

#FreeMoveCreate



Musicians and Brexit

THIRD REPORT / July 2018

ISM
INCORPORATED
SOCIETY OF
MUSICIANS

ism.org

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Musicians and Brexit

In the latest of the Incorporated Society of Musicians' (ISM) surveys of the musician community, four in ten identified an impact on their work predominantly as a result of uncertainties around the right to remain and free movement; this is up from **19%** in 2016.

The 2016 referendum on membership of the European Union (EU) saw the UK vote by a margin of **51.89%** to **48.11%** to leave the EU. Less than a year later, on Wednesday 29 March 2017 the [then new] Prime Minister, Theresa May invoked Article 50 and formally began the process of the UK leaving the EU.

Both these seismic events raised numerous questions for musicians and for the whole of the creative industries workforce about future work opportunities.

The ISM's team of in house lawyers have been working to ensure our members have the best legal advice available and the right services to support them in their work on the continent.

Between October 2016 and May 2018 we conducted three substantial surveys of the music workforce, asking them

about the impact of Brexit on their work and about the nature of their work in the EU and beyond.

In total, we received 1,625 responses from working musicians – performers, composers, singers, songwriters, directors and academics. Responses covered every genre, from electronic and neo-soul to early jazz, classical and rock and pop.

These surveys have been quoted in official reports, shared with civil servants across Government and with Members of Parliament seeking to understand the impact of Brexit on the music sector.

As a reminder, the UK's music industry – contributing some £4.4 billion a year to the UK economy – is globally dominant and forms a central part of our creative industries which, valued at £92 billion a year to the UK economy, are worth more than the automotive, aerospace, life sciences, oil and gas industries combined.

Uniquely, around **90%** of musicians work in a self-employed or portfolio career capacity. We sell services, not stuff, and people need to be able to travel to deliver these services. The Customs Union alone will therefore not resolve any concerns voiced by musicians in relation to free movement and access to the single market.

The impact of Brexit:

During my extensive performing career I have always had 6-10 concert bookings annually in Germany and am now well known in that country with a large fan base. This year I only have 1 concert in Germany.

Many musicians have moved away or decide not to work with the UK, thus thwarting collaboration opportunities.

Some EU clients are reluctant to commit to bookings until there is clarity into my status.

Key findings

The survey shows just how dependent our music workforce is on free movement and access to the EU27 currently for work.

39% of respondents travelled to the EU more than five times a year and the figure was marginally higher for performers at **41%**. **12%** of these musicians travelled to the EU more than 20 times a year.

There was an even spread of length of travel, showing the variety of work carried out from musicians from standing in for another musicians (depping) often at short notice and sometimes with just 24 hours' notice, to longer tours lasting more than three months. And **41% of musicians**, in total during the course of the year, **spend more than 30 days in the EU for work**.

15% of performers responding to the survey had less than seven days' notice between being offered work and taking it.

Unsurprisingly, the biggest markets accessed by musicians were ordered broadly by size of the economy of the countries concerned, with Germany (**51%**) and France (**45%**) topping the rankings, followed by Italy, Spain, The Netherlands, Ireland and Belgium.

Perhaps the most significant finding of this report is that **more than a third of musicians reported that they received half or more than half of their income from working in the EU**. This shows just how dependent on this relationship our predominantly freelance music profession is.

Touring habits:

Tours can be anywhere between 1 day to 2 weeks, very occasionally more. I give concerts in major EU venues.

I work abroad almost every week, most of the time in ten EU states.

I have concerts abroad regularly, tour in the EU and go and give talks in the EU mainly.

The vast majority of my work is with EU ensembles touring the EU. I also work frequently with UK groups – all of whom work in the EU for the majority of our tours.

Warnings from the rest of the world...

And the lessons to learn from the rest of the world are laid bare by the difficulties experienced by musicians when travelling outside of the EU. **54%** of respondents said that they worked outside the EU as musicians.

More than a third of musicians had experienced difficulties with visas when travelling outside the EU. In fact, of those experiencing difficulties at all, **79%** of those identified visas as the source of those difficulties.

