

Making Music, the National Federation of Music Societies
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Submission by John Rostron, Wales Manager

Introduction

Making Music is the UK association for leisure-time music. We represent 173 member groups in Wales, which equates to approximately 10,000 music players, performers and promoters.

Groups are found throughout the country and include community choirs, choral societies, amateur orchestras, brass bands, ukulele groups, drumming circles, big bands, folk ensembles, and more.

70% of our members have an annual turnover of less than £14,500 and are self-funded through their own participants' subscriptions (subs), concert ticket sales and fundraising efforts.

Individually small, music groups' aggregate economic impact is significant, and reflects spending on professional musicians, venues, musical equipment, sheet music, royalties, teaching, marketing materials, etc.. They are an intrinsic part of the music sector ecology.

Even greater is music groups' impact on individual well-being. Much research now shows that mental and physical health can be measurably improved through participation in music activities. Our member groups play an important role in supporting the well-being of the nation.

Communities, too, benefit from music groups which bring together residents, engender civic pride, and make a neighbourhood attractive to live in and as a business location.

1. What has been the immediate impact of Covid-19 on the sector?

Direct

- All regular activity (e.g. weekly choir rehearsals) has ceased
- Estimated 100 concerts (in the period March - July) cancelled
- Social loss (lack of connection) most significant impact according to participants. In particular our members report 38% of participants are aged 65+
- Impact of event cancellations on audiences

Indirect

- Loss of income and *work for professional musical directors* engaged by 76% of our members) and for professional musicians engaged by our members.
- Loss of income for the venues used for rehearsals and performances
- Loss of income for suppliers (music publishers, etc.) to the sector
- Loss of income for charities for which music groups raise money
- Inability of approx. 50% of participants to access musical activity relocated online. This is due to lack of owning adequate or any IT equipment; lack of necessary IT skills; poor or inadequate broadband connection in Wales

2. How effectively has the support provided by the Welsh Government, the UK Government and arms-length bodies addressed the sector's needs?

Mostly, the support has not been applicable to this sector, as leisure-time music groups are generally not businesses, do not run premises/have staff, and are not publicly funded.

The *Self-Employed Income Support Scheme* may not be enough to stem a talent drain from the sector which would be extremely damaging. Many of our member music groups, despite losing their own income (ticket sales, subscriptions), have been continuing to pay the freelance musicians they engage, for fear of losing them altogether, but this may stop shortly as the lockdown extends and their finances become further strained.

Support for venues has been useful but hasn't considered the needs of leisure time music groups to ensure the right spaces can re-open and remain viable and affordable to community music groups when the time comes.

Government help to frontline charities does not replace the money usually raised by music groups for a huge range of (often local) charities.

3. What will the likely long-term impacts of Covid-19 be on the sector, and what support is needed to deal with those long-term impacts?

Long-term impacts

- A number of **leisure-time music groups will fold**. They are run by volunteers, many in the 65+ age bracket and at moderate or high risk of Covid-19, so groups may simply run out of volunteers). Plus financial pressure due to lack of earned income from concerts and pressure on subs from members who have been hit financially / been furloughed / lost work also means they may not be able to continue.
- **Difficulty of maintaining/re-establishing a group** and its musical standard after months of inactivity (or online activity which is not accessible or inclusive for all). Like sport, in music you need to 'remain in training' and for many that's been impossible during lockdown. It will take a long time for groups to be back up and running properly.
- Many groups have participants in the high or moderate risk group who may not feel safe to return to activity, in some cases perhaps until a vaccine is available.
- **Difficulty with venues**: not (re-)opening; not being large enough if they open with social distancing measures to house member groups; lack of, therefore, large enough facilities in the locality; not affordable to hire when venues then consider additional costs of cleaning etc to make safe. Many groups rehearse in venues such as churches and school halls which are currently focussing on re-opening for their primary purpose and are not available to music groups.
- There is currently no research in the UK, but the [University of Freiburg risk assessment for music](#) estimates the need to provide a 2 metre radius of space for singers (as there is no conclusive research yet on Covid-19 transmission via aerosols). This would mean going from a rehearsal space of 2-3 sqm per person currently (approx. radius of 0.8-1m max) to 12 sqm per person (players: 1.5m radius, i.e. 7sqm per person, with more space needed for certain instruments). It is likely that groups' usual spaces will be too small for them under these new space requirement. In many localities there would not be large enough spaces available for e.g. a full symphony orchestra or a large choir. The Freiburg risk assessment recommends venues should be frequently ventilated; this would be difficult in most community or school/church halls. Venues may not be able to offer more frequent cleaning and sufficient hand washing facilities. Venues may have unavoidable pinch points at entry/exits which make them unsuitable. Venues may not be accessible by walking/cycling or driving, to minimise risk of exposure on public transport for attendees
- **Re-establishing audiences**: audience lack confidence or ability (Indigo [research](#)) (if self-isolating, vulnerable of shielding) to return to view performances; therefore events will not be financially viable; venues re-opening for rehearsals or streaming shows but not able to re-open to audiences for public events

