

## Mapping the Traditional Sector in Europe: Stage One Survey 2020

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## European Folk Network

### MAPPING THE TRADITIONAL SECTOR IN EUROPE STAGE ONE SURVEY 2020

**EUROPEAN FOLK NETWORK****MAPPING THE TRADITIONAL SECTOR IN EUROPE – STAGE ONE SURVEY**

Authors: Simon McKerrell & Nod Knowles, December 2020.

**A. Executive Summary**

Between May and October 2020 the European Folk Network (EFN) conducted a survey aimed at those organisations working in or with folk or traditional arts across the European continent. The survey is continuing but this report covers the 173 initial responses gathered between May and October. Detailed information on each question is provided in this report.

- The **173 respondents** to the survey were self-selecting and came from **30 countries from across the European continent and near neighbours**.
- For 83% of respondents, **all, or more than half of all their activity is concerned with traditional arts**.
- **95% of respondents work with traditional or folk music, 30% with dance and 15% with storytelling**.
- **63%** of respondents work with their **national traditions**, and **36%** also work with **traditions from elsewhere** in the world as well as European indigenous traditional arts.
- Respondents covered a wide range of activities and many organisations cover more than one area of work. The vast majority of respondents work with live performance in the form of concerts and festivals, and many respondents also reported working in educational settings such as providing workshops or community projects.
- The 173 respondents to the survey present **5,778 concerts per year**, an **average of 55 concerts** a year. They organise **387 festivals** and over **8,500 workshops** per year. 11 respondents present showcases in which there were a total of round 125 concerts.
- In broad terms, respondents **reach around 2 million people per year** in total, **averaging circa 17,188 audience members** per year, with over **38,000 participants in community projects** and **22,632 people reached through workshops/classes or residential courses**.
- Respondents derive their income from a wide range of sources but primarily from two main sources - **ticket sales** for live performance and **public funding** (national and regional).
- Organisations who responded work across a variety of all the age ranges of people in Europe and the vast majority (**68%**) **work with young people under 25**.
- The 173 respondents support circa **813 salaried jobs**, with a **similar number of project and voluntary staff**. **On average they employ 8 people in their organisation**.

**B. Introduction: Mapping the sector**

*This Stage One mapping survey was generously supported by Creative Scotland and British Council Scotland via TRACScotland and by EFN's Members and Founding members. Wales Arts International supported an additional element to the research, looking at how young people engage with traditional arts and music and this work will be the subject of a separate qualitative report.*

Between May and October 2020 the European Folk Network (EFN) conducted a survey aimed at those organisations working in or with folk or traditional arts across the European continent. The survey is continuing but this report covers the 173 initial responses gathered by October 2020.

This Stage One survey represents the first steps in understanding the state, nature and development of the people and organisations active in traditional arts in Europe and will inform EFN's future work.

At the inaugural EFN conference in November 2019 members agreed that mapping the size and scope of the traditional arts sector in Europe was a high priority for the network and would be invaluable in advocacy.

Although it was recognised that this would be a long-term and multi-stage project, EFN began in early 2020 with the current Stage One research. The survey was created with a set of questions seeking basic information and responses were collected using the online platform Survey Monkey.

EFN sought responses predominantly through a series of emails and reminders, to subscribing EFN members (approximately 80 when the survey began) and to a wider list of (approximately 500) contacts with known interests in the traditional arts. Recipients of the emails were encouraged to take the survey but also to pass the link to their own contacts with further encouragements to respond. This brought EFN to the attention of people and organisations who were not already on those lists and thus broadened the reach of the survey.

It was hoped that EFN could hold meetings across Europe in 2020 to recruit members and publicise the survey. This was not possible and postponed due to the Coronavirus pandemic.

By the point at which this analysis and report is written there were 173 responses. As a self-selecting group these respondents are not necessarily a fully representative sample of the undoubtedly much wider traditional sector but do give an initial indication of the scope and breadth of the individuals and organisations operating across Europe.

Responses have continued to come in and the collection of information will continue - and subsequent surveys and reports encompassing new respondents will revise and update the findings. EFN is publishing the results of this Stage One survey and will use the information in future campaigns, whilst endeavouring to support further and more detailed research.

## **C. Detailed Report and Analysis**

### **Method**

A survey was conducted between May and October 2020 aimed at those organisations working in or with folk or traditional music across the European continent. The initial responses gathered by October reached 173. This purposive survey represents the first steps in understanding the state, nature and development of European folk and traditional arts organisations and will inform the future development of the European Folk Network (EFN).

### **Report**

The basic information accumulated by the survey gives an initial understanding of the organisations involved in folk and traditional arts in Europe, what they do and their own membership. This detailed section of the report and analysis is divided into three basic sections:

- 1. Profiles of Respondents**
- 2. Traditional and Folk Activity**
- 3. Youth Engagement**

**1. European Folk - Profiles of Respondents**

This survey was ‘purposive’ – meaning that it was aimed only at those organisations across the continent of Europe that are actively engaged in folk and traditional arts performance and education and advocacy. The results therefore tell us something about who is involved currently and what they are doing, and although obviously not totally comprehensive they comprise a platform upon which to build in future years, and can assist the development of the EFN in the coming months.

