

WOMEX

Report and Analysis

Survey on the Impact of Coronavirus
Pandemic on the Global Music
Community

Data collected between 6 May – 24 May 2020

To better understand the ongoing professional challenges and to assess how the Coronavirus Pandemic has impacted our global music community, we had put together a survey which ran from 06 - 24 May 2020. This report is based on the data collected within this period and is the snapshot of the first two months of the economic crisis: March and April of 2020.

Since the enforced lockdown, a lot of developments have taken place within the EU and internationally. The data collected via this survey has helped us in recognising the challenges and issues the Coronavirus Pandemic has brought along with providing us with a bigger picture of the current situation of our sector and invaluable insight on methods, efforts and solutions that are being shared to help the global community.

A total of **633 music professionals** (*including artists, bookers, agents, managers, venue owners, music journalists, music export offices, WOMEX community members and others*) altogether from **88 countries** took part in this survey.

SURVEY PARTICIPANTS AND THEIR BACKGROUNDS

The Coronavirus Pandemic has left everyone affected. Being a global music expo, we wished to learn as much as we could from our community members who are living around the world.

We reached out to the whole WOMEX community including our partners at various music export offices along with our networks in the music business to get as diverse participation as possible and learn about their region, their struggles and their accomplishments. We are gratified to have received responses from such diverse professional backgrounds that make-up the WOMEX community.

Given the versatility of the music business and the representing individual professionals, multiple answers were possible.



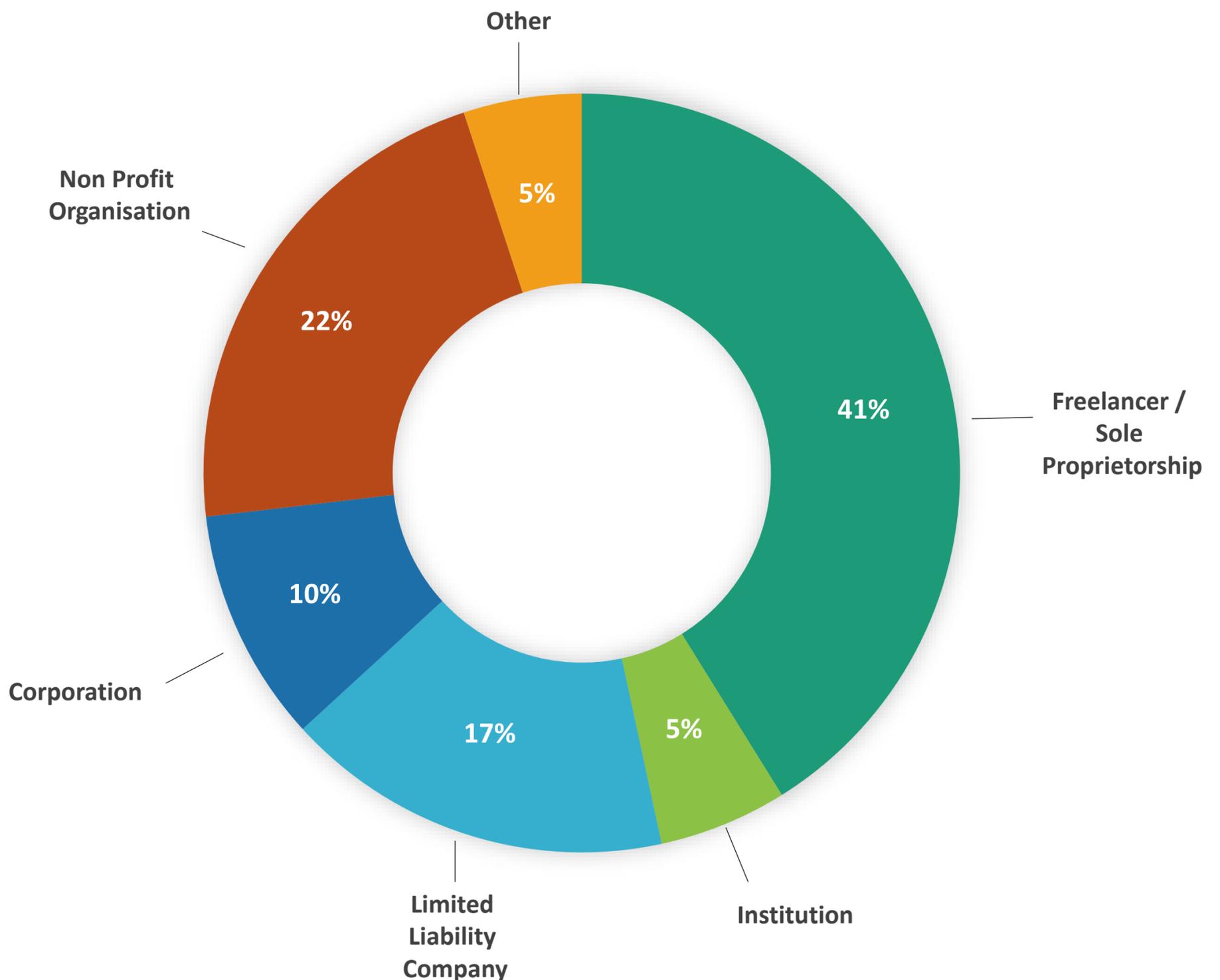
ANSWER CHOICES	RESPONSES
Agent/Booker	39.27%
Manager	38.31%
Artist	38.16%
Promoter (festivals, venues, concerts)	31.32%
Records/Label/Distribution	18.12%
Other (please specify)	15.10%
Cultural Institution	13.67%
Non Government Institution	9.86%
Publisher (music, films, books)	9.86%
Press/Journalist	8.43%
Educational Institution	5.88%
Filmmaker/Distributor	1.91%
Government Institution	1.91%

