



WILL MUSIC SURVIVE BREXIT?

FIFTH REPORT – MAY 2020

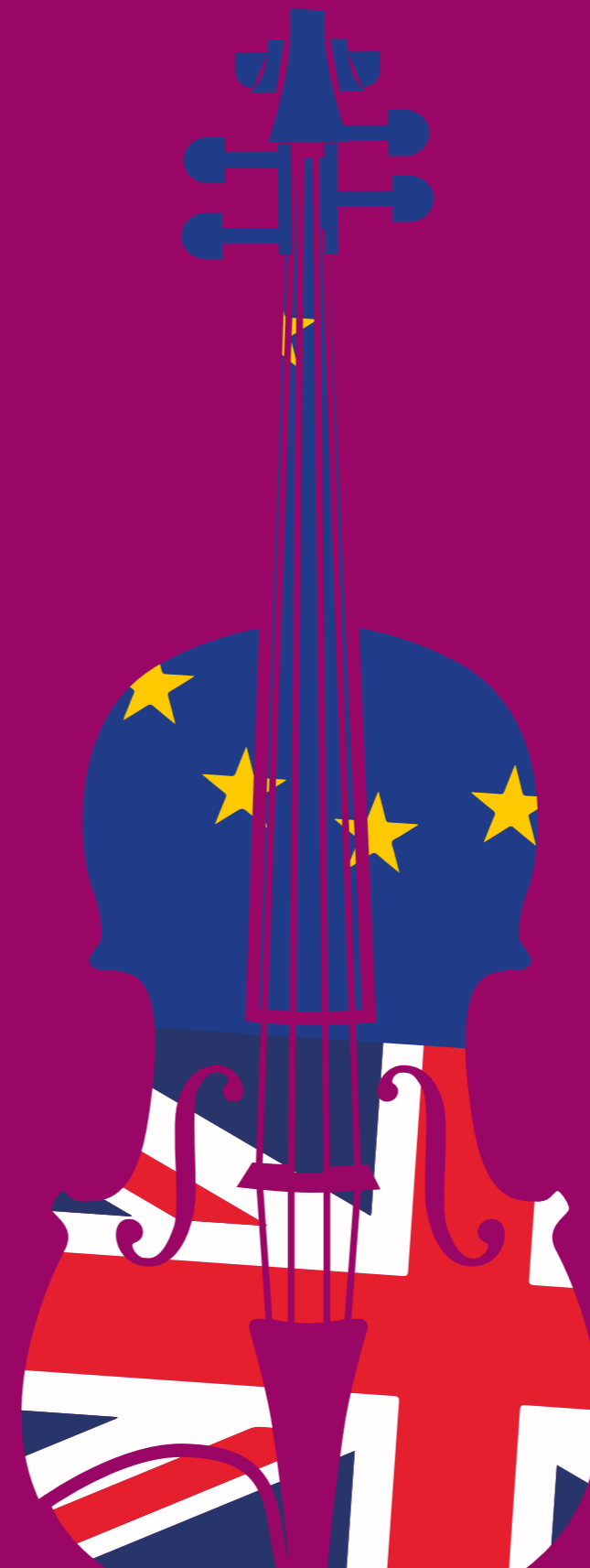
ISM
INCORPORATED
SOCIETY OF
MUSICIANS



#SAVEMUSIC

@SAVEMUSIC2020

CONTENTS



Report by Dr Naomi Bath, Senior Research & Policy Officer

INTRODUCTION

THIS REPORT PUBLISHES THE RESULTS OF THE INCORPORATED SOCIETY OF MUSICIANS' FIFTH SURVEY OF THE IMPACT OF BREXIT ON THE MUSIC PROFESSION, NOW THAT THE UK HAS LEFT THE EU.

The report's findings should be viewed in the context of the previous four ISM surveys conducted between 2016 and 2019, which have captured the increasing impact of Brexit developments since the referendum.

The past twelve months since the previous report was published have seen turbulent political changes to the Brexit landscape. After avoiding the cliff edge of a no-deal Brexit in March 2019, the UK approached a similar scenario seven months later at the end of October. Prime Minister Theresa May resigned in July 2019, succeeded by Boris Johnson who re-opened negotiations with the EU on the Withdrawal Agreement. The combination of Parliament's summer recess and its controversial prorogation for five weeks in September and October meant that there was very little time to break the parliamentary stalemate in passing the Withdrawal Agreement, so the date for exiting the EU was pushed back once more to 31 January 2020. In an effort to break the deadlock, Boris Johnson called a snap general election for 12 December and the Conservative Party won with a majority of 80 MPs. The revised Withdrawal Agreement Bill was passed, the Department for Exiting the EU was disbanded, and the UK left the EU on 31 January 2020. The UK moved into an eleven-month transition period during which the UK has no access to EU institutions (like the European Parliament) but rights for UK citizens have broadly remained the same.

The Government's direction of travel since leaving the EU at the end of January had been to attempt to position the UK as a global power that is open for business. As well as publishing the UK's mandate for negotiations with the EU

in February, the Government had signalled its readiness to negotiate free trade agreements with several 'like-minded' countries simultaneously, especially the USA. This incredibly ambitious approach attracted scepticism from many, including the President of the European Commission who stated that a comprehensive trade deal between the UK and the EU is "impossible" to achieve in eleven months. If the UK-EU trade talks fail, the UK faces the prospect of leaving on WTO terms which means full border checks, tariffs, and huge obstacles to working in the EU.

Plans to negotiate free trade agreements with different parts of the world, including the EU, have been stopped in their tracks by the global Coronavirus pandemic. The outbreak of Covid-19 is a catastrophe for the UK economy and its workforce. The impact of the outbreak has been disastrous for the music sector. Venues have closed, festivals have been cancelled, work has disappeared, and livelihoods have been lost. The UK music industry contributes £5.2bn to the economy each year, but it is under siege from the dual threats of Covid-19 and Brexit. The same is true for the broader creative industries – of which music is a core part – which contribute a considerable £111.7bn per year to the economy and have been growing five times faster than the national economy (DCMS 2019).

The nature of working as a musician is precarious and unpredictable even at the best of times. The music profession has a very high proportion of self-employed, freelance or portfolio musicians, who already struggle with poor rates of pay. Working in the EU/EEA – whether that involves performing, recording, teaching, collaborating or other activities – is an essential part of the profession's ability to earn. There is simply not enough work available in the UK for musicians to sustain their livelihoods so they must travel abroad. Until the referendum, the EU had been the obvious region where the music profession can work easily and cost-effectively. However, Brexit developments have already made this far more difficult and uncertain, and caused considerable harm to the music profession.

Brexit risks the success of the music sector, its economic value, and thousands of jobs. Music is central to the UK's soft power and its place on the world stage but the UK has already slipped to second place in the global rankings of soft power (Portland Soft Power 30 Index 2019). As this report shows, musicians have already lost substantial amounts of work and earnings due to Brexit. Their biggest concern is securing future work in the EU/EEA after the transition period. The data from respondents reveals a strong trend in EU promoters and venues no longer engaging UK passport holders in work and auditions because it is now too complicated and uncertain to book UK musicians compared to their EU counterparts. Indeed, some respondents reported that adverts for jobs and auditions have been specified as 'EU nationals only'. The loss of access to the EU market will be 'career ending' for our musicians as 'there is simply not enough work at a relevant level in the UK to sustain a career in music. Losing the European market will finish my career.'

When we consider the impact of the Covid-19 pandemic on the sector too, there is a genuine cause for alarm. Whilst regeneration in some sectors may happen quickly, the music sector will need careful rebuilding given the requirement to continue social distancing so that musicians can work again in a post-Covid-19, post-Brexit world. The sector relies on live performance which inherently requires large audiences or 'mass gatherings' to make it financially viable. We do not know what this will look like in the future. What we can say with certainty is that the UK – and the UK music sector – needs time and support to recover.

The music sector is at a crossroads. If it is to survive – if the Government *wants* it to survive – then the Government must act to protect it. If £10 million can be secured in the context of Covid-19 to bail out England's fishing industry (part of the UK's fishing industry worth £1.4bn per year), then surely the Government should act to protect an industry worth nearly four times that (the music industry is worth £5.2bn per year). Other European countries such as Germany and Estonia have provided substantial financial packages for the creative industries, and a financial package at EU level is currently being discussed in the European Parliament; we call on the UK Government to do the same. Furthermore, the UK Government must recover some of the time lost to Covid-19 that would have been spent negotiating our future relationship with the EU by requesting an extension to the transition period. This should hardly be considered an inappropriate request; after all, the purpose of the transition period was to allow time to negotiate new trading agreements and minimise financial shock to the UK economy. But this time has been eroded, first by political stalemate, and then by attempts to manage the impact of a deadly disease. The music sector simply cannot cope with the simultaneously devastating effects of Covid-19 and a hard Brexit this December. Extending the transition period and providing a financial package for the creative industries would give the music sector a chance to survive.

HEADLINE FINDINGS

JUST OVER 50% OF SURVEY RESPONDENTS HAVE IDENTIFIED AN IMPACT ON THEIR PROFESSIONAL WORK SINCE THE EU REFERENDUM IN 2016 – 99% OF WHOM SAID IT WAS A NEGATIVE IMPACT.

This is a slight increase from last year and reflects a year-on-year increase – 19% in 2016, 26% in 2017, 40% in 2018, just under 50% in 2019, just over 50% in 2020.

71% OF RESPONDENTS CITED DIFFICULTY SECURING FUTURE BOOKINGS IN EU/EEA COUNTRIES (for reasons such as reluctance from EU promoters to offer work and musicians' inability to confirm future work due to uncertainty caused by Brexit).

MORE THAN HALF OF SURVEY RESPONDENTS SAID THEY EXPECTED TO BE OFFERED LESS WORK NOW THAT THE UK HAS LEFT THE EU.

92% OF RESPONDENTS SAID THEY WERE CONCERNED ABOUT THEIR FUTURE ABILITY TO WORK IN EU/EEA COUNTRIES, OF WHICH 64% WERE 'VERY CONCERNED' AND 28% WERE 'MILDLY CONCERNED'.

NEARLY A FIFTH OF RESPONDENTS CLAIMED THEY HAD EXPERIENCED A LOSS OF EARNINGS DUE TO REDUCED OR CANCELLED WORK IN THE EU/EEA AS A RESULT OF BREXIT, AND A FURTHER 36% WERE NOT SURE.

11% OF RESPONDENTS HAVE LESS THAN A WEEK'S NOTICE BETWEEN BEING OFFERED WORK AND TAKING IT.

THERE HAS BEEN A **14%** INCREASE IN THE NUMBER OF RESPONDENTS NOT EARNING IN THE EU/EEA SINCE THE REFERENDUM. OVERALL, RESPONDENTS ARE EARNING LESS IN THE EU/EEA THAN THEY WERE BEFORE THE REFERENDUM.

78% OF RESPONDENTS VISIT THE EU/EEA AT LEAST ONCE A YEAR; 20% OF RESPONDENTS VISIT THE EU/EEA MORE THAN 11 TIMES PER YEAR.