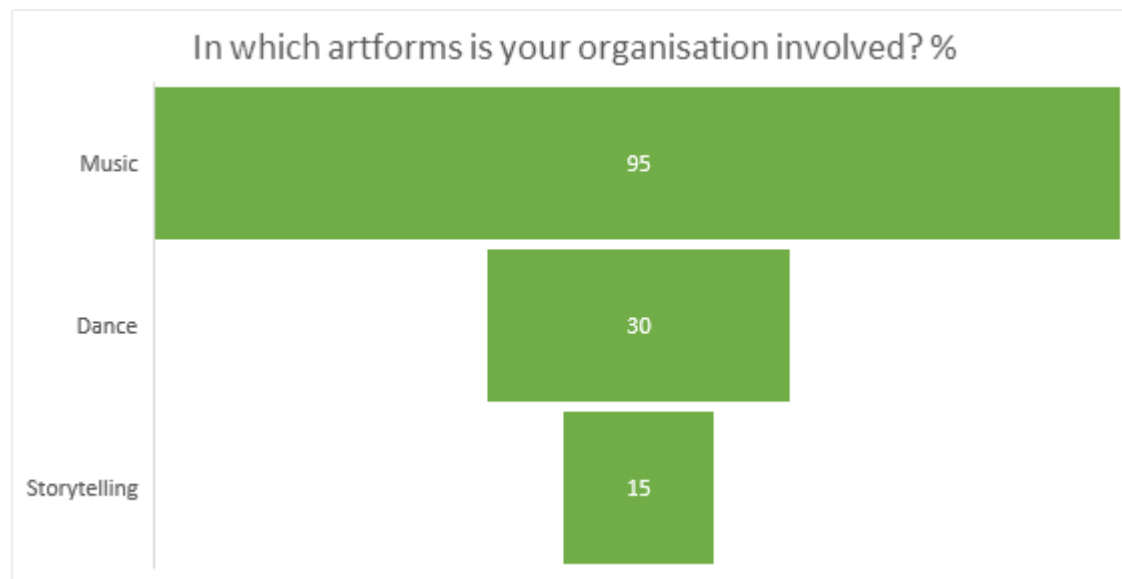
**Which nations?** Respondents to the survey were asked to give their own free-text response for their country of residency. Respondents came from 30 different countries across the European continent:

Belgium	33	France	3	Latvia	1	Serbia	1
Catalonia	2	Germany	9	Northern Ireland	2	Spain	1
Czech Republic	1	Hungary	1	Netherlands	7	Sweden	3
Denmark	2	Iceland	1	Norway	7	Turkey	1
England	6	Ireland	5	Portugal	2	Ukraine	1
Estonia	1	Isle of Man	2	Russia	3	UK **	29
European	1	Italy	8	Scotland	24	Wales	18
Finland	2						

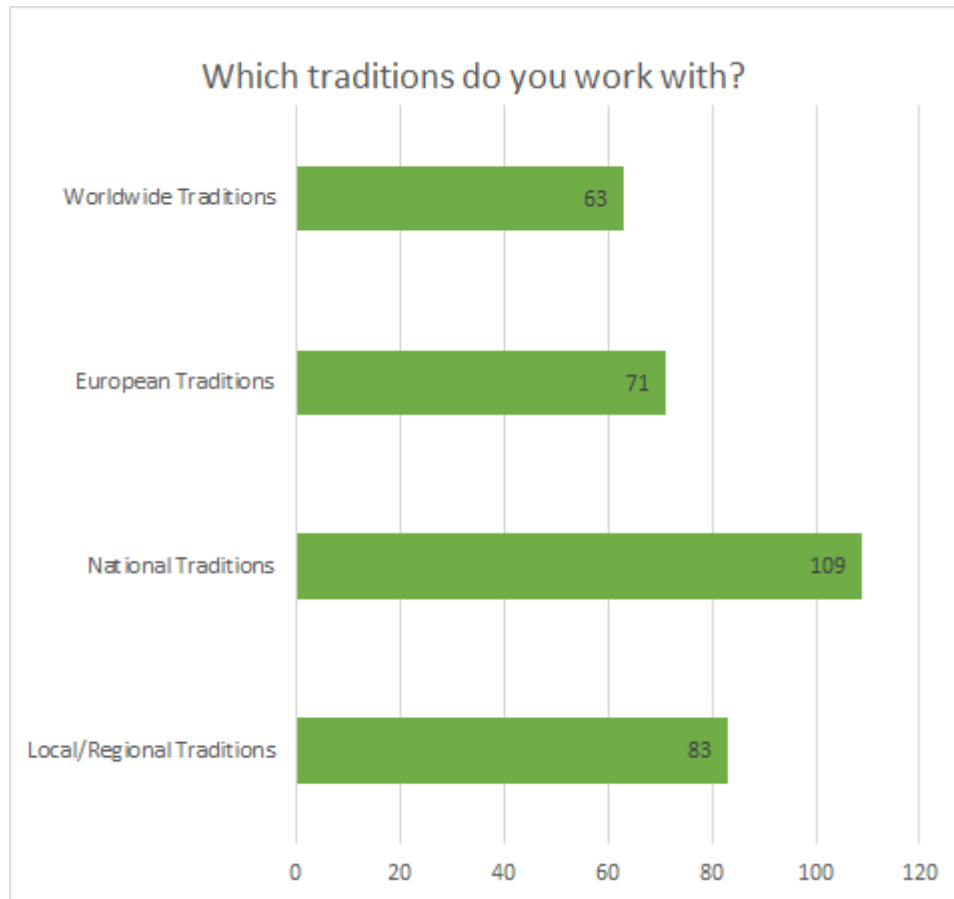
*\*\* Note: UK figure includes some duplicates who indicated primary membership of one of the four UK nations but also indicated UK residency*

**How much of the organisation is folk?** 83% of the respondents to the survey indicated that all, or more than half of all their activity is concerned with traditional arts. This would be expected when surveying people with a direct interest in the scene, but around a fifth of the respondents also suggested that traditional arts represent less than half of their activity. The information therefore suggests that most of the organisations that are involved in traditional arts exist primarily to promote, advocate and educate those with an interest in traditional music, dance, storytelling across the continent, and are not necessarily organisations with a wider or different educational remit.