THE LEGAL FORM OF RESPONDENTS' ORGANISATIONS

To understand our survey participant's company or organisational context adequately and to assess the kind of role they are representing and how it impacted their profession, we asked them to share their company or organisation's legal form:

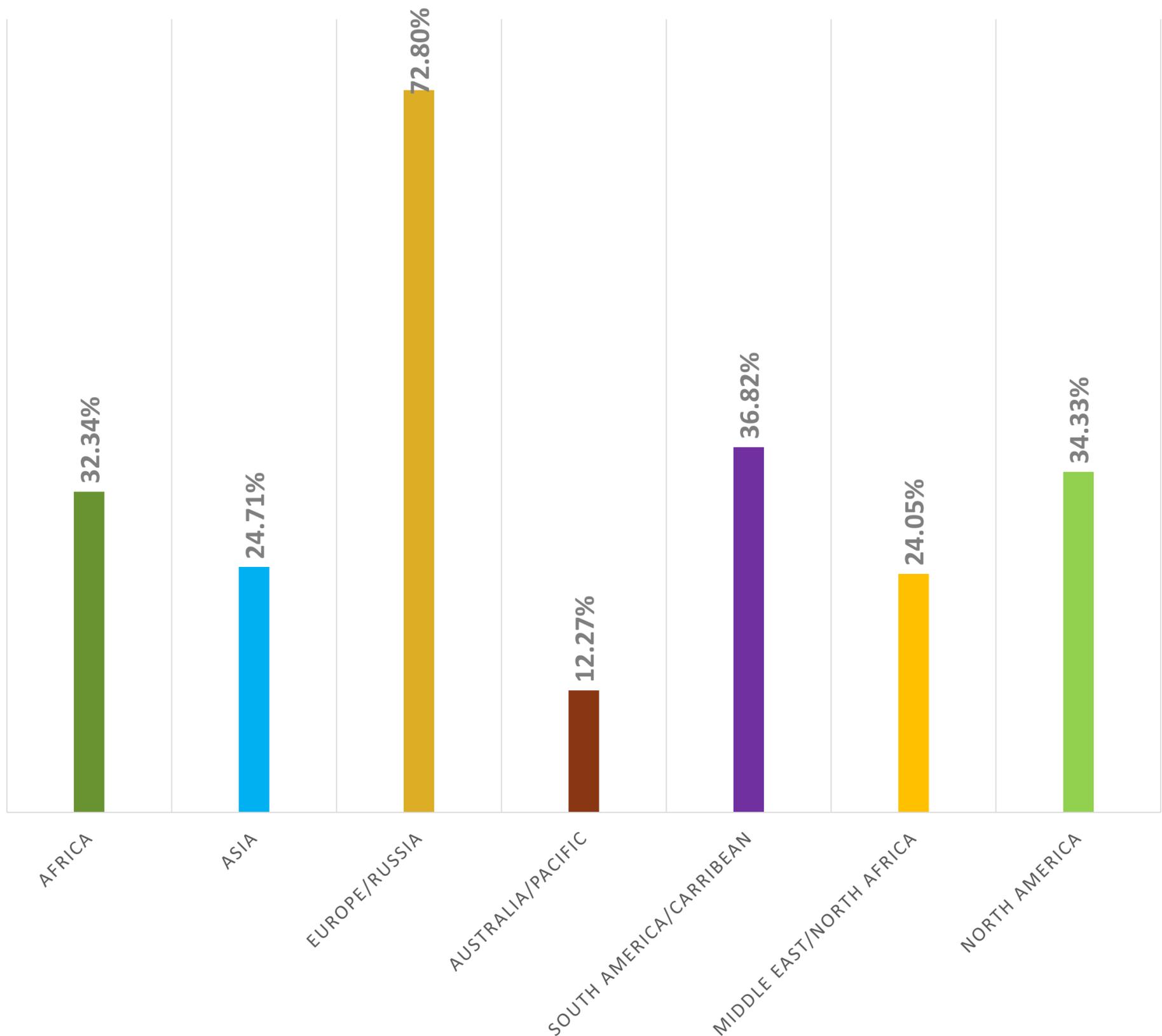
- 41% of all participants are Freelancers or Sole Proprietors
- 22% are Non-Profit Organisations
- 17% are Limited Liability Company

