks that were once fulfilled by professionals in the industry: "The overall difficulty of investment in artists' development by record labels is a major inhibition to future growth. Scottish broadcasters and other media provide insufficient support and labels also encounter weaknesses in the fields of distribution, retail, promotion and marketing."<sup>23</sup>

The Review also notes that the Scottish music industry has limited choice in key support services such as agents, managers and professional services: "Despite the listing of 46 agents and managers within the SMC database, the consultation consistently identified issues with the range and quality of agents and managers in Scotland (with notable exceptions)." Particular concern is raised about the development of a next generation of agents and managers; this is reflected also by respondents in this survey who highlight a need for enhanced skills in promoting, booking, and acting as an agent. Creative Scotland's review makes the point that as agents and managers are paid a proportion of artists' earnings, then "if artists are not earning enough there is not sufficient money in the system to support this layer of the supply chain".<sup>24</sup>

Key development skills desired by the Traditional Musicians across all career stages in this survey relate to:

- marketing and promotion
- how to book gigs and performances
- career development beyond sessions and gigs
- understanding royalties
- writing and recording music
- networking and making contacts

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<sup>23</sup> Creative Scotland Music Review, EKOS 2014: (i)

<sup>24</sup> Creative Scotland Music Review, EKOS 2014: p56



## 7 DEVELOPING THE SECTOR

The survey collected detailed insights into what people working in the sector perceive as the keys to increasing their income, as well as whether they perceive any barriers to their career in Traditional Music. Ways in which the current environment for Traditional Music in Scotland could be enhanced are also identified from the perspective of those working in the sector. The findings have been segmented by career stage, income level and by Professional status in order to draw out key issues.

### Keys to increasing income from Traditional Music

The survey asked respondents what they consider to be the key(s) to increasing their income from Traditional Music. A total of 70 people provided responses.

To provide context, the data for this question has been segmented according to the level of each respondents' maximum income. It is important to remember that the income bands shown below represent *total earnings from across all employment* undertaken by respondents, and not just from Traditional Music. Indeed, as reported in Chapter Two, for 44% of respondents (56 out of n128) Traditional Music brings in 25% or less of their total income.

Responses from those in the sector who indicated earlier in the survey that they *spend 100% of their working time on Traditional Music* have been starred\*\*\* (representing 28 out of 68 responses; 41% of this sample). In addition, the respondents' Professional status has been indicated to enable perspectives to be distinguished between **Amateur (A)**, **Semi-Professional (S)** and **Professional (P)** Traditional Musicians.

#### People who earn less than £5k (n6)

*What would be the key(s) to increasing your income from traditional music?*

- P \*\*\*Advertising
  - S Proper levels of pay for gigs
  - S More people becoming more aware of what I do
  - S Gigs at clubs and festivals, which would in turn increase sales of my CDs and recently published book
  - A Paid opportunities for support. To meet other world musicians in informal sessions where songs are played.
  - A I don't want to - but overall getting people out to live concerts would be great
- (A) Amateur (S) Semi-Professional (P) Professional

#### People who earn £6-10k (n5)

*What would be the key(s) to increasing your income from traditional music?*

- P \*\*\* I only play traditional music as a means to make bread and butter money, I also like it, but my ambitions sit elsewhere.

- P More venues paying much more for live music
- P \*\*\*Digital Recording. Sales. Marketing tips
- P \*\*\*More Performances.
- S I think a better knowledge of how to maximise income from recorded music would help me

### People who earn £11k-15k (n8)

*What would be the key(s) to increasing your income from traditional music?*

- P Promotion
- P More exposure on television. More opportunities to perform at large festivals. An agent.
- P \*\*\*Celtic Connections booking and showcasing acts that are not represented by Active... it seems like their acts are the only musicians who get any bookings and support!
- P \*\*\*Writing and recording my own material
- P \*\*\*better platform to publicise and get remuneration for research/consultancy
- P I have no particular desire to earn more - I periodically turn work down
- P \*\*\*Pub gigs paying better fees. More gigs?
- S More gigs being promoted for audience development

### People who earn £16k-20k (n11)

*What would be the key(s) to increasing your income from traditional music?*

- P If free streaming sites like Spotify we're banned! If my online content was very strong from a promoter's perspective. Also, creating music that audiences want to hear, either new or old.
- P Traditional music in schools
- P \*\*\*Playing to an audience that is interested in one's performance.
- P \*\*\*Running simultaneous gigging projects and diversifying skills as much as possible.
- P \*\*\*Lists of useful contacts - club and festival organisers. Advice from a promoter
- P \*\*\*More gigs. Increased sync opportunities
- P More of an understanding from promoters about the expenses involved with touring and time and energy involved with music creation
- P \*\*\*More ceilidh gigs. More guaranteed income teaching.
- P \*\*\*Being actually paid MU rates.
- S More promotion for weddings
- S \*\*\*Educating the audience

### People who earn £21-25k (n10)

*What would be the key(s) to increasing your income from traditional music?*

- P \*\*\*More availability of gigs
- P Being able to record tracks and videos for promotional purposes.
- P \*\*\*More confidence in networking/self-promotion.
- P \*\*\*Better promotion
- P \*\*\*More gigs
- P \*\*\*Educating Venue managers of the benefits of employing professional artists at a decent fee instead of amateurs happy to turn up for beer money.
- P \*\*\*More gigs, more compositions
- P \*\*\*Raising fees
- S More gigs.
- A (N/A)

### People who earn £26k-30k (n7)

*What would be the key(s) to increasing your income from traditional music?*

- P \*\*\*more time to spend on self promotion and gigs rather than accounting and organising
- P - Venues paying proper fees (MU needs to contact ALL Scottish venues, outlining what a proper fee is).
  - 'Employing' musicians (those who bring a band together under their name) being made aware that you need to pay your band fairly. You can't expect people to work for next to nothing, and if you do so, you perpetuate a 'norm' of low payment which informs the social make-up of the industry.
  - Entertainments Agencies (the middle men) being held to account when they are not paying Union rates
- P \*\*\*Better promotion. Somebody else booking gigs.
- S Releasing a record. Having air play. Being able to play at festivals
- S More active self promotion
- S Giving up full time job
- S Confidence

### People who earn £31k-35k (n6)

*What would be the key(s) to increasing your income from traditional music?*

- P More revenue through royalties, more opportunity for better more consistent work in education
- P Being recognised amongst the current 'top' performers. Not living in the central belt is also a barrier to work in my experience
- S More venues and promoters
- S A boost in the local economy and less competition
- S Finding higher paying venues, increasing CD sales
- S \*\*\*Developing projects and products out of the things I already do. Finding time. Mentoring.

### People who earn more than 35k (n15)

*What would be the key(s) to increasing your income from traditional music?*

- P \*\*\*More Work
- P Consistent rates of pay across cultural organisations i.e. all pledging to deliver MU rates
- P \*\*\*I feel I work all the hours I possibly can at the moment (often 14 hour days), so the only way my income could go up is if my rate of pay improved.
- P The person who manages my band getting more gigs booked in! I have no control over that though. Possibly getting in touch with an agent and signing up to session work but I don't know how that operates.
- P Not sure
- P \*\*\*A more informed, strategic approach, industry experts/advisers with far better knowledge of global trad music opportunities, networks and practices. ... Resulting in more sales.
- S Larger performance opportunities, recording.
- S Having a top 50 or top 20 album in the UK Album charts! Becoming a member of Bob Dylan's touring band. Being a member of Runrig.
- S Time and collaboration opportunities
- S Better promotion leading to recognition within the industry to generate higher profile touring

- S Securing larger gigs and festivals
- S I do not need to increase my income from music
- S More gigs
- A Improving my musical skills.
- A Better performance fees. At the moment fees are so low it isn't worth the bother of performing under a contract.

### Summary of key issues raised

Across all income bands and professional status, increasing income from Traditional Music work centres around:

- Increasing opportunities for paid performances
- Raising fees and levels of pay, ideally to MU rates
- Creating a culture of paying for services, rather than expecting people to work for ‘next to nothing’
- Enhancing promotion of Traditional Music and performers
- Enabling access to wider contacts and networks
- More access to agents and promoters
- More time to devote to Traditional Music work

### Barriers to careers in Traditional Music in Scotland

The survey asked respondents to consider whether they perceive any barriers to their career in Traditional Music, and if so what these are. A total of 65 people provided responses, of whom 40 classify themselves as Professional, 22 as Semi-Professional and 3 as Amateur Traditional Musicians.

The findings on this issue have been segmented according to where respondents are in their career i.e. how long they have been working in the sector. Full responses, including whether respondents consider themselves to be Professional, Semi-Professional or Amateur, can be seen in Appendix One.

The findings have also been presented to distinguish between wider environmental/sector issues or individual career barriers. Several issues of special concern emerging from the responses have been pulled out for special attention: these relate to ageism, sexism and mental health.

### BARRIERS REPORTED BY EARLY-CAREER TRADITIONAL MUSICIANS

#### People who have worked in the sector for up to 5 years (n11)

All but one of the 11 people in this category of respondents are working in a Professional (n7) or Semi-Professional capacity (n3). The key barriers highlighted covered a range of individual and environmental barriers.

Environmental issues	Individual issues
<ul style="list-style-type: none"> <li>• A ‘monopoly within the <b>agency</b> scene’ concerning opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Need for an <b>agent’s</b> help to ‘get in’ to larger festivals</li> </ul>
<ul style="list-style-type: none"> <li>• High <b>travel costs</b> from the Highlands and Islands</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of <b>confidence</b></li> </ul>
<ul style="list-style-type: none"> <li>• The sector feeling “saturated”</li> </ul>	<ul style="list-style-type: none"> <li>• Being able to ‘pitch’ oneself in the right way</li> </ul>



Environmental issues	Individual issues
<ul style="list-style-type: none"> <li>Lack of coverage of traditional dance/dance music in the <b>media</b></li> </ul>	<ul style="list-style-type: none"> <li><b>Becoming well known</b> when “some clubs like what they know [and] many like to book only well-known musicians”</li> </ul>
<ul style="list-style-type: none"> <li>Perceived focus on <b>Glasgow</b> (“Current agencies and services (hands up for trad, etc.) focus on Music based around Glasgow and the RCS”)</li> </ul>	<ul style="list-style-type: none"> <li><b>Contacts</b> and connecting with others (“meeting the right people to start a band with”)</li> </ul>

## BARRIERS REPORTED BY ESTABLISHED TRADITIONAL MUSICIANS

### People who have worked in the sector for 6-10 years (n10)

All of the respondents at this career stage are working in a Professional (n7) or Semi-Professional capacity (n3). Key barriers highlighted are:

Environmental issues	Individual issues
<ul style="list-style-type: none"> <li>Being based in the Highlands and Islands: “I’m based in the Islands and I feel I’m at a <b>geographic disadvantage</b>”; a desire for “More musicians in the Highlands instead of Glasgow so that practise and travel is more achievable”</li> </ul>	<ul style="list-style-type: none"> <li><b>Financing</b> career developments: “Finding the money to record new music and ideas”; “expenditure for consistent marketing material”, “finances in being able support yourself and give the time to practice and rehearse regularly”</li> </ul>
<ul style="list-style-type: none"> <li>“Lack of musicians (especially young adult musicians) willing to play to a <b>professional standard</b> in Wester Ross / Skye and Lochalsh as everyone is in the Central Belt”</li> </ul>	<ul style="list-style-type: none"> <li><b>Lack of agent</b> “for acts that I’m booking for”; “Securing performance gigs with big festivals who usually only liaise with agents”.</li> </ul>
<ul style="list-style-type: none"> <li><b>Audiences</b>: “Live/new music is arbitrary for most people”</li> </ul>	<ul style="list-style-type: none"> <li>“<b>Knowing the right people</b> to engage in more work”</li> </ul>
	<ul style="list-style-type: none"> <li>Lack of <b>marketing skills</b></li> </ul>
	<ul style="list-style-type: none"> <li>Not everyone has same level of time and commitment to offer, making it <b>difficult to sustain bands</b></li> </ul>

## BARRIERS REPORTED BY ADVANCED-CAREER TRADITIONAL MUSICIANS

People who have worked in the sector for more than 10 years are categorised here as ‘Advanced Career’. On this topic a total of 44 Advanced-Career Musicians responded, of whom 16 have worked in the sector for 11-12 years and 28 have worked for more than 20 years.