The purely financial cost is significant, and whilst employers and engagers often covered the visa costs, **33%** still spent more than £300 a year on securing visas to work (**5%** of musicians spent more than £1,000 a year).

But this is not just about the obvious financial costs: **15%** of UK musicians have lost a job opportunity because of problems with visas. Drawing on the comments above about the impact musicians are already experiencing on their work as a result of the uncertainty around free movement, this is a significant area of concern.

What musicians need from the deal...

Since the referendum, the ISM has conducted three surveys of the music workforce, and held numerous round tables not just with colleagues from the music sector, but also with partners from the wider creative industries, many of whom represent sectors with similarly high levels of self-employment, and with civil servants.

What has become clear from this is that free movement must be protected for professionals working in our cultural industries. A single touring visa would not resolve this issue given the frequency of travel and short notice of many professional engagements, and of the problems experienced by professionals around the world.

A creative professionals electronic visa, vouched for by an agent or professional body, valid for two years and enabling multiple entry across the EU27 (the remaining members of the EU) is needed if the UK's profession is to continue to be able to access the significant EU market.

Problems when travelling:

I have recently been offered employment by an American ensemble which then was withdrawn as the American ensemble couldn't afford the visa. Visas are a complete bane of our lives. Whenever one has to apply for one your life is put on hold. You can't travel whilst your passport is at an embassy. You have to attend visa appointments (which often make working the rest of the day impossible as you can't take an instrument to the embassy).

Perhaps the majority of visits are for 2-3 days, but a few are for anything from 1 to 4 weeks.

Only time outside of EU, gear was searched. Items were not returned due to apparent suspicions (two guitar pedals and about 30 guitar picks that were in small plastic bags). We were also held in the airport security for around 4 hours, meaning we (me and the band I was touring with) were late to work commitments.

We also take this opportunity to urge colleagues across the creative sector to support FreeMoveCreate and work towards securing free movement for creative professionals post-Brexit. If individual sectors secure niche arrangements for individual professions serious harm could still hit our creative economy.

This report does not draw on our wider concerns in relation to the protection of copyright and musicians' intellectual property, which can be seen in evidence the ISM submitted to Parliament's Digital, Culture, Media and Sport Select Committee. Nor does it focus on the funding opportunities that must ideally remain open to UK artists at least in partnership with EU colleagues.

For musicians, Europe is our concert hall, it is where we earn a living, and we urge the Government to protect free movement beyond Brexit for our creative professions so that we can continue to lead the world in what the UK is best at: music.

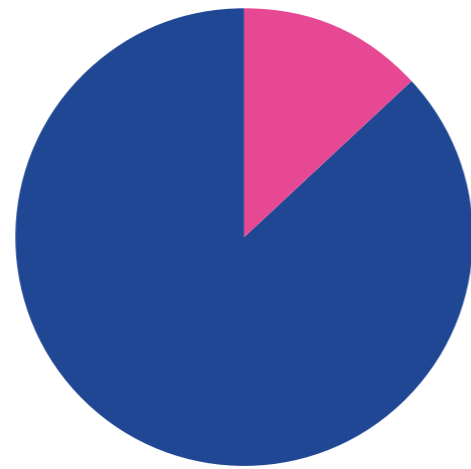
Appendix: The results in detail

The detailed results

The percentage of respondents identifying as self-employed (87%) matches estimates of the music profession and numerous ISM studies. This suggests our survey data continues to be representative of the music workforce and its figures can be trusted.



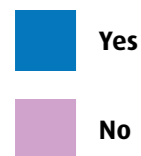
Are musicians employed or self-employed:



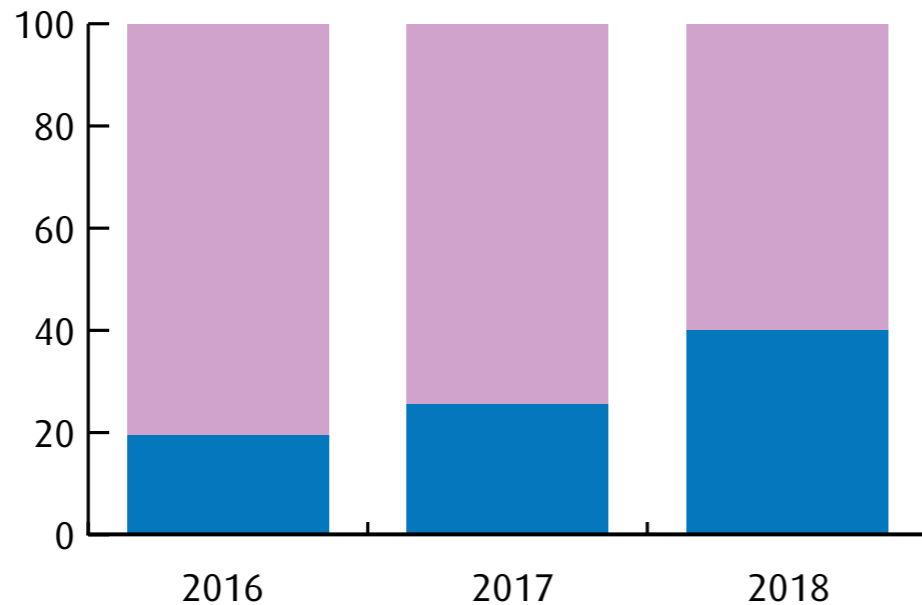
Travelling within the EU

The biggest single variation between this latest survey and previous ISM surveys was found in those musicians who had already identified an impact on their work resulting from the referendum and ongoing negotiations relating to the UK's withdrawal from the EU.

Of those offering an opinion, more than 40% of the music workforce had identified an impact on their work, up from 19% in 2016, and 26% in 2017.



Is Brexit having an impact on your work?



Comments from musicians

Reduced number of contracts and in some instances questions about future work permits etc.

Contractors have already been looking for alternatives rather than book me.

Many musicians have moved away or decide not to work with the UK, thus thwarting collaboration opportunities. I also feel less confident saying I live in the UK as I feel that people will feel that there are less collaboration possibilities than previously.

German record label decided to not take on my band due to border changes etc.

Venues no longer booking tours in advance.

During my extensive performing career I have always had 6-10 concert bookings annually in Germany and am now well known in that country with a large fan base. This year I only have 1 concert in Germany. I think concert organisers are feeling nervous about the possibility of having to pay for artist visas and possibly higher foreign performer taxes.

Some EU clients are reluctant to commit to bookings until there is clarity into my status.

Imported parts and materials are 20% more expensive.

Reluctance of festivals to book UK people beyond 2019 until they know more about the travel agreement after Brexit.

Well most of my work is outside of the UK and I am finding it much more difficult to negotiate work in the EU now.

Huge decline (over 90%) in applications to study from students outside the UK, leading to loss of revenue in the region of £21k this year.

Promoters less likely to confirm work abroad. Orchestras that employ me within the EU are uncertain how Brexit will impact on my work with them as a freelance musician.

I'm a professor at the RCM in London and have noticed that it is becoming more difficult to recruit students from the EU.

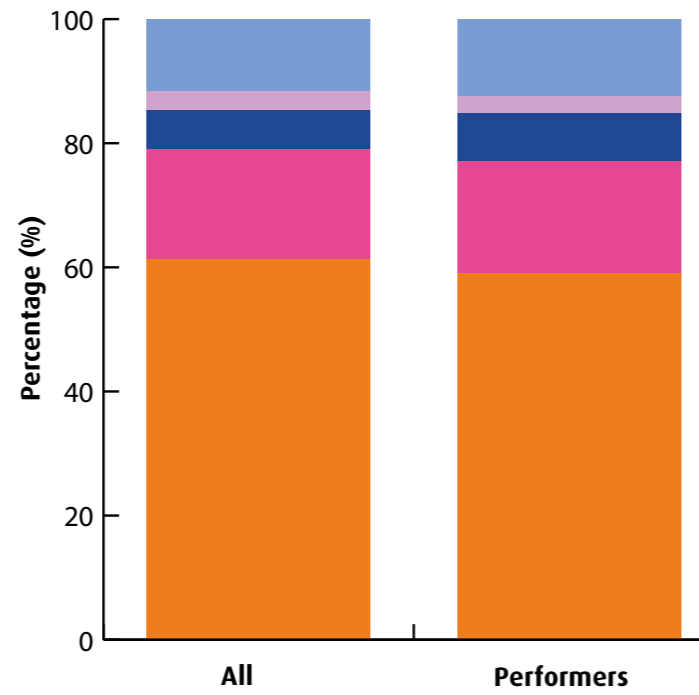
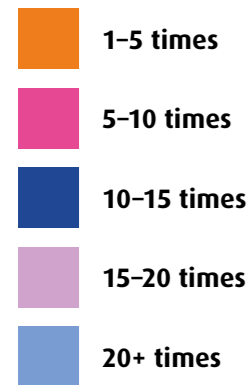
Possible reluctance to book for recitals beyond 2019, noticeable drop in responses from Germany could be due to uncertainty/venues not wanting to take the risk.

