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ECONOMIC IMPACTS OF COVID-19 ON THE CULTURAL SECTOR: TRADITIONAL MUSIC IN SCOTLAND

Theona Morrison

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CONTACT:

Theona Morrison, Director, CoDeL, theona@codel.scot

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Context

The cultural industries in Scotland are integral to the concept of identity and place. A slice within this sector is termed Traditional Music, which has grown uninterrupted from centuries ago when the aural, community memory of song, dance, stories and music were passed from one generation to the next, often not via quill or pen, but from mouth to ear, held in memory and passed on again. Even against a backdrop of linguistic, political and cultural upheaval, the cultural legacy could not be erased. In some cases this cultural inheritance is attributed to its source by its *sloinneadh* (patronymic) and is often known by place, e.g. Skye or Aberdeenshire. The popularity and concomitant economic importance of traditional music has grown exponentially in the last 30 years.

Festivals, the Mòd and Fèisean

Tiree Music Festival

To illustrate what traditional music contributes to the Highlands and Islands of Scotland in economic terms: Tiree, a small island off the west coast of Scotland with a population around 600, hosts the annual 'Tiree Music Festival' which is held over three days each year. In its 10 years it has generated £6.4 million for the island economy.

One small island, one festival.

“Tiree Music Festival (TMF) was held for the tenth time at An Talla from the 12th to 14th July 2019. The 2019 event attracted yet another sell-out of 2,100 festival goers. The number of visitors in 2019 was the same as that achieved in 2018, which, when set against 2012 figures, represents a 68% increase. Over ten years TMF has attracted upwards of 20,000 people to enjoy a celebration of Hebridean music, culture and fun on the golden shores of Tiree.

“Over ten years, visitors have always been active in undertaking other activities outside the festival, which is great for the wider island economy. Visiting the local beaches are always the most popular activity, and this was even more marked in 2019 than previous years.”

The net additional economic impact of visitor spend as a result of the Tiree Music Festival is estimated to be £1,199,560 (+2% on 2018). As reported in 2018, the economic evaluation exercise has presented a visitor expenditure impact greater than £1million.

The net economic impact of TMF has been calculated each year from 2012; ... the annual increase over this period ... totals a value of £6.4 million.

MKA Economics Sept 2019

Am Mòd Nàiseanta Rìoghail

The Royal National Mòd is Scotland’s premier Gaelic festival which is held annually in October. The festival is staged in a different location each year. The hosting of the Mòd is a hard-won prize:

“In 2015 The Royal National Mod generated £3.5million for the Inverness economy – more than £1million above the event target.

“The festival was held in the Highland capital in 2015 for the first time since 1997 and attracted 9,000 visitors, 78 per cent of whom came from outside the host city.”

A study carried out by ‘The Market Specialists’ also showed 67 per cent were in Inverness with the sole purpose of attending the nine-day Mod, while 25 per cent lived in the Highland Capital.

In 2019 the Mòd was held in Glasgow. A report on its economic impact concluded:

“... with figures boasting a massive £3.2 million generated for Glasgow’s local economy. A recent economic impact report shows that the nine-day festival, which was held in Glasgow between 11th – 19th October 2019, welcomed over 12,000 people to the city. An outstanding 81% of visitors that came to Glasgow were here to celebrate Scottish culture at the Mòd.

“The average visitor to Am Mòd Nàiseanta Rìoghail spent £177 each day while staying in the city, with close to 2/3rd of these stating they would come back to Glasgow again. The figures show a notable year on year growth in the festival’s popularity, with overseas visitors staying in Scotland on average 4.3 nights compared to last year’s 3.2.

The report, which was conducted by STR and The Glamis Consultancy on behalf of Am Mòd Nàiseanta Rìoghail, further highlights the importance of the festival, not only as part of Scotland's cultural calendar, but for the city of Glasgow's tourism numbers.

So these reports on the two festivals reveal that in 2015 the economic impact in Inverness was reported as £3.5m, whereas in 2019 in Glasgow it was reported as £3.2m.