### People who have worked in the sector for 11-20 years (n16)

The majority of respondents at this career stage are working in a Professional capacity (n12) with 4 respondents working in a Semi-Professional capacity. The key barriers highlighted by these respondents are:

Environmental issues	Individual issues
<ul style="list-style-type: none"> <li><b>Competition</b>: “Too many bands, not enough gigs”</li> </ul>	<ul style="list-style-type: none"> <li>Access to <b>agents</b>: “organising tours without an agent”; “some agents really dominating the small market that there is”</li> </ul>

Environmental issues	Individual issues
<ul style="list-style-type: none"> <li>• “Poor attitudes between musicians towards <b>pay</b>” e.g. “being expected to record for free, and then later receive a 'cut' of income (which rarely materialises), or being expected to gig for an undisclosed fee”</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cash flow</b> is “a huge issue. I feel I am constantly paying out money for flights to gigs and CD pressing. I know I'll get it back eventually but it's very sore on the bank account.”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Culture</b>: “Too many people rejecting their Scottish cultural heritage”</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Finance</b>: “not being able to afford to make a new CD”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Education</b>: Not enough traditional music in schools</li> </ul>	<ul style="list-style-type: none"> <li>• “<b>Coyness about money!</b> We all need to learn how to have the 'how much are you going to pay me' conversations”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Clubs</b> booking too far ahead.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Time</b> to develop new music projects (instead “Having to spend most of my time grafting, to help support other musicians as an accompanist”)</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Funding</b> “Funding is there but so often it's funding for specific projects that are unusual or cross-genre. I wish there was funding for just helping you have a career making music, music that's just general trad music that folk want to hear - funding seems to always have to have "an edge" to it.”</li> </ul>	<ul style="list-style-type: none"> <li>• Having to turn down opportunities because I can't afford to <b>work for free</b> (e.g. a recent composition opportunity)</li> </ul>
	<ul style="list-style-type: none"> <li>• Lack of self <b>confidence</b></li> <li>• Self <b>promotion</b> and “general cluelessness on the business side”</li> </ul>
	<ul style="list-style-type: none"> <li>• Reaching the <b>market</b>: “Getting my (recorded but also live) music in front of consumers”</li> </ul>

Several responses illuminate particular economic challenges within the sector, and the broader barriers they present.

*Having enough money to pay your way into being noticed by people booking - it seems like music isn't enough. Bookings (especially festivals) are also based on how many followers you have and how many concerts you are playing a year... if you book your own gigs yourself it seems impossible to get any further.*

*Musicians who accept gigs for really poor pay are undermining the whole scene, making it the case that we are all perceived as being worth very little.*

*Attitudes to earning from the arts [are] something that needs to be looked at from all angles (there is a shame attached to talking about money, as if it somehow makes us less 'artful').*

**People who have worked in the sector for more than 20 years (n28)**

The largest segment of responders on this topic comprises people who have worked in the sector for more than 20 years. Of this grouping, only two classify themselves as Amateur Traditional Musicians, with the remainder working in a Professional (n15) or Semi Professional (n11) capacity.

Key barriers highlighted by these respondents are:

Environmental issues	Individual issues
<ul style="list-style-type: none"> <li>• <b>Geographic</b> Location (mentioned by 2 people, no details)</li> </ul>	<ul style="list-style-type: none"> <li>• Not having an <b>agent</b></li> </ul>
<ul style="list-style-type: none"> <li>• <b>Culture</b>: “Lack of interest or indifference to traditional music”; “Still a very marginal music form, poorly regarded in Scotland”; “lack of appreciation”</li> </ul>	<ul style="list-style-type: none"> <li>• Financial responsibilities: “<b>Need to pay mortgage</b>”; “demands of employed work limiting availability”; lack of time “busy 100 hours plus per week”</li> </ul>
<ul style="list-style-type: none"> <li>• Longstanding <b>expectations of low pay</b>; Low pay for tuition</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Funding</b> for recording, specifically desired from Creative Scotland: “[my latest recording] received great reviews but was expensive to make”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Competition</b>: “Lack of dance gigs in Scotland and too many bands competing”; “Young and Voluntary bands who can’t do ceilidhs undercutting us”</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Profile</b>, Promotion: “My profile within the industry is low due to the small number of concerts we perform in any year. This is a catch 22. I need help promoting and generating an interest in my music”</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Professionalisation</b> in the sector: “More semi-pros would help the scene dramatically”</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of <b>time</b>, “spread too thinly”; “the amount of time and money spent by individuals in honing an act and promoting oneself”</li> </ul>
<ul style="list-style-type: none"> <li>• Lack of support from <b>broadcast media</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Breaking in</b> to the industry: “There seems to be a clique which singers who have worked their way up through the bars find it difficult to break”; “Being the little guy in a big guy's game. Having to learn or guess as I go along”</li> </ul>

Some respondents offer a long view on the fortunes of Traditional Music in Scotland, i.e.

*Folk music is and always will be more of a minority interest and market. The debates have now been going on for 60 years since the folk revival came along. Talent and luck will always win through.*

The gradual dominance of commercial rock-music bands claiming to be "traditional" just because they play some songs which are deemed to be traditional.

*If hotels would pay each musician as much as they are willing to charge someone for a night's sleep, musicians would do okay.*

Overview of main ‘environmental’ issues:

- **Geographic location** presenting barriers for those in Highlands and Islands of access to musicians, travel costs and professional standards
- Healthy supply of musicians but **limited demand/paid work**
- Lack of **agency representation** and monopoly among those who are represented
- Culture of **low or no pay**, and poor attitudes towards pay even within the sector
- Feeling that Traditional Music is not valued as part of Scotland’s heritage and contemporary **culture**

### Overview of main 'individual' issues:

- Having to work elsewhere to fulfil **financial responsibilities**, resulting in **lack of time** for Traditional Music careers
- Difficulty financing core outputs like **new recordings**
- Breaking into existing industry '**cliques**'
- Not having an **agent**
- Reaching the market (**becoming 'known'**) including knowledge on marketing and how to promote self/music
- Lack of **contacts** and business know-how
- Lack of general **confidence**

### Special Issues of Concern

Within this topic of barriers to respondents' careers, a number of respondents raised issues of special concern citing barriers related specifically to being female, including sexism. Ageism was also raised by a number of Male and Female respondents, and barriers with an impact on mental health were also reported. Relevant responses on each of these issues are drawn out below

#### Sexism and Being Female in the Sector

For the most part responses from Female Traditional Musicians highlight issues in parallel with Males in the sector concerning practicalities of promoting oneself and advancing one's career. However several Female respondents highlighted gender-specific barriers including sexism. Within the survey as a whole, of 88 people who indicated their gender, 34 are female. Within this group of female respondents, 28 are among the 65 people who provided comments on the topic of career barriers. Five respondents (all female) highlight their gender as a specific barrier to their career in Traditional Music. All are working in a Professional or Semi Professional capacity. Three female respondents cite sexism as an explicit barrier.

If you feel there are barriers to your career in traditional music, what do you identify them as?

***Being female***

(Professional, working in sector for more than 20 years)

***Definitely self promotion. Maybe sexism.***

(Professional, working in sector for 11-20 years)

***Lack of self confidence, sexism***

(Professional, working in sector for 11-20 years)

***I'm a female instrumentalist, and an accompanist. Both can bring barriers. People are less willing to take a risk on a female act. I think audiences need someone else to validate my ability rather than just my ability for themselves. I have to be completely bullet proof, far better than my male peers and work much harder to be noticed. It's quite exhausting. I get congratulated for working hard, for being an inspiration, but only recently are people actually congratulating me on my musical ability ... As long as my rent is paid and I don't lose sleep at night over money, I'm happy. I'm more concerned about being taken seriously as a musician, and about my work being appreciated and recognised.*** (Professional, working in sector for 11-20 years)

In addition **Maternity leave** is stated as a barrier by one female respondent (Semi Professional, working 11-20 years), and "touring commitments versus **family life**" is cited by another person (Professional, whose gender is not declared, working 11-20 years).

## Ageism

Age raised by both male and female respondents (n4) as an explicit barrier:

“Ageism!” (Male Semi Professional, working in sector 11-20 years)

“Age” (Female Professional, working for more than 20 years)

“Ageism” (Male Professional, working for more than 20 years)

“Learning traditional music later in life” (Male Professional, working less than 5 years)

## Mental Health

“Mental health” was given as a full response by one respondent as the barrier to their career in Traditional Music (a Professional who has worked for 11-20 years in the sector). In addition, “stress” was mentioned by one other respondent as a barrier faced in their Traditional Music career.

## Support currently desired for Traditional Music careers

The survey asked respondents to state what specific support would be most helpful to them, right now, in their music career. (If funding, respondents were asked to specify what for). A total of 94 people answered. The findings have been segmented according to career stage, and in addition specific responses relating to childcare have been highlighted with reference to gender-related issues profiled above. The full findings can be viewed in Appendix Two.

### EARLY-CAREER TRADITIONAL MUSICIANS

What people need who have been working in the sector for up to 5 years (n15)

Advice on “how to get on the festival circuit”; “places to approach for gigs”	<i>Including funding for...</i>
An agent/booker	<ul style="list-style-type: none"><li>• <i>Recording an album (3 respondents)</i></li></ul>
Mentoring: “Chats with professionals”; “Discussion (mentoring?) on what steps to take”	<ul style="list-style-type: none"><li>• <i>A mentor</i></li><li>• <i>Marketing &amp; Self Promotion</i></li></ul>
A means of income security – “perhaps through a permanent instrumental teaching job in schools with consistent pay plus sick leave, holiday pay, maternity pay etc.”	<ul style="list-style-type: none"><li>• <i>Touring</i></li><li>• <i>CPD or higher education</i></li></ul>

*Funding for touring would make a huge difference. Venues do not have the financial capacity to pay a fee suitable for covering the fees and costs of anything more than a duo I have found. Unless bands have a following touring is barely sustainable and to build a following it is what you have to do. (respondent up to 5 years)*

### ESTABLISHED TRADITIONAL MUSICIANS

Responses from people who have been working in the sector for 6-10 years (n13)

An agent	<i>Including funding for...</i>
Business development training and loans	<ul style="list-style-type: none"><li>• <i>An album/solo album (6 respondents)</i></li></ul>
Low interest or free start up loans	<ul style="list-style-type: none"><li>• <i>Touring</i></li></ul>

Marketing training	<ul style="list-style-type: none"> <li>• <i>CD production</i></li> </ul>
Contacts & Networking opportunities: “Connecting with other musicians to explore ideas, opportunities and share best practice”	<ul style="list-style-type: none"> <li>• <i>To make series of Fiddle tutor books</i></li> </ul>
Advice and guidance from other touring musicians	

Specific comments provided include:

*I think the key to sustaining the growth of the trad music scene is the encouragement of **new dedicated agents**- a program for this would be very helpful. As well as some sort of wider strategy for continuing audience development.*

***Business development** for bands- funding, marketing, booking, low or interest free start up loans for recordings and other standout projects that can open doors.*

*In terms of my band we are at the stage now where we could do with an agent. It's making that jump from self promoting etc. that we are struggling with.  
(respondent 6-10 years)*

## ADVANCED-CAREER TRADITIONAL MUSICIANS

Responses from people who have been working in the sector for 11-20 years (n24)

An agent	<i>Including funding for...</i>
Promotion; “promoting traditional music to youngsters”	<ul style="list-style-type: none"> <li>• <i>Recording (2 people)</i></li> <li>• <i>Touring</i></li> </ul>
Access to promoters	<ul style="list-style-type: none"> <li>• <i>Time “to create my own music”</i></li> </ul>
Career advice	<ul style="list-style-type: none"> <li>• <i>new project development</i></li> </ul>
Opportunity to learn more about music production / engineering, so I have the tools to create my own music without expensive and possibly restrictive studio time.	<ul style="list-style-type: none"> <li>• <i>CPD funding for collaborative writing</i></li> <li>• <i>Transport</i></li> <li>• <i>PR</i></li> </ul>
“Guided assistance with funding applications”; “Help for people with learning differences in filling in funding applications”	
A way into the weddings market	
“Nothing” (1 person)	

*Funding to develop my own album and tour, where musicians are looked after properly (having worked on many many albums for others (respondent 11-20 years)*

*Funding specifically for PR would be great. Right now I've recorded the album but I don't have the funds to have adverts in the magazines that want to review us, or for the PR agents to help plug it to the likes of radio 2.*

*I'm missing key members of my team: agent and manager. I want to extend the reach of my music through better targeted distribution. Funding for expert input to a longer-term business and development plan as well as recording, tour expenses, and as much marketing/promotion/PR as I can possibly get access to.*

Responses from people who have been working in the sector for more than 20 years (n42)

Management	<i>Including funding for...</i>
An agent	• <i>Creative work , developing new material</i>
Working with a promoter	• <i>Help with PR</i>
Access to promotion through media	• <i>Recording (4 people)</i>
Having a proper rehearsal/tuition studio	• <i>Touring</i>
More regular venues to perform; Affordable Ceilidh dancing venues in and around Edinburgh	• <i>Mentoring</i>
Music publishing/sync advice	• <i>Time for collaboration</i>
Luck	• <i>To buy equipment</i>
Training in entrepreneurial skills	• <i>Build a website</i>
Some BBC TV interest	• <i>Research</i>
“Nothing”; “I’m fine how I am” (5 people)	• <i>Writing, composition</i>
	• <i>Making a “promo video”</i>
	• <i>Publishing teaching material</i>

Additional comments include:

*Paying musicians to play in residential homes and funding musicians to run ceilidhs in rural areas to attract holiday makers.*

*More recognition of the unbroken tradition of genuine, unamplified music in public spaces and at social events. There is more appreciation of this in Europe now than in Scotland*

**Specific feedback concerning maternity and childcare**

- Funding to help new mums tour with a child and childcare. i.e. needing an extra vehicle, room and person along to help
- After maternity leave, more teaching work available from Fèis Rois
- Affordable childcare  
(3 respondents, all working for 11-20 years)

**Overview of main needs across all respondent groups**

Support from an Agent, Manager and Promoter is central to respondents across all the career stages profiled here. Training in business skills and access to mentors is also prominent. Networking opportunities are also mentioned across the respondent groups.