More for the future, possible difficulties of touring small band to Europe, with possibility of Carnet being a requirement and concomitant fees (£500 suggested).

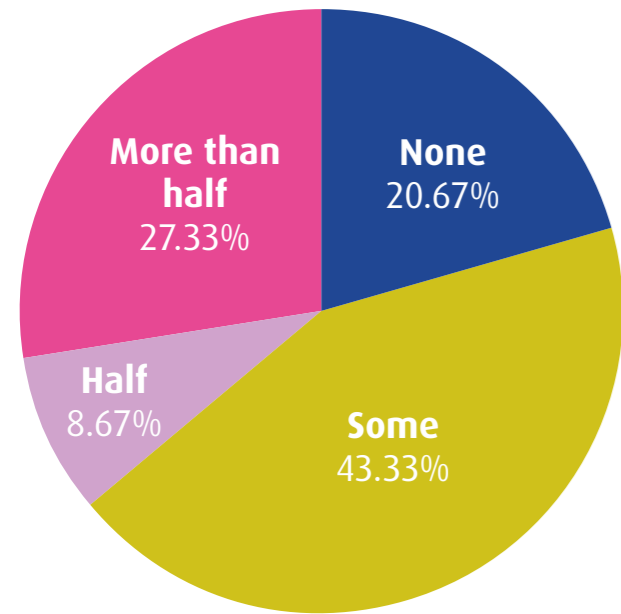
Travelling to the EU – the stats

We asked people where in the EU their work was predominantly based. The results from our latest survey matched the previous findings of our 2017 survey. This again suggests a high level of consistency across the workforce.

