

A group of musicians, including men and women, are gathered around a table in a dimly lit room, playing traditional instruments. The scene is captured in a blue-toned, high-contrast style. The musicians are focused on their instruments, which appear to be bagpipes or similar traditional Scottish instruments. The background shows a stone wall and a window with a wooden frame.

Working as a Traditional Musician
in Scotland
SUMMARY OF MAIN FINDINGS
June 2019

Traditional Music forum

We'd like to thank 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

2019 Traditional Music Forum
Edinburgh, UK

Cover photo © TMF; effects and design by Rachel Blanche

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 is 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. TMF's 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.

About this summary report

This summary presents headline findings from a survey of Traditional Musicians in Scotland carried out during February-March 2019. A total of 66 questions were asked, exploring the nature of traditional music made and taught, respondents' careers, their perspectives on how the sector functions and what is needed to support it.

The study explores income sources and levels, earning patterns and the availability and individual access to professional infrastructure for music production, promotion and performance. It captures the range and scale of performance and other music activity across the country, showing a cultural tradition and an artform heavily reliant on voluntary and in-kind contributions by practitioners. Barriers to careers are explored, as well as the impacts of digitalised sale and consumption of music.

The full findings, including extensive and rich qualitative responses, are presented in the main study entitled *Working as a Traditional Musician in Scotland: Full Report*, which contains the qualitative responses in full, along with the complete list of survey questions.

What our sample suggests about the sector

The survey was targeted specifically to people making, playing and teaching Traditional Music in Scotland as part of their career.

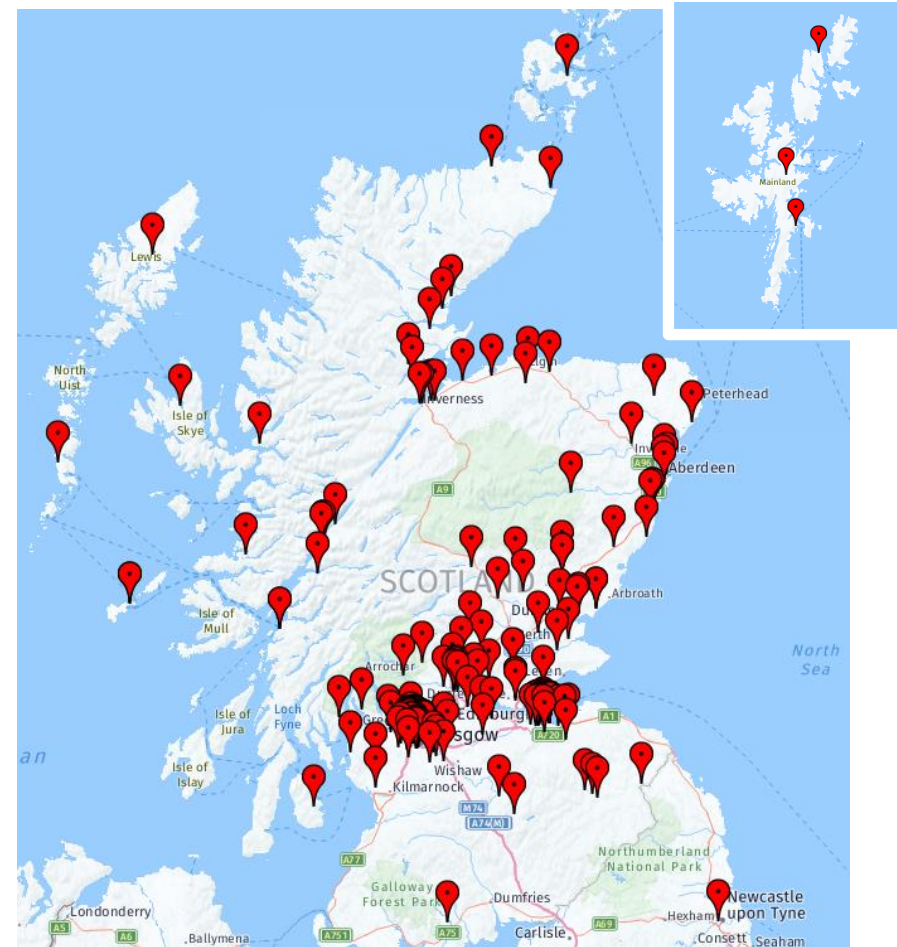
A total of 184 traditional musicians from across Scotland responded to the online survey, which was disseminated via several national bodies including Fèisean nan Gàidheal, the Musicians Union, the Scottish Music Industry Association, Traditional Arts and Culture Scotland and Creative Scotland.