Funding is desired across all the groups predominantly for recording albums, developing new material, composition and publishing. Touring is another important activity that respondents desire funding for, along with PR support. People at all career stages mention CPD and continuing education as something they’d like support with.

## Enhancing the existing environment in Scotland for Traditional Music

The survey sought to capture views from within the Traditional Music sector about the existing environment for their music in Scotland. A total of 58 people provided comments, which are listed in full in Appendix Three.

- Comments coalesce around a number of *key themes* relating to the work environment for musicians: career support, a culture of low pay, availability of key support services, and the nature of funding.
- *Sectoral issues* concern sector diversity and inclusivity, addressing gender inequality and geographical factors.
- Broader *societal issues* raised include traditional music in education, the cultural reception of traditional music, and the continuing authenticity of the artform.

### The working environment

Career support	“Better and more stable career paths ... for some of our most important artists”; “Support for what I would consider grass roots performers who don't come through established channels.”
Profile	“Media coverage of less well recognised artists”; “something to bridge the gap between well-known musicians and others, without having to do endless unpaid floor spots.”
Pay	“A collective effort to reject badly paid work”. “Pull any activities where musicians are being asked to work for (or be 'CPD'd') for free. Their time should be remunerated”.
Infrastructure	“The venues need more support, so they can continue to host the artists.”
Networks	“Better networking opportunities for self-employed musicians / educators”
Agency development	“There is a lack of agencies in Scotland, I'd love to see more choice and opportunity that isn't filtered through same avenues”
Economic model	“We're under pressure to spend our entire gig fee on video recording, light shows, and all sorts of extra production. We pay for posters that are never distributed, often festivals won't provide accommodation or travel any more. Are more expenses being handed down to the artist, or did I have a rose-tinted concept of gigging in the scene? Not sure. I feel the more successful your act appears to be, the less money you earn.”

### Sectoral issues

Diversity	“More inclusion to musicians of other styles, to learn with & from”; “Education in regional playing styles”; “We need more invention and more people from outside of the box! I would like to see folk and trad music being more accessible to working class kids and perhaps an emphasis on Scots language. I would like to see working class kids being in control of a large part of the narrative of what we see as folk and traditional music ... our trad music has always been great because of the mixture of melody and poetry , it feels like a very small exclusive club at the moment where highly skilled articulate middle class kids
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	excel because of the tuition and general support they receive, we have to find a way of balancing this out”
Inclusivity	Scotland seems very well served with recognition from funders and advocacy organisations such as TMF and Hands Up. There could be a greater focus on these ‘professional’ services being seen as applicable/accessible to the whole traditional music community including those working on a semi-professional basis... In Scotland the funding and advocacy organisations are v aware that music income is part of a portfolio for many and yet many players for whom music represents 0% of their income routinely are perhaps excluded. Inclusivity is my point here, how to encourage more interesting recordings from excellent non-pro players and older players?
Gender Inequality	“Funding culture currently not healthy or diverse. Definitely inequality between men and women performers, especially in festival scene which is hugely male dominated- look at top three headline acts for Scotland / Highland festivals 2019. This needs to be urgently addressed”
Funding	<p>“Funding should be made available for 'musicians who have been asked to support another musician', (e.g. a keyboard player who wishes to go on tour with a great singer songwriter, but this singer songwriter cannot afford / won't pay them adequately). If supporting musicians could access a bespoke pot of money to allow them to work for poor-employers (other musicians), then bands would stay together for longer (it would remove money-friction), and supporting musicians wouldn't be so 'trapped' in an unsustainable financial picture.”</p> <p>“Funders could usefully consider stopping funding festivals where musicians are not paid in line with MU fees. An undercover exploration of this should be undertaken, to find out how many musicians are being asked to play 'for the ticket' to the festival (this is very common, though more in the non-trad world than the trad world). Compelling figures on the financial value of this 'support in kind' received from musicians to these festivals (which are often run by landowners), would result. An exploration of this issue might encourage festivals to 1) cut their cloth, and 2) offer fair terms and payment to musicians.”</p> <p>“Funders should scrutinise the experiences of musicians in relation to record companies, and should look to only fund projects which align with record companies that demonstrate good ethics in their treatment of musicians.”</p> <p>“Fund fewer bodies 'to support us' and instead fund more direct musical activity.”</p>

### Societal issues

Traditional Music in Schools	“More education within the state schools. It's a fun form of music and easily accessible to kids and teenagers, and investing in young people would help to nourish the future scene, this would also have benefits for the tourist industry as many people visit Scotland because of the music, and if they don't come specifically for that reason their experience is often enhanced by hear Scottish traditional music.”
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	<p>"I would like to see more opportunity for young people to experience traditional music in schools. Certain instruments such as the bagpipes are relatively well represented but others such as fiddle/accordion are not."</p> <p>"Greater focus on tradition music in schools. Too much focus is out on classical music, and trad is looked down upon by most sectors of music education. Traditional music is often seen as a gimmick and where support is provided by schools for classical musicians or other genres, trad musicians are generally dismissed or left to get on with things themselves."</p>
<b>Authenticity: "Where's the Trad gone?"</b>	"There's an industry bubble that feeds off the grassroots scene and the study/ funding/ work cycle loops back into itself e.g. Trad music courses produce confident and able musicians and singers who don't refer to the traditional material and existing exponents enough but instead turn their backs upon them. They then become the examples for the next generation, teach, appear in festivals to bigger audiences, get the awards etc which the industry focuses upon. It becomes a trad-inspired industry that congratulates itself on its own measurable success, but is not traditional. Young people don't seem to play the old tunes. Is anyone worried about that?"
<b>Cultural reception</b>	"More respect given to authenticity and more mature performers. Better exposure of real (rather than "contemporary") traditional music on BBC Scotland and other Scottish broadcast media"; "Continued raising of the profile of trade music to encourage the wide public to value it more"
<b>National body</b>	"National centre or hub for traditional music".
<b>Geography</b>	<p>"Rural engagement could be better particularly among young bands. Glasgow is good but it's not the be all and end all. I think the MOD is terrible for Gaelic music."</p> <p>"It does seem central belt and highlands &amp; Islands heavy. More mixed informal sessions with tunes and songs available in local venues not just city centres. But also towns Hamilton, Coatbridge, East Kilbride."</p>

### Inspiring examples from other countries or contexts

The survey asked respondents if there is anything from other countries or contexts they think we can learn from in Scotland to support our Traditional Music sector. Of 44 people who answered this question, six state 'no' (there isn't anything they think we can draw from beyond the sector) and the remaining 36 have contributed thoughts and ideas. These are summarised below (for the responses in full, see Appendix Four).

#### Other countries we can learn from: themes

Policies for supporting traditional music in Ireland, France, Germany and Scandinavian countries are cited by a number of the Traditional Musicians in this survey as examples of inspiring practice. The comments centre around on specific themes concerning the way that Traditional Music is valued/respected in society, policy mechanisms for supporting music salaries, provision for touring and accessible infrastructure, and educational initiatives.

## 1. Value, respect and esteem for traditional musicians

	"I see the respect which is given to ' <b>masters of their craft</b> ' in Ireland. Older performers are revered for their knowledge, style and repertoire. This is not so common in Scotland."
<i>Other countries seem to appreciate their <b>roots and culture</b> more readily than others although I can't say this reflects on all venues in Scotland</i>	<b>In other countries traditional music is treated with respect. Nae here.</b>
Ireland. Musicians more welcome	<i>Respect for traditional culture which relates to <b>the community and its environment</b>. It doesn't cost much to nurture this as it is low-cost by its very nature. It doesn't require electronic equipment or massive promotion. But it becomes drowned out by heavily amplified neo-trad rock-bands in Scotland. Europeans have managed to retain an environment for organic traditional culture to flourish.</i>
"Look what Riverdance did for Ireland"	
<b>France, where part of people's tax goes directly to the arts.</b>	
<i>"Better promotion and more value placed on culture / music of Scotland. Value of female acts".</i>	<b>The way in which musicians are seen in society is far more positive in other countries</b>
Ireland has several good models, although I am not a fan of them all. However, believing in traditional material and not being embarrassed by it or scared to celebrate it without dressing it up somehow is <b>essential for a healthy future</b> .	[There's a <b>disconnect</b> ] in (some areas of) Scotland between the current burgeoning young/ educated/ professional contingent and more venerable(!) players who were making LPs in the 70s but have perhaps not played professionally since then. (This isn't universal, Orkney and Shetland observably buck this trend with a strong 'carrying stream' but in the cities the disconnect can seem absolute). In Ireland (say) this disconnect is, if not totally absent, distinctly less visible.

## 2. Pay and salary support mechanisms

	Norway: more <b>government support</b> for freelance artists - mandatory minimum fees, financial support for usually unpaid work- admin, taxes, booking, marketing etc.
<i>In France there is a benefit for professional musicians called 'Intermittent Spectacle' which gives a <b>basic income</b>. We should have it here.</i>	<b>I think there is a standard touring wage for musicians in Sweden or Norway - it would be great to see something like that implemented here.</b>
Denmark, where even <b>folk clubs pay £900+ for a trio</b> . (Folk clubs here are lucky to raise £500, and recently I've been speaking to folk clubs where they are offering £200 for a four piece. I don't think they know about union fees).	French schemes such as the artist's stipend, Universal Basic Income
	<b>France-supports artists to a degree we can't even imagine in the UK.</b>

## 3. Accessible infrastructure and touring

	The abundance of <b>small community culture centres</b> across Germany have provided an opportunity for making tours
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	work over there for me. I wonder if a similar initiative across Scotland would work?
<i>The Scottish <b>tourist board</b> could <b>promote places</b> that actually make an effort to put in quality acts in and around the Highlands! The Irish have been doing this for years</i>	<b>Local councils</b> putting on Folk dance event in public spaces.
	<b>Having a music export office</b>
More easily <b>accessible funding for new music and rehearsing/ performing</b> . The creation of more work will inevitably create more opportunities for more people to perform allowing the saturation to flow and pool more efficiently	<i>Best example would be for <b>venues to run a season ticket for concerts</b>. This means they know a budget and can plan accordingly to provide guarantees</i>
	<b>More performances in cafes</b> . Again, attracting younger audiences and participants.

#### 4. Traditional Music within state education

	I love the Cultural Schoolbag in Norway, and similar projects in Sweden and Denmark. Each student is entitled to 4 different high quality professional level shows / experiences per year. We have a level of music tuition in schools, but are we bringing high quality music shows to schools / communities? Would this help build our audience at home? Are touring bands only visiting places they can afford to play, performing to those who can afford to pay?
"Education is the key"	

#### Other contexts we can learn from

Two respondents highlighted other contexts and artforms that could be helpful for supporting Traditional Music in Scotland. These are: 'the **community music sector**' in general, and **theatre/dance** (where "funding for developing new work is more accessible in theatre / dance ... Investing in the creation of new music from the tradition and supporting artists to do this would be a great thing to have").

Three respondents raised **Broadcasting** as an important issue:

<ul style="list-style-type: none"> <li>• More promotion through TV and Radio.</li> <li>• Representation on TV and radio.</li> </ul>
<ul style="list-style-type: none"> <li>• I worked as a hip hop DJ. 1xtra is "home" of UK black music. But if no hip hop is played on Radio 1 or other popular stations then it would be a sign that the music was being ghettoised. <b>BBC Alba and BBC Scotland should play Scottish Music - and share Gaelic Culture</b>. But if it's not on National (UK) TV and radio then it is being ghettoised. Radio play is more common- but Scottish traditional music is 'UK' music - so it needs represented on 'UK' radio and television channels too. This would be a sign of its strength - just as with hip hop and UK black music.</li> </ul>

## Headline points on developing the sector

Across all income bands and regardless of professional status, the key issues to increasing income from Traditional Music are identified by respondents as:

- Increasing opportunities for paid performances
- Raising fees and levels of pay, ideally to MU rates
- Creating a culture of paying for services, rather than expecting people to work for ‘next to nothing’
- Enhancing promotion of Traditional Music and performers
- Enabling access to wider contacts and networks
- More access to agents and promoters
- More time to devote to Traditional Music work

Common ‘environmental’ sectoral barriers to careers are perceived as **Geographic location, limited demand/paid work**; Lack of **agency representation** and monopoly among those who are represented; a culture of **low or no pay**, and poor attitudes towards pay; and a feeling that Traditional Music is not valued as part of Scotland’s heritage and contemporary **culture**.