The average number of **full-time employed staff** at every organisation that participated is **7** and on average as many as **12 freelancers** (*excluding artists*) participate in company/organisation's work activities, i.e.: graphic designers, sound technicians, light engineers, PR, communications etc.



REGIONS OR CONTINENTS OF ARTISTS THAT ARE REPRESENTED BY THE SURVEY PARTICIPANTS

As we have seen earlier, occupations around artists vary from managers to labels, from publishing to booking agents, from promoters to legal representation and others. As WOMEX represents musical diversity, we also wanted to identify the regions where these artists are based. The answers show that the WOMEX community and its members work with artists from all continents. However, we can see a strong presence of artists based in Europe, representing a broad diversity of music from all European regions but also from diasporas from all over the world that are based in Europe.

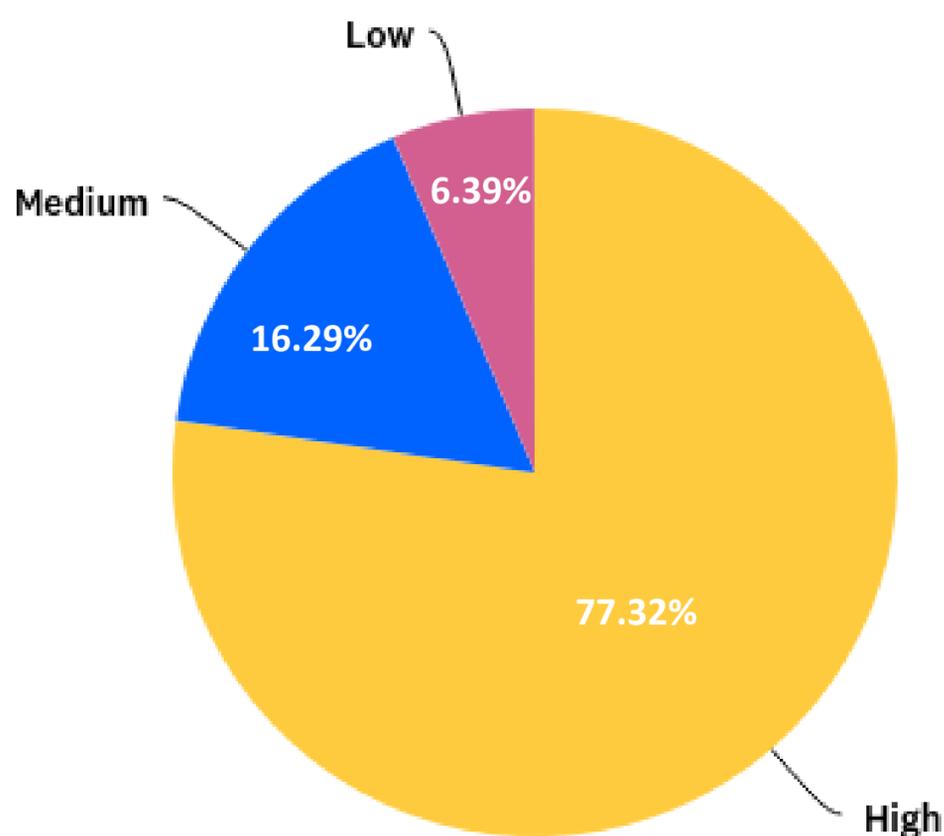


LEVEL OF IMPACT OF CORONAVIRUS PANDEMIC ON THE BUSINESS OR PROFESSION OF THE SURVEY PARTICIPANTS

Between March and May 2020, the entire music sector was heavily impacted by the Coronavirus Pandemic. Since the whole segment is hugely dependent on live music revenues, the impact of shutdowns hit our community particularly hard.

