



**exibproject.org**

**SURVEY 2020**

**INTERNATIONALIZATION  
OF MUSIC DIVERSITY  
IN TIMES OF COVID-19**



**EXIBPulse**

State of today's  
Ibero-American musical  
ecosystem

The idea of creating this survey has been to find out the outlook of the music industry environment, how this has impacted the work of artistic productions, the internationalization of music and intercultural exchange.

Artistic circulation and intercultural exchange are key to the development of our projects. We create experiences encouraging the connection between creators, promoters, organizations and cities through people's network and collaboration to prompt the relationship of the music from Ibero-America with Europe and the rest of the world.

The current crisis has smashed freedom to travel and blocked the dialogue between the creators and the audience, preventing the human contact, that is so necessary and irreplaceable. Both the nature of this pandemic and the measures undertaken to withstand it affect the possibility of celebrating and gathering together, having a great impact in people's emotions and the general spirits of the music sector.

We are confident that people's aptitude to overcome this situation is essential for the actions and decisions they will make. We are looking to recognize the standpoint of the music sector in this critical time, hoping to generate reflections that could serve as encouragement to transform the current challenges into opportunities to try new working ways that can still be useful after the pandemic ends.

**Adriana Pedret**

Director [exibproject.org](http://exibproject.org)

Managing Director

Expo EXIB Música



“ Resilience includes two elements: Resistance to destruction, which means, the capacity to protect one's own integrity under pressure; and on the other hand, beyond that resistance, the capacity to shape one's own vital positive outlook towards difficult circumstances. ”

**Stefan Vanistendael**

## **SURVEY OBJECTIVES**

To find out the current outlook of the music sector especially in the Ibero-American countries. We are hoping to understand what the concerns of the music professionals are and identify ways to help resume the exposure and livelihood of the traditional, popular and roots music during the pandemic crisis due to COVID-19.

## **A SURVEY CREATED IN RESPONSE TO A SPECIFIC PHENOMENON**

The cultural sector has possibly been hit hardest by the measures imposed to control the pandemic. People working in live music can't earn money if social activities are stopped. Since most music professionals are independent entrepreneurs, the situation has had a devastating effect in their economy.

## **SURVEY FRAMEWORK**

We have asked about aspects of the music industry within the expertise of [exibproject.org](http://exibproject.org) and EXIB Música, as follows:

- 
- Music circulation
  - Music dissemination
  - Internationalization
  - Live concerts
  - Music management
  - Cultural projects sustainability
  - Preservation of heritage and roots identity music
  - Music cooperation between Ibero-America and Europe

## STEPS

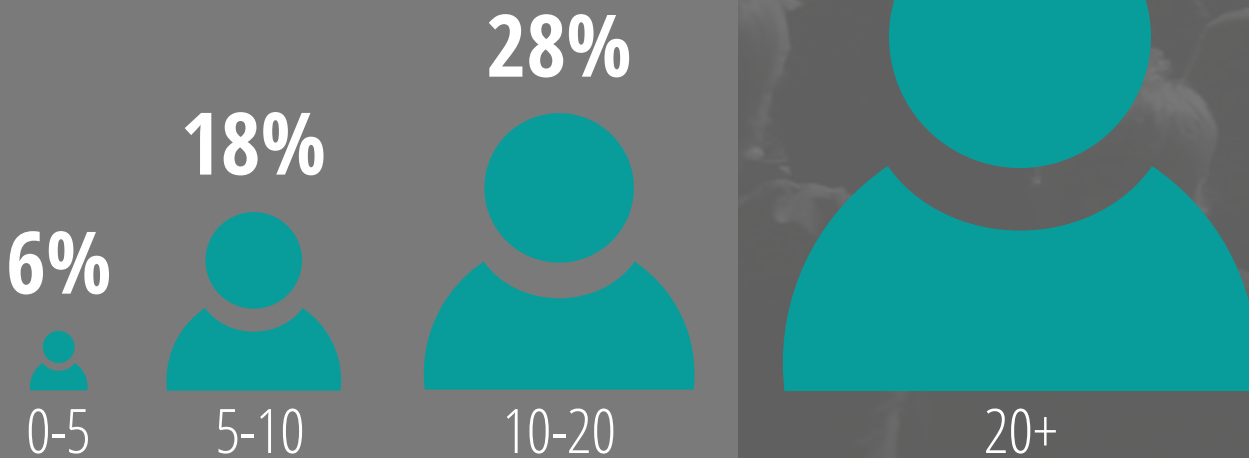
- Design of content (20th April to 25th May)
- Review by experts (25th to 31st May)
- Formatting for the survey platform (27th to 31st May)
- People filling out the survey online; social media promotion (1st to 18th June)
- Collecting the responses (10th to 24th June)
- Analysis of the results (10th to 28th June)
- Writing the report (19th to 28th June)

## IMPLEMENTATION

- We sent out the survey with our newsletter and via social networks.
- It was sent out through several professional groups and networks.