Two points to consider in reflecting on this comparison:

1. Each report was carried out by a different organisation.
2. It may be reasonable to assume that participants and attendees may not have required so many overnight stays in Glasgow given that more participants and attendees alike would be within travelling distance to Glasgow. There were estimated to be more attendees at the Glasgow Mòd, 12,000 as opposed to 9,000 at the Inverness Mòd.

In terms of the impact of Covid-19, The Mòd was scheduled to be held in Inverness in October 2020 but was cancelled. It is therefore reasonable to project the impact deficit would have been somewhere in the region of £3.5m.

The competitions were held online and concerts were broadcast online which enabled participants to compete, but the profile was greatly diminished.

Fèisean

The Fèis movement came about when a group of parents and other individuals – including Fr Colin MacInnes, Dr Angus MacDonald, Kenna Campbell and Isbhbel T MacDonald – on the Isle of Barra became concerned that local traditions were dying out and that island children were not being taught traditional music in the context of formal education. To address this issue the first Fèis Bharraigh was held on the island in 1981.

Inspired by the success of this first Fèis, many other communities throughout Scotland established similar events. Today there are 47 Fèisean, each one community-led and tailored to local needs. Volunteers still form the core of most local Fèisean.

The skills taught at Fèisean are a highly-valued aspect of the informal education of young people, as demonstrated by the level of volunteer commitment and parental support in local areas. Most importantly, the Fèis experience is valued by the young participants themselves. At national level, the Fèisean are seen by many as one of the most successful arts initiatives in Scotland.

Fèisean represent excellence in youth work in the arts and strengthening of community skills, and offer significant employment opportunities and good value for money. Commitment to Gaelic language and culture is central to the Fèis ethos, and Fèisean nan Gàidheal and the Fèisean consistently strive to develop opportunities for the use and transmission of Gaelic language within the Fèisean.

The Feis movement has been one of the influencing factors that has galvanised the growth of the traditional arts since the early 1980's.

Growth of traditional music

Traditional Music has had a significant resurgence in the last 30 years. An example would be for wedding celebrations. Whereas in the 1970s and 1980s the popular music of the day would shape the ‘dance’ in disco or equivalent, today, even in ‘cool city centre’ weddings, couples will often want to have the dance which is more reflective of the place they have a connection to in the Highlands and Islands, but where they do not live.

Music is associated with identity of self and place and Devolution in Scotland in 1999 and a Referendum on Independence in 2014, although not successful, increased the debate in the population around identity and how that is creatively expressed.

The introduction of the degree in Traditional Music at the Royal Scottish Academy of Music and Drama, now the Royal Conservatoire of Scotland in 1996, provided recognition and parity of esteem to the genre for the first time. Since then courses have become established through the University of the Highlands and Islands on the Isle of Benbecula and Sabhal Mòr Ostaig, the Gaelic college on the Isle of Skye.

In 2019, the year pre Covid-19, the Traditional Music Forum conducted a survey of 184 musicians from across Scotland. It found income patterns as follows:

“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 also.

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 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%.

	(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%

Source: [Traditional Music Forum research 2019](#)

The Musician

In the traditional music sector, the musician is often that of a 'sole trader'. Here is an illustration of a 'typical musician' drawn from a field interview in *Understanding Scotland Musically* by Simon McKerrell and Gary West.

'This musician's job involves performing traditional music with an number of bands, both self-started and for other projects, compositional commissions and teaching, and has an established national, and an international reputation amongst the Scottish traditional music community of practice. She resides in Scotland yet performs all over the UK, occasionally in Europe and in North America and regards her role as a highly fulfilling one, embedded within a strong social group of other musicians and friends and family that support her work. In terms of income this musician has been performing professionally for more than fifteen years, and has gradually built up performing and teaching opportunities which provide the vast bulk of her income throughout the year. Financially her accounts for the last financial year show around £40,000 of total income, around half of which goes out immediately to other subcontracted musicians with whom she plays. Her persona; income from all activity is in the range of £12,000 - £18,000 per annum.'