By June, the situation in many regions was starting to improve but still far from being normal or economically sustainable.

In July as EU borders reopen, venues are starting to host events with limited capacity and strict regulation. While in other regions around the world, the lockdown is still in place which is delaying the reopening of cultural activities. This is severely impacting the live music business, artist, live music venues and festivals.



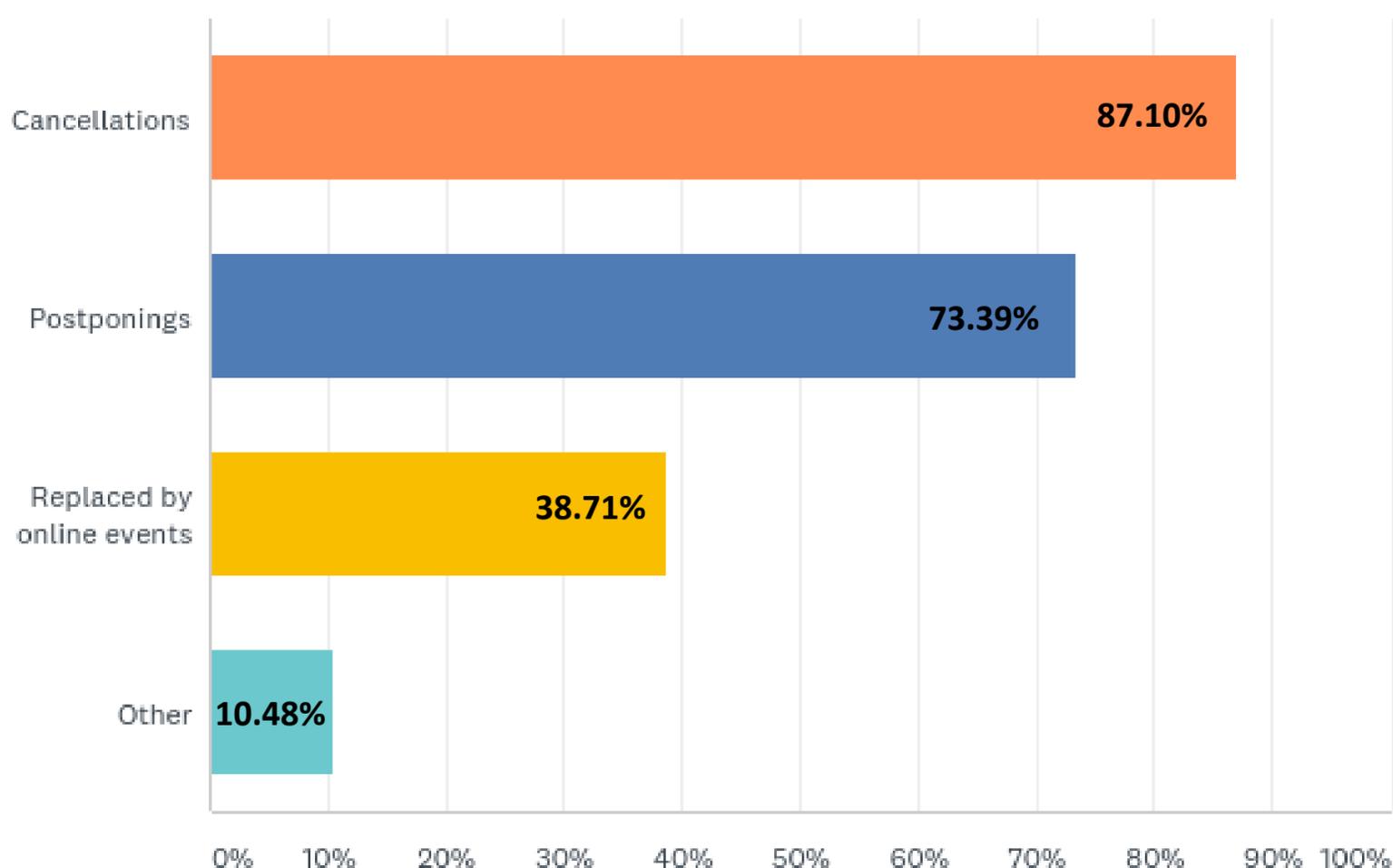
ANSWER CHOICES	RESPONSES
High	77.32%
Medium	16.29%
Low	6.39%

87% OF ACTIVITIES CANCELLED FOR 2020

On average, each artist/artist manager/booking agent cancelled or postponed 42 bookings beginning March 2020.

