ACADEMIA | Letters

Reflections on an imperfect normal: A letter to the future music industries

Haftor Medbøe, Edinburgh Napier University
Sarah Raine

As industry bodies such as UK Music, Association of Independent Music (AIM), and the Association of Independent Festivals (AIF) have clearly stated, the COVID-19 pandemic measures will have a potentially catastrophic impact on the live music and (in particular) the festival economies in the UK. Already facing significant issues relating to the UK's departure from the EU and the closure of live music venues due to urban regeneration, the live music industry in the UK (worth £1 billion in 2019 – UK Music 2019[1]) now faces the costs of cancelled events, the financial burden of refunds and venue closures. Furthermore, the vast majority of music festivals are unprotected by insurance and (for some) ineligible for government support schemes (AIF 2020)[2]. Beyond the festival stage, a whole swathe of music professionals have found their livelihoods decimated overnight, and the cultural and monetary value of their industry questioned by those in power. Many self-employed musicians, sound and lighting engineers, roadies and merchandisers, promoters and agents have found themselves slipping between the cracks of government provision, and music writers have been cut from media teams struggling to survive. The extent of the damage to a comparatively informal and fragile infrastructure – fuelled by the work of passionate and often precariously employed creatives – cannot be accurately plotted. However, we can be sure that the next two years represent a time of reckoning for the live music and festival economies, and signal the development of a very different industry landscape.

[1]UK Music *Music By Numbers 2019* report, available online at: https://www.ukmusic.org/assets/general/Music_By_Numbers_2019_Report.pdf

[2]Available online at: https://www.musicbusinessworldwide.com/uks-aif-warns-of-independent-festival-sector-collapse-without-urgent-government-support/

Corresponding Author: Haftor Medbøe, h.medboe@napier.ac.uk
Citation: Medbøe, H., Raine, S. (2021). Reflections on an imperfect normal: A letter to the future music industries. *Academia Letters*, Article 125. `https://doi.org/10.20935/AL125`.

Musicians have long been tasked with diversifying their skill-sets in response to an increasingly 'democratised' industry heralded by the digital revolution. With the waning dominance of the record label, musicians have adopted DIY approaches to creating and managing their output (Medbøe and Dias 2014). These activities demand the development and maintenance of a range of practical knowledge including intellectual property and royalty collection, audience development and data capture, commodification of creative outputs across user formats, industry networking and tour management. The COVID-19 pandemic has foregrounded video capture and streaming within this ever-growing portfolio of 'essential' survival skills (see also Taylor, Raine and Hamilton 2020).

Where the streaming of gigs may at first glance offer an immediate and elegant solution to the temporary suspension of the live music circuit, quality (beyond the creative) is significantly impacted by access to technologies at both ends of the production line. Musicians are not necessarily equipped with broadcast standard cameras and lighting, nor do they as a matter of course have access to high-bandwidth connection to the Internet. Similarly there is little control over how the audience views the content, whether via smartphone screen and speaker or wide-screen TV with surround sound set-up, or the speed and stability of their Internet connection.

Monetisation for musician-led streaming has taken the form of pay-per-view, crowd-sourcing, tip jar or other pay-what-you-want models. None of these replace the relative stability of a guaranteed gig fee and place all risk with the musician and the onus on forging and capitalising on direct relationships with their audiences – a more than passing resemblance to busking. Where the production costs, over and above time investment, may be modest, there is nonetheless no guarantee of financial success. Anecdotally, there appears to be a degree of goodwill from audiences wishing to support their favourite musicians in this time of need. Whether this goodwill will continue beyond the immediate crisis remains to be seen, especially within the context of national recession and subsequent loss of disposable income, not to mention an increasingly oversaturated marketplace.

The majority of festivals and promotional companies across the UK are piloting paid virtual events, attempting to monetise what was previously free, to understand what live music audiences want to see in a virtual festival or gig space, and negotiating the limits of available technology, all within a similarly saturated context (see also Carr 2020). Depending upon their financial model, music festivals and promoters must also negotiate with their funders and sponsors the changes to delivery, maintain their salaried teams and consider their financial responsibilities to gigging musicians. Like their audiences, music festivals are reconsidering the cultural and monetary value of virtual material. There is currently no standardised model of remuneration for live or legacy streaming, which has led to a range of festival responses

Corresponding Author: Haftor Medbøe, h.medboe@napier.ac.uk
Citation: Medbøe, H., Raine, S. (2021). Reflections on an imperfect normal: A letter to the future music industries. *Academia Letters*, Article 125. https://doi.org/10.20935/AL125.