Simon McKerrell, *Understanding Scotland Musically*, 2019

This serves as an outline of the pluralistic nature and also almost entirely social interfacing range of work that shapes the life of traditional musicians. So, with the arrival of Covid-19 in March 2020, their world changed.

Economic Impact of Covid-19

The economic impact of Covid-19 on the Traditional Music sector in Scotland, like so many in the 'entertainments' and public interface sectors, has been crushing in terms of the complete cancellation of every performance 'gig', concert, wedding and festival.

The impact on musicians, communities and the country is as if someone turned the soundtrack off.

In the early weeks of national and international lockdown, musicians in isolation went on-line.

Leaders in the field initiated on-line performances:

#Covid Ceilidh – Duncan Chisholm, Highland Fiddle Player:

#CovidCeilidh started with a call from Duncan on social media to other musicians around the world to post an acoustic track whenever they could, in order to bring people together through music, to comfort and reassure people who might be feeling isolated or vulnerable. The response was incredible with thousands of tracks being posted from all around the world and millions of views. What was especially gratifying to Duncan were the messages of thanks from people who genuinely felt relief and were uplifted by listening to the music as they were navigating their own journey through the pandemic.

“Tunes in the Hoose” is an online community created to keep Scottish musicians playing together at a time when opportunities are uncertain.

At the start of the pandemic, musicians had to develop skills to be able to broadcast music, such as recording, editing and uploading. A solo artist is one thing, but a band with perhaps six musicians, all in different locations (even if next door!) had to be recorded individually, the visual synced with the audio and then with each other – hours of work before eventually a sound track and video was produced – for free, an on-line offering with no income.

As time went on major events, festivals and teaching went on-line and musicians were paid for delivering their music in a virtual context.

Fèis Rois delivers opportunities for people of all ages to participate in traditional music, song and dance in schools during term time and has dedicated ‘music camps’ for junior and senior children, young people and adults throughout the year. Funded by the Youth Music Initiative, during Covid-19 the funding was veered to pay musicians to deliver on-line tuition of 1-hour classes per week for 8 -16 weeks. This enabled 50 freelance musicians to continue to be paid for tuition that would normally be delivered in a classroom face to face but went on-line. Fèis Rois paid £100,000 to musicians to enable them to deliver work.

As an organisation Fèis Rois was able to access Youth Arts Recovery Money under the Small Grants Recovery Fund from Creative Scotland which gave organisations, on average, a grant of £50,000 each.

As with all virtual events, there have been benefits as well as disadvantages.

Fèis Rois would normally host a 3-day event each year in Ullapool on the west coast of Scotland with an average of 250 attendees. In 2020 the same on-line programme attracted 2,600 attendees with more than 50,000 watching on-line, internationally as well as nationally over the following two weeks.

On-line classes provided for adults and young people found that demand for the adult cohort climbed and climbed, people could join from home, did not have to travel at night, in the dark and perhaps wintry weather. On the other hand, the young people numbers fell away from 130 to just 30. Youngsters who spend their life on their phones speaking to their friends and receiving their schooling on-line did not find music lessons enough of an attraction to stay on-line, they wanted face to face contact.

The musicians received 100% of what they would normally receive for the work. The Adult Fèis has never been busier and is self-funding.

From an organisation’s perspective, some venues or organisations that deliver classes and events have been able to access funding to pay musicians.

Venues that closed and were furloughed could in some cases pay staff that keep the venues running, but the performances by performers were cancelled.

The Government introduced a compensation scheme for loss of revenue for those involved in the wedding business. Some bands have been able to access some funds to compensate the loss of income from cancelled weddings.

Creative Scotland launched a 'Hardship Fund' for freelance musicians who could demonstrate their loss of income against earnings from previous years.