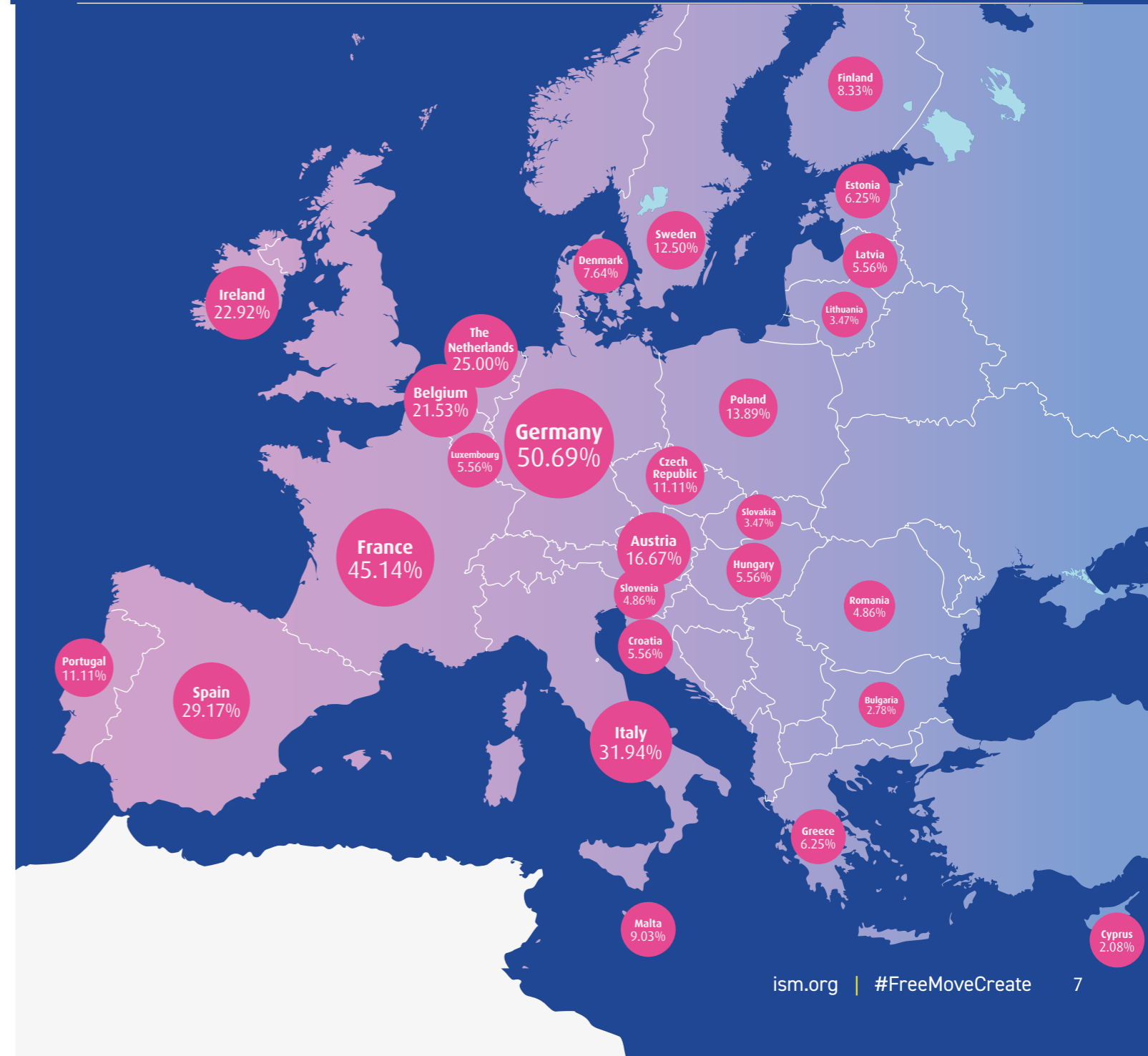
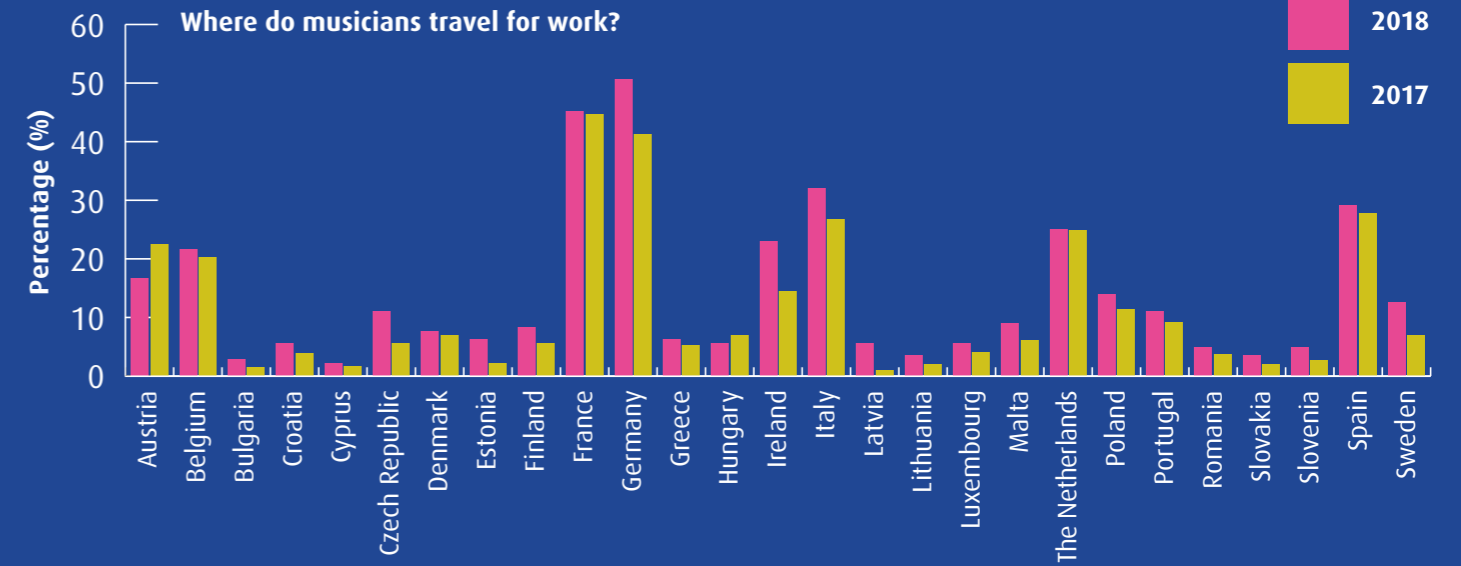
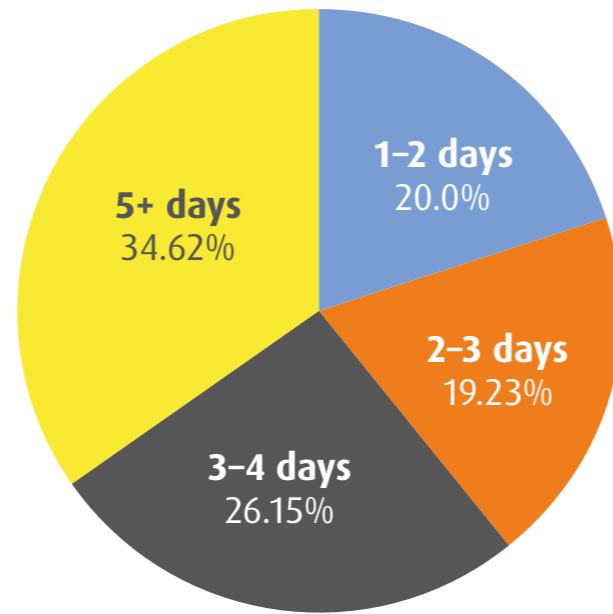
How many times a year do you visit the EU for work?