73% NEARLY THREE QUARTERS OF RESPONDENTS SPEND MORE THAN A WEEK IN THE EU/EEA PER YEAR; ROUGHLY A THIRD (32%) OF RESPONDENTS SPEND MORE THAN A MONTH IN THE EU/EEA PER YEAR.

61% NEARLY TWO THIRDS OF RESPONDENTS REPORTED THAT THEY WERE CONCERNED ABOUT THE TRANSPORTATION OF INSTRUMENTS AND EQUIPMENT TO THE EU/EEA IN THE FUTURE.

74% NEARLY THREE QUARTERS OF RESPONDENTS CLAIMED THEY WOULD NOT BE ABLE TO AFFORD PRIVATE HEALTH INSURANCE IF THE EHIC SCHEME IS REVOKED WITHOUT AN EQUIVALENT IN PLACE.

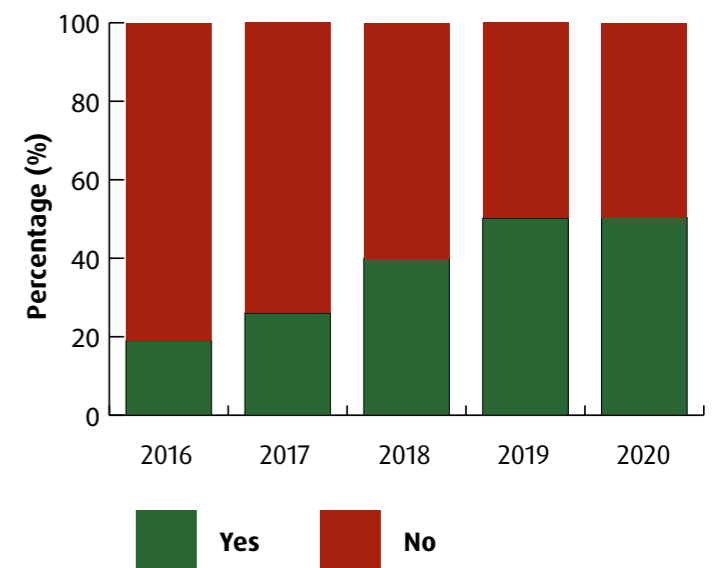
96% OF RESPONDENTS WANT RECIPROCAL ARRANGEMENTS ON TAX AND SOCIAL SECURITY TO REMAIN IN PLACE, OR EQUIVALENTS NEGOTIATED.

34% JUST OVER A THIRD OF RESPONDENTS SAID THAT THEY TRAVEL TO THE USA TO WORK, AND MORE THAN A THIRD (37%) OF RESPONDENTS TRAVEL TO THE REST OF THE WORLD (E.G. JAPAN, CHINA, RUSSIA) TO WORK.

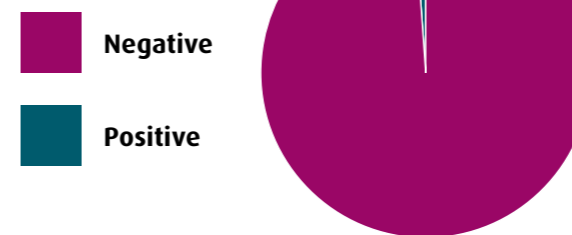
IMPACT OF BREXIT ON PROFESSIONAL WORK

According to the survey results, just over 50% of respondents have identified an impact on their professional work since the referendum result in 2016 – 99% of whom said it was negative. Therefore, over half the music workforce has identified Brexit as having a negative impact on their professional work. This is a slight increase from last year and reflects a steady increase each year, from 19% in 2016, 26% in 2017, 40% in 2018, and just under 50% in 2019.

Impact of Brexit since June 2016

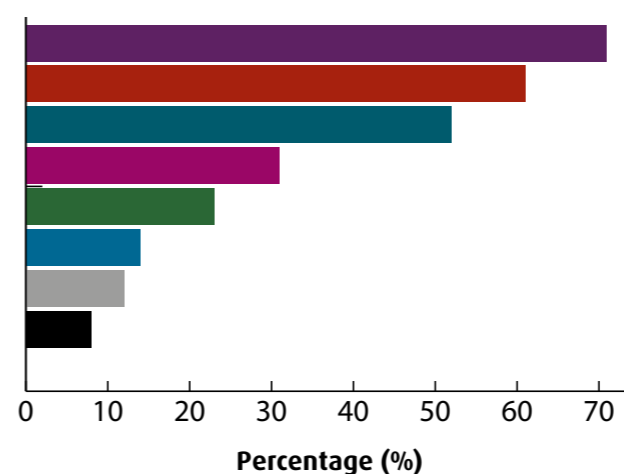


Positive or negative impact?



The negative impact of Brexit on musicians has taken many forms, the most prevalent being lost work in the EU.

Types of negative impact



- Difficulty/uncertainty securing future bookings in EU/EEA countries (including reluctance from EU promoters to offer work and inability to confirm future work due to uncertainty)
- Increased difficulty/uncertainty securing bookings between June 2016 and now
- Uncertainty regarding payment conditions (e.g. withholding tax, social security)
- Increasing travel costs
- Increasing difficulty and/or cost of transporting instruments and materials
- Cancellation of existing bookings or withdrawn offers of work in EU/EEA countries (with Brexit given as a reason)
- Other
- Difficulty getting or renewing insurance (instrument, travel, health)

According to respondents, the area of work that has been most affected by Brexit (71%) has been musicians' ability to secure future bookings in EU/EEA countries (for reasons such as reluctance from EU promoters to offer work and musicians' inability to confirm future work due to uncertainty caused by Brexit). The second most experienced factor (61%) has been difficulty/uncertainty

securing bookings between June 2016 and now. More than half (52%) cited uncertainty regarding payment conditions such as withholding tax and social security, and more than one in ten (12%) had experienced the cancellation of existing bookings or withdrawn offers of work in EU/EEA countries with Brexit given as a reason.

LOSS OF WORK

THE LOSS OF FUTURE WORK IN THE EU REPORTED BY THIS SURVEY IS STRIKING.

Among the 71% of respondents who reported difficulties securing work, many described a significant drop in bookings (both since the referendum and in the future), a pattern of contracts not being renewed, and composition commissions drying up.

Comments from respondents:

'Noticeable drop off in bookings from EU27 countries since 2016. At present I have now no future bookings at all, which is a marked difference.'

'Both my regular groups in Germany and Poland stopped booking me for work in 2018, after 10 years as their regular continuo cellist.'

'I have had a distinct drop off in bookings in the EU especially when there was uncertainty around "no deal" deadlines in the last couple of years. Going forward my EU engagements have all but ceased.'

'Composition commissions drying up after 15 years of being booked up 1-2 years in advance.'

'I frequently travel for short festival gigs (over a weekend), rather than tours, meaning that the festival would bear all of my costs. Obviously, organisers don't want to commit to costs that they cannot know. 2019 was my first year with no overseas bookings in 5 years.'

One of the most widely cited reasons for this drop off in bookings was uncertainty felt by EU promoters and their reluctance to book the 'risky' option of a UK musician compared to an EU musician. EU promoters lack the information to know the terms under which they would book UK musicians so are choosing to avoid this uncertainty altogether. Although the legislation has not yet changed, tours, festivals and opera seasons can be booked years in advance and respondents reported a 'hiring chill' towards UK musicians for future projects. In some cases, respondents stated that UK musicians are ineligible for many future jobs and auditions because they require EU citizenship. This is particularly prevalent in opera and theatre. Even more unsettling, several survey respondents reported discrimination based on 'anti-British' or 'anti-English' sentiment from EU promoters.

Comments from respondents:

'European opera houses have now categorically stated that they will no longer offer auditions to British artists not holding anything except a UK passport. Loss of Freedom of movement will be virtually career ending for myself and many of my friends and colleagues.'

'Considerably less work in EU. Promoters are open about not booking UK performers owing to uncertainty, as well as easily perceptible anti-British feeling post-Brexit vote.'

'Difficult to get auditions and jobs posted as EU nationals only with discrimination against UK citizens even last year when technically no changes have been implemented.'

'Reluctance on the part of EU groups to make long-term appointments of freelance musicians from UK. In the contract-less world of chamber orchestras, knowledge of future freedom of movement arrangements is crucial.'

'Reluctance of EU musicians/groups to work with UK musicians and venues including 2-way collaborations that have been common.'

'Not to be able to compete for work in the EU as before Brexit, narrows what I can apply for and will impact on future earnings.'

'I have no EU performance bookings for this year so far, normally I would expect to have a few already. Speaking to an agent who works in the UK and Europe, he said that promoters have been wary of booking UK artists because of uncertainty over Brexit outcome.'

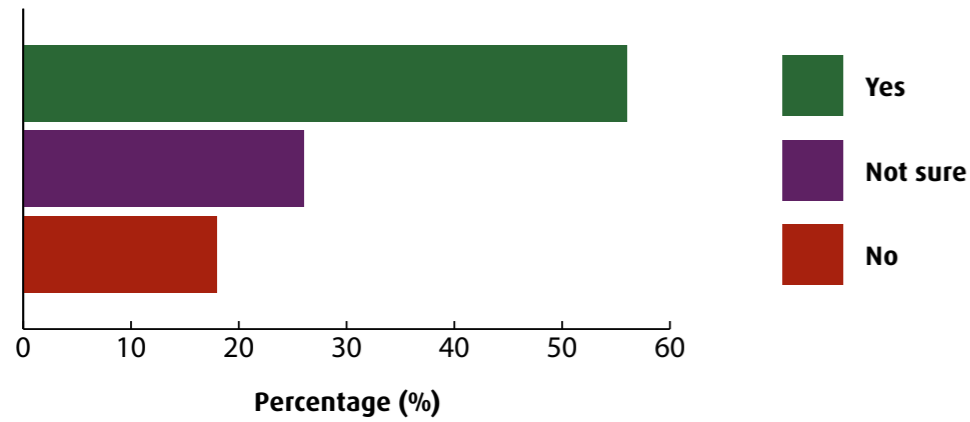
'Great uncertainty over taking future bookings for the UK-based orchestras - promoters very nervous and uncertain, so booking other nationalities. A major European festival which has over the years booked many British musicians now says colleagues have stopped inviting British orchestras and theatres. That is what we all feared, but to have it written in black and white is dreadful.'

'British nationals have already joined other 'third country nationals' on the lowest rung of hiring desirability as a result [of Brexit uncertainty]. In an industry that often casts two, four, sometimes even seven years ahead, this is catastrophic for individual artists' careers and livelihoods.'

'We fear Brexit will mean MUCH higher charges and costs which will either price us out of taking the work or we will have to put our fees up too high and promoters will choose against hiring British bands.'

More than half of survey respondents (56%) said they expected to be offered less work now that the UK has left the EU.

Do you expect to be offered less work in the EU now that the UK has left the EU?



Fewer opportunities for musicians to work in the EU will have a dramatic knock-on effect on the number of opportunities available in the UK. As fewer musicians are able to secure work in the EU, UK-based opportunities become the only viable option. However, not only is there not enough work available in the UK in the first place, but the competition for that work will increase dramatically. Several respondents feared increased competition for UK-based work to the extent that they will no longer be able to sustain a career as a musician.