Creative Scotland also published research into public attitudes to cultural participation and attendance in the context of the Covid-19 pandemic.

The key findings were:

- More than half the population (56%) say they really miss attending cultural venues and events.
- However, there is wariness amongst the culture-going public as regards returning to venues and events as restrictions ease, more so than with many other leisure activities.
- The vast majority of the population (98%) are engaging with cultural activity from home during the Covid-19 pandemic, but only a small proportion (17%) say they are willing to pay for cultural content that has moved on-line due to the pandemic.
- Audiences are nevertheless looking forward to attending cultural activity when they can; are open to trying new experiences at different types of venue (70%); and audience levels look likely to return to pre-Covid levels, or increase, once a vaccine is widely available.

The most alarming impact being that only 17% of audiences said they were willing to pay for online performances.

Comparator Musician

Case Study, Jan 2021: Jamie MacDonald, traditional musician, Isle of Tiree

My experience as a touring musician:

"For me this year (2020) was going to be a bit quieter as my main band (Eabhal) had been planning to record our second album, so we were consciously taking on less festival shows than we did 2019, or than we had planned to take 2021 with a view to touring the album. That being said we still lost out on 8 confirmed festivals and a further 3 that we were in talks with. Some of these have provisionally booked us for 2021 and we are already holding dates for back up dates for 2022 in the event that 2021 events can't take place. We also saw the breakdown of talks about a tour of the east coast of the US and a tour of Germany/West Europe; although neither of these were confirmed they were likely to have gone ahead without Covid. We are not sure what impact Brexit will have on these plans but maybe that's an entirely different e-mail. Outside of Eabhal, I missed out on other tours and festivals with various other acts as well as numerous wedding dances. I estimate under half have been rescheduled for 2021. I have received SEISS government support and a Creative Scotland bridging bursary which has gone some way to mitigating the loss of income due to the pandemic.

Personally, I feel like I have been fortunate compared to lots of young musicians. I have been able to work at home on the croft, we managed half a season with our glamping cabins and my work with the organisation side of Tìree Music Festival wasn't affected. I have also picked up more recording and broadcasting work than I would usually take on. I realise my experience isn't typical of the majority of self-employed musicians and I don't want to undersell the struggle that I know some folk have gone through.

I have to say I have enjoyed not having to travel off island regularly and one positive that might come from this is how apparent it has become that working remotely is a viable option for lots of industries. I hope this might encourage a younger generation to return/remain and thrive while being based in the Islands, which is something I feel strongly about.”

So, Jamie demonstrates the advantages of a pluralistic life which he was able to manage and enabled him to earn a living as well as draw down some Government support funding. Others, based in the main cities, particularly Glasgow, have found alternative work in supermarkets and in other non-music related work.

Celtic Connections, Scotland’s largest international cultural festival was delivered on-line and had sold 10,000 tickets before it started in January. A small number of flagship performances were screened on national television with the rest paid for. By the end of the festival over 27,000 tickets were sold,¹ with audiences from 65 countries and 10.9 million minutes of musical entertainment spread over 19 days. All musicians were paid and showcased their performances.

For the previous year in 2019 the Celtic Connections Economic Impact Assessment, published in August 2019, showed that Celtic Connections generated £5.36m of new output to Glasgow. Overnight visitors stayed in Glasgow for an average of 3.8 days, and daily expenditure ranged from £72.03 to £96.47. The festival makes use of the exceptional venues, architecture and infrastructure in Glasgow, creating the opportunity to stage world class premieres and events. The festival maintains strong relationships with key local suppliers, including Glasgow Restaurateurs Association, local hotels, equipment hire and transport companies.

In 2019, the festival welcomed a total of 38,056 unique visitors (excluding schoolchildren), and a total attendance figure for events of 113,267. This represents a slight increase from the 2016 Economic Impact Assessment in which there were 31,023 unique visitors and a total of 124,746 attendances. Of these visitors, 38.9% came from outside of Glasgow and a total of 15.2% visited from the rest of the UK or overseas.