**Which arts?** By far the overwhelming number of respondents are working with traditional or folk music:



**Which traditions?** Respondents were working not just with European indigenous traditional arts, but were also working with music, dance and narratives from elsewhere in the world:



It is perhaps surprising that more organisations are not working directly or exclusively with local or national traditions of song, music or dance, but issues around plurality and diversity are critically important for the folk communities across Europe at this time. Therefore the European Folk Network will need to gather more granular information about the types of traditional arts that individual members work with whether in festivals, educational classes or online.



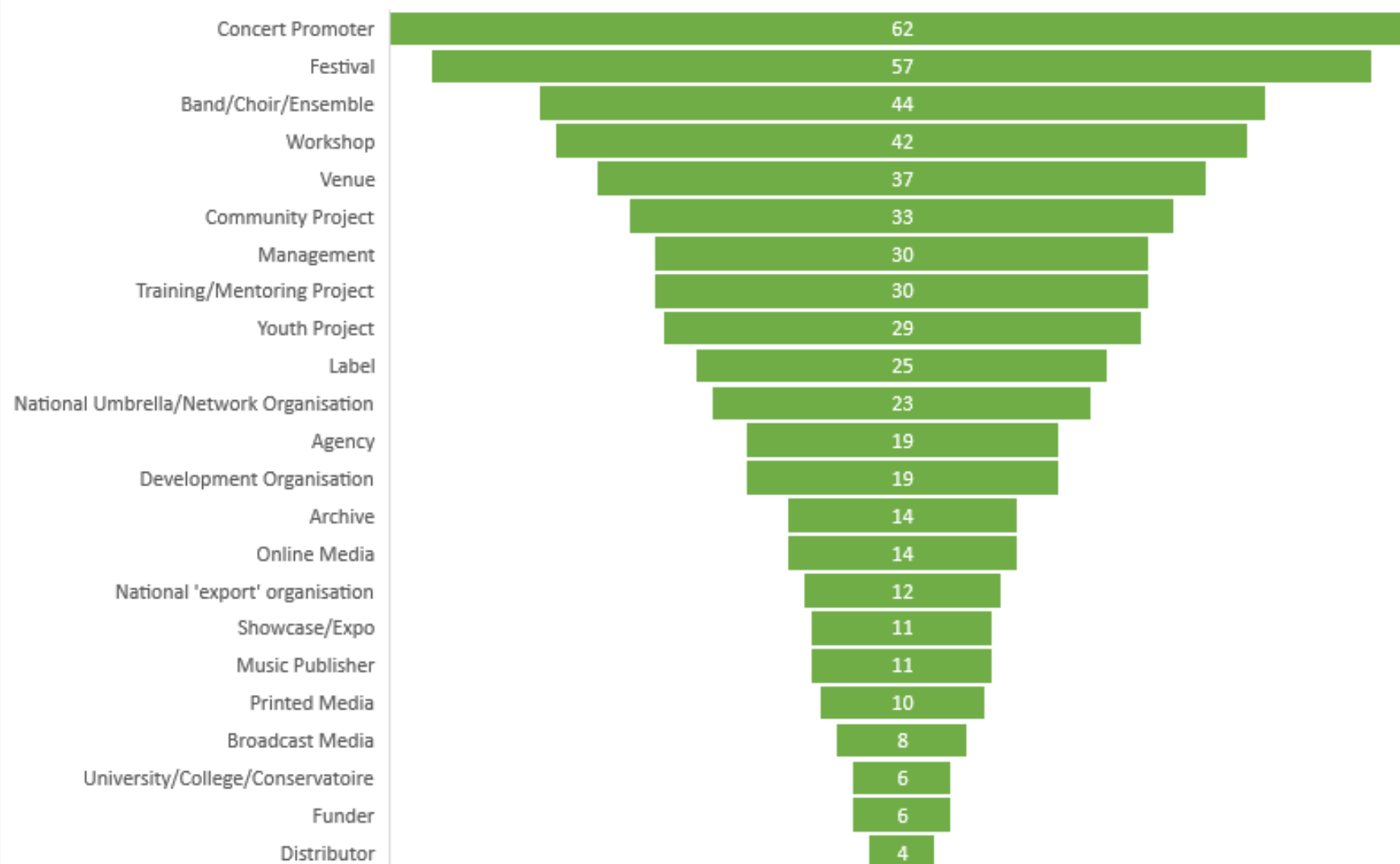
**Definitions?** A key consideration for the new network is whether to consider limiting membership to those organisations that are primarily focused upon 'traditional arts', or 'folk music' or whether to maintain a broader scope for members. There are benefits and disadvantages to both paths ahead. One key consideration however is whether as an umbrella advocacy and lobbying group the EFN wishes to pursue political or policy-related advocacy for traditional music, song, dance and storytelling as distinct genres of practice which would essentially require a working definition of 'traditional arts'. Or, whether the EFN becomes a networking organisation primarily that involves sharing good practice and information across the continent to facilitate traditional arts. This would not necessarily involve any focus upon defining or pinning down traditional arts.