Common barriers experienced at an individual level are: having to work elsewhere to fulfil **financial responsibilities**, resulting in **lack of time** for Traditional Music careers; difficulty financing core outputs like **new recordings**; breaking into existing industry ‘**cliques**’; Not having an **agent**; **becoming ‘known’**; lack of **contacts** and business know-how; lack of general **confidence**.

Reports of industry sexism highlighted by a number of female respondents, and ageism reported by a range of respondents, require urgent investigation.

The main support needed right now across respondent groups relates to: Support from an Agent, Manager and Promoter; Training in business skills and access to mentors; Networking opportunities; maternity and childcare support.

Funding is desired across all the groups predominantly for recording albums, developing new material, composition and publishing. Touring is another important activity that respondents desire funding for, along with PR support. People at all career stages mention CPD and continuing education as something they’d like support with.

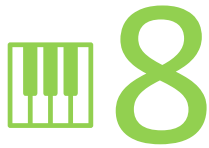
Concerning enhancements needed in the existing environment in Scotland for Traditional Music, comments coalesce around a number of key themes relating to:

- **The work environment for musicians:** career support, a culture of low pay, availability of key support services, and the nature of funding.
- **Sectoral issues:** sector diversity and inclusivity, addressing gender inequality and geographical factors.
- **Broader societal issues:** traditional music in education, the cultural reception of traditional music, and the continuing authenticity of the artform.

Policies for supporting traditional music in Ireland, France, Germany and Scandinavian countries are cited by a number of the Traditional Musicians in this survey as examples of inspiring practice. The comments centre around on specific themes concerning the way that Traditional Music is

valued/respected in society, policy mechanisms for supporting music salaries, provision for touring and accessible infrastructure, and educational initiatives.

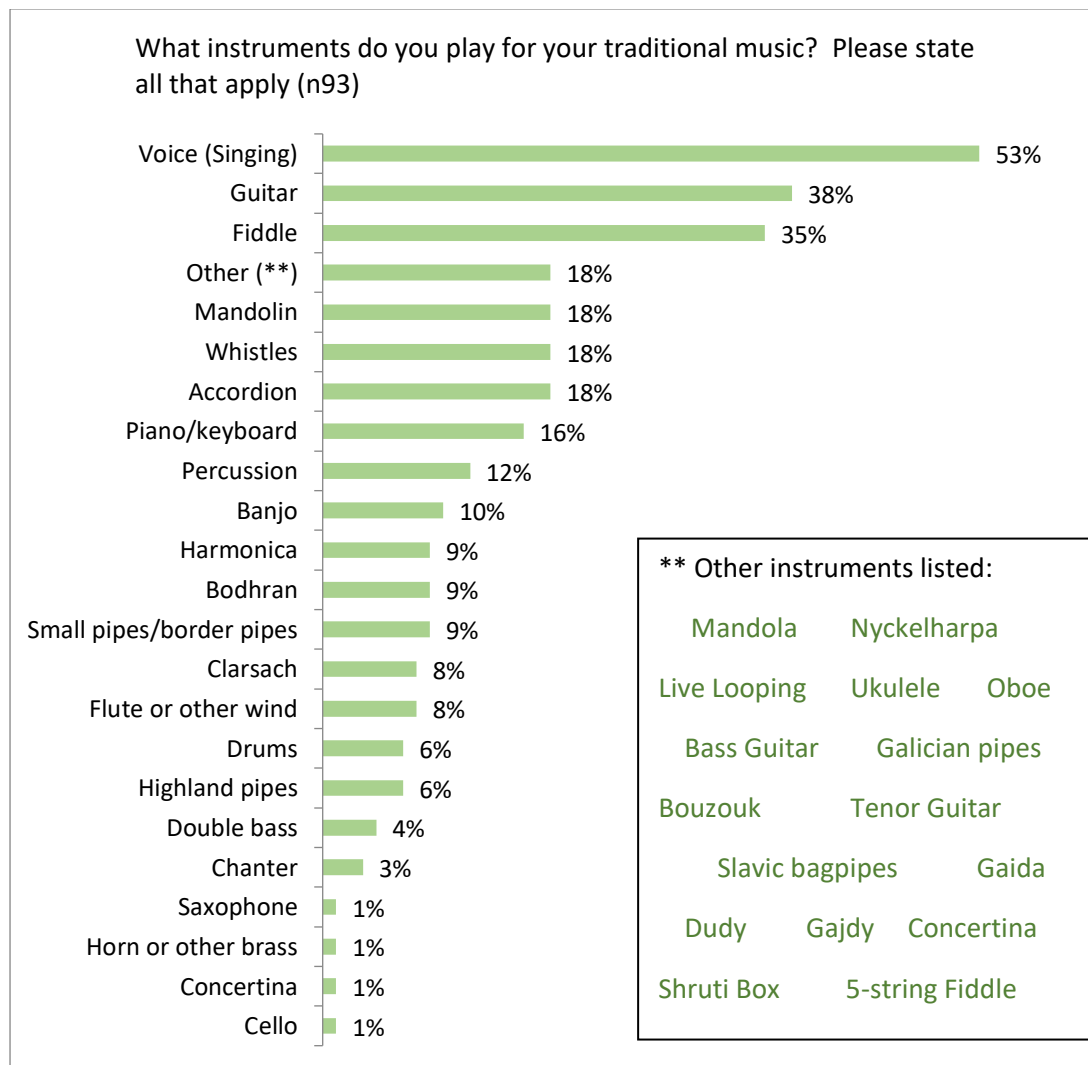
If a single overarching theme might be identified across these myriad of comments, it is addressing the way that Traditional Music is valued within the Scottish culture with corresponding value assigned to musicians' services and pay.



## A VIBRANT ARTFORM

This study closes with a glimpse of the breadth, depth and vibrancy of Traditional Music as an artform in Scotland today. Respondents were asked what instruments they play as part of their traditional music, and how they would describe the kind of music they make, play or teach. Their responses reveal the passion and energy that feed Traditional Music, showing it to be informed by a multitude of influences and reflective of diverse styles.

Traditional Music in Scotland is played on a very wide range of instruments beyond the core of voice, fiddle and guitar, with 38 different instruments reported in total.







### Music styles

As can be seen in the word cloud, core elements in the Traditional Music presented by these 76 respondents reflect Scottish, Celtic, Irish and Gaelic heritage. The music reflects predominantly 'Traditional' and 'Folk' styles, but also includes significant Contemporary elements and also 'Fusion'. Ceilidh and Dance feature strongly in the music described.

Music styles distinguished within Scottish contexts include: West Coast, Highland, Celtic, Gaelic and Traveller variations.

Beyond the Scottish and Irish culture, other key styles and influences are listed by respondents including: American, Anglo-American, Australian, Balkan, Breton, Bulgarian, European, Macedonian, Quebecois, Scandinavian and Serbian.

### Music genres

Genres mentioned include: balladry, bluegrass, ceilidh, choral, classical, contemporary, country, folk, folk/rock, funk, fusion, historical, mash, punk/'Celtic punk', rock, sacred and Trad.

### What the music is like

Philosophical descriptor words include: Authentic, Justice, Lived, "Rooted in questions of social justice", "Political trad music that breaks all the rules!"

Mood words used include: entertaining, exciting, exhilarating, family, fun, lively, popular, singalong, social, thought-provoking, upbeat, uplifting

Other evocative signifiers include 'accessible', 'authentic', 'award winning', 'broad', 'commercial', flavour, 'quality', places, rural, self-composed and self-written, solo, "Taught to me by rural tradition-bearers", trained, "twisted roots".

**Our survey clearly shows that Traditional Music is not a museum-piece but a contemporary artform representing Scotland's culture, taking in and reflecting the world too.**



## REFLECTIONS & NEXT ACTIONS

The wealth of evidence generated by this study gives us unprecedented insight into the work and experiences of Traditional Musicians in Scotland. *We close this report with commentary from the Traditional Music Forum* on the key insights that have emerged from this study of sector, and what this evidence suggests is needed next in advocating for and supporting the development of the Traditional Music artform and our sector in Scotland.

### Key contextual issues

Individual musicians' perspectives and needs will change at different stages of their lives and careers, and whether they identify themselves as professional, semi-professional or amateur. This identification also intersects with the different economic systems within an overall cultural economy – the profit-oriented creative industries, public subsidy and the mutual or social economy.

The creative industries are focused on distributing the artist's work for profit and are represented by commercial venues, record labels, digital sales and video, supported by a commercial infrastructure of booking agents, road crew, specialist equipment hire, recording studios, marketing and PR, media and publishers.

The public economy, spending by central and local government, supports and subsidises activities identified as public benefits whether by statute or policy, contributing to the cultural economy through spending on education and training, enterprise, health, and culture. The social economy mirrors the profit-driven economy in the sense that it operates by trading goods and services but diverges in that revenues are directed towards social or cultural purposes.

What has come to be referred to as 'traditional music' in Scotland covers several genres

including Gaelic song, Scottish dance music, piping, and balladry.

For the traditional music community, comprising creators, performers, audiences, active and passive supporters, economic activity is refracted by the perceived qualities of traditional music and its practice: the free sharing of a common resource, respect for past practitioners, its status as an emblem for both national sentiment and marginal or suppressed communities.

People by and large are not in traditional music for 'the money'. There may well be some professional musicians whose goal is to commoditise their creative vision in performance, reaching and resonating with big audiences and ultimately commanding large performance fees, extensive sales of recordings and royalties.

There are others who simply wish to commoditise their skills to the extent that they can make a comfortable living, combining work as a studio or live session musician with teaching, for example.

For other musicians, lack of opportunity perhaps or a desire for security leads them to exercise their practice in conjunction with work or a career outside the field. Still others, the lorry driver or the teacher say, who performs for a modest fee at a local ceilidh,

might not see themselves as semi-professional at all.

Some areas, such as local pipe bands, are resolutely amateur and follow a traditional practice of passing on skills at no charge. No matter their approach it is our job to support musicians and maximise their opportunities for success as long as there is a discernible connection to traditional music.

### **Actions to strengthen the sector**

The findings of this report point to a number of actions that could be taken by individual musicians, businesses, organisations and funding bodies, and finally by the Traditional Music Forum as the collective voice of the traditional music community.

#### **What Musicians can do**

- Form clear personal policies about the balance of paid and unpaid work in their practice
- Remind bookers if necessary of industry-standard fee minimums (e.g. MU rates)
- Maximise royalty payments by submitting returns

#### **What Businesses can do**

- Pay support acts
- Budget for at least industry-standard fee minimums (e.g. MU rates)
- Give due attention to diversity and gender balance

#### **What Organisations can do**

- Minimise requests for unpaid work (where this is not part of the organisation's ethos)
- Give due attention to diversity and gender balance

#### **What Funding Bodies can do**

- Continue to maintain support for formal and non-formal traditional music education opportunities and to widen these to areas not currently served
- (Creative Scotland) Consider funding for career development rather than specific projects
- A workable touring circuit and touring subsidy

### **And finally, what the Traditional Music Forum can do**

- Work to include the Traditional Music of other cultures within its remit
- Highlight issues around diversity, gender balance, mental health and geographical inequity
- Work with stakeholders on an audience development strategy for Traditional Music across Scotland
- Use the prevalence of micro-businesses to consider and develop co-operative approaches to the lack of agents, returns on digital distribution, publishing and CD distribution
- Create CPD sessions on topics such as funding applications, marketing, publishing and royalties, career development, specifically aimed at Traditional Musicians
- Continue to work to promote the value of Traditional Music in Scottish culture and gather and promote evidence for this

# APPENDICES

**ONE. Barriers to careers in Traditional Music in Scotland:  
full findings**

**TWO. Support currently needed in Traditional Music careers:  
full responses**

**THREE. Enhancing the existing environment in Scotland for  
Traditional Music: all responses**

**FOUR. Inspiring examples from other countries or contexts:  
all responses**

**FIVE. How respondents describe their traditional music**

## Appendix ONE. Barriers to careers in Traditional Music in Scotland: Full Findings (n65)

The findings on this issue have been segmented according to where respondents are in their career i.e. how long they have been working in the sector.