Since the Coronavirus pandemic started, the live music business has been heavily impacted by cancellations and postponements. To make up for the loss, we witnessed more than a third of activities getting replaced by online events. New experiments with digital transformation are being tested all the time to keep the music community connected and to get the music out to its audiences.

While this has shown the resilience and adaptive nature of the music business, artists, music professionals and of music consumers, these new alternative formats are still far away from generating the incomes and the financial stability that live music events bring. As every artist, agent, or promoter faced different scenarios with their bookings, multiple answers were possible.



Two thirds of respondents shared that their 50% to 100% of their annual activities got cancelled.

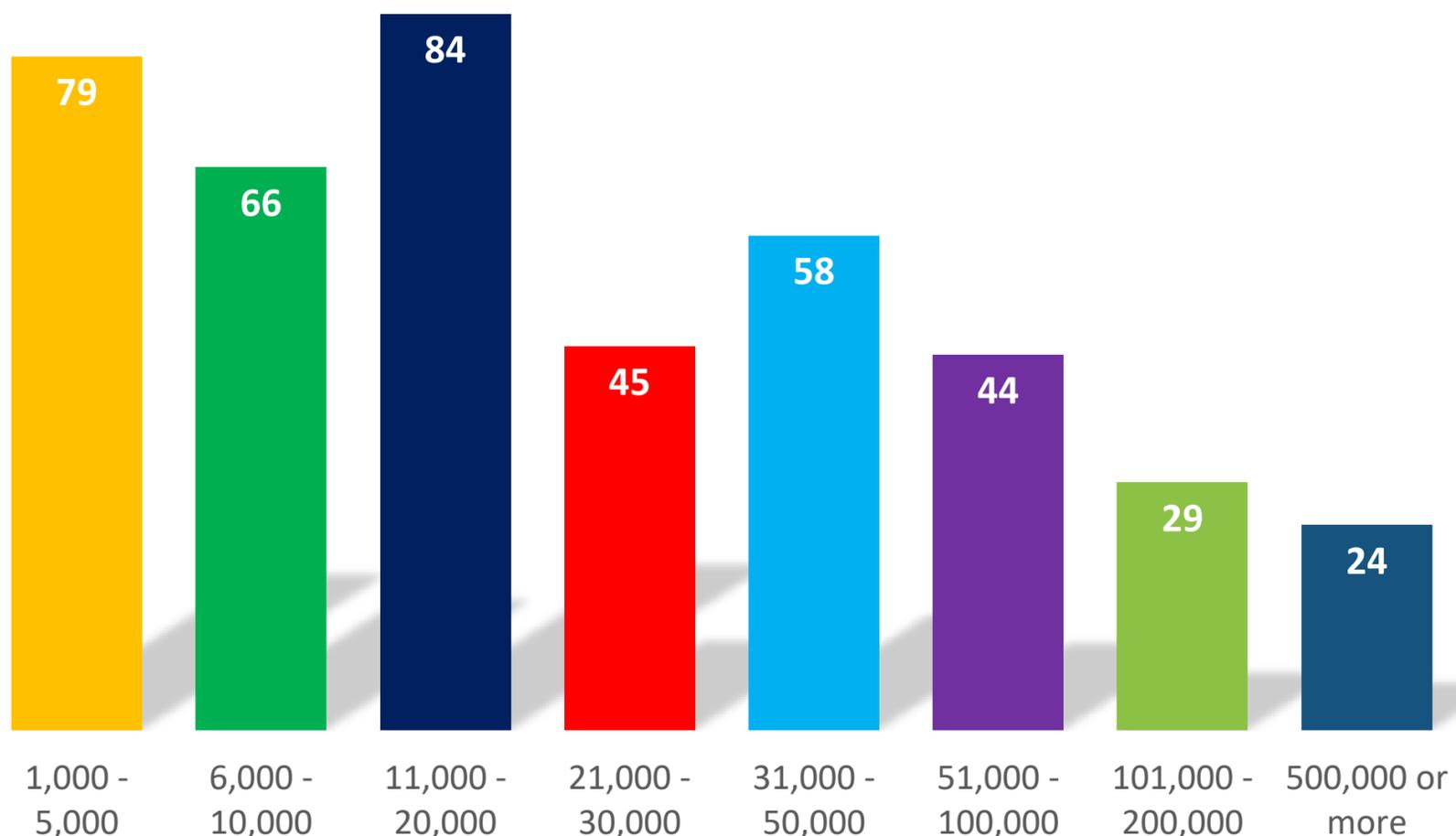
ANSWER CHOICES	RESPONSES
upto 25%	13.96%
upto 50%	19.97%
upto 75%	38.47%
upto 100%	27.60%

FINANCIAL LOSS IN NUMBERS

It is very challenging to evaluate the damage of the loss of thousands of jobs and the loss of the music industry revenue caused by the Coronavirus Pandemic. The live music industry has collapsed due to this crisis and it will be one of the last sectors to emerge from after this crisis is over.