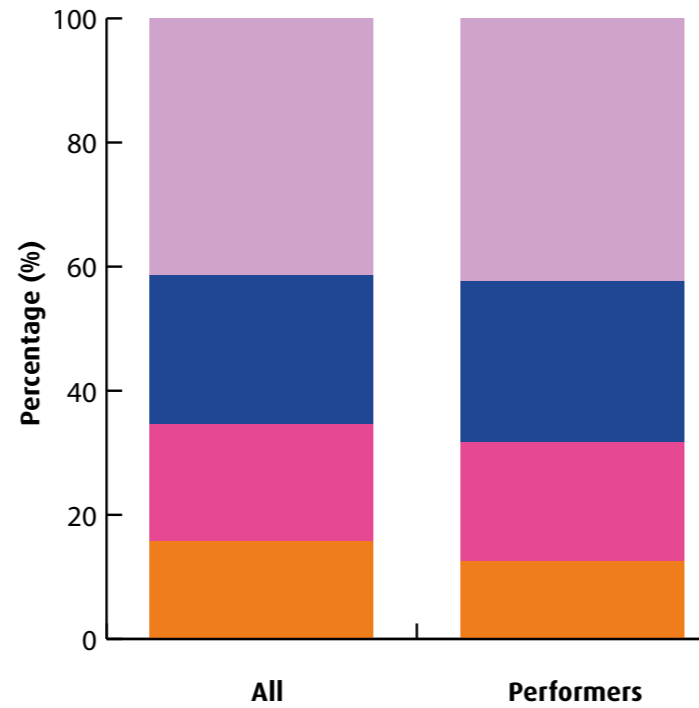
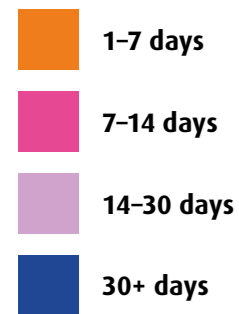
What percentage of your annual income is from the EU?