*Whether respondents consider themselves to be Professional (P), Semi-Professional (S) or Amateur (A) traditional musicians is indicated.*

### Early-Career Traditional Musicians (n11)

#### People who have worked in the sector for up to 5 years

*If you feel there are barriers to your career in traditional music, what do you identify them as?*

- S the larger festivals are not locally run so much - so it seems agents etc are needed to 'get in'. Travel costs from Highlands and Islands are high.
- P Although we benefit from this there is definitely a monopoly within the agency scene as to where opportunities go and present themselves. This has made it hard in the past.
- P Lack of confidence.
- P Pitching yourself in the right way. I perform within traditional music scene but am a songwriter. Some clubs, etc like what they know. Also, many like to book only well known musicians. There can be a barrier in becoming well known.
- P Changing times
- S Too saturated
- A Meeting the right people to start a band with.
- P Contacts. Money
- P Self-confidence. Lack of coverage of traditional dance/ dance music in the media
- P Learning traditional music later in life.
- S Current agencies and services (hands up for trad, etc.) focus on Music based around Glasgow and the RCS

### Established Traditional Musicians (n10)

#### People who have worked in the sector for 6-10 years

*If you feel there are barriers to your career in traditional music, what do you identify them as?*

- P Finding the money to record new music and ideas
- S I'm based in the Islands and I feel I'm at a geographic disadvantage
- S More musicians in the highlands instead of Glasgow so that practise and travel was more achievable. There are not many musicians (especially young adult musicians) willing to play to a professional standard in Wester Ross / Skye and Lochalsh as everyone is in the Central belt
- P Finances.
- S Live/new music is arbitrary for most people
- P Lack of agent for acts that I'm booking for. Lack of marketing skills
- P Knowing the right people to engage in more work.
- P Expenditure in providing consistent marketing material, finances in being able support yourself and give the time to practice and rehearse regularly.
- P Securing performance gigs with big festivals who usually only liaise with agents
- P It's difficult to set up a band from scratch and for everyone to have the same level of commitment. A number of bands/projects I've been involved with starting have folded quite early on with folk not being committed.

## Advanced-Career Traditional Musicians (n16)

### People who have worked in the sector for 11-20 years

*If you feel there are barriers to your career in traditional music, what do you identify them as?*

- P I don't particularly fit in a genre so it can be hard to sell. My background isn't in a specific, rooted tradition. Also, organising tours without an agent/some agents really dominating the small market that there is. Too many bands, not enough gigs? Also, not being able to afford to make a new CD.
- P Having enough money to pay your way into being noticed by people booking - it seems like music isn't enough. Bookings (especially festivals) are also based on how many followers you have and how many concerts you are playing a year... if you book your own gigs yourself it seems impossible to get any further.
- P Not enough traditional music in schools
- S Maternity leave
- P Being to comfortable playing other people's music
- P mental health
- P Size of the market, Touring commitments versus family life
- P I'm a female instrumentalist, and an accompanist. Both can bring barriers. People are less willing to take a risk on a female act. I think audiences need someone else to validate my ability rather than just my ability for themselves. I have to be completely bullet proof, far better than my male peers and work much harder to be noticed. It's quite exhausting. I get congratulated for working hard, for being an inspiration, but only recently are people actually congratulating me on my musical ability. As an accompanist or supporting musician, I feel it's often left to me to arrange sets, write tech specs, plan recording sessions, drive to the gigs, put the PA up, book the flights, yet I also feel the people who create the gig opportunities look at me as completely replaceable. There are certainly financial barriers in the world of traditional music - there are only so many gigs, opportunities to go round, and there's a lot of competition, but I work in this scene because I love playing the music not because it's a business opportunity (although the way the world is means I need to look at it as a business). As long as my rent is paid and I don't lose sleep at night over money, I'm happy. I'm more concerned about being taken seriously as a musician, and about my work being appreciated and recognised.
- P - Poor attitudes between musicians towards pay; e.g. being expected to record for free, and then later receive a 'cut' of income (which rarely materialises), or being expected to gig for an undisclosed fee
- Coyness about money! We all need to learn how to have the 'how much are you going to pay me' conversations
- Musicians who accept gigs for really poor pay are undermining the whole scene, making it the case that we are all perceived as being worth very little
- Attitudes to earning from the arts: this is something that needs to be looked at from all angles (there is a shame attached to talking about money, as if it somehow makes us less 'artful')
- Having to spend most of my time grafting, to help support other musicians (I am an accompanist), rather than having time available to develop new projects
- Having to turn down opportunities because I can't afford to work for free (e.g. composition opportunity provided by Distill)
- Lack of reciprocity between musicians
- S Too many people rejecting their Scottish cultural heritage.
- P N/A
- P Cash flow is a huge issue. I feel I am constantly paying out money for flights to gigs and CD pressing. I know I'll get it back eventually but it's very sore on the bank account. Funding is

there but so often it's funding for specific projects that are unusual or cross-genre. I wish there was funding for just helping you have a career making music, music that's just general trad music that folk want to hear - funding seems to always have to have "an edge" to it. I know what I do is what folk want to hear but because it's not unusual sometimes I feel we won't get funded.

- S Lack of self confidence, sexism
- P Definitely self promotion. Maybe sexism. General cluelessness on the business side.
- S Reluctance of promoters for clubs and festivals to return e-mails. Ageism!! Clubs booking too far ahead.
- P Getting my (recorded but also live) music in front of consumers.

### People who have worked in the sector for more than 20 years (n28)

*If you feel there are barriers to your career in traditional music, what do you identify them as?*

- S Lack of support from broadcast media.
- P I'm pretty happy with the way things are for me in relation to traditional music.  
Age, location, no agent
- A Audiences
- S None. Folk music is and always will be more of a minority interest and market. The debates have now been going on for 60 years since the folk revival came along. Talent and luck will always win through.
- P Same as in previous question [keys to increasing income]
- P Being female
- S Lack of interest or indifference to traditional music
- P If hotels would pay each musicians as much as they are willing to charge someone for a nights sleep, musicians would do okay.
- P Because I play pub gigs to pay the mortgage I can't take a gamble on the folk world i.e. folk clubs festivals etc! Also help for recording from Creative Scotland would have helped the project. It received great reviews but was expensive to make
- S Need to pay mortgage
- P longstanding expectations of low pay
- P Location, stress and demands of employed work limiting availability.
- A N/A
- P Ageism
- S Lack of dance gigs in Scotland and too many bands competing
- S Profile
- P Lack of appreciation of the amount of time and money spent by individuals in honing an act and promoting oneself.
- P The gradual dominance of commercial rock-music bands claiming to be "traditional" just because they play some songs which are deemed to be traditional.
- P Still a very marginal music form, poorly regarded in Scotland.
- P Lack of income, lack of exposure. Lack of time! (busy 100hrs plus per week!)
- S Young and Voluntary bands who can't do ceilidhs undercutting us
- S There seems to be a clique which singers who have worked there way up through the bars find it difficult to break
- S Lack of time, spread too thinly. Being the little guy in a big guy's game. Having to learn or guess as I go along.
- S My profile within the industry is low due to the small number of concerts we perform in any year. This is a catch 22. I need help promoting and generating an interest in my music
- P None. I feel responsible for myself.

P Low fees for tuition in trad music

S I have no barriers but too many traditional musicians try to work full time at it . More semi-pros. would help the scene dramatically.



## Appendix TWO. Support currently needed in Traditional Music careers (full responses n94)

The survey asked respondents to state what specific support would be most helpful to them, right now, in their music career. (If funding, respondents were asked to specify what for). A total of 94 people answered. The findings have been segmented according to career stage.

### Support Most Needed by Early-Career Traditional Musicians

#### Responses from people who have been working in the sector for up to 5 years (n15)

*Right now, at this stage in your music career, what specific support would be most helpful to you?*

- 1 Advice on how to get on the festival circuit.
- 2 Funding for self promotion
- 3 Funding for touring would make a huge difference. Venues do not have the financial capacity to pay a fee suitable for covering the fees and costs of anything more than a duo I have found. Unless bands have a following touring is barely sustainable and to build a following it is what you have to do.
- 4 I would like to have more income security - perhaps through a permanent instrumental teaching job in schools with consistent pay plus sick leave, holiday pay, maternity pay etc.
- 5 Funding for recording. Advice on places to approach for gigs etc.
- 6 Chats with professionals
- 7 Getting off the ground
- 8 Agent/booker for gigs
- 9 Improve vocal technique so I can perform longer and get paid gigs. Diagnosis of back/ shoulder/ wrist pain so I can practice piano/guitar more and take up fiddle.
- 10 Funding for marketing. Discussion (mentoring?) on what steps to take
- 11 Funding for recording an album, funding for CPD or even higher education (a second degree so I think that excludes SAAS?)
- 12 Funding for a mentor, funding for an album
- 13 [no answer]
- 14 Specialised Traditional music tuition.
- 15 Promotion of material

### Support Most Needed by Established Traditional Musicians

#### Responses from people who have been working in the sector for 6-10 years (n13)

*Right now, at this stage in your music career, what specific support would be most helpful to you?*

- 1 Funding for a new album, the album would be to promote the use of "non traditional instruments" such as silver flute/clarinet/saxophone in traditional music.
- 2 I think in terms of my band we are at the stage now where we could do with an agent. It's making that jump from self promoting etc. that we are struggling with.
- 3 Funding for PA etc
- 4 Funding, for the above, as well as touring.
- 5 Food
- 6 Business development for bands- funding, marketing, booking, low or interest free start up loans for recordings and other standout projects that can open doors. Marketing training. In general I think the key to sustaining the growth of the trad music scene is the encouragement of new dedicated agents- a program for this would be very helpful. As well as some sort of wider strategy for continuing audience development
- 7 Connecting with other musicians to explore ideas, opportunities and share best practice.

- 8 Funding for touring and CD production.
- 9 I think contacts/networking opportunities. I play for bands as a bit of extra pocket money (I am talking trousers with large pockets) but it's all additional to a full time role so... I suppose if I wanted to, I could market myself more and push to get engaged in more work. I just haven't as I'm comfortable but if the band stopped getting gigs or reduced gigs then it would impact my pocket. Maybe I should be doing more.
- 10 Advice and guidance from other touring musician. How to make it more profitable and engage with more audiences
- 11 Funding to make a series of grade appropriate Fiddle tutor books and recordings to accompany. Funding to record a solo album - pay other musicians and pay for recording studio.
- 12 Creative Scotland funding to record music
- 13 Funding to create albums would be fantastic. If there was an endless supply of money to record an album then folk could be so much more creative. Albums are expensive to produce and so I haven't done half of the recording that I would have liked to have done.

### Support Most Needed by Advanced-Career Traditional Musicians

#### Responses from people who have been working in the sector for 11-20 years (n24)

*Right now, at this stage in your music career, what specific support would be most helpful to you?*

- 1 Recording.
- 2 Funding to help new mums tour with a child and childcare. i.e. needing an extra vehicle, room and person along to help.
- 3 Any help in our music being promoted would be great. Help for people with learning differences in filling in funding applications. I'd love to be able to earn enough to be creating work I am passionate about, instead of just doing work I have to, to try to get by
- 4 None.
- 5 Promoting traditional music to youngsters
- 6 After maternity leave, more teaching work available from Fèis Rois.
- 7 CPD funding for collaborative writing
- 8 financial support to do what I do or to give me time to build profile without having to work to live
- 9 Access to promoters
- 10 Help with career advice
- 11 Affordable Child care
- 12 It's difficult to say. I'd like more time to write and create my own music, but there isn't any spare time as I'm either working to earn money to support myself, or rehearsing for free for other people. However, if I decide to carve out time for myself, and I perhaps had funding to support myself financially while I have the time to create my own music, does someone else step into my roles as accompanist, and do I lose out on future work? It's a fine balancing act giving everyone the time that they want / need in order to do the work. Having said that, I'd love to learn more about music production / engineering, so I have the tools to create my own music without expensive and possibly restrictive studio time.
- 13 Don't know
- 14 - Funding for new project development and execution (three strands of work which I have been attempting to fund for 12 months)  
- Funding to develop my own album and tour, where musicians are looked after properly (having worked on many many album for others)
- 15 Guided assistance with funding applications.
- 16 A way into the weddings market

- 17 Not sure
- 18 Transport
- 19 None that I'm aware of
- 20 Funding specifically for PR would be great. Right now I've recorded the album but I don't have the funds to have adverts in the magazines that want to review us, or for the PR agents to help plug it to the likes of radio 2.
- 21 Better pay so I had more time to pursue performing rather than having to carry out administrative work to pay bills
- 22 An ability to pay rent, reliably.
- 23 An agent would help.
- 24 I'm missing key members of my team: agent and manager. I want to extend the reach of my music through better targeted distribution. Funding for expert input to a longer-term business and development plan as well as recording, tour expenses, and as much marketing/promotion/PR as I can possible get access to.