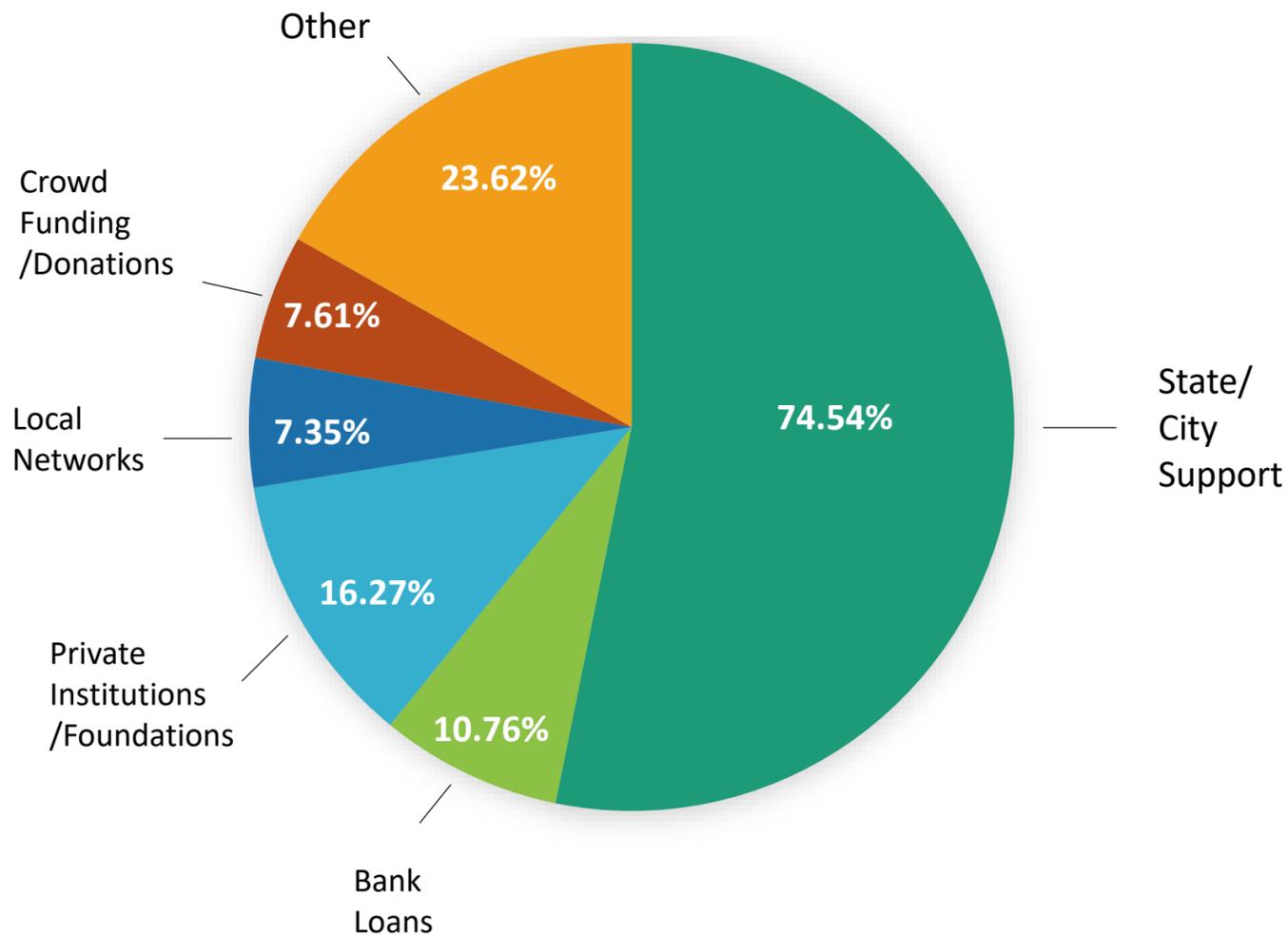
A lot of respondents stated that it was too early for them to be able to evaluate the financial loss they are suffering or predict the forthcoming loss they might suffer due to the loss of business. Here below are declarative answers.