Comments from respondents:

'I expect that due to the tension with EU countries, more musicians will be trying to find work in the UK, creating more competition and therefore less opportunities. So, my income will definitely decrease and it does make me worried that I am going to face times where I cannot get enough working opportunities to cover my maintenance expenses.'

'I will struggle to continue as a performer as more and more UK singers, unable to secure work in the EU, are forced to chase the same, limited number of opportunities in the UK.'

'I'm screwed. There is not enough work in the UK alone to live on. USA are not suddenly going to fling their doors open to UK performers and the UK government is so uncultured they don't give a toss.'

'I am expecting harder times since the competition in the UK will then be massive and there will be less work.'

'There is simply not enough work at a relevant level in the UK to sustain a career in music. Losing the European market will finish my career.'

Fear for their careers is felt acutely by musicians at the early stages of their careers. Emerging artists and bands typically rely on gigging in the EU to increase their exposure and build their reputation. They operate on very slim margins and will be unable to cover additional costs incurred after the end of the transition period. Classical musicians who are early in their careers can depend on short-notice opportunities or 'jump-ins' to 'dep' for more established musicians when they are unavailable. Sometimes this helps to make ends meet, but other times it can result in a 'big break' and herald a new phase in their professional career.

Comments from respondents:

'As a young musician who needs to establish a presence/ following for work as a performer, it will be harder to get (to) work in the EU27, meaning it will be harder to gain exposure, reputation and earnings.'

'At an unsigned / DIY level, promoters and bookers are unwilling to pay for visas / carnets etc. Bands and artists themselves cannot cover these costs.'

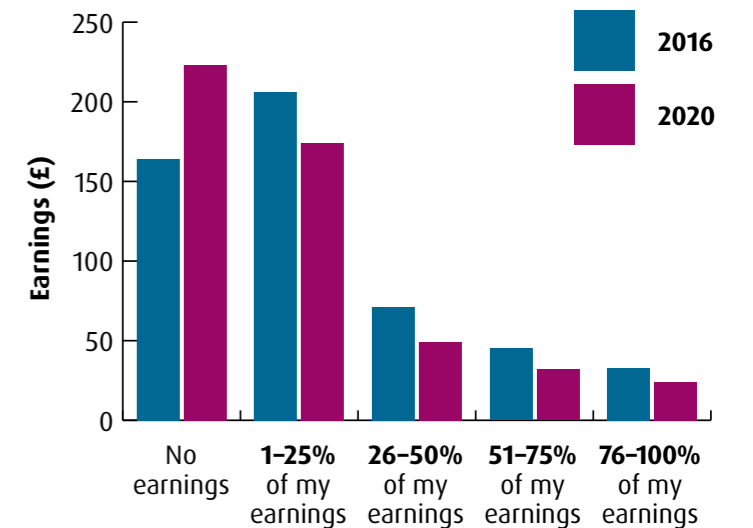
'My "break" with one major continental ensemble came when I was able to go to Belgium at 72 hours' notice to do a week of recording sessions when a regular ensemble member was indisposed. This kind of short-notice engagement, which in my case (as in many others) was genuinely career-advancing, will probably not be possible in future.'

LOSS OF EARNINGS

UNSURPRISINGLY, AS THE AMOUNT OF WORK MUSICIANS HAVE IN THE EU HAS DECREASED, SO HAS THE AMOUNT OF MONEY THEY HAVE EARNED.

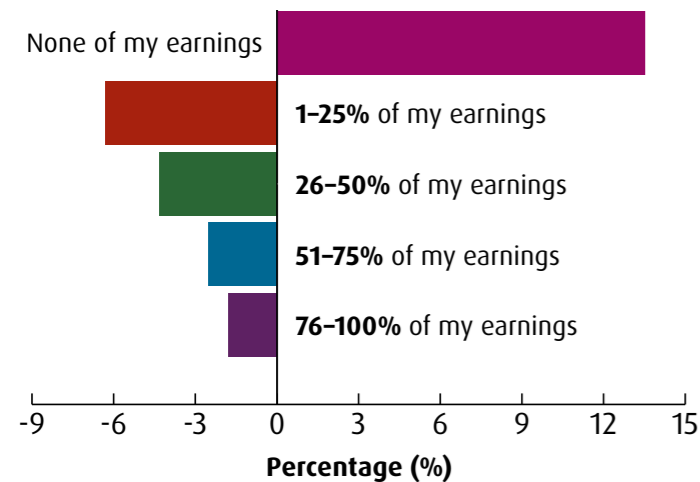
A comparison of earnings from work in the EU/EEA before 2016 and in 2020 demonstrates that musicians are currently earning less from work in the EU/EEA than they were before the referendum.

Comparison of earnings in the EU/EEA between 2016 and 2020



In each earnings category, the percentage of respondents decreased between 2016 and 2020 – for example, before 2016, **40%** of respondents earned 1-25% of their earnings in the EU/EEA, but in 2020 only **34%** of respondents earn 1-25% of their earnings in the EU/EEA.

Percentage variance between 2016 and 2020 in each earnings category



The only category of earnings to increase was 'none of my earnings'. Before 2016, **32%** of respondents didn't earn from work in the EU/EEA but in 2020 this has increased to **46%** of respondents.

Another way of presenting this is through the percentage increase or decrease of each earnings category. This shows that there has been a **14%** increase in the number of musicians not earning in the EU/EEA since the referendum. It also shows that **28.4%** of respondents overall changed to a lower earnings category between 2016 and 2020.

Comments from respondents:

'I used to have a run of work in the Netherlands every December which comfortably paid my tax bill in January and left almost enough to pay the next instalment. This has now gone to local performers/EU citizens.'

'As well as European promoters being less keen to employ UK musicians, private sponsorship has dried up, to a large extent thanks to the uncertainty of markets following Brexit.'

'It is unlikely I would be able to tour as I have done in the past when I was earning almost 100% of my earnings for at least 15 years.'

'Fewer gigs = less earnings! Also the UK live music industry simply does not pay enough for UK bands and artists so EU gigs are essential.'

As well as reduced opportunities to earn, respondents commented that the amount of money they have earned has also reduced simply due to exchange rates. Brexit uncertainty has weakened the value of the British pound, further undermining musicians' earnings.

'Drop of GBP against the EUR means my daily EUR rate is now lower than it was in 2015, even though the GBP rate has gone up. And it's going to get worse!!!!'

Reduction in earnings from live concerts. The UK concert scene is severely underfunded so getting concerts in Europe is often the best way of getting income for my chamber group.'

Reduced earnings is having a negative impact on many musicians' livelihoods. Several respondents revealed that the consequences of Brexit have made it difficult to make a living, their livelihoods have suffered as a result of Brexit, and that they are struggling to secure enough work to support themselves. Some indicated that they may need to change careers in order to survive.

Comments from respondents:

'Vastly reduced performing/ touring opportunities mean it will be even more difficult to make a living performing.'

'I'm really struggling to secure enough work to support myself.'

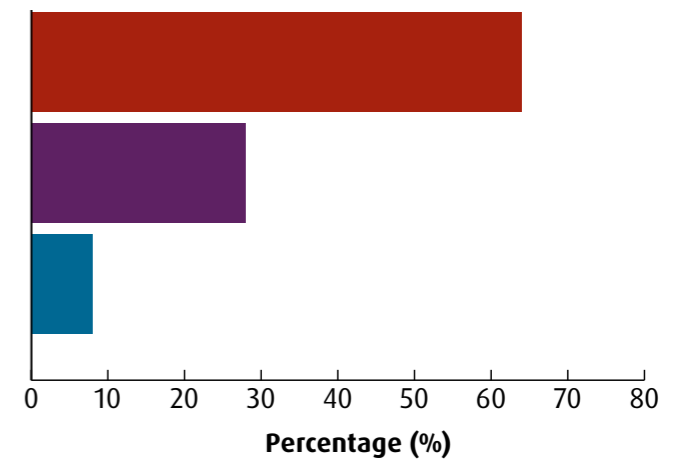
UNCERTAINTY AND CONCERN

MUSICIANS REPORTED FEELINGS OF UNCERTAINTY, ANXIETY AND CONCERN FOR THEIR FUTURES.

92% of respondents said they were concerned about their future ability to work in EU/EEA countries, of which **64%** were 'very concerned' and **28%** were 'mildly concerned'.



To what extent are you concerned about your future ability to work in EU/EEA countries?



Survey respondents cited lack of clear information or guidance from the Government and 'total' uncertainty regarding all aspects of working in the EU after the transition period. Some reported the impact of this uncertainty on their mental health, contributing to anxiety and depression. The music sector urgently needs clarity and further information regarding the UK's future relationship with the EU and how they might be able to continue working there.

Comments from respondents:

'Enormous anxiety faced both by me and those I deal with, total uncertainty about whether ANY of it is going to be able to continue (nothing to do with work abroad, but even just within the UK itself) – economic uncertainty, likely lowering of earnings, worry that nobody is actually ever going to be able to afford luxuries like concerts or lessons any more.'

'General lack of clear information or definitive rules which creates uncertainty. Lack of trust in the competence of those negotiating.'

'Total and complete uncertainty about all aspects of the future of being able to realistically tour in mainland Europe.'

'Going through gov. uk website on 'how Brexit will affect you' gives extremely limited information on the impact of Brexit.'

'Generally musicians need security at least in the basics of no visas, secure bookings and reasonable travel options, as getting work and delivering on a high artistic level is tough enough without also having to be concerned over the Brexit consequences for musicians.'

MOBILITY

MOBILITY IS CRUCIAL TO THE CAREERS AND LIVELIHOODS OF THE MUSIC PROFESSION.

Musicians depend on the ability to travel easily and cheaply around multiple countries for work in a short period of time. They need to be able to simultaneously plan years in advance and to jump in at short-notice.

73%
OF MUSICIANS
SPEND MORE THAN
A WEEK IN THE EU/
EEA PER YEAR

32%
OF MUSICIANS
SPEND MORE THAN
A MONTH IN THE
EU/EEA PER YEAR

78%
MUSICIANS VISIT
THE EU/EEA AT
LEAST ONCE A YEAR

20%
OF MUSICIANS
VISIT THE EU/EEA
MORE THAN 11
TIMES PER YEAR

11%
OF MUSICIANS
HAVE LESS THAN
A WEEK'S NOTICE
BETWEEN BEING
OFFERED WORK
AND TAKING IT

As freedom of movement will end after the transition period (currently 31 December 2020), musicians will require a mechanism that allows them to continue travelling to the EU to work. Without it, and particularly if the UK leaves without a comprehensive arrangement in place, the music profession could overnight find themselves trying to navigate the entry requirements for each of the 27 EU countries. This is unviable and unnecessary and must be rectified.

The ISM continues to call for the Government to commit to establishing a two-year, multi-entry touring visa that is cheap and admin-light.