### Responses from people who have been working in the sector for more than 20 years (n42)

*Right now, at this stage in your music career, what specific support would be most helpful to you?*

- 1 Management
- 2 Funding for creative work and help with PR.
- 3 an Agent. Funding for recording and touring
- 4 NA
- 5 More gigs
- 6 Having a proper rehearsal/tuition studio
- 7 Access to promotion through media.
- 8 No outside support should be needed by an artist apart from agents/ record companies - and unfortunately it is only the best or the younger talent coming up that will get these.
- 9 Time and collaboration and funding
- 10 More regular venues to perform
- 11 Funding to develop further a music and spoken word piece I am involved with
- 12 Nothing
- 13 Funding for a small website, which I will set up soon and pay for it myself.
- 14 Paying musicians to play in residential homes and funding musicians to run ceilidhs in rural areas to attract holiday makers.
- 15 Funding
- 16 I need to make a follow up cd and I can't afford to do it last one costed £2000 and I am not the only person to think it stood up as a great recording
- 17 Funding to buy teaching equipment
- 18 None. I'm fine how I am
- 19 funding for research. Mentoring. Collaboration with organisations and institutions
- 20 Funding for recording / writing. Current trend seems to be the same people being funded multiple times for different projects. No self sustainability.
- 21 NA
- 22 Funding for composition and developing new material
- 23 Working with a promoter!
- 24 Music publishing/ sync advice
- 25 Affordable Ceilidh dancing venues in and around Edinburgh
- 26 not sure
- 27 N/A

- 28 More recognition of the unbroken tradition of genuine, unamplified music in public spaces and at social events. There is more appreciation of this in Europe now than in Scotland.
- 29 Recognition of a lifetimes work as traditional musician!
- 30 Luck!
- 31 As in previous question
- 32 Nothing, Up to ourselves
- 33 Being able to earn enough to work less hours in my main job
- 34 Mentoring
- 35 Training in entrepreneurial skills
- 36 Funding for promo video and to allow me to publish 3 music books of recorded material and teaching material.
- 37 None
- 38 None
- 39 Funding for an album
- 40 A funded sabbatical
- 41 Funding to write and tour shows based on trad themes
- 42 Some BBC TV interest

### Appendix THREE. Enhancing the existing environment in Scotland for Traditional Music (all responses) (n58)

	<i>Are there any aspects of the existing traditional music environment in Scotland you think could be improved?</i>
1	Needs more public media exposure.
2	Better and more stable career paths - not for me but for some of our most important artists.
3	More education within the state schools. It's a fun form of music and easily accessible to kids and teenagers, and investing in young people would help to nourish the future scene, this would also have benefits for the tourist industry as many people visit Scotland because of the music, and if they don't come specifically for that reason their experience is often enhanced by hear Scottish traditional music.
4	There could be more respect given to authenticity and more mature performers. I notice that there seems to be a trend of ageism, particularly with regard to female performers.
5	I worry about alcoholism being easy to hide. I am also Muslim and would love opportunities to play in teetotaler venues.
6	Tuition
7	We can be pretty critical of each other. It's good to talk, share ideas and support differences in creativity and opinion. Diversity makes the scene evolve and continue, but there seems to be a new culture of Folk really criticising music/bands/venues etc. I don't think that helps.
8	I think the rural engagement could be better particularly among young bands. Glasgow is good but it's not the be all and end all. I think the MOD is terrible for Gaelic music.
9	Better promotion through gigs and media.
10	The existing organisations do a fantastic and selfless job.
11	Media coverage of less well recognised artists.
12	No
13	Pubs etc. more welcoming and appreciative towards musicians. Especially for sessions.
14	Most definitely
15	Better exposure of real (rather than "contemporary ") traditional music on BBC Scotland and other Scottish broadcast media
16	A collective effort to reject badly paid work
17	Funding and financial support.
18	Something for bands in the middle ground. Not newly formed but also not at festival headline stage yet. Anything from advice (more than get an EP and do folk clubs) and funding/encouragement to tour and build an audience.
19	I would like to see more opportunity for young people to experience traditional music in schools. Certain instruments such as the bagpipes are relatively well represented but others such as fiddle/accordion are not.
20	Again, something to bridge the gap between well known musicians and others, without having to do endless unpaid floor spots. Attracting and being relevant to younger audiences.
21	There is too much emphasis on young highly technically proficient but boring musicians , we need more invention and more people from outside of the box ! I would like to see folk and trad music being more accessible to working class kids and perhaps an emphasis on scots language. I play fiddle pipes and guitar and I sing. I am self taught but I am 49 years old! I would like to see working class kids being in control of a

<i>Are there any aspects of the existing traditional music environment in Scotland you think could be improved?</i>	
	large part of the narrative of what we see as folk and traditional music and if that means stepping back from well played hugs and reels so be it ! I don't know how this all is achievable and personally I have not the time or the inclination to be part of this but our trad music has always been great because of the mixture of melody and poetry , it feels like a very small exclusive club at the moment where highly skilled articulate middle class kids excel because of the tuition and general support they receive, we have to find a way of balancing this out or we will just be making nice coffee table music that does not actually speak to anyone !
22	Like inflation the number of musicians earning a living have soared - perhaps more support for gigging musicians so that the competition doesn't fall to those who can dedicate all their time to organising...
23	Yes
24	See prev question.
25	We need to consistently look for ways of expanding the traditional music market and have better connections with the media.
26	Better infrastructure to support collaborative projects, and role for research in these. Healthy culture of debate
27	Greater focus on tradition music in schools. Too much focus is out on classical music, and trad is looked down upon by most sectors of music education. Traditional music is often seen as a gimmick and where support is provided by schools for classical musicians or other genres, trad musicians are generally dismissed or left to get on with things themselves.
28	More support and nourishment for up and coming musicians
29	Funding culture currently not healthy or diverse. Definitely inequality between men and women performers, especially in festival scene which is hugely male dominated- look at top three headline acts for Scotland / highland festivals 2019. This needs to be urgently addressed.
30	Not aware of anything
31	Continuing music education for all ages. I feel youth music tuition and projects such as Glasgow Fiddle Workshop enriches the lives of the individual learners and encourages them to join our trad music community, strengthening our audiences. I wonder if there's a difference between the English and Scottish folk scene audiences (and other audiences around the globe), and whether tuition and introduction to Scottish culture at an early age has encouraged more young people to have an interest in trad music. I find the professional gig scene tricky and I've no idea if it can improve - I feel it is what it is. Agent interest, dwindling interest for CDs vs. the pressure of having to have a CD as a marketing tool... We're under pressure to spend our entire gig fee on video recording, light shows, and all sorts of extra production. We pay for posters that are never distributed, often festivals won't provide accommodation or travel any more. Are more expenses being handed down to the artist, or did I have a rose-tinted concept of gigging in the scene? Not sure. I feel the more successful your act appears to be, the less money you earn.
32	It does feel quite central belt/ highland & islands heavy.
33	Audience development for ceilidh dancing
34	More venues, more promoters, more young people running gigs
35	There is a lack of agencies in Scotland. I'd love to see more choice and opportunity that isn't filtered through same avenues.

<i>Are there any aspects of the existing traditional music environment in Scotland you think could be improved?</i>	
36	<p>Funding should be made available for 'musicians who have been asked to support another musician', (e.g. a keyboard player who wishes to go on tour with a great singer songwriter, but this singer songwriter cannot afford / won't pay them adequately). If supporting musicians could access a bespoke pot of money to allow them to work for poor-employers (other musicians), then bands would stay together for longer (it would remove money-friction), and supporting musicians wouldn't be so 'trapped' in an unsustainable financial picture.</p> <p>Funders could usefully consider stopping funding festivals where musicians are not paid in line with MU fees. An undercover exploration of this should be undertaken, to find out how many musicians are being asked to play 'for the ticket' to the festival (this is very common, though more in the non-trad world than the trad world). Compelling figures on the financial value of this 'support in kind' received from musicians to these festivals (which are often run by landowners), would result. An exploration of this issue might encourage festivals to 1) cut their cloth, and 2) offer fair terms and payment to musicians.</p> <p>Funders should scrutinise the experiences of musicians in relation to record companies, and should look to only fund projects which align with record companies that demonstrate good ethics in their treatment of musicians.</p> <p>Fund fewer bodies 'to support us' and instead fund more direct musical activity.</p> <p>Means test funding - don't fund people who can afford to fund themselves, but instead direct the money to people who work really hard, and for whom working in music results in poverty.</p> <p>Pull any activities where musicians are being asked to work for (or be 'CPD'd') for free. Their time should be remunerated.</p>
37	RSCDS paying more for their musicians. Accordion & Fiddle clubs charging a higher fee for entry and to charge players for entry too. Fiddle to be taught in schools.
38	not sure
39	<p>Scotland seems very well served with recognition from funders and advocacy organisations such as TMF and Hands Up. There could be a greater focus on these 'professional' services being seen as applicable/accessible to the whole traditional music community including those working on a semi-professional basis. In Ireland the music is enriched by duo/solo/trio recordings from players who might make only a single record in many years and not extensively tour in support of it. These records are frequently supported by funding. In Scotland the funding and advocacy organisations are v aware that music income is part of a portfolio for many and yet many players for whom music represents 0% of their income routinely are perhaps excluded. Inclusivity is my point here, how to encourage more interesting recordings from excellent non-pro players and older players?</p>
40	Ensuring tuition for children in schools
41	Administrators and event directors who can distinguish between Culture and Fashion.
42	More mixed informal sessions with tunes and songs available in local venues not just city centres. But also towns Hamilton, Coatbridge, East Kilbride.
43	The venues need more support, so they can continue to host the artists.
44	Not really. I think as a country we do pretty well!
45	No
46	Support for what I would consider grass roots performers who don't come through established channels. I have been performing off my own back for 25 years

<i>Are there any aspects of the existing traditional music environment in Scotland you think could be improved?</i>	
47	There's an industry bubble that feeds off the grassroots scene and the study/ funding/ work cycle loops back into itself e.g. Trad music courses produce confident and able musicians and singers who don't refer to the traditional material and existing exponents enough but instead turn their backs upon them. They then become the examples for the next generation, teach, appear in festivals to bigger audiences, get the awards etc which the industry focuses upon. It becomes a trad-inspired industry that congratulates itself on its own measurable success, but is not traditional. Young people don't seem to play the old tunes. Is anyone worried about that?
48	National centre or hub for traditional music. Permanent venue of the soundhouse organisation.
49	Continued raising of the profile of trade music to encourage the wide public to value it more.
50	Greater coverage of dance/ dance music in the media. Greater understanding (amongst the wider public) of the importance of music education (and arts generally)
51	No
52	More inclusion to musicians of other styles, to learn with & from.
53	It feels healthy to me. Music in schools is the big question at the moment and I feel very strongly about keeping it in nursery/school.
54	Better networking opportunities for self-employed musicians / educators
55	Education in regional playing styles
56	Yes , stop pumping out formally trained 'traditional' musicians who expect to make a living from their music.
57	more strategic and coordinated - lots of energy/time/resources are wasted on individuals repeating the same actions with limited results.
58	More funding to be available. When starting up a band you're putting a lot of time and money into a project and not getting anything financially out of it for quite a while. How can this be sustainable?



## Appendix FOUR. Inspiring examples from other countries or contexts (all responses) (n44)

*Is there anything that you have seen from other countries or contexts we could learn from in Scotland for our traditional music sector?*

- 1 In other countries traditional music is treated with respect. Nae here.
- 2 I see the respect which is given to 'masters of their craft' in Ireland. Older performers are revered for their knowledge, style and repertoire. This is not so common in Scotland.
- 3 I worked as a hip hop DJ. 1xtra is "home" of UK black music. But if no hip hop is played on Radio 1 or other popular stations then it would be a sign that the music was being ghettoised.  
BBC Alba and BBC Scotland should play Scottish Music - and share Gaelic Culture.  
But if it's not on National (UK) TV and radio then it is being ghettoised.  
Radio play is more common- but Scottish traditional music is 'UK' music - so it needs represented on 'UK' radio and television channels too. This would be a sign of its strength - just as with hip hop and UK black music.
- 4 The Armagh Pipers Club tuition programme
- 5 More promotion through TV and Radio.
- 6 The music industry is one of the toughest ever businesses to be in. At the folk/ jazz/ blues etc level it is even tougher. You cannot forget (and this is well documented) that when a main band member /side musician in a large touring rock band ( say Eric Clapton or Bob Dylan's bass player ) finishes a 4 month world tour playing to huge audiences, then very often they will be found in between tours/ or work playing in £50 a night pub bands/ sessions. Some will do this just because they want to play and others because they have to. Malcolm Jones from Runrig will go from playing to 20,000 in a German arena to doing a ceilidh in Dingwall for £100 !
- 7 No
- 8 No
- 9 In France there is a benefit for professional musicians called 'Intermittent Spectacle' which gives a basic income. We should have it here.
- 10 Ireland. Musicians more welcome
- 11 Look what Riverdance did for Ireland.
- 12 Hotels needs to have entertainment on for their customers but unfortunately they don't want to give up table room for musicians. People who visit Scotland these days don't get the chance to see traditional musicians due to the greed of most hotels.
- 13 More performances in cafes. Again, attracting younger audiences and participants.
- 14 The Scottish tourist board could actually promote places that actually make an effort to put in quality acts in and around the Highlands! The Irish have been doing this for years
- 15 more easily accessible funding for new music and rehearsing/performing. the creation of more work will inevitably create more opportunities for more people to perform allowing the saturation to flow and pool more efficiently
- 16 Education is the key
- 17 Norway- more government support for freelance artists- mandatory minimum fees, financial support for usually unpaid work- admin, taxes, booking, marketing etc
- 18 Representation on TV and radio.
- 19 community music sector has a lot to share...  
opportunities for performers who want to gain research skills
- 20 Better promotion and more value placed on culture / music of Scotland. Value of female acts.