How many days do you spend in the EU27 per visit on an average trip?

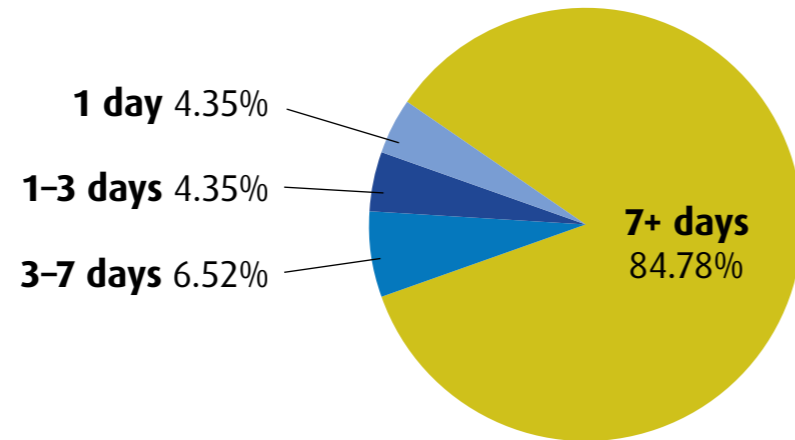


During the course of the year, how many days do you spend in the EU27 in total?



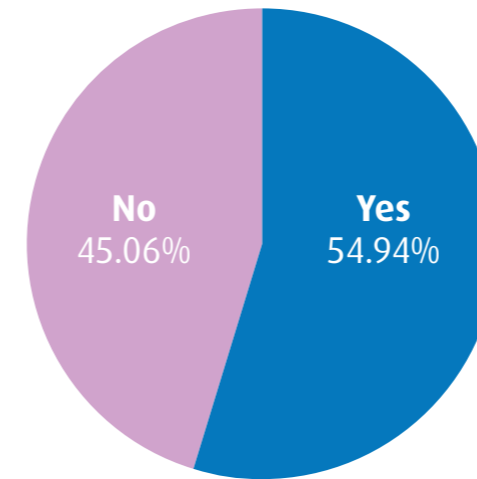
What is the timeframe between being offered work in the EU and having to start?

Performers:



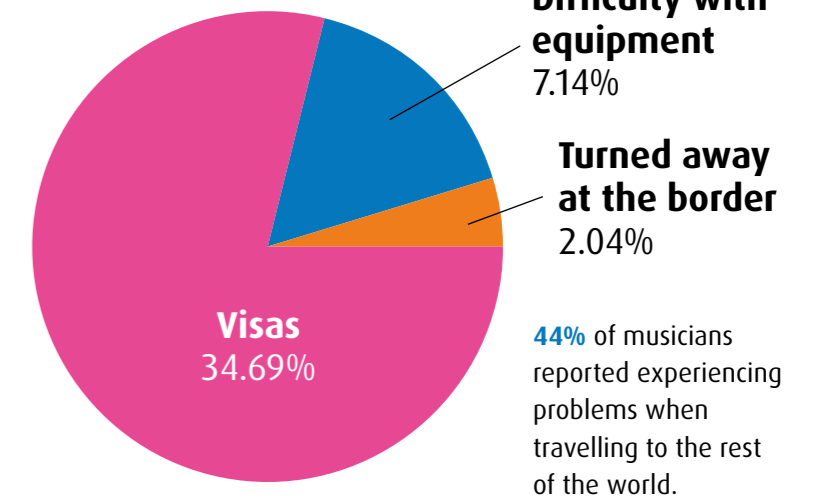
The rest of the world – the stats

More than half of the respondents worked outside the EU. Do you work outside the EU in the rest of the world?