The ideal solution would be a multi-entry touring visa that is valid for two years and is EU-wide, covering all 27 Member States. This route would be applicable specifically to highly-skilled musicians and creatives for paid work. There is precedent for longer EU-wide visas given the one year, three year, and five year multiple-entry Schengen visas – so long as the 90 days out of 180 days rule is respected – and in some cases it is possible to work.

The music sector must be able to continue touring in the EU and a two-year, multi-entry touring visa would help them to do so. However, if this is not possible, a visa for creatives based on a 90 days model must be established as soon as possible.

Comment from respondent:

'It will definitely be harder if not impossible to find work abroad from here if it takes more than a simple document to fill in.'

'The Government should seek also seek a commitment for an EU-wide multi-country, multi-entry short-term 'touring visa' for UK citizens, and offer a reciprocal commitment for EU citizens. This would enable self-employed persons to travel for short-term visits between the UK and the EU, recognising the two-way benefits that accrue from allowing artists, entertainers and other cultural sector workers to move freely between the UK and EU to tour and work on short-term contracts.'

HOUSE OF LORDS EUROPEAN UNION COMMITTEE (JULY 2018)

There is strong support from the music sector and Parliament for a touring visa. Multiple organisations across the music sector and creative industries have made similar calls, such as the Musicians' Union, UK Music, and the Creative Industries Federation. In Parliament, both the House of Lords European Union Committee (July 2018) and the House of Commons DCMS Committee (March 2019) have supported a touring visa.

'Ensuring frictionless travel for musicians, touring personnel and their equipment is essential for musicians to continue to access work opportunities abroad, and for foreign artists to tour to the UK. We support the industry's calls for the introduction of an EU-wide touring visa, which the Government should pursue in its future relationship with the European Union.'

HOUSE OF COMMONS DIGITAL, CULTURE, MEDIA AND SPORT COMMITTEE (MARCH 2019)

Despite these parliamentary statements of support, the direction of travel from Government regarding short-term movement between the EU and the UK (and vice versa) is cause for concern. The Government's approach to EU musicians making short-term visits to work (e.g. perform, teach, collaborate) in the UK after the transition period is important because EU countries may reciprocate the rules we set.

The ISM is particularly concerned about the mobility for musicians after the transition period given the new points-based immigration system, details of which were published as a Policy Statement by the Home Office in February 2020. The Policy Statement outlines that the current system for non-EEA nationals making short-term visits to the UK will apply to EU nationals from January 2021, and that EU nationals will be treated as non-visa nationals.

Given the stated intention of reciprocity between the UK and EU countries, the ISM has for a long time recommended that the current system of visitor visas and temporary work visas not be used as a model for post-Brexit mobility concerning EU creatives travelling to the UK, and UK creatives travelling to the EU. Details of the problems with the current system and how musicians from all over the world attempt to overcome them are laid out in detail in another ISM report, *How Open is the UK for the Music Business?* (April 2020). If the current system is applied to EU nationals, it would mean that EU musicians and promoters have to navigate the UK's immigration system for the first time, encountering new costs and bureaucratic demands. Not only is this likely to disincentivise musicians and promoters from coming from the EU to the UK, but if reciprocal arrangements are applied to UK musicians travelling to the EU, our UK musicians will suffer similar hurdles and costs. This will adversely affect their ability to work in the EU and put their livelihoods at risk.

Several respondents offered warnings about the consequences of EU musicians no longer being able to tour or perform at festivals in the UK. Not only would this be a huge setback to cultural exchange and collaboration between peers, but it may have negative financial implications too. Festivals and concert venues may not be able to afford the additional cost and bureaucracy of booking EU artists, which in turn may cause a decline in ticket sales and a downturn in the UK tourism industry.

Comments from respondents:

'[Being based in the EU] this will be a devastating blow to our market strategy. A large part of our market is in the UK, as well as the majority of business connections necessary to organize and promote the concerts; if the logistics of organizing concerts by EU artists isn't feasible due to excessive administration, [the UK market] will be unable to book EU artists anymore, and we will have to look to other lucrative markets within the EU for concert bookings. We lose bookings, concert organizers lose their pool of talent to promote, and the UK loses a cultural draw that attracts tens of thousands of visitors who spend their money in the UK.'

'If UK events cannot easily afford to bring in overseas acts they may choose to not run events (overseas headliners are often the big draw to UK festivals), and then there will be fewer opportunities in the UK as well.'

'I facilitate touring and record release PR by Italian bands in the UK. With touring margins cut to the bone, I fully expect bands to forego UK touring and quite possibly record releases as well.'

The future of mobility between the UK and the EU is highly uncertain, not only due to Brexit. The impact of Covid-19 on travel has thus far been disastrous, and it is unknown what restrictions might be in place in the medium and long term or what the financial consequences of these might be. For example, social distancing rules on planes and trains could mean that funding models are forced to change, making travel tickets more expensive to customers. This would make it even less likely that musicians were able to afford to travel to the EU after the transition period, on top of new Brexit-related costs for visas and work permits, transportation of instruments, and private health insurance among others.

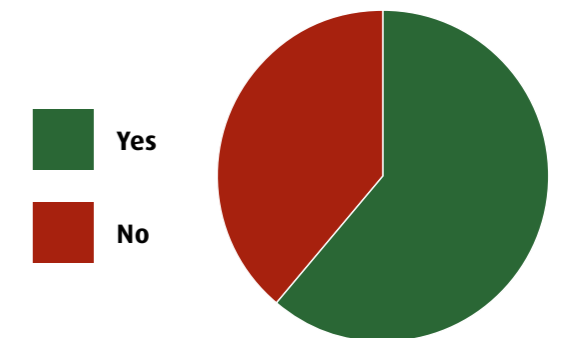
TRANSPORTATION OF INSTRUMENTS & EQUIPMENT

THE TRANSPORTATION OF INSTRUMENTS AND EQUIPMENT IS CRUCIAL FOR THE MUSIC PROFESSION TO WORK IN THE EU.

Leaving the customs union is likely to make it very difficult for musicians to travel to and within the EU with instruments and sound equipment. Musicians frequently perform in different countries on consecutive days, which requires their instruments and equipment to move quickly and without hindrance. Any introduction or increase in paperwork, cost, and inspections is expected to cause delays at the border. This not only makes touring more expensive – due in part to increasing need for overnight stays and longer working hours (including for drivers) – but delays may lead to cancelled performances and the loss of future bookings.

Nearly two thirds (61%) of respondents reported that they were concerned about the transportation of instruments and equipment to the EU/EEA in the future.

Do you have concerns about the transportation of instruments or sound equipment in the EU27/EEA after the UK leaves the EU?



CARNETS

WHEN FREE MOVEMENT OF GOODS ENDS AFTER THE TRANSITION PERIOD, NEW CUSTOMS REQUIREMENTS WILL COME INTO FORCE.

Musicians will require new documentation to transport instruments and equipment temporarily into the EU, primarily to prove they are not intending to sell it.

There is a lot of uncertainty among the music profession about what will be required and how much it will cost to take instruments and equipment temporarily into the EU. One likely option is ATA carnets.

WHAT IS A CARNET?

An ATA Carnet is a temporary international customs document that allows goods, including instruments and sound equipment, to move temporarily outside the UK. ATA Carnets can be used in around 70 countries, can valid for up to 1 year, and cost around £325.85 to issue plus a security deposit that is proportionate to the value of the goods. The carnet must be presented to customs each time the goods are imported, exported, or pass through a country.

Carnets are already used by professional bands and orchestras when they transport instruments and equipment to other parts of the world and they are generally disliked. Numerous survey respondents described feelings of dread if carnets were needed for the EU, describing them as ‘massively onerous’, ‘resource consuming’ and ‘prohibitively expensive’. The Live Music Forum explained that the increased costs and bureaucracy associated with carnets would have a ‘crippling effect on bands’ and urged the Government to ‘resist any arrangements that would result in the reintroduction of temporary customs documents for touring equipment’ (DCMS 2019).

Comments from respondents:

‘It’s going to slow the whole movement of musicians down. Many tours I have done have been all over Europe with very tight time for travel transfers between countries. Any hold up at customs will add to cost and add friction to our freedom to work travel and movement on to the next gig. The benefits of touring are often marginal so (especially for young bands starting out) this will act as a dis-incentive to work.’

‘Carnet costs and customs delays at borders – I toured in the early 1970s and worked in music trade fairs in the 1980s and have the experience.’

‘Worried that a DIY Artist like myself will have to pay for carnet as I have no label backing, all self-funded.’

‘I travel with my own double manual harpsichord. It is a very precious instrument. I am concerned about charges/custom are going to be a percentage of the value of the instrument.’

‘The cost of carnets in terms of the financial burden and the time factor will make touring almost impossible to be financially viable.’

‘Obtaining carnets will prove difficult – I take instruments to the far east and it is already a time-consuming process filling out paperwork.’

‘We’re leaving the customs union. Having to fill in and pay for carnets for instruments and merchandise would make touring financially and logistically impossible. We were offered a tour of New Zealand two years ago and turned it down for precisely these reasons.’

‘It’s hard enough for musicians to check in luggage and ensure they are not damaged – higher costs and carnets to travel with equipment will have a detrimental effect.’

‘Unloading/loading constantly for thorough inspection. Risk of damage or confiscation if anything mislabelled on carnets etc.’

‘It will affect timings of group tours – we already experience delays when paperwork for double basses is not in order. Groups would have to transport whole ensembles earlier which will increase costs and make the groups less profitable.’

The ISM calls on the Government to negotiate a cultural exemption for the temporary transportation of musical instruments and equipment, or cover the cost of carnets for musicians.

CITES

MUSICIANS, PARTICULARLY CLASSICAL MUSICIANS, WILL BE AFFECTED BY RESTRICTIONS ON THE TRADE AND MOVEMENT OF INSTRUMENTS THAT CONTAIN CITES-LISTED PRODUCTS.

WHAT IS CITES?

CITES is the Convention on International Trade in Endangered Species of Wild Fauna and Flora. It is an international agreement between governments that aims to ensure that international trade in wild animals and plants does not threaten their survival.

Comments from respondents:

‘I’m very worried about my bow which is an antique with endangered materials, I currently would never travel to the US with it. But I never thought twice about around the EU before now.’

‘Several of my instruments contain ivory and as a multi instrumentalist I often need to travel with several instruments. If I have to pay to transport each one it will be prohibitive.’

After the transition period, CITES regulations will now apply to the UK when bringing instruments containing CITES-listed products into the EU. Instruments containing restricted species that can be found on the CITES list, for example ivory, tortoiseshell and Brazilian rosewood, will be subject to CITES regulations. This means that transportation of these instruments into the EU will require a musician to obtain a Musical Instrument Certificate (MIC). MICs are currently free of charge, though they are likely to incur a fee in the near future.

The ISM calls on the Government to scrap plans to introduce a charge for Musical Instrument Certificates.

CITES regulations are already implemented when UK musicians travel to other parts of the world. Some survey respondents explained that the processes of obtaining a MIC and undergoing instrument inspections at customs is so cumbersome and complicated that they opt to take an alternative instrument or bow. Performing on second instruments is far from ideal, but it is testament to how challenging the process can be. When CITES regulations are applied to the EU, this will generate several new obstacles that may be hard to overcome.