These respondents are located the length and breadth of the country, from the Borders to many of the islands, with just under a third of the musicians in this survey based in the Highlands and Islands and other remote/rural areas. Within the sample, 37% are reporting from Glasgow and Edinburgh.

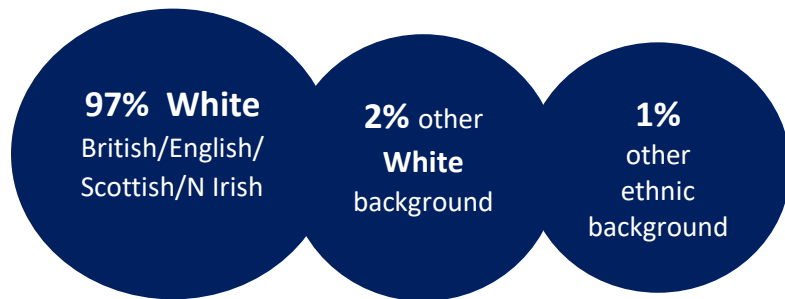
The predominant age range of the respondents is consistent with the core of people expected to be engaged in working life (24-65 years old). However a significant proportion of our sample (18%) is over 65 years old, with a commensurate level of experience and skills.

88 respondents in the survey told us their gender identification, with 61% of them stating Male gender, 39% stating Female gender, and 0% representation of Transgender or another gender identification. These statistics diverge from those of the general population, which is recorded as 51% Female and 49% Male.¹ Our survey results therefore suggest that the Traditional Music sector in Scotland has a disproportionate number of Male musicians, or else that Female Traditional Musicians have been under-represented in the data collected.

¹ Mid 2017 Population Estimates Scotland, National Records of Scotland



Based on the sample represented in this survey, the sector appears to be predominantly White Scottish/British and does not reflect the ethnic diversity of Scotland's population-at-large.



Though people with a range of limiting mental and physical conditions and disabilities working in the Traditional Music sector are represented in this sample, their numbers are not representative of the disabled population-at-large. This in turn suggests that the Traditional Music sector in Scotland is not representative of the population as a whole in terms of disability or limiting conditions.

Working in the Sector

Our sample shows a sector rich in experience, with almost half of the respondents working in the sector for more than 20 years. Another fifth have worked in the sector for 11-20 years, with only a third of respondents less than 10 years into their career as a traditional musician.

The majority of respondents in the survey earn income from their Traditional Music activities in Scotland (83%).

A third of these musicians earn money from other music genres as well.

8 in 10 of the traditional musicians in our sample are working in a professional or semi-professional capacity.

All but one of the musicians identifying as Professional and four as Semi-Professional report that they earn income from their work. Conversely the majority of those identifying as Amateur (68%) do *not* earn money from their Traditional Music activity. This suggests that generating income is a major determinant for considering oneself Amateur or Professional.

This highly skilled sector comprises both formally-trained and grassroots musicians. Around a third of respondents have a university degree (BA, MA, PhD) in music or traditional music but almost two fifths have no formal qualification, including a fifth of those working in a Professional capacity, showing this sector's strong roots in the grassroots traditional culture.

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.

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

Employment in the sector

The Traditional Music sector in Scotland is characterised by self-employed and freelance musicians (80% of respondents) and many musicians who run their own businesses.

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) are employed in sector organisations.

Professional musicians are more likely to spend all of their working time in Traditional Music (66% of professional respondents). The vast majority of those devoting less than a quarter of their working time to Traditional Music are Amateur or Semi-Professional (85% and 65% of those groups respectively).