*Is there anything that you have seen from other countries or contexts we could learn from in Scotland for our traditional music sector?*

- 21 No
- 22 I love the Cultural Schoolbag in Norway, and similar projects in Sweden and Denmark. Each student is entitled to 4 different high quality professional level shows / experiences per year. We have a level of music tuition in schools, but are we bringing high quality music shows to schools / communities? Would this help build our audience at home? Are touring bands only visiting places they can afford to play, performing to those who can afford to pay?
- 23 I haven't studied this enough to know. Other than really good tunes!
- 24 Local councils putting on Folk dance event in public spaces.
- 25 French schemes such as the artist's stipend, Universal Basic Income
- 26 I don't know much about this and may have been something I've made up but I think there is a standard touring wage for musicians in Sweden or Norway - it would be great to see something like that implemented here.
- 27 France, where part of people's tax goes directly to the arts.  
Denmark, where even folk clubs pay £900+ for a trio. (folk clubs here are lucky to raise £500, and recently I've been speaking to folk clubs where they are offering £200 for a four piece. I don't think they know about union fees).
- 28 Other countries seem to appreciate their roots and culture more readily than others although I cant say this reflects on all venues in Scotland
- 29 I had a conversation recently with **Margaret Bennett** where we discussed some kind of disconnect we perceive in (some areas of) Scotland between the current burgeoning young/educated/professional contingent and more venerable(!) players who were making LPs in the 70s but have perhaps not played professionally since then. (This isn't universal, Orkney and Shetland observably buck this trend with a strong 'carrying stream' but in the cities the disconnect can seem absolute). In Ireland (say) this disconnect is, if not totally absent, distinctly less visible.  
There's some great fusion music coming out of Scotland at the moment but fusion has become a new norm for funded traditional music projects and a subjective glance at the CC programme sees more Scottish fusion projects than 'pure drop' (or even vaguely pure drop) projects. This isn't in itself a problem and some will see this as a natural progression for the music but at the extremes are concerts that are effectively a funk band with a contemporary trad melody on the top line used as a decorative filigree. Again this isn't problematic in and of itself and these projects provide employment and performance opportunities for players. But at some level this preponderance of funding fusion projects and describing them unabashedly as traditional music widens that divide or disconnect I mentioned above.
- 30 Respect for traditional culture which relates to the community and its environment. It doesn't cost much to nurture this as it is low-cost by its very nature. It doesn't require electronic equipment or massive promotion. But it becomes drowned out by heavily amplified neo-trad rock-bands in Scotland. Europeans have managed to retain an environment for organic traditional culture to flourish. I play more often in public in Europe than in Scotland.
- 31 The way in which musicians are seen in society is far more positive in other countries. Traditional musicians in particular seem to get a bad reputation for time keeping and general professionalism because in the past (and some in the present) others have acted in this way slightly tarnishing the reputation.
- 32 Cape Breton have lots of good music initiatives.
- 33 Not specifically but I know Ireland and the Scottish islands have more music sessions. I wish him me was like that. I moved to Glasgow west end specially to experience it.

*Is there anything that you have seen from other countries or contexts we could learn from in Scotland for our traditional music sector?*

- 34 France-supports artists to à degree we can't even imagine in the UK.
- 35 No
- 36 No
- 37 Best example would be for venues to run a season ticket for concerts this means They know a budget and can plan accordingly to provide guarantees
- 38 Ireland has several good models, although I am not a fan of them all. However, believing in traditional material and not being embarrassed by it or scared to celebrate it without dressing it up somehow is essential for a healthy future.
- 39 The abundance of small community culture centres across Germany have provided an opportunity for making tours work over there for me. I wonder if a similar initiative across Scotland would work?
- 40 Music Export office
- 41 No
- 42 Be more open minded and less judgemental
- 43 Funding for developing new work I think is more accessible in theatre / dance other art forms. Investing in the creation of new music from the tradition and supporting artists to do this would be a great thing to have.
- 44 I would really like to know more about this - where is the trad music industry expertise at this level?

## Appendix FIVE. How respondents describe their Traditional Music (n76)

### *How would you describe the kind of traditional music you make, play or teach? (n76)*

- 1 Ceilidh, twisted roots.
- 2 Traditional songs, dance music.
- 3 Highland fiddle style
- 4 Traditional Scottish /Irish/European/Self Composed tunes
- 5 Gaelic song
- 6 Uplifting, thought-provoking and, at times, sacred.
- 7 Scottish
- 8 Bluegrass, old time, contemporary trad and composition.
- 9 Gaelic West Coast
- 10 Celtic folk/rock
- 11 Just music - aim for it to have a traditional or Celtic flavour or roots in parts (sometimes 100%) - but would hate to be described as Scottish traditional - that would be far to limiting for anyone to describe themselves.
- 12 Ceilidh and traditional
- 13 Scottish and Folk
- 14 Traditional
- 15 Ceilidh
- 16 Scottish/Irish
- 17 Scottish and other European
- 18 Upbeat
- 19 Mixed Scottish to keep it varied
- 20 Ceilidh and country dance music
- 21 Not bad
- 22 Exciting, entertaining, fun. A broad collection of voices and styles from time and space
- 23 Singing
- 24 Traditional and contemporary fiddle music with some self-written tunes
- 25 Contemporary
- 26 Political trad music that breaks all the rules!  
I aspire to punk
- 27 Celtic punk and drumming workshops
- 28 contemporary traditional
- 29 Mediocre in some settings and of the highest possible quality in others
- 30 Varied. And drawing upon a wide range of influences.
- 31 Trad/Pop
- 32 What?
- 33 Contemporary folk music
- 34 Scottish traditional music
- 35 Largely traditional - pipe bands, ceilidh band and solo.
- 36 Folk, traditional, dance band
- 37 Gaelic traditional and contemporary, Celtic, Scottish. Vocal sound.
- 38 Mostly songs and dance music of Scottish or Irish origin.
- 39 Traditional Scottish

***How would you describe the kind of traditional music you make, play or teach? (n76)***

- 40 It's hard to define! I play a mix of contemporary and traditional music, predominantly from the UK, Scandinavia and America. I often teach Scottish repertoire, but try to find tunes in the Trad idiom from a range of places.
- 41 Modern Trad/Contemporary Trad. I like to mash up different styles as I'm classically trained but very Scottish.
- 42 Folk dance
- 43 Rooted in dance music and balladry
- 44 Exhilarating
- 45 Contemporary Traditional
- 46 Rooted in questions of social justice  
Accessible, award-winning  
Of high quality
- 47 Traditional
- 48 Lively, uplifting, popular, singalong, historical
- 49 Iddley diddley!
- 50 Folk music
- 51 Taught to me by rural tradition-bearers with minimum Anglo-American commercial input. I learned this through the medium of Gaelic. Then, when in my teens I lived in the Balkans and learned their equivalent through the medium of Serbian, Macedonian and Bulgarian.
- 52 Ceilidh and country dancing.
- 53 Scottish traditional music
- 54 Bagpipes
- 55 Traditional/folk/highland
- 56 Singing traditional Scottish songs unaccompanied. Played guitar to accompany myself and others. Joining in with tunes with whistle.
- 57 Folk, traditional, songwriter.
- 58 Great fun
- 59 Folk song
- 60 Scottish and Irish traditional music
- 61 Folk rock / funk
- 62 Mainly Scottish, and occasionally Breton/Irish
- 63 Trad
- 64 Dance music (ceilidh and country dance)  
Traditional West Coast  
Compose "fusion" style trad music for dance displays
- 65 Scottish trad and contemporary folk song (mainly), with other folk songs and some tunes from around the world.
- 66 Traditional Scottish song, Ceilidh and Dance Band music and traditional Scottish music
- 67 Scottish, Irish, Australian Celtic, American Celtic, bluegrass, old time, Québécois, classical, other interests.
- 68 Celtic Fingerstyle Guitar.  
Scottish Singer.  
Scottish Traditional Guitarist.
- 69 Singer and songwriter of Scottish songs in traditional style, plus authentic traditional songs/ballads passed down from my traveller family.

***How would you describe the kind of traditional music you make, play or teach? (n76)***

- 70 Varied
- 71 A mix of old & new, rooted in the dance and Scots song tradition
- 72 Trad Scottish, American, Ceilidh,
- 73 Entertaining and chorus ridden.
- 74 Contemporary Irish and Scottish trad/folk
- 75 Varied
- 76 Mix of Scottish and Irish traditional music. Music for Irish dancing as well.  
Always composing new tunes.

## **Appendix SIX. Full List of Survey Questions**

*/See overleaf*

## Economic Survey: Working as a Traditional Musician in Scotland

If you are currently working as a traditional musician in Scotland, then we need to hear from you!

**This anonymous survey seeks to capture the economic realities for traditional musicians in Scotland today.**

**The Traditional Music Forum is a network of over 100 organisations and individuals across Scotland. We are undertaking this work to advocate the economic and cultural case for traditional music and open up ways for the network to better support musicians and music-making. We plan to use the information to underline the importance of traditional music to Scotland's culture, and to inform thinking within the traditional music community about how music gets from musician to audience and how that might change and improve.**

**The survey takes around 30 minutes to complete.**

How it works: Answers in this survey are saved and submitted each time you finish a page and move on to the next one. It is possible to go backward and forward through the survey and to amend your answers. You can exit and enter into your saved survey again using the link, but it is necessary to use the same device as before. We don't ask you to provide any exact figures or facts, but you may want to have a rough idea in advance of your maximum-minimum annual income level, how much you get annually from any online music sales (if relevant), and approximate annual royalty amounts (if relevant).

\* 1. As a traditional musician do you consider yourself to be...?

- Professional
- Semi-Professional
- Amateur

\* 2. Do you earn income from traditional music in Scotland?

- Yes
- No

3. Do you earn income from other genres of music in addition to traditional music?

- Yes
- No

\* 4. Please tell us your postcode (this will help us to map our sector in Scotland and could reveal significant trends)



Please tell us about you and your work

5. Which activities generate the most PAID WORK OPPORTUNITIES for you at present in traditional music? (Please select all that apply and RANK them where 1 is your most common activity)

- Large-scale public performances (concerts, festivals)
- Small-scale public performances (session gigs in pubs, clubs, hotels, restaurants)
- Performing at private functions (weddings, parties, conferences, dinners)
- Session musician for recording
- Live or Studio Production
- Tuition or education work
- Commissioned Arranging or Composition work
- Management and Administration
- Other

6. If you selected Other, please tell us what it is

**7. Which ONE of these roles reflects what you'd most like to be doing, in your career as a traditional musician?**

- Performer
- Recording Artist
- Arranger
- Session Musician
- Composer / Songwriter
- Producer
- Manager or Administrator
- Music Teacher or Tutor
- Lecturer
- Your Other Role specified above

**8. How long have you been working as a traditional musician?**

- up to 5 years
- 6-10 years
- 11-20 years
- more than 20 years

**9. What is your highest level of formal qualification in music/traditional music?**

- I have no formal qualification in music or traditional music
- I have a music qualification from high school
- I'm qualified to HNC / HND
- I have a BA in music or traditional music
- I have an MA in music or traditional music
- I have a PHD in music or traditional music
- Other (please specify)

## Please tell us about your Employment as a Traditional Musician in Scotland

10. How much of your working time do you spend as a musician?

- All (100%) of my working time
- 75% of my working time
- 50% of my working time
- 25% or less of my working time

11. How would you describe your employment status in traditional music?(Please tick all that apply)

- I am a permanent salaried employee in a traditional music organisation
- I have a fixed term role in a traditional music organisation
- I am self employed and freelance
- I run my own business
- I am currently unemployed
- I am retired

## Economic Survey: Working as a Traditional Musician in Scotland

### Your working pattern

12. Do you consider traditional music to be your primary source of income?

- Traditional Music generates my main source of earnings
- Traditional Music is my secondary source of income
- I have no income from Traditional Music

13. In addition to your traditional music activity do you have other paid employment from an additional job?

- Yes
- No (please skip ahead to Question 17 on the next page)