‘Cost and difficulty to obtain [certificates] especially for old instruments with few exact details to give. Problems with old materials (e.g. proving bow materials are bone/mammoth ivory not elephant).’

The UK’s implementation of CITES regulations also affects the routes through which musicians can travel with their instruments. Musicians will only be able to transport instruments containing CITES materials through CITES-designated points of entry and exit. As the UK was preparing for a no-deal Brexit last year, the ISM successfully lobbied the Department for Environment, Food and Rural Affairs (DEFRA) to expand its list of CITES-designated ports to include Dover, the Eurotunnel, Holyhead and Belfast Seaport. However, the ports of Immingham and Tyne (Newcastle) – as well as Eurostar – are not yet on the list and the ISM continues to campaign for this.

The ISM calls on the Government to include Eurostar and the ports of Immingham and Tyne (Newcastle) as CITES-designated points of entry and exit.

HEALTH INSURANCE

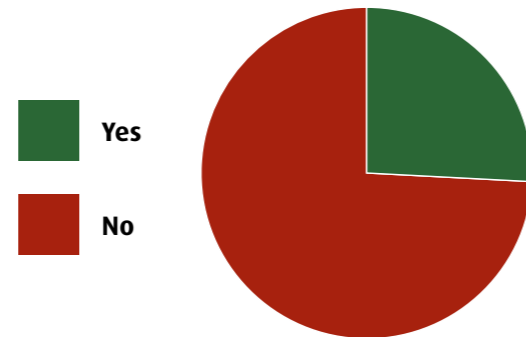
THE MUSIC WORKFORCE WILL SUFFER IF CERTAIN MECHANISMS AGREED BETWEEN THE UK AND EU THAT CURRENTLY PROTECT THEM ARE WITHDRAWN.

The music profession relies on the European Health Insurance Card scheme (EHIC) while in the EU, which also covers those with pre-existing health conditions, e.g. diabetes. If this provision ceases and an alternative is not negotiated, musicians would need to pay for private health cover through travel insurance. Private health cover can be expensive, particularly for those with a pre-existing condition. This is problematic for musicians who are mostly self-employed and operate on slim margins. **74%** of survey respondents claimed they would **not** be able to afford private health insurance if the EHIC scheme is revoked without an equivalent in place.

Whilst it is encouraging that the UK's mandate for negotiations with the EU (published 27 February 2020) mentions that 'arrangements that provide healthcare cover for tourists, short-term business visitors and service providers...could be good for business and support trade', the music workforce needs a concrete commitment from Government.

The ISM calls on the Government to ensure the continuation of the EHIC scheme or its equivalent.

If an equivalent scheme to the EHIC is not secured, would you be able to afford private health insurance?



SOCIAL SECURITY & TAX

THE MUSIC WORKFORCE FACES SIGNIFICANT UNCERTAINTY REGARDING FUTURE ARRANGEMENTS ON SOCIAL SECURITY AND TAX.

Unsurprisingly, **96%** of respondents want reciprocal arrangements on tax and social security to remain in place, or equivalents negotiated.

Do you want reciprocal arrangements on tax and social security to remain in place (or equivalents negotiated)?



The uncertainty regarding future social security payments and tax is reportedly felt by tour managers, promoters, festival organisers and musicians alike as it affects how fees are negotiated. Thus far, both employed and self-employed musicians in the UK have been using the A1 certificate system when they work in the EU to ensure they are exempt from paying social security contributions in more than one EU Member State. However, if the A1 certificate system ceases after the transition period, the music workforce would be in danger of double deductions in social security contributions. In October 2019 as the UK approached a no-deal Brexit for the second time, many musicians received letters from HMRC warning them of this possibility. At that time, France confirmed it would not recognise A1 certificates whereas Ireland was the only country that confirmed it would.

It is encouraging that social security coordination is covered in the UK's mandate for negotiations with the EU (February 2020) in which it states that 'the UK is ready to work to establish practical, reciprocal provisions on social security contribution'. However, the music sector does not yet know what this looks like and will need time to adapt so their earnings do not suffer.

The ISM calls on the Government and HMRC to maintain the A1 certificate system or provide details of a suitable equivalent as soon as possible.

Comments from respondents:

'Social security matters are significant in France in particular as the employer has a substantial amount to pay if the artist cannot produce an A1 making engaging non-A1 -holding artists less attractive financially.'

'Uncertainty over future A1 forms from UK social security, uncertainty over future double taxation agreements. David Davis didn't even know what an A1 was when my MP contacted him on my behalf.'

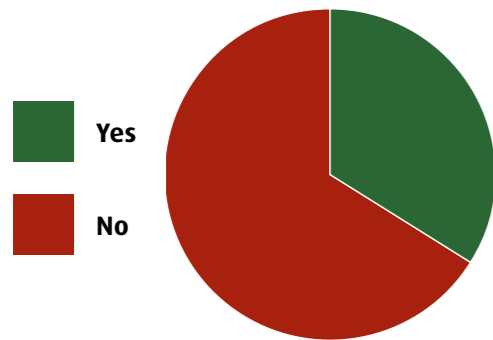
'I work mainly with EU musicians and have been unable to secure bookings for our ensembles in the UK due to Brexit. It is also difficult to know how much fee I should be asking for due to not knowing how much social security and tax I may be liable to.'

'Promoters in other countries have also been reluctant as the terms under which they hire citizens of EU nationals will no longer apply to British citizens, and what the implications of that will be for them are still unclear - no one knows what conditions and regulations will apply, especially in regard to issues around tax, social security etc.'

WORKING IN THE USA

WHILST MUSICIANS HAVE TYPICALLY TOURED TO THE EU MORE FREQUENTLY AS IT HAS BEEN RELATIVELY CHEAP AND EASY (DUE TO FREEDOM OF MOVEMENT AND THE FREE MOVEMENT OF GOODS), MUSICIANS ALSO VISIT THE US AS PART OF THEIR TOURING CAREERS.

Just over a third (34%) of respondents said that they travel to the USA to work.



PROBLEMS GETTING VISAS:

The paperwork involved in organising visas for an orchestra [to tour in the USA] is EXTREMELY onerous!

O-1 Artists visa. Very heavy admin to apply for this visa. This has taken at least 1 month of heavy administrative work which has reduced my instrument practice time and other outreach work. The application is very costly too. More than \$1,500 just to make the initial application with the use of a US-based lawyer (and her fee was the lowest I could find, others were much worse).

Musician visa. Travel to US embassy in London for interview (from Wales). Last visa was £400 – more than the gig fee!

Work visa. Cost thousands, nightmare experience, delays, didn't get sorted before tour so lost gigs.

To visit the US to work, the musicians and crew typically require visas, customs paperwork for their equipment such as carnets, CITES paperwork for instruments containing endangered materials, and private health cover. Often they need to secure the services of an accountant to help them retrieve withholding tax and social security payments. All these requirements make working in the US very expensive and paperwork-heavy, which demands a lot of time in a musician's busy schedule.

Depending on the outcome of the Brexit negotiations, musicians may face similar obstacles and costs when travelling to the EU. This would seriously damage the music profession.

The ISM urges the Government not to adopt the US visa system as a model for temporary work when negotiating with the EU.

P1, took over 4 months and I missed the first 2 shows due to slow processing. I also bought a second passport (£177) because of the problems. Then £155 for the visa, plus £300+ to go through the application forms to then be allowed to apply for a visa.

O1-B Artist Visa. Toured extensively during 2016-19. Cost of visa was upwards of £2500 (Did fast track and was handled by a law firm specializing in musicians). All paid out of my own pocket. Process was very long, nerve wracking and in my opinion unnecessary (There should be an agreement between the US and UK to make the whole process much easier and cheaper). If your visa is rejected you do not get your money back. You have to prove your worth and popularity through various means, from magazine articles to "famous" or worthy people vouching for you in the form of letters. They can reject you on the spot at the embassy.

O1B. The cost and complexity of application is excessively onerous (and likewise with inviting US musicians to the UK): there should be a simplified system for short visits for guest work, where there is no intention to settle. The current system is unreasonably difficult, especially for smaller host organisations.

O1 VISA (Persons of extraordinary ability) Most recent visa (November 2019) cost nearly \$2000 as my agent had to use fast track 'Premium Processing' since the visa had not been issued 2 weeks before I was due to leave. Trump's 'Buy American:Hire American' directive is making it almost impossible for foreign artists to perform in the USA. And yet many American artists (organists in particular) come to perform in this country without any visa at all! Something needs to be done about this to be fair to British performers.

O1 – artist of outstanding ability. Cost is hundreds of dollars. Very difficult and time-consuming to apply for. Need assistance of expensive immigration lawyer. Prohibitive to the extent that I don't look for work in USA anymore.

P1 and O1. Costs well in excess of £100 each time. The process is very lengthy and impractical, given time to travel to the embassy from outside London, and the length of time required for appointments. Applications are hugely time-consuming, and need to be done so many months in advance as to be prohibitive for 'everyday' work, as opposed to special occasions.

MUSICIANS DECLARE EQUIPMENT FOR CUSTOMS OR USE CARNETS:

All equipment that we travel with is declared for customs.

I have to fill in a declaration form for everything I bring in because it's professional.

A very detailed declaration of everything, including place of origin, price, component parts, etc. must be produced.

MUSICIANS EITHER HAVE CITES CERTIFICATES OR LEAVE AFFECTED INSTRUMENTS AT HOME AND TAKE SUBSTITUTES:

I take instruments that do not contain any CITES material because I am worried about not having the correct paperwork.

I have CITES certificates for all my equipment.

Leave CITES items at home and use substitutes.

I buy and sell instruments – CITES certificates and export/import licences are mandatory.

HEALTH INSURANCE IS OFTEN TAKEN OUT AT PERSONAL EXPENSE:

Either none, or personal cover at own expense.

We ask our musicians to arrange travel insurance at their expense.

Get my own insurance if affordable, none if not.

PROBLEMS WITH TAX AND SOCIAL SECURITY:

The USA take social security unless you apply for a card in person, which you can only do if staying there for a longer period of time than just travelling for a concert. Therefore I lose money.

Earnings were withheld at a rate of 30%. You must be physically present and attend a social security building in the USA to obtain a social security number, which you are entitled to with the O1-B visa and is mandatory when filing a US tax return. Tried twice to apply for a SSN, never received anything. They are notoriously bad with it. I am owed money by the IRS as I was always under the \$20,000 threshold which is contained in the UK-US double taxation treaty. Awful, awful process.

Expensive accountancy fees to organise repayment of tax.

Lots of paperwork and long waits for reimbursement.

Massive chunk taken in withholding tax. Forms for reclaiming are complex.