The survey as a whole reveals a 50-50 split between whether Traditional Music represents a respondent's *primary or secondary source of income*. 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 in general,

and that 12% reported no income at all from music.² Our survey suggests that Traditional Musicians rely even less on their music as their primary source of income (with 45% of our respondents stating it as their secondary income).

People working in the sector predominantly spend either all of their working time as a Traditional Musician, or 25% or less of their working time (36% and 39% of respondents respectively)

Just over half of the respondents in this survey have additional employment parallel with 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. The majority of these additional jobs are in sectors unrelated to music.

The sector is characterised by so-called 'portfolio' careers which appear to be necessary to generate additional income.

"There is a real blindspot as to the realities of the folk world, and the hand-to-mouth aspects of the trad music industry"

² Creative Scotland Music Review, EKOS 2014: p99

Generating income from Traditional Music in Scotland

The top individual income-generating activity for the musicians in this survey is **Teaching** which is ranked as their number 1 by 45% of respondents, followed by *Performing at Private Functions* like weddings, parties or conferences (ranked top by a quarter of respondents) and then *Small-Scale Public Performances* (session gigs in pubs, clubs, hotels or restaurants), ranked 1st by a fifth of the musicians.

Only 30 respondents generate all of their income from Trad Music and the average maximum earnings across the sector are £23,896 per year.

However the most prevalent overall income-generating opportunities are provided by Performances.

Performing at Private Functions and *Small Scale Public Performances* are ranked in their top 3 by two thirds of the respondents (66%). *Large-scale public performances* (concerts, festivals) were ranked 1, 2 or 3 by 43% of the musicians. These figures make clear that Performances generate very significant opportunities for Traditional Musicians to earn money.

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.

	Most work opportunities are generated by...	Ranked in top 3 by
1	Performing at private functions (weddings, parties, conferences, dinners)	66%
2	Small-scale public performances (session gigs in pubs, clubs, hotels, restaurants)	66%
3	Tuition or education work	53%
4	Large-scale public performances (concerts, festivals)	43%
5	Management and Administration	20%
6	Other (* see below)	10%
7	Session musician for recording	7%
8	Live or Studio Production	3%
9	Commissioned Arranging or Composition work	3%
<i>(Ranked by total % of respondents who picked each within their top 3 income-generating activities)</i>		
<i>* Other things listed include performing in hospitals, care homes or lunch clubs, making traditional musical instruments, instrument set up and repair, research</i>		

The income sources most relied on are performance fees/box office receipts and teaching.

Performance fees and/or box office receipts are not only the most prominent response (with 54% of 114 respondents ranking these 1st), but when factored in as a second and third most important income-generator, these sources are declared as 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 a fifth (18%) of respondents.

The activities most relied on for income are...	Ranked in top 3 by
Performance fees and/or box office receipts	88%
Teaching or education work	65%
Ad hoc or regular session fees	41%
Direct sale of original work and merchandise (CD/vinyl, digital)	27%
Royalty payments	18%
Other traditional music income (* see below)	9%
Grants from funders	6%
Arrangements or Composition commissions	3%
<i>(Ranked by total % of respondents who picked each within their top 3)</i>	
* Other things listed include running a festival, working as a promoter, paid mentoring, research, project management, conducting, administration, music in hospitals or care	

The data provided by the musicians in this survey shows a significant proportion of respondents earning well below both this survey's average of £23,896 (around 60%) and the national salary average of £29,588

Average* income, from all of their work, across all respondents is:

Maximum £23,896
Minimum £14,520

*based on the middle (median) value in each income bracket


(around 70% of respondents) from all of their work including their Traditional Music activity.

For half of our respondents, their low-end (minimum) annual earnings come in at £10,000 or less.

For almost a fifth of the respondents who provided income data, their *maximum* income is £10,000 or less (with the majority of this group coming in at less than £5000 per year as their maximum income). Within this group, the majority are working in a Professional or Semi-Professional capacity, and they are less likely than the highest income musicians to earn money from other music genres in addition to Traditional Music, with 75% earning money just from Traditional Music. More than half of this group don't have any paid employment from another job.