– from unpaid pre-recorded “living-room gigs” to the honouring of full lineup and residual payments. This lack of a clearly communicated strategy between festivals or a consolidated approach may endanger the fragile trust between festivals and their audiences, musicians, funders and the industry more widely. It will be interesting to discover whether the goodwill of audiences shown to musicians will translate to a promoter/festival mediated model.

With the loss of festivals and year-round gig promotion, music venues are taking a significant hit across the UK. In their public responses, the Music Venue Trust (MVT) – initially set up to secure long-term futures for venues under threat from urban development – have highlighted the significant impact of lockdown, social distancing and early closures on the nighttime and live music economies. Without standing live music gigs, many of these spaces have become financially unviable (see Taylor, Raine and Hamilton 2020 on COVID-19 as a crisis of spatiality). Equally, the allocation of grants through the UK Government Cultural Recovery Fund – which aims to provide financial support for cultural organisations – will potentially ensure the survival of *some* more established live music venues, but cannot sufficiently safeguard the previously vibrant and grassroots UK live music venue network through an impossibly straitened economic period. Even those venues who have received Government support are finding their continued operation over the extended period of restrictions impossible to overcome. The potential closure of venues across the UK due to COVID-19 accelerates an already pervasive issue within the music ecosystem, as a result of urban redevelopment plans (see, for example, van der Hoeven and Hitters 2019, 2020; Thompson 2019).

The least visible within this debate are sound and lighting engineers, roadies and merchandisers – self-employed, seasonal, or cash-in-hand professionals who do not qualify for the Self-Employment Income Support Scheme or employer-supported furlough. Many highly skilled and experienced music industry professionals are now reliant upon Universal Credit or have taken up temporary roles in “Key Worker’ sectors. With an increasing range of HE and FE music and sound production courses across the country busily training the “next generation” of engineers and support professionals, it will take more than a return to live music to address this decimation of a previously established career path.

Most within the music sector have been forced to reevaluate their identity and purpose in response to the social distancing measures imposed to mitigate the spread of COVID-19. What is music-making or festival production without the live experience and how can we, in the short term at least, to some degree replicate it? In exploring potential answers to this question, music promoters and musicians have had to reevaluate their relationship and the traditional demarcation of their roles to arrive at new understandings of production and value. Equally damaging to the recovery of the live music industries is the mental health impact of COVID-19. Rates of depression and anxiety have been rising across the UK during the

Corresponding Author: Haftor Medbøe, h.medboe@napier.ac.uk
Citation: Medbøe, H., Raine, S. (2021). Reflections on an imperfect normal: A letter to the future music industries. *Academia Letters*, Article 125. https://doi.org/10.20935/AL125.

pandemic (Jia, Ayling, Chadler et al. 2020), and initial surveys (such as the Jazz Promotion Network's *Jazz in the Pandemic* report[3]) suggest that COVID-19 has had a significant impact on the mental health of music professionals. Not only has this been a time of widespread uncertainty and worry, many individuals have been unable to practice their craft, engage with collaborators or team members, or gain essential feedback and support. 2020 represents a period of unprecedented disruption and we are yet to understand how this will play out in terms of mental health, wellbeing and creativity.

With recent optimism surrounding testing and vaccination against COVID-19, a return to 'normal' at the earliest opportunity may be the professed goal for many. But, within the context of the music industries, 'normal' has over the past decades become an increasingly untenable reality. Where one might (rightly and vehemently) disagree with UK Chancellor of the Exchequer Rishi Sunak's summation of a 'viable' job in its application to artistic production, the value attached to cultural commodification has been steadily eroded to the point of spelling the demise of a professionalised sector. As we write, the UK Government is inviting evidence on the economic impact of music streaming and artists are increasingly questioning the pay off between, on the one-hand, making their music available to a global audience and, on the other, deriving mere micro-payments in return[4]. In addition to the relative collapse of income from recorded music, gig fees have failed to keep pace with inflation with earnings from teaching, a mainstay of the musician's professional portfolio which is becoming increasingly insecure due to cuts to local authority education budgets. The inevitable financial impacts on European touring of Brexit represent a further nail in the coffin of a career in music.[5]

Beyond operational, the established structures that underpin the music industries are not perfect or, for that matter, necessarily fit for purpose. As exposed by the #metoo and Black Lives Matter movements, the practices, processes and politics of the music industries have offered a space for misogyny, homophobia and racism. Escaping the legacy of this past, and indeed present, offers a space for addressing issues of diversity and representation, for listening to new voices, and instigating clear professional guidelines and expectations. Persistent voices during this time of reflection, such as *Keychange* and the UK Music diversity task force, offer new models, networks and frameworks for the reimagining of the music industries going forward which disrupt extant power dynamics.