- The graph below shows the diversity of players in our community and the level of impact on their financial figures. The total amount of loss indicated by **490 respondents is almost 60,000,000 euros**.
- A fifth of respondents said they lost between **11,000** and **20,000 euros** in **May 2020** due to the lockdown, and **24** said they lost **500,000 euros** or more.



53.4% OF RESPONDENTS RECEIVED SUPPORT

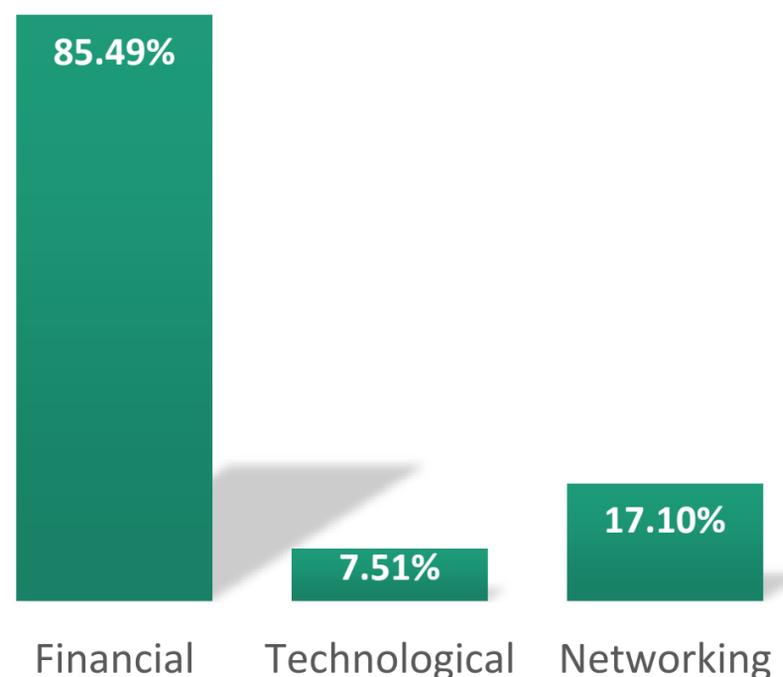
In May, more than half of the respondents declared to have received support from their State or City, and primarily in financial form, in order to balance out the income loss.



The chart below of top countries has been calculated by the proportion of respondents who have received support in the first two months compared to those who did not. The results tell us that a high proportion of respondents who have access to support are based in countries of the Global North which have been very reactive and have provided help; while support is drastically lacking in countries of the Global South, generating concerns about the increase in inequalities which would further disadvantage many music professionals in those regions.

On the basis of responses we received, the top 4 countries to provide support are:

- 1.Canada
- 2.The Netherlands
- 3.UK
- 4.France



The kind of support the respondents received. Multiple answers were possible.

WE ASKED OUR SURVEY PARTICIPANTS WHAT WOULD BE NECESSARY FOR THEM TO OVERCOME THE CRISIS

We selected only a few answers out of the hundreds that we received.

“Improved funding streams, and creation of an online platform for indigenous music and forum.”

director of a cultural foundation from New Zealand

“To be able to keep in contact, continue networking and to be able to get refunds from flights that have already been bought.”

artistic director from Malaysia

“We would need a subvention from the government with a stimulus package for all musicians on proof of loss of work. As an organization, we will need financial support in funding for us to use this time to develop the artistes in areas such as songwriting, stage performances, EPKs, copyright awareness, media interview coaching, branding and marketing.”

media and communications director from Saint Lucia

“Platforms that give me the chance to sell live streams, video concerts and merchandising.”

musician from Colombia

“Improved networks between different branches of the music industry. A standard working practice in difficult circumstances, for example when tours are cancelled, most of the crew are sent home in financial hardship leading to poor mental health.”

folk musician from the U.K

“We are working with partners to reduce the information gap and transparency regarding copyrights. We will work to activate our national community to do medium concerts in Mexico, because our band’s annual income from international tours represents between 40% and 50% of their profit. Our solution is a mix of digital and its monetization, royalty collection, community growth, and continue with live concerts gradually within the national territory.”

artist manager from Mexico

WITH INTERNET CHANGING THE WAY WE ARE NETWORKING AND LEARNING HERE ARE SOME ONLINE TOPICS OR DIGITAL FORMATS THAT WERE SUGGESTED BY THE RESPONDENTS

We selected only a few answers out of the hundreds that we received.