Another 28% report a maximum income across all of their work in the bracket £11,000-£20,000. They are predominantly self-employed and freelance, and 57% of these respondents have no other employment.

A quarter of the respondents report their maximum income as £21,000-£30,000, of whom almost half devote less than 50% of their working time to Traditional Music work, considering Traditional Music to be their secondary source within this income. Two thirds of this group have other employment that contributes to this income.



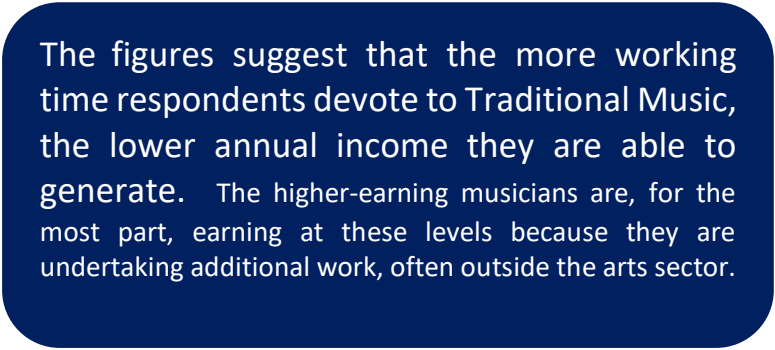
Only 6 in 10 of those who devote all their time to Traditional Music are able to generate all of their earnings from Traditional Music alone

Among the sample of 50 respondents who *devote 100% of their time* to their music career, the majority earn in the £16,000-£20,000 range. Of these fifty 'full-time' musicians represented in this survey, only thirty (60%) say that *all of their income* comes from Traditional Music work,

meaning that for the remaining 20 people their income doesn't match the time they are devoting to the sector.

A significant number of respondents (just over a quarter) indicate maximum earnings of over £30,000 in the last 5 years. However, 6 in 10 of these respondents have other jobs including professional capacities not related to the arts (i.e. company director, engineer, lecturer), revealing that in most cases the bulk of these earnings are coming from other sectors. The majority of this grouping (62%) consider Traditional Music to be their *secondary source* of income, and it brings in 25% or less of their earnings for 68% of them.

Overall this survey shows a sector that relies heavily on employment beyond the Traditional Music or music sector in order to generate a reasonable income.



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, 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 even from the very lowest income brackets.

Unpaid contributions to the Sector

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

Two thirds of our respondents performed for free in the last year in order to advance their music career. These include people at all career stages, though the incidence decreases the longer people have been working in the sector.

1 in 4 of the respondents said that, aside from performing, they had delivered other music-related services for free which they felt should have been paid for, including short sets and floor spots, teaching and workshops, educational performances and organising events. Traditional Musicians routinely help each other out for free as session players and band members.

41% of respondents contribute voluntary time to the artform in the community

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.

Two fifths of respondents contribute voluntary time to the artform in the community, comprising informal public performances, organising community music, education and development for young people, music in charitable, care and community settings, for Fèisean and festivals and as members of committees and boards.

"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"

In addition to the paid and unpaid working time devoted by respondents to the sector, all respondents practice to hone their skills for at least 5 hours per week, on top of band practice or rehearsal. Half of the respondents practiced 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.

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

Performing Traditional Music

99% of respondents perform traditional music in Scotland

Performance is the mainstay of Traditional Music in Scotland. All except for one respondent perform traditional music in Scotland, showing that performing is central to a career in Traditional Music.

The survey sought to capture the nature and volume of Traditional Music being performed on a regular basis by Scottish musicians. 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.

A significant part of the sector is performing regularly: a quarter of respondents are performing *pub sessions* and/or *ceilidhs* once a week; another 40% 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.

Other performance types reported by the musicians 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 reporting a handful each year)
- Performances for voluntary sector social groups
- Performances for competition
- Performances as part of projects with community groups



Only 7% of Traditional Musicians report having a third party involved in booking any of their work. Musicians' own independent arrangements may involve self-financing their own venue booking and promotions.