14. How many additional jobs do you have the moment?

- 1
- 2
- 3 or more

**15. What is your additional work related to?**

- Music
- Another artform
- Unrelated to music/the arts

**16. If your other paid employment is not related to music/the arts, which sector(s) is it in?**

- Third sector (charity, social enterprise)
- Retail
- Professional services (i.e. Marketing / PR / consultancy)
- Food or Bar work
- Other (please specify)

Economic Survey: Working as a Traditional Musician in Scotland

Your earnings

**17. In the last 5 years, what is the MOST you've earned in one year across all your work, before tax?**

**18. In the last 5 years, what is the LEAST you've earned in one year across all your work, before tax?**

**19. Roughly what proportion of this total income comes from your traditional music work?**

- 100%
- 75%
- 50%
- 25%
- Less than 25%
- None

Economic Survey: Working as a Traditional Musician in Scotland

Your most significant income sources

20. **Within Traditional Music, which activities do you most rely on for INCOME?** (Please RANK all that apply, where 1 generates the most significant income for you)

- Performance fees and/or box office receipts
- Ad hoc or regular session fees
- Direct sale of original work and merchandise (CD/vinyl, digital)
- Royalty payments
- Teaching or education work
- Arrangements or Composition commissions
- Grants from funders
- Crowdfunding
- Other traditional music income

21. If you ranked 'Other traditional music income', please specify what it is here

22. **Do you receive any of the following State Benefits?**(please tick all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Working Tax credit             | <input type="checkbox"/> Universal Credit      |
| <input type="checkbox"/> Child Tax credit               | <input type="checkbox"/> Job Seekers Allowance |
| <input type="checkbox"/> Working Families tax credit    | <input type="checkbox"/> Carers Allowance      |
| <input type="checkbox"/> Housing Benefit                | <input type="checkbox"/> Council Tax benefit   |
| <input type="checkbox"/> Disability Living Allowance    | <input type="checkbox"/> State Pension         |
| <input type="checkbox"/> Employment & Support Allowance | <input type="checkbox"/> None of the above     |
| <input type="checkbox"/> Other (please specify)         |  |

**23. Have you ever received external funding, for instance grants or patronage or crowdfunding, for...?**

- |   |   |
|---|---|
| <input type="checkbox"/> Touring                              | <input type="checkbox"/> Travel                                 |
| <input type="checkbox"/> Making recordings                    | <input type="checkbox"/> Training & Development                 |
| <input type="checkbox"/> Developing new material              | <input type="checkbox"/> I have not received any external funds |
| <input type="checkbox"/> For something else? (please specify) |   |

## Economic Survey: Working as a Traditional Musician in Scotland

### Unpaid time devoted to Traditional Music

**24. How many hours each week do you spend personally practicing your music? (i.e. to develop or hone skills; not for band or rehearsal)**

- Up to 5 hours
- Up to 10 hours
- Up to 15 hours
- More than 15 hours

**25. Have you performed for free in the past 12 months in order to advance your traditional music career?**

- No
- Yes
- This is not applicable for me

**26. Have you delivered any other music-related services for free that you feel you should have been paid for?**

- No
- Yes (please specify the nature of the unpaid work)

**27. Are you presently involved in voluntary, community or amateur traditional music activity?**

- No
- Yes (please tell us the nature of this activity and how much time is spent per week)

Economic Survey: Working as a Traditional Musician in Scotland

Your profile in the sector

**28. Do you have an agent?**

- Yes
- No
- This question is not applicable for my career

**29. If applicable, please tell us the name of your agent**

- |  |                                 |
|--|---------------------------------|
| <input type="checkbox"/> Active                        | <input type="checkbox"/> Oscar  |
| <input type="checkbox"/> TwentyTwo                     | <input type="checkbox"/> Strada |
| <input type="checkbox"/> Stoneyport                    | <input type="checkbox"/> TRJ    |
| <input type="checkbox"/> Someone else (please specify) |                                 |

**30. Where are your audiences / fans located as far as you are aware?** Please tick all that apply.

- This is not applicable to me
- This is applicable but I don't have a sense of who follows my music
- I have a music following in Scotland
- I have a music following in the UK
- I have a music following in USA-Canada
- I have a music following in Australia-NZ
- I have a music following in Europe
- I have a music following in Asia
- Other (please specify)

**31. How do you promote and market yourself, your band, your music products or activities?** Please tick all that apply

- My own website
- My own Youtube channel
- My own blog
- Via Facebook or other social media
- Through my Spotify presence
- Another way (please specify)
- Via an agency
- Via a paid PR service
- Word of Mouth
- Print media (posters, flyers)
- I don't market myself or my music

**32. Who else in the music or creative sector do you hire to help make, produce or promote your music?** Please tick all that apply.

- Other musicians or singers
- Music producers
- Sound or other technical support
- Video filmmaker
- Other (please specify)
- Graphic or web designer
- PR professional
- I don't hire anybody else



If you are a Performer

\* 33. Do you ever perform traditional music in Scotland?

- Yes
- No (please skip ahead to Question 38 on the next page)

34. How do you perform? Please tick all that apply to you

- I perform solo
- I perform in a band
- I perform in more than one band

35. How many performances do you give in an average year?

Concerts	<input type="text"/>
Pub sessions	<input type="text"/>
Ceilidhs	<input type="text"/>
Private functions	<input type="text"/>

Another kind of performance (please specify and tell us how many per year)

36. How do you usually generate these live performance opportunities? Please tick all that apply

- Via my agent
- Direct dealings with festivals/venues/bookers from my own contacts
- I make independent arrangements myself, self-fund and self-promote

**37. What countries do you perform in?** Please tick all that apply

- Scotland
- Elsewhere in the UK
- Europe
- North America/Canada
- Australia/NZ
- Asia
- Middle East
- Elsewhere (please specify)

Economic Survey: Working as a Traditional Musician in Scotland

**If you are a Recording Artist**

**\* 38. Do you make recorded music?**

- Yes
- No (please skip ahead to Question 41 on the next page)

**39. Do you have a record deal with a label?**

- No
- Yes (Please tell us which label, and if it is your own label)

40. **What are your main ways of making independent music sales?** Please tick all that apply

- CD/vinyl at gigs
- CD/Vinyl via a distributor
- Online song/album downloads
- Online streaming
- Not applicable / I haven't sold any music
- Other (please specify)

Economic Survey: Working as a Traditional Musician in Scotland

### Online music sales

\* 41. **Do you use an aggregator site to sell or distribute your music online?**

- Yes
- No (please skip ahead to Question 44 on the next page)
- I don't sell my music online (please skip ahead to Question 44 on the next page)

42. **Which aggregator sites do you use?** Please tick all that apply

- Emu Bands
- Threads of Sound
- Bandcamp
- Tunecore
- CD Baby
- Reverbnation
- Other (please specify)

43. **Do you receive revenues directly from these platforms?**

- No
- Yes (please tell us how much per year on average)

Your royalties

**44. Do you feel that increasing digital consumption in the music industry has affected your traditional music career or income?**

- YES, it has affected me positively
- YES, it has affected me negatively
- NO, it hasn't really affected me

Please feel free to comment in more detail

**45. Are you a member of PRS or PPL or another collecting society?**

- Yes
- No (please skip ahead to Question 49 on the next page)
- Not applicable (please skip ahead to Question 49 on the next page)

**46. What do you receive royalties for? Please tick all that apply**

- Live performance
- Streaming
- Arrangements
- Sync royalties / use of your music
- Something else (please specify)

**47. How much do you receive each year in royalties?(an indicative ballpark figure is fine)**

48. Do you habitually submit your returns to them?(In other words, do you feel you are leveraging your maximum possible royalty payments?)

Yes

No

## Economic Survey: Working as a Traditional Musician in Scotland

### Services you need to support your career

49. To what extent do you feel these services are needed to support you in your music career?

	Critical for my success	Very Important	Quite Important	Not important
Agent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Studio facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Music publisher	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Distributor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sound engineer or other technical support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing/PR services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legal and accounting services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Union services (i.e. Musicians Union)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Something else (please specify)

**50. In practice, how do you fulfil these service needs?**

	I have to do this for myself	I pay for this as expert support	I need this but can't get it	I don't need this
Agent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Studio facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Music publisher	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Distributor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sound engineer or other technical support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing/PR services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legal and accounting services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Union services (i.e. Musicians Union)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you mentioned another Service above, please comment here on how you fulfil it

**51. What key business/industry skill(s) would you most benefit from more training or confidence in?**

**52. Do you ever access Continued Professional Development (CPD) training?**

- No
- Yes (Please tell us how it is paid for)

**53. Have you ever accessed advice or enterprise support from**

- Business Gateway
- Cultural Enterprise Office
- Highland and Islands Enterprise (HIE)
- Other Business Support (please specify)

Economic Survey: Working as a Traditional Musician in Scotland

**Developing your music career**

Your insights on the following questions will be really helpful for our strategic efforts and sector advocacy.

**54. What would be the key(s) to increasing your income from traditional music?**

**55. If you feel there are barriers to your career in traditional music, what do you identify them as?**

**\* 56. Right now, at this stage in your music career, what specific support would be most helpful to you? (If it's funding, please specify what for!)**

Economic Survey: Working as a Traditional Musician in Scotland

**The Bigger Picture**

Please share your thoughts with us for developing the sector.

**57. Are there any aspects of the existing traditional music environment in Scotland you think could be improved?**

58. Is there anything that you have seen from other countries or contexts we could learn from in Scotland for our traditional music sector?

## Economic Survey: Working as a Traditional Musician in Scotland

### Final questions

This information will help us show the current diversity and richness of this artform and the people working in it

59. How old are you?

- Under 24                       35-44                       55-64  
 25-34                       45-54                       65+

60. How do you identify your gender?

61. Which of these options best represents your Ethnicity?

- WHITE British/English/Scottish/Northern Irish                       MIXED Other                       ASIAN or ASIAN BRITISH Bangladeshi  
 WHITE Irish                       BLACK or BLACK BRITISH Caribbean                       ASIAN or ASIAN BRITISH Chinese  
 WHITE other background                       BLACK or BLACK BRITISH African                       ASIAN or ASIAN BRITISH Other  
 MIXED White and Black Caribbean                       BLACK or BLACK BRITISH Other background                       ARAB  
 MIXED White and Black African                       ASIAN or ASIAN BRITISH Indian                       OTHER  
 MIXED White and Asian                       ASIAN or ASIAN BRITISH Pakistani

62. Do you consider yourself to be Disabled or Impaired?

- Yes  
 No



63. If you answered Yes above and if you are happy to do so: **Please select the option(s) that best describe your disability/ impairment.**

- |   |                                    |   |
|---|------------------------------------|---|
| <input type="checkbox"/> Long term pain           | <input type="checkbox"/> Visual    | <input type="checkbox"/> Speech               |
| <input type="checkbox"/> Chronic health condition | <input type="checkbox"/> Breathing | <input type="checkbox"/> Behavioural          |
| <input type="checkbox"/> Mobility                 | <input type="checkbox"/> Memory    | <input type="checkbox"/> Prefer not to answer |
| <input type="checkbox"/> Dexterity                | <input type="checkbox"/> Hearing   |   |
| <input type="checkbox"/> Mental health            | <input type="checkbox"/> Learning  |   |
| <input type="checkbox"/> Other (please specify)   |                                    |   |

64. **What instruments do you play for your traditional music?** Please tick all that apply

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Voice (Singing)          | <input type="checkbox"/> Guitar         | <input type="checkbox"/> Bodhran             |
| <input type="checkbox"/> Fiddle                   | <input type="checkbox"/> Mandolin       | <input type="checkbox"/> Double bass         |
| <input type="checkbox"/> Accordion                | <input type="checkbox"/> Cello          | <input type="checkbox"/> Harmonica           |
| <input type="checkbox"/> Small pipes/border pipes | <input type="checkbox"/> Piano/keyboard | <input type="checkbox"/> Concertina          |
| <input type="checkbox"/> Highland pipes           | <input type="checkbox"/> Clarsach       | <input type="checkbox"/> Horn or other brass |
| <input type="checkbox"/> Whistles                 | <input type="checkbox"/> Banjo          | <input type="checkbox"/> Saxophone           |
| <input type="checkbox"/> Chanter                  | <input type="checkbox"/> Drums          |  |
| <input type="checkbox"/> Flute or other wind      | <input type="checkbox"/> Percussion     |  |
| <input type="checkbox"/> Other (please specify)   |   |  |

65. **How would you describe the kind of traditional music you make, play or teach?**

Economic Survey: Working as a Traditional Musician in Scotland

A very big Thank You for completing this survey

You can help us map the sector as widely as possible by sharing this survey link with your friends and colleagues in the Traditional Music scene.

66. Our last question: Would you like to join the mailing list of the Traditional Music Forum?

No thanks

I'm already on your list

Yes Please (please provide your name and email address - this information will be separated from your survey response and stored securely)