

All-Party Parliamentary Group (APPG) on Music Barriers to Touring the EU for the UK Music Industry: Call for Evidence findings

This document provides supporting evidence to the All-Party Parliamentary Group (APPG) on Music's inquiry into touring in the EU under the Trade and Cooperation Agreement (TCA). It takes evidence from the Call for Evidence, including quotes from respondents, to support the full report, *Let the Music Move - A New Deal for Touring*. The full report can also be found on the UK Music website.

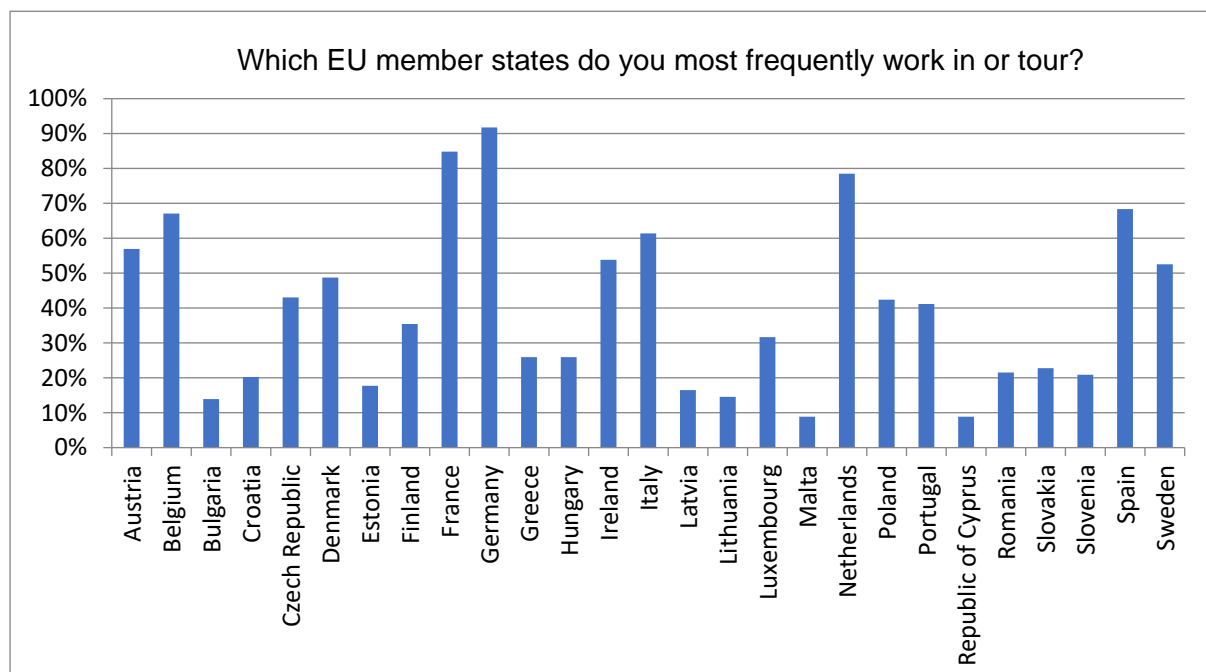
About The Survey

The APPG on Music's Call for Evidence ran on Survey Monkey between November 4th – 24th, 2021. It was promoted by UK Music and its members across their social media channels and in trade media press. The survey ran in parallel to the first evidence session and helped steer the content and which participants were invited to speak in the second evidence session.

In total, we had 165 responses from a wide variety of individuals: touring musicians, artist managers, promoters, booking agents, logistic agencies, and sound engineers, among others. Respondents were asked about their relevant interest and involvement in the issue of working or touring the EU for music. They were also given the opportunity to leave their name and email address to be contacted in the future about the research or to be asked to give more evidence at a later date. Respondents were also informed their findings may be quoted in the final report.

After the survey closed, the results were thematically analysed. The survey questions were generally qualitative and on average the survey took participants 10 minutes to complete.

There were two quantitative questions. Firstly, respondents were asked which EU member states they work in or tour most frequently. From the sample the top four most common answers in order were Germany, France, Netherlands and Spain.



In the second quantitative question, respondents were asked if they believed the system for EU nationals entering the UK to work or tour should be improved: 81% answered yes.