That these performance opportunities are largely self-generated and self-managed shows the extent to which Traditional Music in Scotland relies on the musicians themselves to make it accessible and possible, on the basis of their own networks and often with their own money staked upfront.

Our survey shows that Scotland's Traditional Musicians have a global profile and an international fan base.

All but two of the 113 musicians who answered this part of the survey perform in Scotland; two thirds of them also perform elsewhere in the UK

and almost half perform in Europe. Other world regions performed in by the traditional musicians in this survey are USA/Canada, Australia and New Zealand, Asia and Middle East, as well as North Africa, West Africa and the Falkland Islands.

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; another quarter 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.

Marketing Traditional Music in Scotland

Of the 114 musicians who responded on this topic, 1 in 8 report that they *don't market themselves* or their music.

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

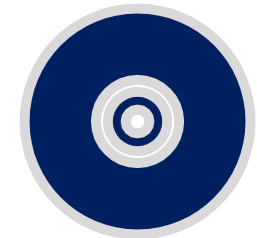
Aside from social media, the next most prevalent marketing tool seems to be *word of mouth*, which is cited by 68% of the respondents as an important way of marketing and promoting themselves and music. It may be presumed that some of this takes place online.

Only 16 respondents report using a paid PR service or an agency to promote themselves, their band, their music

products or activities. Indeed 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.

Recording and selling Traditional Music

With one of the key drivers for this survey being to generate insights on the effects on the sector of increasing digital consumption of music and resultant shifts in industry practice, a key aim was to profile Recording Artists in particular.



A total of 69 respondents in this survey make recorded music, representing 62% of the survey population that engaged with that part of the survey (n112). The majority of this grouping (91%) are Professional and Semi-Professional, with only 6 of the people who record their music 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 well as *all income brackets* (though they make up a slight majority of those who earn more than £30,000).

Respondents in the Recording Artists group are less likely to have other employment in addition to their Traditional Music career and are consequently *more likely to consider Traditional Music as their primary source of income*.

Only 9 people in the whole survey have an agent. They are all 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 a small number (ten) of the musicians in this survey are signed to a record label; needless to say they are all from the Recording Artist grouping. Their responses highlight specific challenges with being contracted to a label including production costs being passed down the chain to the musicians, and limitations on selling music independently or online.

The main way of selling recorded music remains CD/vinyl direct to fans at gigs.

Only a quarter of the musicians who sell their music report using a distributor for retailing CDs or records. Of the musicians in this survey who have recorded music for sale, 10% haven't managed to make any sales.

In 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 (reported by 63% of the recording artists). In addition to this, two fifths of this grouping make music sales through *online streaming*.

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

Over half of the Recording Artists in this survey use *aggregator sites* to sell or distribute their Traditional Music online. The sites used most commonly by respondents in this survey are Bandcamp, Emu Bands, Threads of Sound and CD Baby. Of this grouping 72% report that they earn income from music sales via these platforms.

Respondents' annual revenues from aggregator sites are wide ranging, from as little as £5 to as much as £3000. The majority (65%) earn £250 or less, suggesting that earnings from music sales via these platforms tend to be extremely modest. Only four respondents reported earnings breaking into four-figures.

The perceived effects of increasing digital consumption on traditional music careers are mixed, with respondents recognising both positive and negative effects.



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% of respondents who don't record their music), suggesting that digitalisation has created additional opportunities for them to gain profile, promote their music and make online sales.

4 in 10 of the recording Artists feel that increasing digital consumption hasn't affected their careers or income in a significant way. Among those who aren't recording artists, 8 in 10 feel that digitalisation hasn't had any discernible effect on their music career.

"CD sales were a significant earner ten years ago. Sales have dropped by 60% and downloads / streaming income has not replaced that".

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 the 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.

"We're increasingly expected to provide digital tracks or videos online, but I'm [not] in a place financially to afford to produce these"

For those performers who aren't recording artists, the online market place represents a promising opportunity. However the costs and logistics of producing digital content are seen as challenges to overcome.