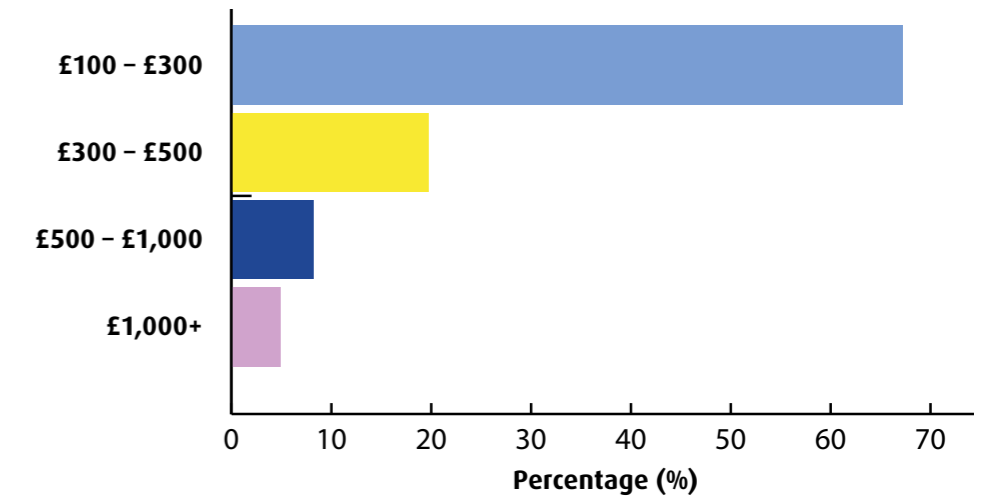


What are the biggest problems experienced by musicians when travelling to the rest of the world?

% of those identifying a problem:



Comments from musicians
How much do musicians spend per year on visas?



Comments from musicians

The USA is a nightmare for music: visas - costly and not guaranteed, in the Middle East you need a contract and a sponsor to get a visa. Another challenge is the sheer cost of travel.

US Visa getting very laborious and time wasting.

Applying for US work visa is a pain in the arse!

It's sometimes a problem finding time to get visas, especially if your passport has to be given in. Usually the orchestra organises the trip to ensure we don't have problems with visas or bringing in instruments.

Only time outside of EU, gear was searched. Items were not returned due to apparent suspicions (two guitar pedals and about 30 guitar picks that were in small plastic bags). We were also held in the airport security for around 4 hours, meaning we (me and the band I was touring with) were late to work commitments.

I have recently been offered employment by an American ensemble which then was withdrawn as the American ensemble couldn't afford the visa. Visas are a complete bane of our lives. Whenever one has to apply for one your life is put on hold. You can't travel whilst your passport is at an embassy. You have to attend visa appointments (which often make working the rest of the day impossible as you can't take an instrument to the embassy). There is always the fear that for some small technicality your visa will be turned down.

They are all complicated and expensive.

All are a problem, especially as I have to send my passport away. China is probably the most difficult but it is a 2-year visa and I pay a company to organise it for me.

Recently I had to get a Japanese visa which was very smooth. USA, China and Russia are hugely complex and frustrating. I hear that Australia is relatively straight forward but luckily I have an Australian passport.



The Incorporated Society of Musicians is the UK's professional body for musicians and a nationally-recognised subject association for music. We were set up in 1882 to promote the art of music and to protect the interests and honour of all musicians. Today we support almost 9,000 members with unrivalled services and expert advice, from study up until retirement and beyond. We are a wholly independent, non-profit-making organisation.

Musicians who are members of the ISM have access to advice from experienced in-house employment lawyers by contacting the **ISM legal team** at legal@ism.org or by contacting our **24-hour advice line** on **01275 376 038**.



FreeMoveCreate is a campaign to protect freedom of movement for the UK's creative industries post-Brexit.

The campaign represents the coming together of more than 30,000 musicians and artists from across the memberships of **a-n The Artists Information Company** (the UK's largest artists' membership organisation) and the **Incorporated Society of Musicians** (ISM – the UK's professional body for musicians).

We are calling for any transitional and permanent relationship with between the UK and EU to ensure that musicians, directors, technicians, designers, artists, dancers, sound engineers, actors and all the creative industries professionals can continue to travel to the EU for work.