The Young Scottish Traditional Musician of the Year was broadcast live on national television and radio which showcased Scotland’s leading young traditional musicians. In addition, national television and radio has enabled traditional musicians to broadcast live for key events such as the **BBC Scotland** and **BBC Alba** Hogmanay (New Year), Burns Night and the weekly radio programmes BBC Radio Scotland on a Saturday and Sunday evening. **Radio nan Gaidheal** continues to broadcast traditional music every weekday morning, afternoon and Friday evening.

¹ The 27,000 tickets sold will have given on-line access to a number of online events, so the figure does not compare like with like to previous studies which reflect unique visitor numbers per physical event.

In summary

Funding has been available:

- To musicians providing they could demonstrate their loss, from the Hardship Fund
- Organisations have been able to access funds from Creative Scotland and the Small Grants Fund under the Youth Arts Recovery Money.
- The Youth Music Initiative which funds local authorities to deliver music tuition in partnership with organisations like Fèis Rois; they work with Dumfries and Galloway, Highland and Aberdeenshire Local Authorities.
- There has also been support from Help Musicians UK, but this is not specifically for traditional musicians.
- The umbrella organisation of **Fèisean nan Gaidheal** delivered on-line Fèisean classes for children throughout the summer and was able to pay musicians accordingly.
- The big Celtic Connections festival paid musicians.
- The BBC paid musicians.
- Some independent folk clubs organised on-line fundraising to help support musicians. This was sporadic but reflective of kinship within the sector.
- Some promoters staged high priced ticketed events on-line and charged almost the whole ticket price, and the event was only available on-line to those who had paid for up to two weeks. The musicians received their full fee.
- Some businesses, such as the Harris Distillery, hosted on-line ceilidhs and paid musicians to perform. The ceilidhs were promoted through the business mailing list and entry was charged.
- The Ceilidh Club, based in London, hosted on-line ceilidhs and paid musicians.
- Commissioned works which had secured funding were able to continue on-line with associated payment.
- Traditional musicians confidence to place value on their work has increased and has gathered momentum during Covid'-19. Simon McKerral found there was conflict around monetising traditional music as it was perceived to devalue and commoditise a traditional art form, but this is changing out of necessity and facilitated by on-line tools such as Paypal, GoFundme and Patreon which enables income to be earned. The Facebook page Music from Scotland with around 40,000 'likes' enables musicians to perform and post a link to a Patreon page or 'Tip Jar' on their website where viewers can donate to pay for a concert or performance.

Funding has enabled good quality on-line delivery of traditional music to be held in the public arena. From the musician's perspective this has been 'a reason to practice' their art and a reason to step-up to the mark for performance. They also kept the profile of traditional music in the public eye and ear, but often these events have been sporadic throughout the year and the range of events which are normally the 'glue' between the big events has been absent.

Some insights from Ireland

In Ireland cross sectoral research has been carried out by the **Economic and Social Research Institute** in their Quarterly Economic Commentary in 2020. In the second quarter of the year they noted “significant variation of the impact of the pandemic on different sectors of the economy. The manufacturing sector had grown by +16.5%, the distribution and transport -32.0% whereas in comparison the Arts and Entertainments sector had shrunk by -67.8%.”

In the Autumn of 2020

‘The Irish Arts Council’s 2020 budget had already been increased by €20m by Minister Josepha Madigan in June of this year as a result of the pandemic and following intensive campaigning by the sector. It was then further increased by the new Minister for Arts Catherine Martin by an additional €5m in July, bringing it to €105m.

- The allocation of €130m is the largest amount received by the Council to date, substantially higher than the €83m received at the height of the Celtic Tiger in 2007. The funding included specific support for:
- Irish Traditional Music Archive to Launch New Monthly 'Drawing from the Well' Series; an on-line series which started in October 2020.
- In November 2020 the Irish Arts Council announced a further €886,540 in funding for 62 festivals as part of its Festival Investment Scheme for 2021.
- Awards were also made to a range of theatre, multi-disciplinary, literary, film and dance events. Grants range from €2,600 to €35,000.