Collection of Royalties is fragmented with many musicians not maximising their possible payments.

Of 105 people who responded regarding royalty collection, the majority (two thirds) are members of a collecting society; however 57 people said that they do not submit their returns habitually, suggesting that people working in the sector are not maximising their possible royalty payments.

The biggest source of royalties for the performers and recording artists in this survey is *Live Performance*, followed by *Streaming, Arrangements* and *Sync royalties*. Another other royalty generator mentioned by respondents is *radio play*. 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.

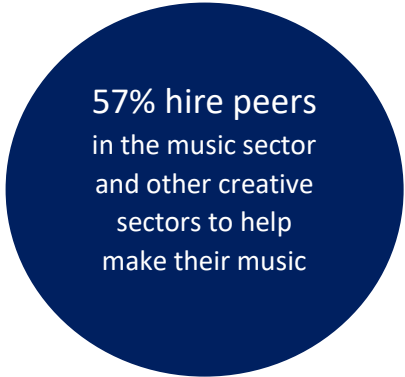
Indeed, a number of respondents express a need to understand more about how royalties work as part of their professional development.

Annual revenues from royalties are extremely modest for those in the sector represented in this survey. According to MU, over half of musicians across the whole UK music industry consider their royalty returns as 'economic valuable'.³ To find a majority of just 'over half' in our Traditional Musician sample, the bar needs to be lowered to an annual return of £50. Only 47% of respondents receive more than £200 per year from royalties, with many in our sample receiving nothing.

"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"

³ MU 2012. The Working Musician, p19

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.



The predominant activity is to employ *other musicians and singers* (mentioned by 44% of the respondents). *Video filmmakers* and *sound or other technical support* are each bought in by a quarter of the musicians. *Graphic or web designers* are also hired by a fifth of the respondents. *Music producers* and *PR professionals* are also employed, along with *Photographers, Artists and designers* and *Printers*.

This shows that the sector exists within its own ecosystem of skills and services, with correspondent economic impacts. However, as highlighted earlier, 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 57% of respondents who play in *more than one band*, in addition to their own band or solo music.

Support for Making, Producing & Promoting Traditional Music

There is a need for, but limited Access to, core Professional Services. Respondents were asked to what extent they need certain services to support them in their career, and then whether they are able to access and pay for these services. Despite evidence of mutual employment and support within the sector, the survey highlights gaps in what the majority of musicians are able to afford, especially in relation to their own careers and development.

	Top expert services that respondents pay for
1	Union services
2	Studio facilities
3	Sound Engineer /Other Technical support
4	Legal and accounting services
5	Distribution



Studio facilities are important to 7 out of 10 of the Traditional Musicians who answered this question, and the majority pay to access them professionally. Three quarters of the respondents need sound and tech engineers, of whom 62% pay for these as expert services.

Roles respondents tend to <i>do for themselves</i>	
1	Promoter
2	Agent
3	Manager
4	Marketing/PR
5	Legal and accounting
6	Sound Engineer / Technician
7	Music Publisher
8	Distributor

7 in 10 do their own marketing and PR with only 19% paying for external services

This data shows a sector that finds itself having to fulfil a lot of roles for itself in the absence of a supportive performing and recording industry.

Top things respondents <i>need but can't access</i>	
1	Music Publisher
2	Agent
3	Distributor
4	Manager
5	Promotor
6	Studio Facilities
7	Sound Engineer/ Technical support

Overall only 26% of the 95 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. 60% say they feel they have to do this role for themselves. Just under 10% report that they need agency

representation but can't access it: they are all from the 'Professional' category, the majority being Recording Artists.

A significant proportion of respondents (72%) signal that they *don't* feel they need management in their career including 6 in 10 of the Recording Artists. Conversely 10% (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 (the majority again being Recording Artists). Management is something that the majority of respondents are doing for themselves.