## HOW MANY YEARS HAVE YOU BEEN COMMITTED TO YOUR PROFESSION?



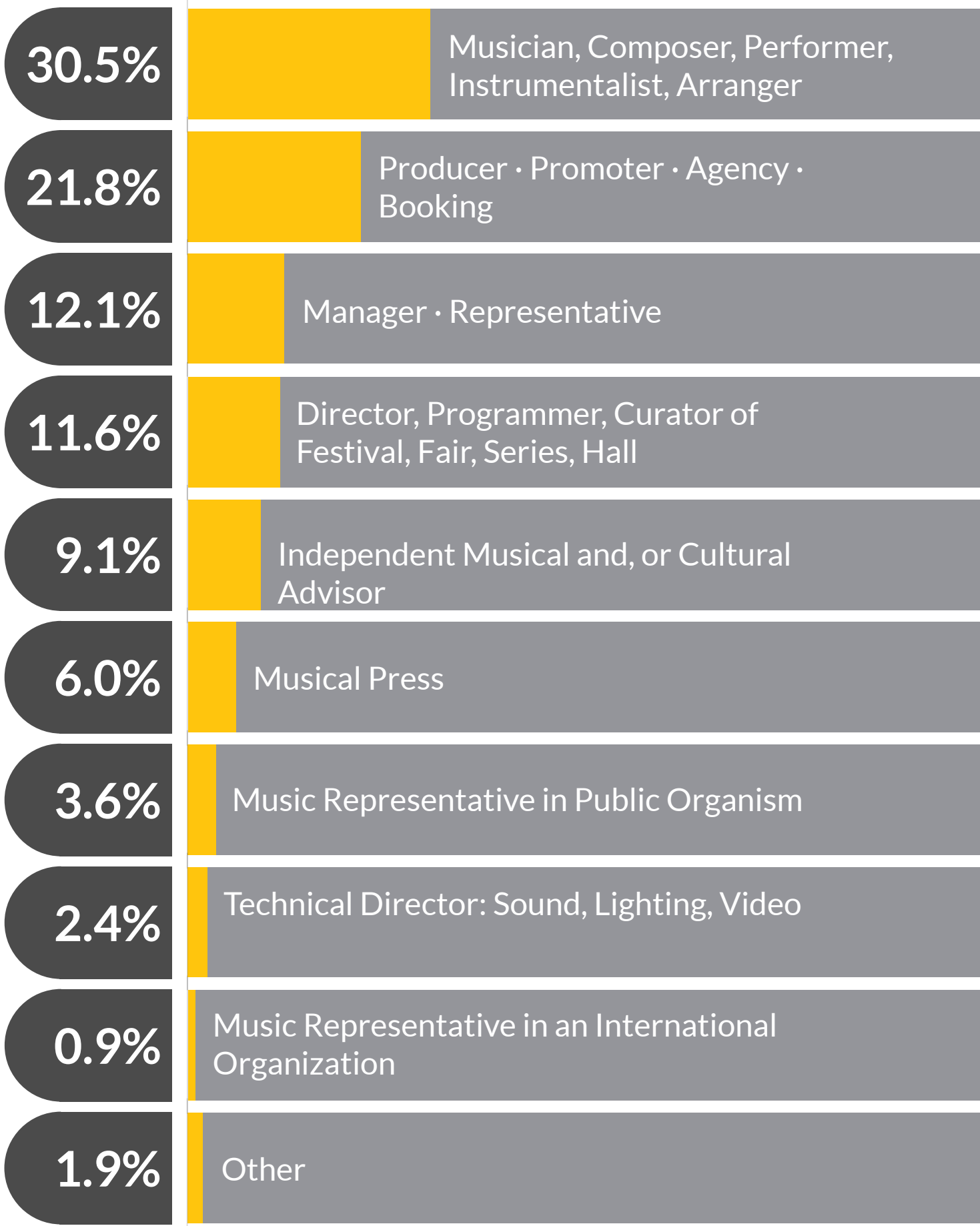


# RESULTS BY COUNTRY

# SURVEY MADE IN THREE LANGUAGES

SPAIN 21.2%	PORTUGAL 16.7%	ARGENTINA 15.6%	MEXICO 6.7%	VENEZUELA 4.4%
BRAZIL 3.8%	CHILE 3.1%	USA 3.1%	UK 3.1%	COLOMBIA 2.9%
PERU 2.3%	URUGUAY 1.7%	NETHERLANDS 1.7%	COSTA RICA 1.5%	BOLIVIA 1.2%
PARAGUAY 1.2%	BELGIUM 1.2%	ECUADOR 1.0%	CUBA 1.0%	FRANCE 1.0%
PANAMA 0.6%	CANADA 0.6%	ITALY 0.6%	GERMANY 0.6%	LUXEMBURGO 0.4%
POLAND	DOMINICAN REPUBLIC 0.2%	SWITZERLAND 0.2%	GUATEMALA 0.2%	PUERTO RICO 0.2%
HONDURAS 0.2%	NEW ZEALAND 0.2%	AUSTRIA 0.2%	SWEDEN 0.2%	GREECE 0.2%