The six key themes identified in the thematic analysis from the qualitative questions were: competition, confusion, costs, CITES, cabotage, and carnets. Or: the 'Six Cs'.

Theme One: Competition

One of the clearest areas of concern from the survey was the impact of increasing overseas competition and the loss of potential work. Several survey respondents expressed concern that promoters were choosing to hire EU musicians and staff, as they would be cheaper and easier to book because of the new restrictions on UK workers. Other respondents spoke about how the new regulations had meant that they had to turn down work. The new rules were seen as putting UK artists at a real competitive disadvantage.

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- *“Since Brexit and Covid we simply have not been approached to perform in the way we were used to.”*
 - *“I work in opera. When a performer is unable to perform, a replacement is often flown in at short notice. This is no longer possible for British artists.”*
 - *“As I approached 90 days within 180 I had to turn down the offer of work in Sweden.”*
 - *“The restriction visas have put on means I can only work a limited amount in the EU. This means I am currently going through the process of moving out of the UK permanently as there is not enough work at home.”*
 - *“We now get 95% less work in the EU than we used to, largely due to the increased paperwork, costs, carnets and laws that make EU production companies less likely to want to spend the money/hassle in hiring/transporting UK crew and facilities.”*

- Call for Evidence respondents

The perception that UK artists are hard to book seemed as detrimental as the actual changes which are now in place.

Survey respondents said this issue had been exacerbated by COVID-19. The pandemic acted as a reset point for many EU promoters and managers, who are now prioritising local music. Alternatively they can't afford the extra cost associated with UK musicians as their budgets are under greater strain due to the impact of the pandemic. The 90 in 180 days rule also means musicians and music workers have to turn down work as tours or residencies (e.g., being a DJ in Ibiza for a summer)

can last much longer than this. Many respondents suggested all touring had stopped or was no longer viable, though some respondents found this tricky to untangle from the impact of COVID-19.

Theme Two: Confusion

Survey respondents shared their frustrations about how confusing the new rules are, when travelling between different countries.

When asked, most people told us they find information online, such as the Musicians' Union (MU), Music Managers Forum (MMF), Featured Artist Coalition (FAC) and BPI websites. Some people also mentioned trying to use the GOV.UK website, though views on this were more mixed. People also said they use labels, specialist companies and visa agents (who they have to pay).

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- *“It has become extremely difficult and confusing.”*
 - *“There’s nothing to say how the 90 days are counted, whether it’s 90 days from first entry or if you can tot it up on multiple entries (different bands) within that period before resetting or not.”*
 - *“Massive delays at customs because nobody there fully understands carnets yet (3 hours in UK, 2 hours in Calais on the outbound leg, then just 5 minutes in Calais on the return leg but still 3 hours in UK).”*

- Call for Evidence respondents

A number of respondents relied on the information they heard through friends, families and colleagues. Therefore it is vital that people’s experiences match up to government expectation, as news will spread fast if certain tasks are not easy as anticipated or forms are not accepted. It’s also why it’s key to have the information in an easily accessible location.

Theme Three: Costs

The unreasonable burden of the new financial costs was another very clear theme in this survey. Costs were seen as an issue for solo artists, who have to shoulder the cost alone, and for larger bands, where the costs for each person add up.

Mentioned alongside additional financial costs was the extra time needed to find answers to all the new components that now have to be considered. This is time which would normally be spent preparing for a tour. For some individuals this extra time cost was seen as just as large an issue as the new financial costs.

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- *“We are no longer able to complete a full European tour for our clients and they do not wish to go through the process of finding new suppliers.”*
 - *“Not commercially viable even for artists with an average audience of 1500 people.”*
 - *“It is now not feasible financially to tour... for me as a solo artist.”*
 - *“The main difference was the amount of time spent trying to find answers on what visa I needed, info about what materials my instrument was made out of etc. In the end I didn't have to obtain any work permits or provide any certificates etc but it took a long time finding out what I needed to know.”*

- Call for Evidence respondents

Within additional costs, merchandise sales were also highlighted as an area of ongoing issue. Respondents spoke about no longer selling merchandise, due to it no longer being commercially viable, or sales dropping substantially.