As many will know, defining traditional or folk music or dance has been both a strength as a conversation amongst participants, and a weakness in the distraction it can serve. A working definition set out by Simon McKerrell can be found on his website at <https://simonmckerrell.com/2014/06/02/98/>. He argues in favour of putting forward a working definition because it allows the purpose and advocacy for traditional arts to be better refined, and a clearer argument for resources to be put in place.

What is not in doubt, is that this is a complex area, and traditional musics from within Europe now contain many second, third and fourth generation traditions brought by migrants from outside Europe, meaning that in some senses, getting united behind a definition that places the focus on transmission and orality, is in many ways more inclusive than relying on the many and often, problematic (or even racist) definitions of 'traditional' arts that have historically been based upon ethnicity, race, geography, national identity or pre-industrial activity. This will be a key issue for the EFN in defining its mission in the coming months. An inclusive definition that relies on practice rather than origin would be far more inclusive for different populations, constituencies and national traditions around the continent and who have made their home in Europe.

**Which roles?** The majority of respondents to the survey were concert promoters, festivals or bands, choirs or ensembles. That is to say, that the majority of respondents to the survey were involved in presenting or performing live folk music. This was closely followed by educational or training as a secondary activity which would largely follow the patterns in other genres of performance across the continent.

### What does your organisation do (tick all that apply)?



## 2. Traditional and Folk Activity

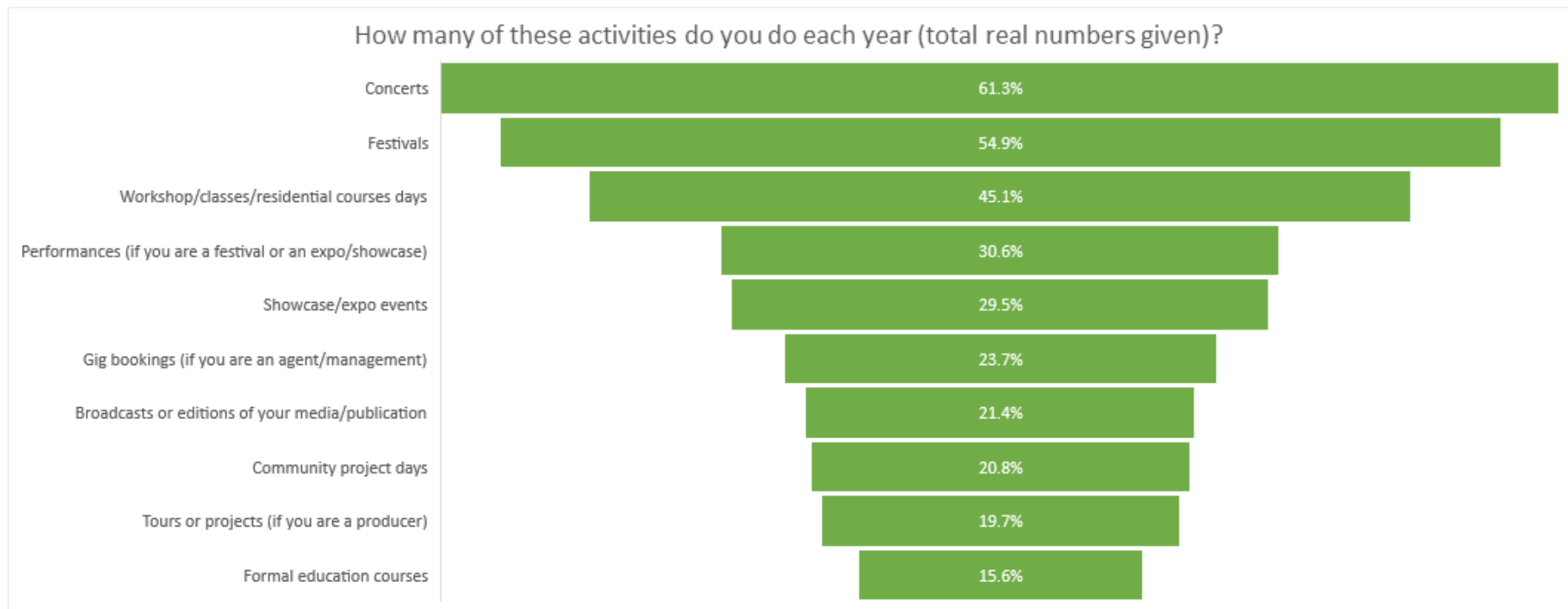
**How many activities?** Respondents to the survey reported presenting circa 5,778 concerts per year with an average of 55 concerts a year. They are involved in around 387 festivals and arrange over 8,500 workshops per year. Respondents organising showcases present a total of 125 concerts annually.

If we assume that the survey sample may have attracted around 10% of the actual scene, then that would give a very rough estimate of around 50,000 traditional arts performances each year across the continent, around 3,000 festivals and perhaps 80,000 to 100,000 workshops (very broadly defined) every year.