JAPAN 0.2%	IRELAND 0.2%	CZECH REPUBLIC 0.2%	SERBIA 0.2%	UKRAINE 0.2%

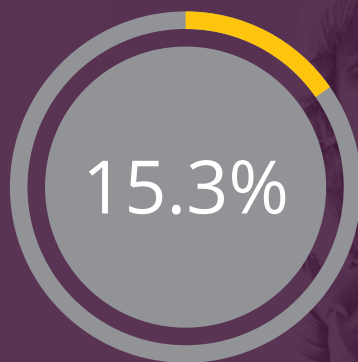
# Within the music sector, what is your role?



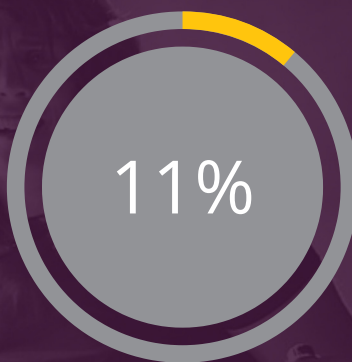
# What is your operating structure?



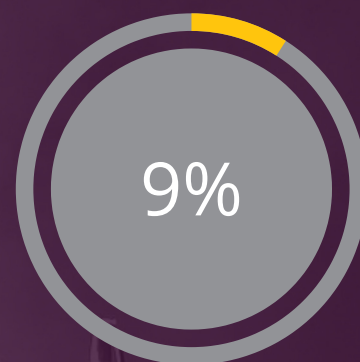
Freelance/  
Independent Worker



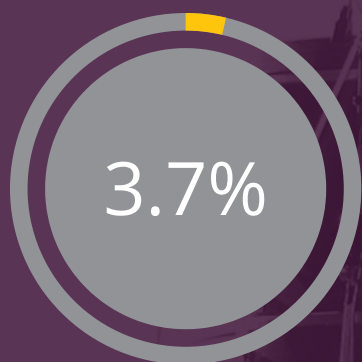
Private company



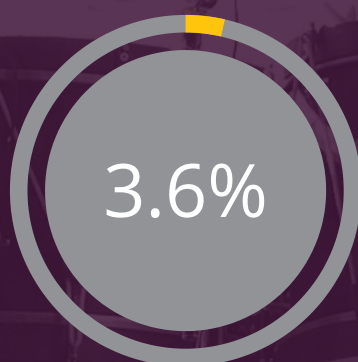
Non-profit  
organization



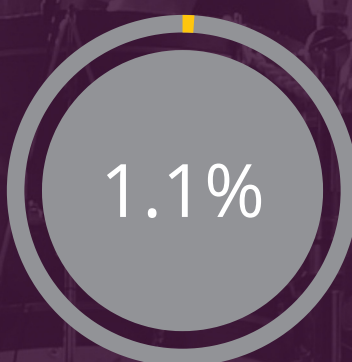
Public organization



Cultural  
Cooperative



Without legal  
structure (Informal)