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- *“We have also advised for artists not to sell merch by mail order due to the artist being blamed for the additional fees incurred by the EU customer.”*
 - *“My merch sales, however, have dropped off the cliff. Normally 90% of my online physical merch sales have been from the EU - but so many packages have gone missing, been rejected entry to the EU that people have simply stopped ordering from me.”*

- Call for Evidence respondents

Theme four: CITES

Although free, CITES permits and certificate were highlighted as another resource heavy, time-costly addition to the process of touring in the EU under the TCA. Respondents referred to having instruments altered or having to take second instruments as an expensive, inefficient, and less than ideal workaround.

Respondents also referred to the apprehension and worry they now feel before entering new countries, as new elements including CITES can make it hard for them to relax which then impacts their ability to perform.

- *“Artists face a level of uncertainty about what is required when crossing borders in the EU, and increasing expense involved with obtaining paperwork such as carnets, work permits, and CITES (although free – this also takes time).”*

- *“We travel with instrument passports detailing what materials instruments are made of in case we were ever queried re CITES, even though we have implemented a 'No CITES' policy to avoid having to obtain specific permits and checks. Players are having to use 'second instruments' to avoid taking CITES-listed materials into the EU, or have instruments/bows modified at significant expense and risk of altering and devaluing the instrument/bow.”*

- Call for Evidence respondents

Theme Five: Cabotage

The issues around cabotage were presented as twofold by respondents. Firstly, there was concern that cabotage rules will take away work from the world class trucking companies currently based in the UK, forcing them to go under completely or relocate.

Secondly, there was concern that it would lead to a lack of availability in the UK, which would make it harder for artists to tour at home.

- *“Cabotage is an enormous problem - we are used to leaving the UK and having the same trucks carry gear on long tours that can sometimes last many months - how can they go back to the UK after two drops? This is an absolutely killer to the touring business and particularly the world class trucking companies that undertake this work.”*

- *“Fewer artists are prepared to tour internationally, due to the costs and additional administration associated with obtaining working permissions/carnets, and in light of the logistical challenges posed (e.g. lack of availability of tour buses as a consequence of the cabotage rules.)”*

- Call for Evidence respondents

Theme Six: Carnets

Carnets were seen as a particularly expensive addition when touring in the EU, especially as respondents told us the advertised price does not always match up with the actual price. This was seen as an unaffordable cost for new and emerging artists in particular.

Some respondents referred to shipping equipment instead, but the extra delays involved can make this another inefficient workaround.

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- *“Cost of carnet for the privilege of taking your own equipment with you in order to do your job... advertised as costing £325 but after additional insurance costs and VAT came to £666.”*
 - *“It has become more challenging and costly, requiring additional paperwork and administration. We now have to obtain expensive carnets (between £2000-£5000 depending on the size of the orchestra and equipment transported) to move orchestra equipment across the UK-EU border, which requires players to provide detailed information to be able to compile the carnet application.”*
 - *“Carnets - not previously needed to cross from UK to EU - now required - a big expense (£500+), impossible for many artists especially at the early stages of their career.”*

- Call for Evidence respondents

Solution and Conclusion

For the final question in the Call for Evidence, respondents were asked what solutions they thought should be taken forward in order to address the challenges for the music industry following the UK's exit from the EU. The most prevalent suggestion was having a centrally managed, regularly updated point of information to go to with questions. This was seen as something that could be a huge benefit to the industry. Respondents wanted an easier way to know exactly what they needed to do and what they should expect ahead of touring in Europe.

On a macro level, respondents wanted to go back to the ease of the system that was in place before the UK left the EU. It was felt UK musicians should have reciprocal rights to enter, work, and perform in the EU. This included eliminating the need for the large swathes of paperwork, which is now needed, and the costs and time associated with it. Respondents felt bilateral agreements were needed across the EU to resolve this issue.

In conclusion, this survey helped further illustrate how touring in the EU under the TCA is impacting all levels of the music industry. While there was a sense new and emerging artists will be particularly impacted by these changes, respondents acknowledged that for medium to large scale artists there are also challenges to be resolved.

The findings presented in this paper helped shape both the evidence sessions and design for the APPG on Music's full report, *Let the Music Move: A New Deal for Touring*. We thank all the respondents who took part and shared their thoughts, concerns, and recent experience.