	N (number of respondents to each)	Sum	Median
Concerts	106	5778	20.00
Festivals	95	387	1.00
Showcase/expo events	51	125	2.00
Performances (if you are a festival or an expo/showcase)	53	3891	15.00
Gig bookings (if you are an agent/management)	41	2939	40.00
Tours or projects (if you are a producer)	34	259	3.00
Formal education courses	27	5519	2.00
Workshop/classes/residential courses days	78	8655	5.00
Community project days	36	792	2.50
Broadcasts or editions of your media/publication	37	993	8.00

**Which activities?** The majority of respondents to the survey are involved in promoting concerts and festivals, and around half organise workshops, classes or residential days or courses every year. The following numbers are a simple count of how many respondents reported organising at least some of these event types every year.

What this demonstrates is the potential for the EFN is to act as a voice for a very professionalised folk music scene; both in terms of live performances of music and dance and storytelling, but also in terms of the professional performers, festival organisers, and all the associated social and economic benefits that accrue to the creative economy. However, this will be a key question for the EFN members: how much do they wish the EFN to be a representative body for the professionalised scene, and/or how much work does the membership wish to do for the voluntary and charitable traditional arts right across the continent?



**How many people?** With outliers\*\* removed, we can say fairly confidently that respondents reported reaching around 2 million people per year in total, averaging circa 17,188 audience members per year, with over 38,000 participants in community projects and approximately 22,632 people reached through workshops/classes or residential courses each year.

This work is carried out by approximately 36,000 members across 173 organisations, averaging around 1,491 per individual organisation. Clearly, there are some groups with only a handful of members, and some with thousands, but in the table below, the extreme outliers\*\* have been removed from the data to show the figures that exclude skewing figures from extremely large businesses that responded to the survey.

	Audiences	Delegates at showcases/expos	Students in formal education courses	Students in workshops/ classes/ residential courses	Participants in community projects	Readers or listeners or viewers of your media/ publication	Members - if you are a network or an umbrella organisation
<b>N</b>	113	46	26	61	36	36	24
<b>Mean</b>	17188.04	144.83	232.08	371.02	1080.28	23078.33	1491.38
<b>Median</b>	2000.00	4.00	7.00	50.00	50.00	900.00	95.00
<b>Sum</b>	1942249	6662	6034	22632	38890	830820	35793
<b>Minimum</b>	0	0	0	0	0	0	0
<b>Maximum</b>	500000	2000	3000	9000	22500	500000	27000

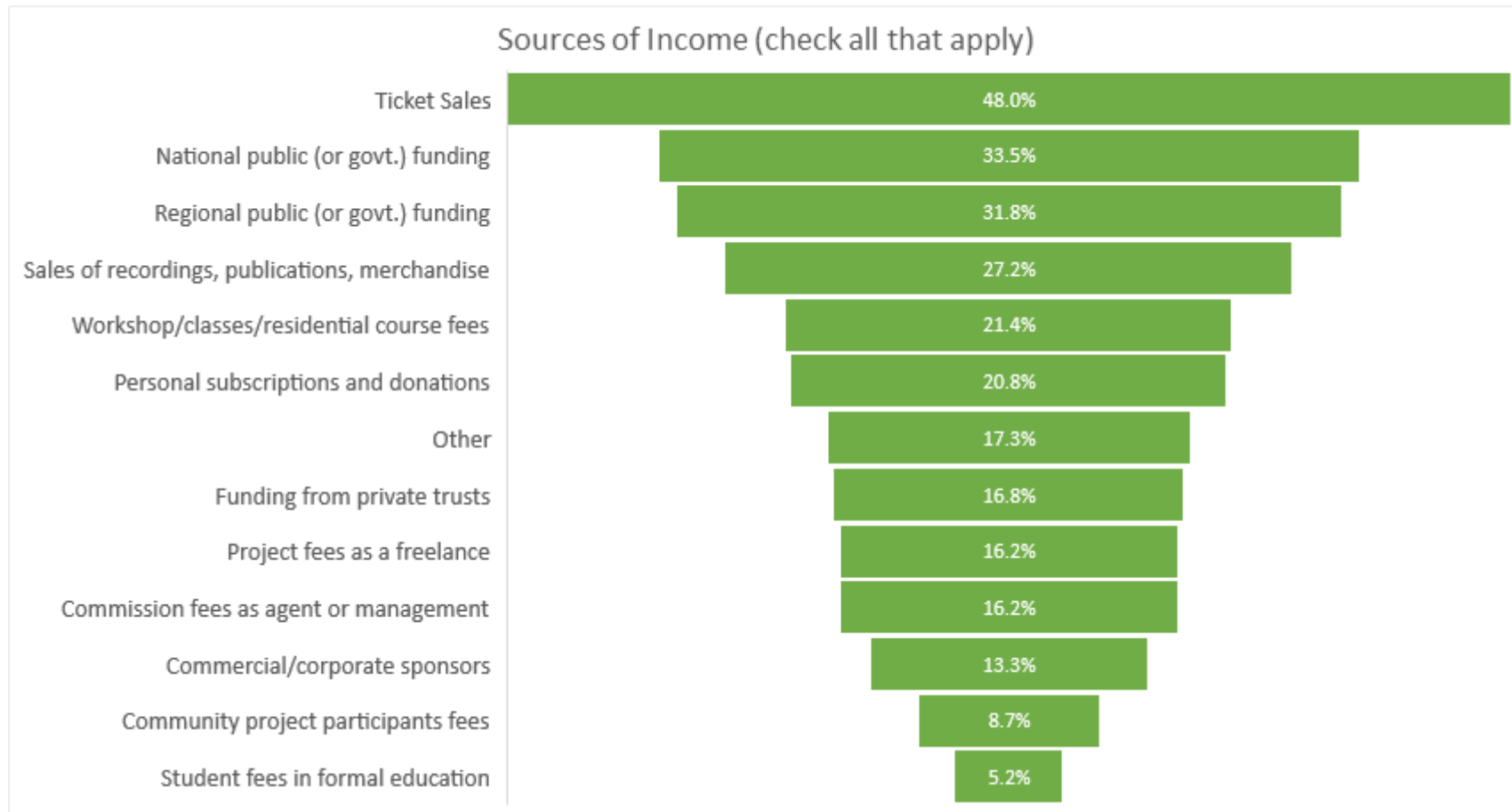
[\*\* Four outliers were removed in this section whose data significantly skewed the range, median and sum figures to enable a more representative picture for the vast majority of respondents.]