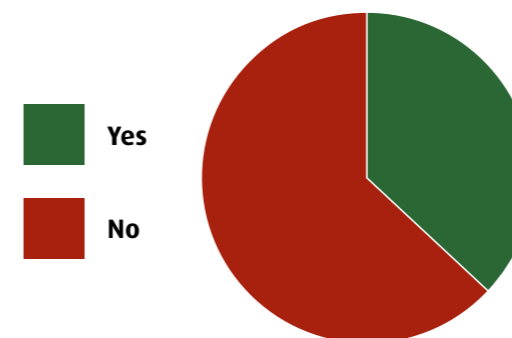
Have had problems getting social security number without employing USA accountant

WORKING IN THE REST OF THE WORLD

AS WELL AS TOURING IN THE US, MUSICIANS ALSO TRAVEL TO OTHER PARTS OF THE WORLD TO PERFORM, TEACH AND COLLABORATE.

The most common countries (not the US or in the EU) visited by survey respondents were China, Russia, Australia, Turkey, Japan, South Korea and Singapore.

More than a third (37%) of respondents travel to the Rest of the World (e.g. Japan, China, Russia) to work.



Musicians described similar obstacles to travelling to the US such as visas, customs paperwork, CITES documents, private health cover, and managing tax and social security payments. Some explained that when promoters completed a lot of the paperwork for them it effectively came out of their fee so they earned less; others said that they had to pay for a second passport so they could continue working while waiting for visas; and one commented on the requirement for an HIV test to obtain a work visa in Russia. Overall, a recurring theme from responses was that the systems in the US were more complicated. Several respondents explained that this level of cost and bureaucracy was just about manageable occasionally, but if these processes were applied to the EU it would be impossible to continue touring.

PROBLEMS GETTING VISAS:

I have travelled to Australia, China, South Korea & Singapore for work. In each instance the visa process was lengthy and costly. I used a UK based Visa service in each instance as they took the faff out of the process and ensured everything ran smoothly. Fine for a one off, but I couldn't use them regularly, e.g. for working in the EU.

Experience of applying for them differs because each process is different – all of them generally easier than US apart from China which can be tricky (rules about re-entry etc.).

None are as much of a pain as the US process.

Sorted by management but obviously extra costs that are borne either by me or by the promoter – which practically, comes out of my fee.

It varies, of course, but US tends to be the most onerous and expensive of the countries I work in in terms of acquiring a visa.

China – work visa for tour period only. It is impossible to organise one alone, so promoter/host needs to organise and jump through many hoops.

The last place was Russia. I had to show three months of bank statements and have an HIV test.

Visas are always time consuming, expensive and logistically complicated – a major reason for staying in Europe until now.

SE Asia Tour with OAE 2018 for Toyota Classics. Needed visas for 5 of 7 countries. Needed to pay for a second passport to make this possible whilst fulfilling my work commitment in Poland.

Temporary working visas usually organised by management on tours. When I travel alone a visa application usually needs to be made several weeks in advance and requires two visits to an embassy.

MUSICIANS DECLARE EQUIPMENT FOR CUSTOMS OR USE CARNETS:

Every country has different regulations – complex, time-consuming and expensive.

Russian customs is notoriously difficult and requires instrument passports. I have also been advised to declare it when I travel to South Africa (which I visit at least once a year). I have an export licence and a CITES certificate for my violin and bows.

MUSICIANS EITHER HAVE CITES CERTIFICATES OR LEAVE AFFECTED INSTRUMENTS AT HOME AND TAKE SUBSTITUTES:

Last time I borrowed an instrument to avoid travelling with ivory.

I have a letter certifying my bows as complying with CITES regulations,

I get a certificate. Have always avoided taking bows actually containing ivory, and just had certificates for the other materials.

Leave all contentious materials in UK.

HEALTH INSURANCE IS OFTEN TAKEN OUT AT PERSONAL EXPENSE:

Extra health insurance – costs extra when it's for work.

We ask our musicians to arrange their own cover at their expense.

Expensive private health insurance – this makes touring less affordable.

PROBLEMS WITH TAX AND SOCIAL SECURITY:

Tax deducted at source not easily reclaimed. Expensive accountancy fees and at least a year before any money recouped.

Every country has different regulations – to wade through them is expensive, time consuming and frustrating.

China has a reciprocal agreement with the UK for PAYE, but would not allow a self-employed status.

RECOMMENDATIONS

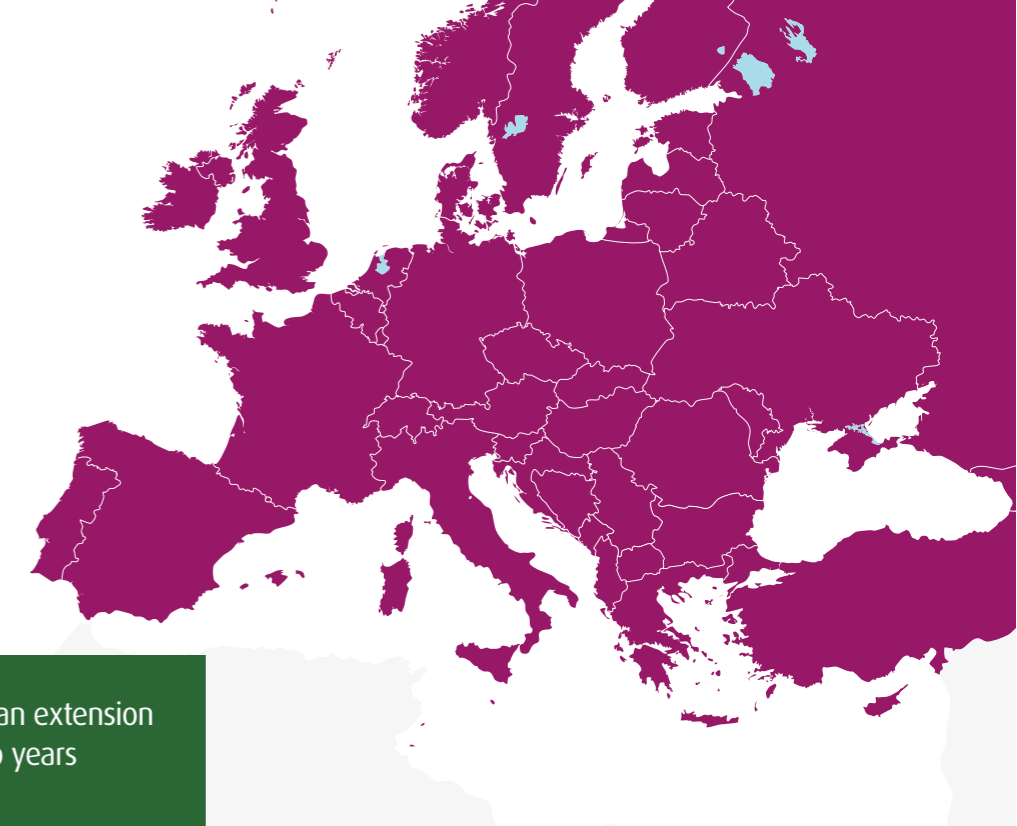
BASED ON THE RESULTS OF THE ISM'S FIFTH SURVEY ON BREXIT AND THE MUSIC WORKFORCE, THIS REPORT DEMONSTRATES THAT THE MUSIC WORKFORCE:

The data from this report shows the damage that Brexit has already caused to the music sector. On top of this is the devastation of Covid-19 which has led to musicians losing work overnight for the foreseeable future and the music sector more broadly facing ruin. The recommendations of this report relate to the current negotiations between the UK and the EU and the set of measures which need to be put in place if music is to survive in the post-Brexit world. In the immediate term we also call on the UK government to put in place a rescue package for the cultural sector along the same lines as that created by the German government or indeed discussed by MEPs at the European Parliament's Cultural Committee.

There are several related and relevant issues that were not in scope of the survey, but about which the ISM is aware. These include (though are not limited to) issues of copyright and the EU Copyright Directive, intellectual property, sources of EU funding such as Creative Europe, and future intake of EU students at UK music conservatoires, universities and schools.

- **depends on EU/EEA countries for professional work**
- **has lost substantial amounts of work and earnings due to Brexit**
- **is less desirable to EU promoters now that the UK has left the EU**
- **needs mechanisms for healthcare and social security to continue**
- **experiences a range of significant obstacles when working in the USA, Australia and across Asia**
- **faces significant uncertainty about their ability to work in the EU beyond the end of the transition period.**

Based on the findings of this report, the ISM calls for:



- 1 The Government to negotiate an extension of the transition period for two years beyond 31 December 2020.
- 2 The Government to negotiate a two-year, multi-entry touring visa that is cheap and admin-light.
- 3 The Government to negotiate a cultural exemption for the temporary transportation of instruments and equipment, or cover the cost of carnets for musicians.
- 4 The Government to further expand the list of CITES-designated points of entry and exit to include Eurostar, Immingham and Tyne (Newcastle).
- 5 The Government to scrap plans to introduce a charge for Musical Instrument Certificates.
- 6 The Government to maintain European Health Insurance as provided by the EHIC scheme, or provide an equivalent.
- 7 The Government to ensure that the A1 certificate system continues to be recognised in the EU or provide details of a suitable equivalent as soon as possible.
- 8 The Government to provide detailed information on new arrangements well in advance of the end of the transition period so the music sector can adequately prepare.
- 9 The Government not to adopt the US visa system as a model for temporary work when negotiating with the EU.
- 10 The Government must ensure that UK copyright laws are not undermined by post-Brexit future trade deals with the United States or any other nations.

Additional recommendation based on other ISM research:

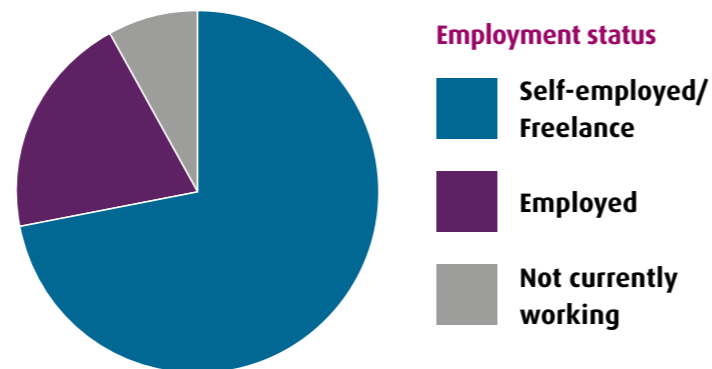
APPENDIX: RESULTS IN DETAIL

ABOUT THE REPORT

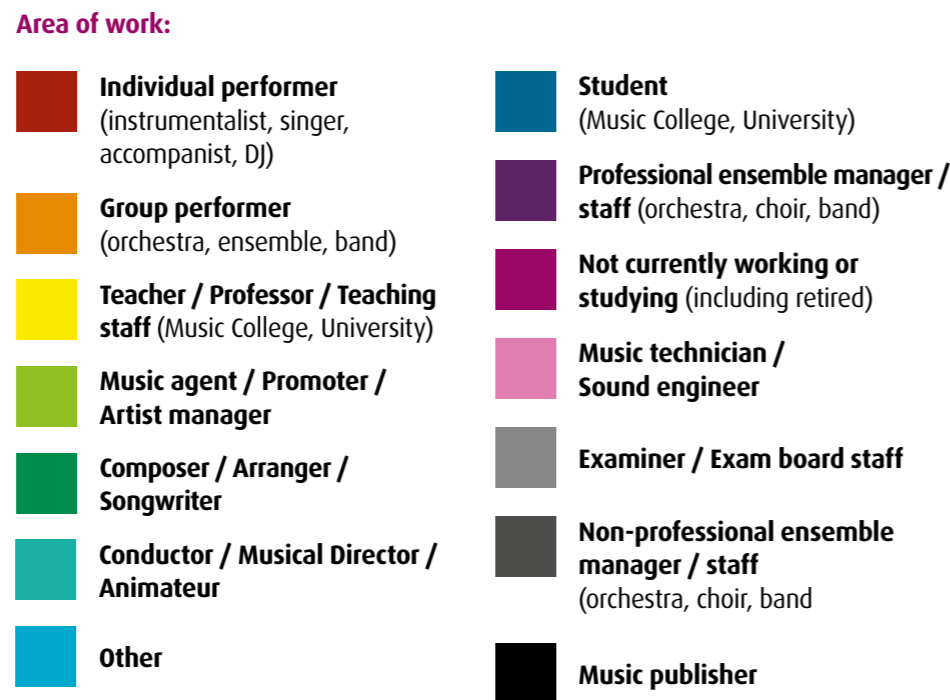
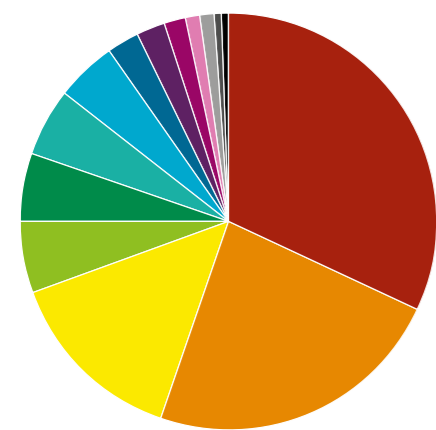
The ISM's fifth Brexit survey ran for five weeks in February and March 2020 and had 629 respondents. Respondents were from a cross-section of the music workforce including but not limited to performers, composers, directors, artist managers, teachers, and music technicians. Respondents covered the range of genres, from classical to goth pop, jazz to musical theatre, folk to film music. The majority of respondents (91%) were UK-based.

EMPLOYMENT STATUS

72% of respondents were self-employed/freelance, 20% were employed, and 8% were not currently working.

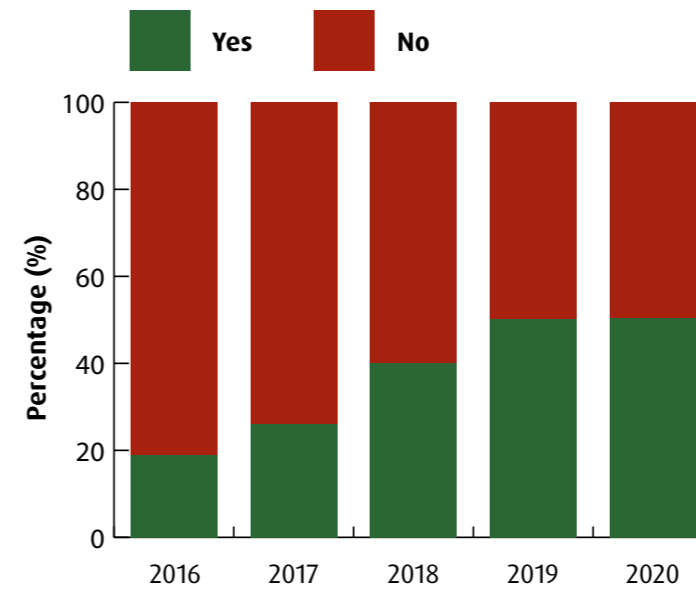


Respondents came from all kinds of profession across the sector, with just over half (56%) being performers.



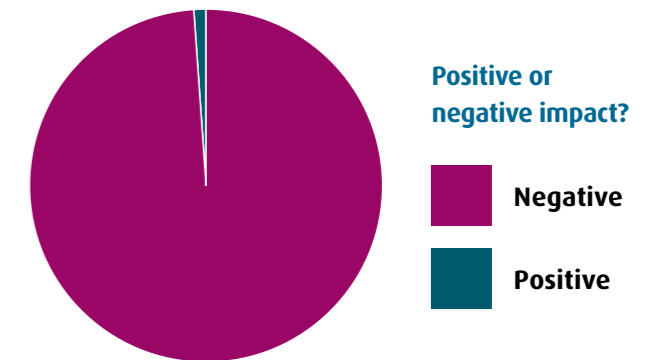
IMPACT OF BREXIT

As in the previous four ISM surveys, this survey asked respondents if they identified an impact on their work resulting from the referendum and ongoing negotiations relating to the UK's withdrawal from the EU.



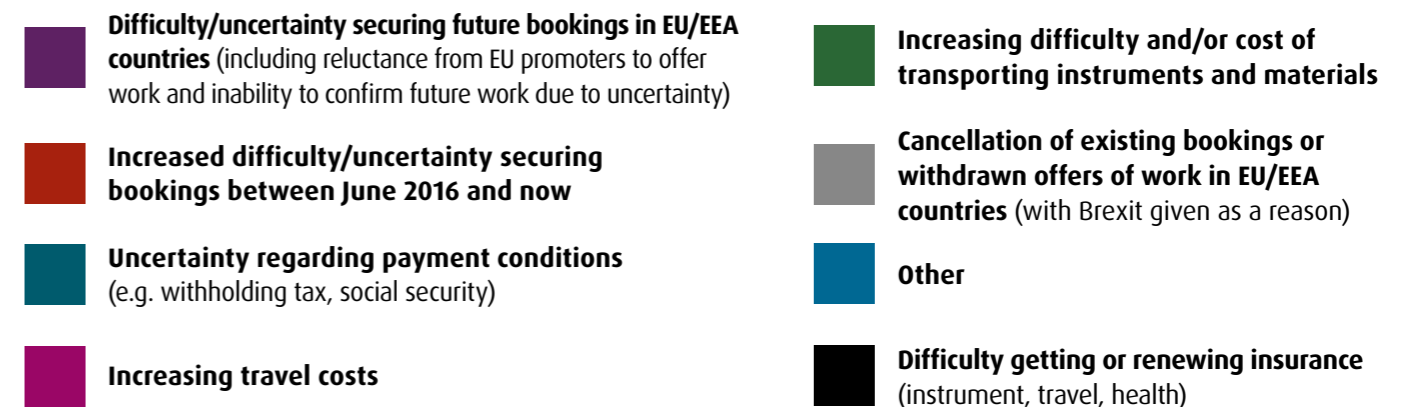
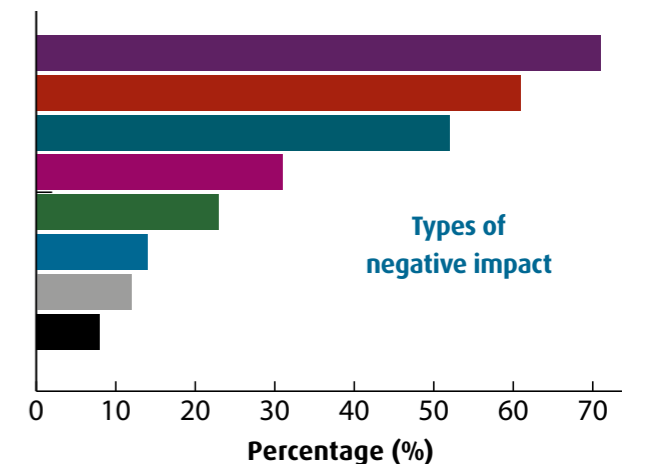
Of those responding to the question, 50.4% of the music workforce identified an impact on their professional work since the referendum result in 2016. This is a slight increase from last year and reflects a steady increase each year, from 19% in 2016, 26% in 2017, 40% in 2018, and 50.2% in 2019.

Of those who identified an impact of Brexit on their professional work, 99% said it was a negative impact.



TYPES OF IMPACT

According to respondents, the area of work that has been most affected by Brexit (71%) has been musicians' ability to secure future bookings in EU/EEA countries (for reasons such as reluctance from EU promoters to offer work and musicians' inability to confirm future work due to uncertainty caused by Brexit). The second most experienced factor (61%) has been difficulty/uncertainty securing bookings between June 2016 and now. More than half (52%) cited uncertainty regarding payment conditions such as withholding tax and social security, and more than one in ten (12%) had experienced the cancellation of existing bookings or withdrawn offers of work in EU/EEA countries with Brexit given as a reason.



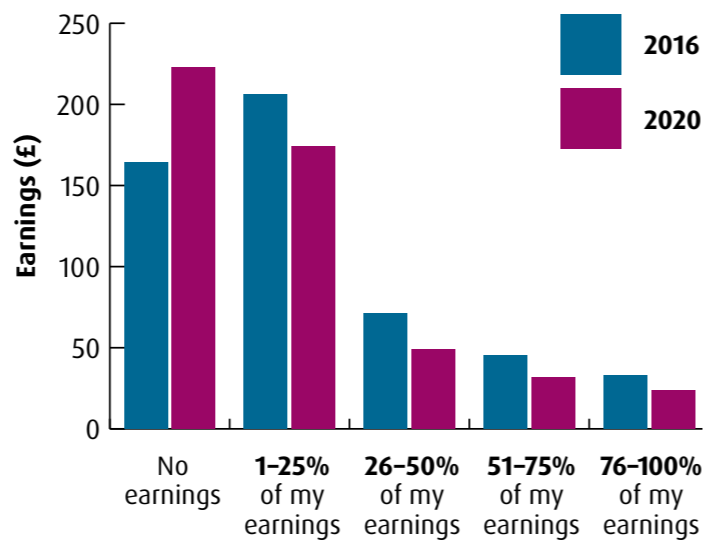
LOSS OF EARNINGS

A comparison of earnings from work in the EU/EEA before 2016 and in 2020 demonstrates that respondents to the question are currently earning less from work in the EU/EEA than they were before the referendum.

In each earnings category, the percentage of respondents decreased between 2016 and 2020 – for example, before 2016, **40%** of respondents earned 1-25% of their earnings in the EU/EEA, but in 2020 only **34%** of respondents earn 1-25% of their earnings in the EU/EEA. Similarly, before 2016, **9%** of respondents earned 51-75% of their earnings in the EU/EEA, but in 2020 this has fallen to **6%** of respondents.