This bleak economic assessment coupled with ongoing and ever-pressing issues of inclu-

[3] Available online at: https://jazzpromotionnetwork.org.uk/jazz-in-the-pandemic-2020-survey-report/

[4] See online at: https://committees.parliament.uk/work/646/economics-of-music-streaming

[5] This is the focus on Birmingham Live Music Project, an ongoing study into the impact of BREXIT on the UK music industries. An initial report (2019) can be accessed here: https://publications.aston.ac.uk/id/eprint/42087/1/BLMP_Report_I.pdf

Corresponding Author: Haftor Medbøe, h.medboe@napier.ac.uk
Citation: Medbøe, H., Raine, S. (2021). Reflections on an imperfect normal: A letter to the future music industries. *Academia Letters*, Article 125. https://doi.org/10.20935/AL125.

sivity and representation paints a picture of a beleaguered sector in desperate need of systemic renewal. The roadmap towards a transformed post-pandemic music industry in the UK is not yet clear, but we argue that change must come collectively from those who create. Musicians have the ultimate choice as to what they will and will not accept in the form of 3rd party monetisation and rates of pay and conditions of employment. Where music streaming has afforded all a route to market, it is a market that is unregulated, oversaturated, manipulated and exploitative. The lure of global exposure to an imagined (imaginary) fanbase is swallowed at what cost? Without a fanbase developed through touring and data-capture, or aided by the clout of the major labels, success (by which we mean a sustainable income from recorded music) is at best fanciful.

For the majority, there is not a great deal to lose by challenging current norms head on and the time seems right to reset the rules of the game – not by attempting to undo progress or return to halcyon days, but by bravely reimagining and implementing new modalities of dissemination and monetisation. Specifically through solutions that redistribute power and place fairness and sustainability at their heart. Finally, the sense of loss experienced by musicians and audiences alike should not be allowed to be forgotten as pubs and venues reopen and 'demob' revelries begin following our emergence from the current pandemic. This extraordinary period of silence and reflection has highlighted the importance of grassroots support for the arts and shone a light on an army of people of great individual and collective worth, and whose contribution to our cultural enrichment and societal well-being should be valued and legitimised.

Notes

This letter is written in response to findings from our ongoing research which explores the impact of COVID-19 on the festival and live music industries in the UK. Part of the research – a genre-specific study of the jazz and blues scene in Scotland – has been funded by PLACE (Scottish Government).

References

Carr, P. 2020. *The Welsh Music Industries in a Post-Covid World: A Report for the Culture, Welsh Language and Communications Committee.* Open Access Report.

Jia, R., Ayling, K., Chadler, T.,Massey, A., Broadbent, E., Coupland, C. andVedhara, K. "Mental health in the UK during the COVID-19 pandemic: Cross-sectional analyses from

Corresponding Author: Haftor Medbøe, h.medboe@napier.ac.uk
Citation: Medbøe, H., Raine, S. (2021). Reflections on an imperfect normal: A letter to the future music industries. *Academia Letters*, Article 125. `https://doi.org/10.20935/AL125`.

a community cohort study.” In *BMJ Open*, 10(9).

Medbøe, H, Dias, J. 2014. *Improvisation in the digital age: New narratives in jazz promotion and dissemination*. First Monday. University of Illinois at Chicago Library. Online at: https://firstmonday.org/ojs/index.php/fm/article/view/5553/0

Taylor, I., Raine, S. and Hamilton, C. 2020. “COVID-19 and the UK Live Music Industry: A Crisis of Spatial Materiality.” In *Mast* 1(2), 219-241.

Thompson, M. (2016) “UK Music Venues and the Auditory Politics of Gentrification.” In *Dancehall* 12, 3-8.

Van der Hoeven, A. and Hitters, E. (2020) “The spatial value of live music: Performing, (re)developing and narrating urban space.” In *Geoforum* 117, 154-164.

Van der Hoeven, A. and Hitters, E. (2019) “Challenges for the future of live music: A review of contemporary developments in the live music sector.” In *The Future of Live Music,* eds. Ewa Mazierska, Les Gillon and Tony Rigga. New York and London: Bloomsbury Academic.

Corresponding Author: Haftor Medbøe, h.medboe@napier.ac.uk
Citation: Medbøe, H., Raine, S. (2021). Reflections on an imperfect normal: A letter to the future music industries. *Academia Letters*, Article 125. `https://doi.org/10.20935/AL125`.