**Membership?** The average membership of respondents' organisations was 1,491 people with a median figure of 95, which is a figure that is obviously slightly skewed towards larger membership organisations, of whom there were quite a few in the survey respondents. Nevertheless, the figures represent real numbers from across 173 respondents across the European continent.

Figures also show a large difference between the *median* audience figure of 2,000 people reached per annum as against the *mean* of 17,188. This can be explained by the presence of several fairly large organisations in the survey who have very large festivals or events that happen annually.

The EFN will have to consider how it represents both the very large organisations with a professionalised staff, and those member organisations doing equally valuable work in their local community with much smaller numbers of people and smaller audiences. Some questions of scale should be addressed in the purpose and mission of the EFN as it develops in the coming years.

**Money?** The sources of income for respondents to the survey represent a fairly predictable pattern derived primarily from live performance and local or national public funding:



**Income questions?** One question that will need to be examined for the EFN is whether to think about income commercially, and in terms of public funding, given that the different nations around the European continent all have very different cultural policies and patterns of funding for traditional arts.

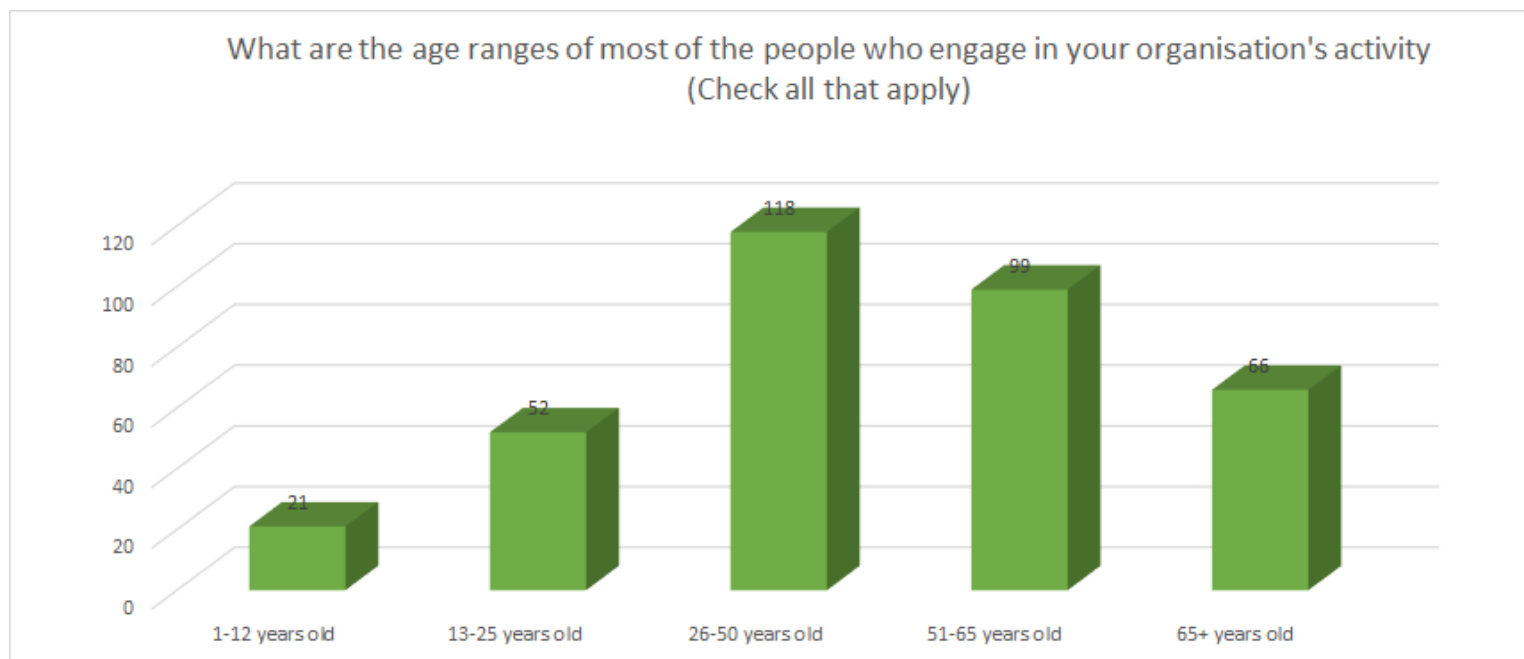
More granular data on when income emerges during the year, and what organisers' expectations might help to refine our understanding of how sustainable the traditional arts are, and especially in planning for future catastrophic events such as the Coronavirus pandemic situation of 2020.

Economic stability would be a question worth examining in more detail, and how different organisers manage their reliance or rejection of national and regional public money in relation to their mission and other sources of income and expenditure. It would be a great advantage to the EFN to gather information about the role of the state and public funding for traditional arts across the continent, both to help members in arguing and advocating for traditional arts in their own countries but also to provide a long term understanding of public funding trends across Europe.