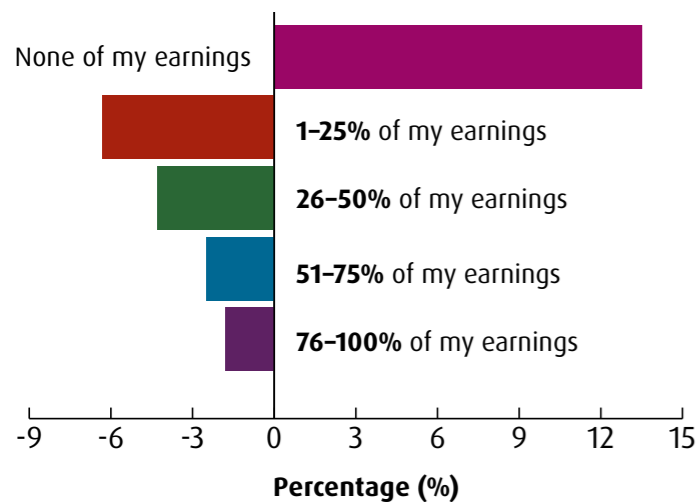
The only category of earnings to increase was 'none of my earnings'. Before 2016, **32%** of respondents earned none of their earnings in the EU/EEA but now in 2020 this has increased to **46%** of respondents. Put another way, there has been a **14%** increase in the number of musicians not earning in the EU/EEA since the referendum.

Comparison of earnings in the EU/EEA between 2016 and 2020

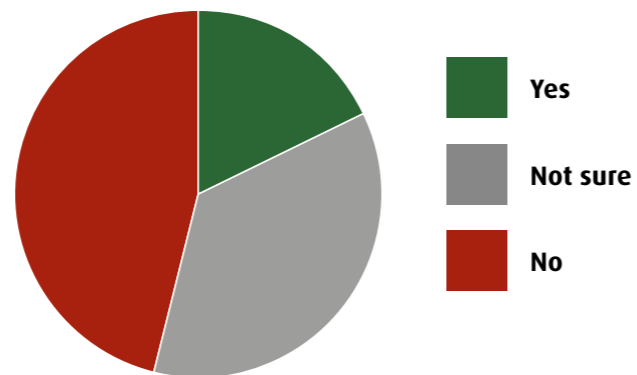


Another way of presenting this is by showing the percentage increase or decrease of each earnings category. This shows that **28.4%** of respondents changed to a lower earnings category between 2016-2020, earning less in every case.

Percentage variance between 2016 and 2020 in each earnings category



Nearly a fifth of respondents (**18%**) claimed they had experienced a loss of earnings due to reduced or cancelled work in the EU/EEA as a result of Brexit, and a further **36%** were not sure.

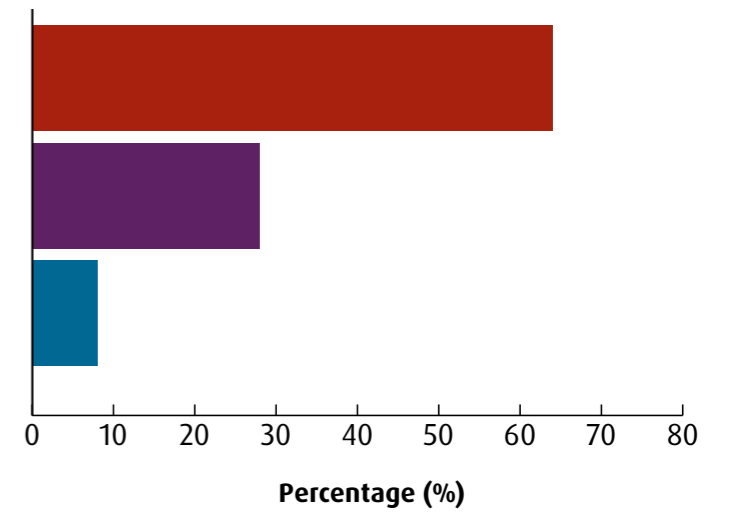


CONCERN ABOUT FUTURE WORK

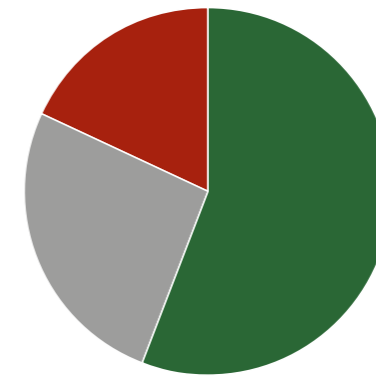
92% of respondents said they were concerned about their future ability to work in EU/EEA countries, of which **64%** were 'very concerned' and **28%** were 'mildly concerned'.



To what extent are you concerned about your future ability to work in EU/EEA countries?

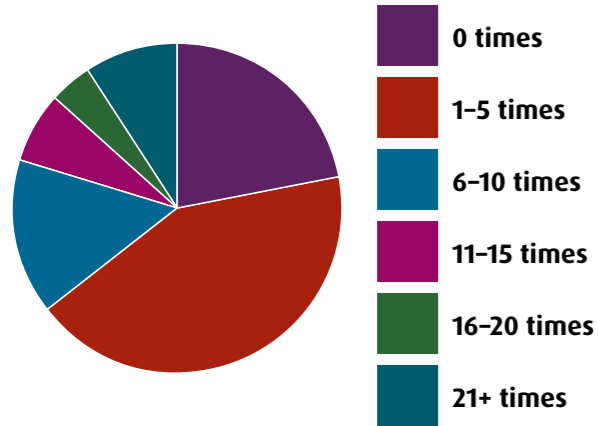


More than half of respondents (**56%**) said they expected to be offered less work now that the UK has left the EU.

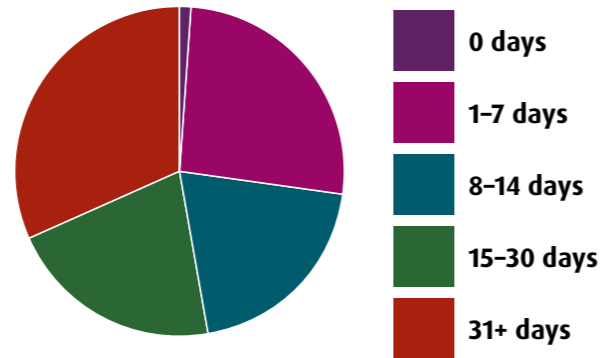


WORK PATTERNS IN THE EU/EEA

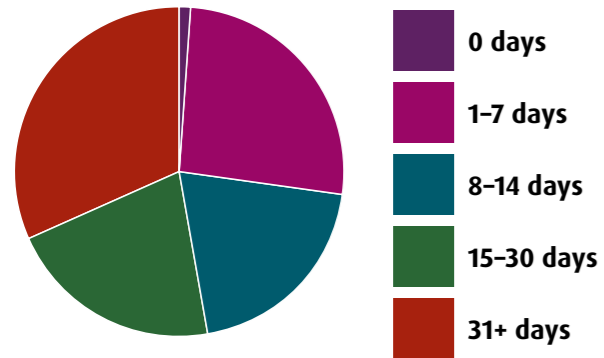
How many times per year do you visit the EU27/EEA for work?



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



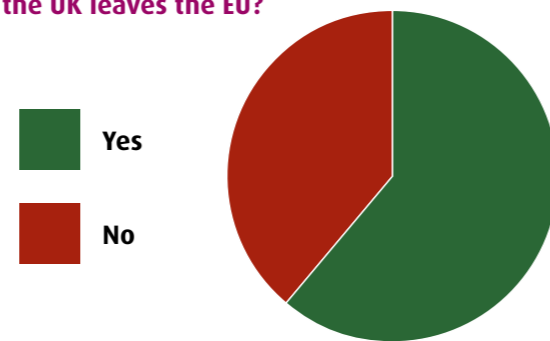
On average, what is the timeframe between being offered work in the EU27/EEA and the actual start day?



TRANSPORTATION OF INSTRUMENTS AND EQUIPMENT

When asked whether musicians had concerns about the transportation of instruments and equipment to the EU/EEA in the future, more than three fifths (61%) said they were concerned.

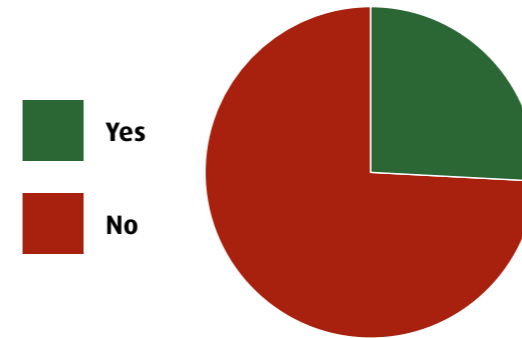
Do you have concerns about the transportation of instruments or sound equipment in the EU27/EEA after the UK leaves the EU?



HEALTH INSURANCE

74% of respondents claimed they would not be able to afford private health insurance if the EHIC scheme is revoked without an equivalent in place.

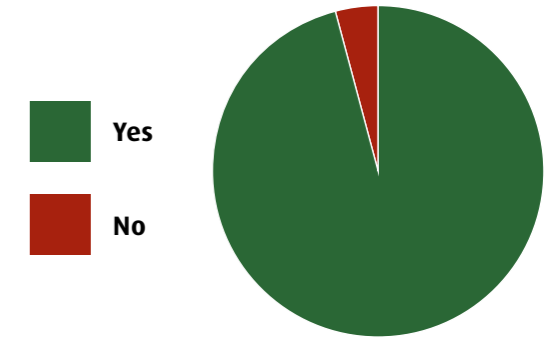
If an equivalent scheme to the EHIC is not secured, would you be able to afford private health insurance?



TAX & SOCIAL SECURITY

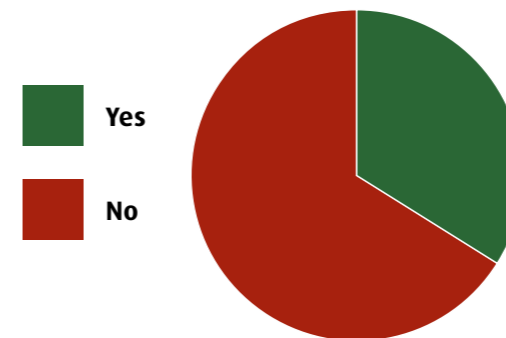
96% of respondents want reciprocal arrangements on tax and social security to remain in place, or equivalents negotiated.

Do you want reciprocal arrangements on tax and social security to remain in place (or equivalents negotiated)?



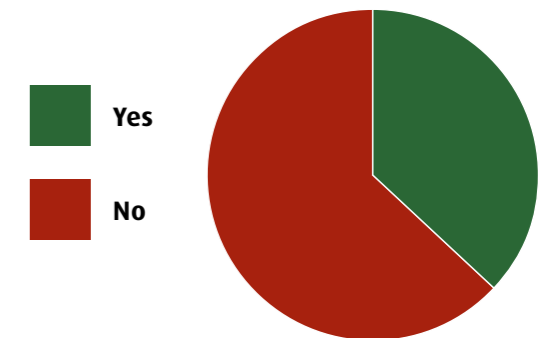
TRAVELLING TO THE USA

Just over a third (34%) of respondents travel to the USA to work.



TRAVELLING TO THE REST OF THE WORLD

More than a third (37%) of respondents travel to the Rest of the World (e.g. Japan, China, India) to work.





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 10,000 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**.



The **Save Music** campaign, launched in October 2018 by The Incorporated Society of Musicians, is calling for freedom of movement to be maintained for musicians after Brexit – or failing that, a two-year working visa which allows musicians to tour easily in EU and EEA.