- **Re-engaging/engaging professional musicians:** talent drain from the sector as those lacking adequate financial support leave to find other work outside of music. This includes Musical Directors, freelance professional musicians etc

Support needed

- **venue and rehearsal room funding** for Covid-19 adaptations; to keep them mothballed or supported until full income/cost recovery restored; to make sure they remain affordable to leisure-time music groups when they re-open
- **extension of SEISS** to January 2021 to help prevent talent drain
- **clear technical guidance** for music group rehearsals, such as available in [Norway](#)
- **research** on risks of Covid-19 transmission via aerosols in music activity to enable group activity to resume as soon as possible
- **reduce social distancing to 1.5m** as used in other countries would enable some groups to get back together more quickly.
- Long-term: **re-examine the precarious nature of professional music careers** (freelance; low rates of pay; inadequate compensation for online creative work and content)

4. What lessons can be learnt from how the Welsh Government, the UK Government, arms-length bodies and the sector have dealt with Covid-19?

Welsh Government - Moved quickly, and with music they were particularly fast and should be applauded in offering grant support through Creative Wales and arranging a sector working group to advise that team going forward. What's apparent, though, is the 'gap' between the Creative Industries Sector and the 'non-commercial' music sector - mostly represented by Arts Council Wales - though in this case our members - as they aren't publicly funded, are not represented by ACW. The lack of an overall music strategy / framework for Wales is apparent here, as is the join up between all the parts of the ecosystem that could be fixed by such a piece of work.

Arms-length bodies – good response from Arts Council Wales, but they needed to move more quickly than they did. As an organisation they need more substantial financial resources to fund their support for the sector and they require more expertise - or more consultation with the sector - to support decisions and strategy in music (see above).

Sector – the lack of a music strategy for Wales meant there was no join up or single network through which different parts of the music ecosystem in Wales could work, connect and share. Fortunately at Making Music, we are such network, at least for leisure time music groups - so all our member groups had a place to come for help, questions and support. We moved all our work digitally, creating new twice-weekly online meetings for all UK members to meet and share; creating a new monthly meeting for all Wales members; moving all training online and offered to members across the UK; and building (and continuing to build) a suite of new digital resources - titled #stayconnected - free to members on our website (www.makingmusic.org.uk). Our model is one that other parts of the music sector should be supported in creating to serve them. Likewise a body, or network, that brings all key music organisations together in some structure on a regular basis in Wales would be useful here.

- **How might the sector evolve after Covid-19, and how can the Welsh Government support such innovation to deal with future challenges?**
- The leisure-time music sector has exponentially increased its **digital activity** and literacy; this is beneficial and elements will remain going forward. In particular we can see how **we have contributed to bringing more older people online; we have created new digital tools; and we have created new digital networks across Wales.** Music - and connection to a music group - has been a catalyst for increased digital

engagement by previously unengaged individuals. To support this, however, Wales needs to deliver reliable, high speed broadband across the country; needs to ensure there is equity in access to relevant digital hardware (ie laptops, tablets, headsets, microphones, cameras)

The leisure-time music sector was only patchily digital before Covid-19; it has made enormous strides in developing online activity since March and devising new digital resources. This has been beneficial in many ways and some of that will continue.

Volunteers running or participating in music groups and the professional musicians they engage, e.g. their Musical Directors, have developed new digital skills, inventing methods for running choir rehearsals online, learning how to record themselves at home to create group videos, running virtual Annual General Meetings etc..

These are desirable developments - going forward, time, travel and effort may be saved by using digital tools people have now become familiar with, and alongside regular rehearsals, online methods will now be available to musical directors of groups.

However, there are challenges in terms of inclusion and access.

We estimate that on average only 50% of a group's participants are able to engage online.

Some of the reasons:

- Lack of suitable equipment (there are still people without even a smartphone)
- Inability to access the online world due to lack of instruction
- Fears about online safety, believing that identity theft, hacking etc. is inevitable
- Safeguarding issues or their personal situation, e.g. living with vulnerable person etc.
- Lack of reliable or any broadband, a particular issue in rural areas
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To support the new digital dimension discovered by music groups, Welsh Government needs to accelerate deployment of broadband and digital training to enable all to get online.

2) This crisis has revealed the shocking financial frailty of professional music careers.

To make sure the individual and community benefits of the leisure-time music sector continue to be accessible to the general public, the sector needs reliable and affordable access to professional musicians. The precariousness of music careers means music groups are not certain of being able to engage in future the number and quality of professionals they need to flourish and inspire their participants.

We believe greater public investment is needed in the long term into sustainable careers for professional musicians.

3) This crisis has revealed the lack of financial sustainability of venues, both dedicated arts venues and multi-purpose community spaces.

There isn't a single authority or organisation which oversees the provision of space for hire in an area, although locally available affordable spaces are of such importance to all community-run groups, not just music groups.

We believe that greater financial support needs to be provided to ensure that all communities have access to affordable local spaces for self-governed activities.

John Rostron
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