**Employment?** On the evidence of this survey, the 173 respondent from the folk scene support circa 813 salaried jobs, with a similar number of project and voluntary staff. The average number employees is 8 (this excludes the outlier figures).



And age groups?



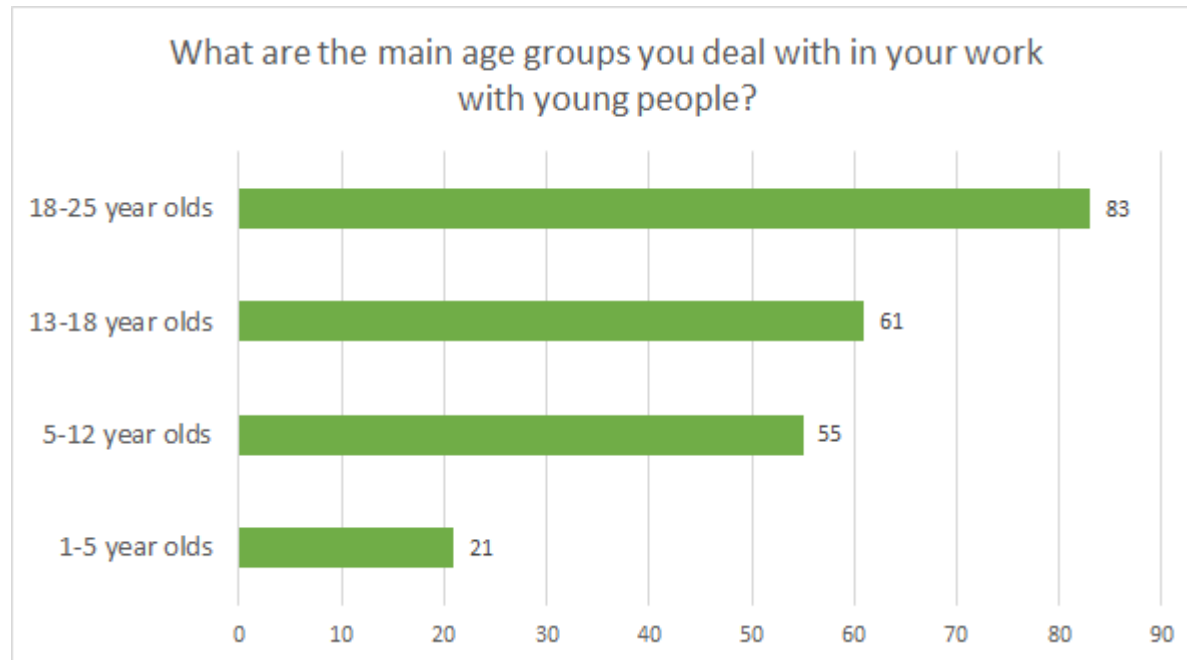
### 3. Youth Engagement

**Who's involved?** Whilst respondents work with people of all ages, around 65% of respondents work with young people aged under 25 and around 30% do not work with young people:

Does your work involve young people (age under 25 years) in any way?			
		Frequency	Percent %
Valid	Yes our work involves young people	113	<b>65.3</b>
	No our work does not involve young people	53	<b>30.6</b>
	Total	166	96.0
Missing	System	7	4.0
Total		173	100.0%

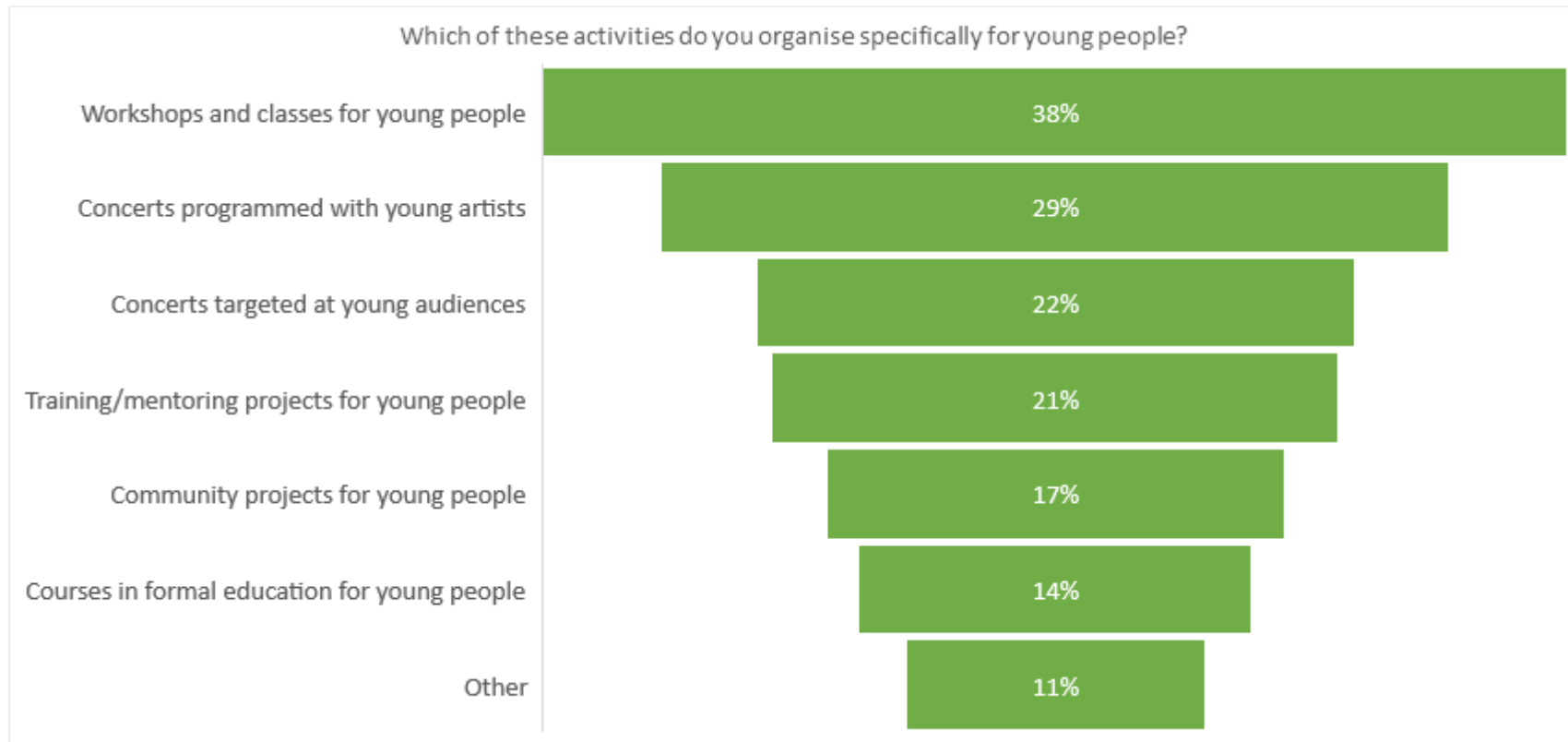
These figures are unsurprising for performing arts, given so much of the activity is based around live events and festivals as well as educational programmes.