"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"

Our survey shows a deeply interconnected sector with many 'hired hands' relying on the skills of those who have the agreements with agents, promoters and labels, within a tiered business structure with little recourse for influencing working terms and conditions

"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"

Developing the Sector

Key development skills desired by the Traditional Musicians in this survey, across all career stages, 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



For early career Traditional Musicians (those working less than 5 years in the sector), *marketing and promotion* are common requirements. Navigating the world of *bookings* is also highlighted, learning *'how to' build a career*, along with support in building *professional performance and composition skills*, and *networking*.

For those more established in their career (6-10 years), *marketing and promotion* are the predominant requirement, with one respondent specifying guidance on internet promotion. *Legal* knowledge, *royalties*, and *health and safety* are also areas highlighted as training needs along with support in *building professional careers*.

Those Advanced in their Traditional Music careers (11 or more years) report the same requirements: *Marketing and Promotion*, how to increase *bookings for paid gigs*, *technical skills*. *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*.

"To be successful in folk music and at the top you have to compete at a rock music business level"

One third of respondents have accessed CPD while two thirds have not. Those who do access CPD are evenly distributed across all of the career stages, though Professional Traditional Musicians are most likely to have accessed CPD training. Half of the respondents always or sometimes pay for CPD themselves. For 28% of the respondents who have accessed CPD, these opportunities are subsidised by organisations like TMF and MU or by their employer, while a third of respondents gain funding for CPD from Creative Scotland, YMI and other sources.

Just under half of the respondents have accessed business services, the majority of whom (73%) have received support or advice from Business gateway, and a quarter each from Cultural Enterprise Offices and HIE. However, over half of the people who engaged with this topic in the survey hadn't accessed any of these services. *Other* business support agencies accessed by respondents include: Hands Up for Trad, TMF, SMIA, SMC.

6 in 10 respondents have not received any external funds to support their work. Of those who have accessed external funding in the form of grants, patronage or crowdfunding, a quarter have used it 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*.

The traditional musicians in this survey identify a number of keys to increasing their income (consistent across all income bands and professional levels):

- Increasing opportunities for paid performances
- Raising fees and levels of pay, ideally to MU rates
- Creating a culture of paying for services, overturning expectations for people to work for 'next to nothing'
- Wider promotion of Traditional Music and performers
- Access to more contacts and networks
- Greater access to agents and promoters
- More paid time to devote to Traditional Music work

The survey asked respondents to consider whether they perceive any barriers to careers in Traditional Music, and if so what they are. A range of environmental/sector issues emerge, as well as individual career barriers.

'Environmental' barriers to careers in traditional music include:

- *Geographic location*, presenting barriers for those in the Highlands and Islands of access to musicians, high travel costs and varying professional standards
- A healthy supply of musicians but *limited demand/paid work*
- Lack of *agency representation* and monopoly among those who are represented
- A prevalent 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

Main individual career barriers include:

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

Issues of special concern emerge from the responses with reports of industry sexism highlighted by a number of female respondents, and ageism mentioned by both genders.

Sexism as a Barrier 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 report gender-specific barriers including sexism. 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.

The main support needed right now (reported across all respondent groupings) can be summarised as:

- Support from an Agent, Manager and Promoter
- Training in business skills and access to mentors
- Networking opportunities
- Maternity & 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.

Enhancing the conditions for Traditional Music in Scotland

The respondents provided rich comments on how the existing environment in Scotland for Traditional Music could be enhanced. Key themes from this feedback relate 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 respondents as examples of inspiring practice for Scotland's sector. Comments centre around how Traditional Music is valued and respected in society, policy mechanisms for supporting music salaries, provision for touring and accessible infrastructure, and educational initiatives.

"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"

If a single overarching theme might be identified across the myriad of points raised by the respondents, it concerns addressing the way in which Traditional Music is valued within Scottish culture, with corresponding value assigned to musicians' services and pay.

Actions to strengthen the sector

A number of actions have been identified by the Traditional Music Forum on the basis of this study, to be undertaken by individual musicians, businesses, organisations and funding bodies, and by TMF itself 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

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

Detailed reporting on everything presented in this document is available in our main study entitled *Working as a Traditional Musician in Scotland: Full Report, June 2019, TMF*