The Irish Arts Council issued funding across the arts sector as a response to Covid-19.

- The award intended to cover Covid-19 related costs, including those associated with implementing national and/or sectoral safety guidelines. It was designed to enable work funded under the programmes outlined below to be completed and/or realised in line with the artistic intention of the original funded proposal, and, in doing so, ensure that artists and arts workers are supported to make work.
- The award was open to individuals/organisations awarded funding in 2019 for activity in 2020 under the following funding programmes:

Arts Grant Funding 2020

Projects 2020 (all artforms and practices)

Opera Projects and Production Award 2020

Reel Art 2019

Authored Works 2019

Engaging with Architecture 2019

Young Ensembles Scheme 2020

Deis Recording and Publication 2020 (awarded in 2020)

The Irish Arts Council

Ealaín na Gaeltachta has awarded bursaries to fifty-seven Gaeltacht artists including a number of musicians, dancers and composers. The Scéim Sparánachta (Bursary Scheme) aims to support Gaeltacht artists in creating new work, undertaking research, developing their practice, and, where possible, partaking in artist residencies.

“Their projects are truly inspirational and are a tribute to their unique vision,” Minister for Arts and the Gaeltacht Catherine Martin said, announcing the awards. “Our language is a precious jewel and those that are working in it must be cherished and supported.”

Looking forward

It is hard to imagine full festival and event face to face engagement any time soon. Event organisers will have to ensure all mitigations around hygiene practices are in place to reassure people it is safe to attend.

It is likely events will become a hybrid model with a combination of ‘live’ attended events with smaller numbers and streamed on-line. This will sit well with environmental concerns and enable greater participation from a wider audience, within Scotland, and internationally.

The pluralist model, with a portfolio of work for the traditional musician (solo performance, as a member of a number of bands, teaching, etc.) is likely to continue.

International travel to perform and teach will be limited in the short term because of Covid-19, Brexit and increasingly economic and environmental indicators.

Will this impact traditional music in the long term? This is hard to say.

The richness of touring and collaboration, if not lost, will be diminished.

In the folk club revival in Scotland in the 1960s, Ewan MacColl, English folk singer and labour activist, along with Peggy Seeger, American born left-leaning folk singer, established a folk club in which visiting singers were only permitted to sing songs from the area from where they came. This meant an increase in the performance of songs with some knowledge of their origins. Likewise in Ireland there is a tradition of introducing a traditional tune by retelling who gave them the tune.

Will we see a strengthening of place based traditional music?

Will this mean traditional musicians are still valued within their communities and able to make a living or will it mean fewer full-time musicians?

Perhaps, on-line collaborations and festivals will enable the international performances to continue as with Celtic Connections, international musicians performing on-line from their own country and being highly cherished and valued by performers, the funding bodies and the audience, to continue to strengthen the sector’s role in the cultural fabric of Scotland and the world.

Sources

Thank you to the following contributors:

- Fiona Dalgetty, CEO Fèis Rois, Dingwall, Highland
- David Francis, Director TRAC – Traditional Arts and Culture Scotland, Isle of Lismore and Edinburgh
- Jamie MacDonald, Traditional Musician, band member of Eabhal, solo musician, teaching – Isle of Tiree
- Pàdruig Morrison, PhD composer, solo musician, teaching and band member Beinn Lee – Gimsay, Isle of North Uist

Further research sources:

- *Understanding Scotland Musically, Folk Tradition and Policy*, 2019, Simon McKerrall (Interdisciplinary researcher) and Professor Gary West
- Creative Scotland
- Trad Music Forum Research 2019 (Scotland)
- MKA Economics Impact of Tiree Music Festival 2019
- On-line forums
- Economic and Social Research Institute (Ireland)
- Irish Arts Council (Ireland)