**Which age groups?** What was a little more surprising however was when asking the 113 organisational respondents who do work with young people which age groups they work with, there was a definite bias in favour of older teenagers and young adults.



One of the key areas of policy and advocacy that the EFN board should consider is how involved with young people's education and advocacy they wish the organisation to be. There are surprisingly few respondents to this survey working with young people, and although not comprehensive as a survey, it indicates that more real figures and research could provide a much clearer picture of how folk and traditional musics are embedded within the lives of young European children, and how members might feel about future needs in this area. It would be helpful for instance to know how much traditional arts provision is taking place in primary and secondary schools across the continent? How much is state- or regionally-funded? How engaged festivals of traditional arts are with their local children and youth groups? And, particularly what the position is of folk and traditional music in relation to statutory school curricula across the continent? And how it might be improved?

Sharing good practice in relation to young people, children and traditional arts could also be a very valuable networking function of the EFN, and members should be consulted on how much priority to assign to children and young people in future work of the network.



**Which activities?** When examining the activities organised by respondents for young people, there is again a clear bias in favour of live performance and workshops specifically targeted at children and young people. It would be useful to get more granular data on how regular these activities are, and the socio-economic reach. Recent work in the UK and in Ireland is currently highlighting a possible emerging set of issues in relation to socio-economic disadvantage and access to traditional music, and the EFN will need to consider how actively they wish to be involved in access and participation funding or advocacy for poorer children’s access to traditional music, dance and storytelling.

**What involvement?** The picture that emerges from the survey of organisations that offer inclusive events for all ages that do include young people, suggests that the majority of the respondents are engaging children and young people primarily as consumers of their cultural offering; as audience members or workshop participants, with 37% suggesting they are featured as young artists:



## European Folk Network

### Mapping The Traditional Sector In Europe – Stage One Survey

Authors: Simon McKerrell & Nod Knowles, December 2020.

#### Authors

Dr Simon McKerrell is a Reader in Music and Society at **Newcastle University**, UK. He has published widely on traditional music, cultural policy and the social impact of music. He is also known internationally as a Highland and Uilleann bagpiper who has recorded 12 albums. <https://www.ncl.ac.uk/sacs/staff/profile/simonmckerrell.html>

Nod Knowles, founding member and currently Administrator of EFN, is a freelance arts and music consultant whose international career includes spells as Head of Music at Scottish Arts Council, CEO of Bath Festivals, President of Europe Jazz Network and advisory or consultative roles with all four UK arts councils and the British Council.

#### Contact

Anyone wishing more detailed discussion of these results can get in touch directly with Simon McKerrell ([simon.mckerrell@newcastle.ac.uk](mailto:simon.mckerrell@newcastle.ac.uk)) or Nod Knowles ([info@europeanfolknetwork.com](mailto:info@europeanfolknetwork.com)).

Information on the European Folk Network and on membership can be found at [www.europeanfolknetwork.org](http://www.europeanfolknetwork.org) and all enquiries can be made through the 'Contact' page on the website.

#### Further Youth Engagement Research

The information on Youth Engagement from this Stage One survey will contribute to qualitative research on the ways in which young people get interested and involved with folk music. The results of that research, being undertaken by Angharad Jenkins with the support of Wales Arts International, will be completed in 2021 and, subject to the necessary permissions, EFN plans to publish the ensuing report on the EFN website

#### Support

This Stage One report was generously supported by **EFN Members** and **Founding Members** and by **Creative Scotland** and **British Council Scotland** via **TRACS – Traditional Arts and Culture Scotland** with **Wales Arts International** support for the Youth Engagement element