“That there was a platform where to do the concerts online and that you can collect money, or contribute some money to the musicians who perform.”

composer from Spain

“Online artistic content marketing, online music workshops tutorials, music publisher's market information, music agents' info - creative funds info - info on sustainability of art and culture projects - all other info on presenting culture digitally I cannot think of.”

composer and music performer from Serbia

“Digital music business, related to cultural practices such as indigenous culture.”

music entrepreneur from Thailand

“I prefer to wait for physical meetings and do hope you do not make WOMEX digital.”

singer and actress from Sweden

“Music therapy!”

musician from Portugal

“Training methods on how to teach students (online) to play musical instruments in groups.”

cultural entrepreneur and concert producer from Kyrgyzstan

“We are really saturated with all the offer we can see on the internet. Everything is similar. We must need to find different and creative possibilities.”

artist manager and booker from Colombia

RESPONDENTS SHARED THE CHANGES IN THEIR ATTITUDE TOWARDS WORK PRACTICE AND THE COMMUNITY DUE TO CONORAVIRUS PANDEMIC

We selected only a few answers out of the hundreds that we received.

"I'm now even more convinced than before that renting an office is not necessary to run a small music agency!"

music entrepreneur from India

"I think we should be conscient now, more than ever, of the importance of our bodies outside the screens. I wish the change could go in that way, thinking deeper about our careers as artists in the physical world, and how to stablish better possibilities to live a more stable life, without being so vulnerable to this unpredictable changes. I hope this crisis let us empower more and being more conscious about the importance of our work and role in society."

artist from Colombia

"I will retract from online more. It has its merits but it's not for me. People need online downtime and I think spending my working hours online is enough. I do not want to spend my after work hours online too."

traditional arts coordinator from Ireland

"Yes, SLOWING DOWN and focusing much more on sustainability and wellness in the workplace and personal as well, working on some exciting initiatives now to bring more wellness to the fast paced music industry."

artist manager from the USA based in Berlin

"Probably I'll get used to a bit more to online conferences, panel talks, however I still prefer the real live versions."

journalist from Hungary

"The attitude towards our work practice has already changed, never before has there been an interest among the entire work team to enter the digital field with so much discipline and commitment. The change of attitude towards the community goes more to understand our own role as agents of social change and the responsibility that this entails."

artist manager from Mexico

SOME THOUGHTS OR COMMENTS REGARDING THE CURRENT CRISIS AND ITS MID AND LONG TERM IMPACT

We selected only a few answers out of the hundreds that we received.

“If anything I have learned is the value of live music and how the live experience is irreplaceable for our shared humanity. While recording and various technology in digital, virtual and electronics is important, it cannot and should not continue to replace real life and acoustic music. This crisis will probably leave the world much changed, for good and bad, and it is essential for musicians to help steer toward the latter.”

musician and performer from the USA

“We have to care for people who need more aid...solidarity is the key of preserving the ecosystem.”

director of publication from Cameroon

“We are engaging in digital but ultimately it is the live experience in the outdoors we are interested in and we will use all of our energy to get that going again as soon as we are able. Digital will never be even close to a substitute.”

cultural producer from Scotland

“I'm really impressed to learn how fragile it is to be an artist. Except a few privileged ones that have enough income and savings to not worry about the future, the highest percentage of professional artists cannot consider their career as a real or stable profession. We need to think of strategies to change this; I know that it is well known, but this crisis really put a lot of things in perspective.”

artist from Colombia

“There will be an end to this crisis. We should see this pandemic as an opportunity of sorts and accelerate our movement toward the future.”

concert producer from Japan

“The eco-system for world music and global-local music cultures has to be re-invented in respect to the support of international cultural exchange with less travelling and pollution, to facilitate the artist for border crossings, more ecological events, more respect to the economical needs of the individual artists, more respect to the audience etc.”

promoter and activist from Germany

ACKNOWLEDGEMENTS

We are honored to be a part of such a passionate and motivated community and thank everyone who shared their valuable feedback with us. Our special regards goes to all the music export houses who helped us spread the survey and get as many diverse responses.

The results, the suggestions, the positive feedback, the resilience shown by our global community in such challenging times and the encouraging words shared through this survey has not only reinvigorated us but also strengthened and reinforced our belief in advancing with the on-ground WOMEX in Budapest, Hungary. We will host the live event in these uncertain times because of you and your many positive messages. They spurred us forward into action and we are moving to make it happen. The 26th edition of WOMEX this October will be unlike any other edition, but it will be positive.

REPORT CONTRIBUTORS

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WOMEX 20 Edition: 21–25 October 2020 in Budapest, Hungary

WOMEX – Worldwide Music Expo – is the most international music meeting in the world and the biggest conference of the global music scene, featuring a trade fair, talks, films and showcase concerts.