International  
organization



Other

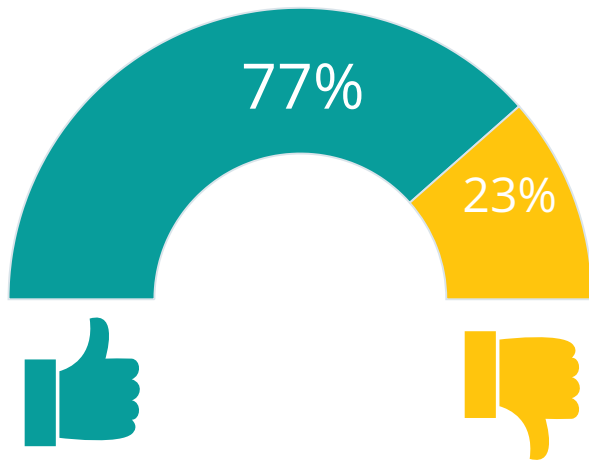
“During this time when we have observed the importance of care, seeing it in gestures is a reason to celebrate and be thankful. Being used to the professionalism of the EXIB team, I am not surprised by their initiative to find out how the music sector professionals, one of the most affected of the economy, have been coping through the response measures of the (Spanish) government to tackle the pandemic due to COVID-19. This is an impeccable consultation; they are in their element and they own it. They have decided to listen to the music independent sector, which they call the “independent music ecosystem of Ibero-America”. This has the double virtue of getting us together, and not only protecting our work but also our identity. Surely, as they well put it, they try to find an answer to the unavoidable changes. They have made a commendable first step. I want to be part of the next step”.

**Lara López**

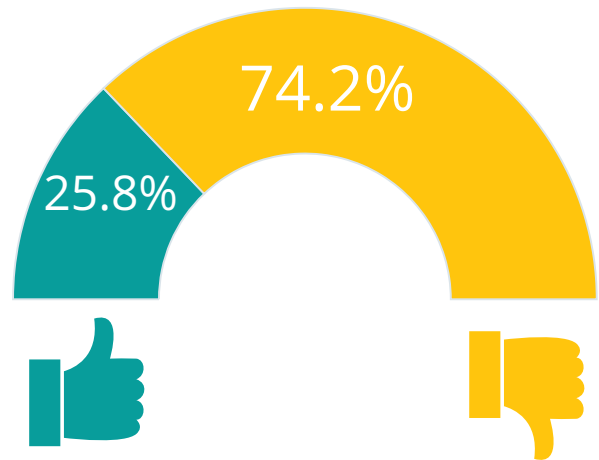
Writer, Journalist specialized in music  
Ex-director de Radio 3 / RTVE  
Spain



Do you dedicate your time exclusively to the musical/cultural sector?



Have you considered quitting your plans within the music sector and committing yourself to something else?

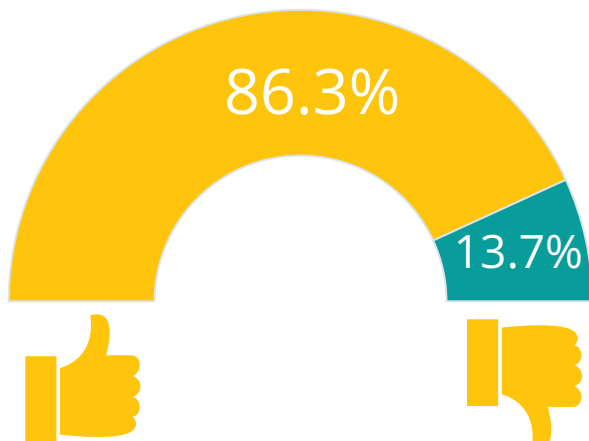


“En situaciones de crisis cómo la que vivimos actualmente, se suele pensar que las áreas del conocimiento deben ser priorizadas según su capacidad para ofrecer respuesta a los problemas. Esta visión olvida que áreas supuestamente improductivas cómo la música, pueden aportar enormemente a hacer la vida más llevadera en momentos difíciles. En este tiempo de confinamiento, músicos de todo el mundo han dado soporte anímico a sus semejantes, igualmente han desarrollado formas alternativas de producción y distribución de música. Ver y escuchar estos procesos será de gran utilidad para el desarrollo de políticas culturales sostenibles para nuestro medio ambiente cultural y material.”

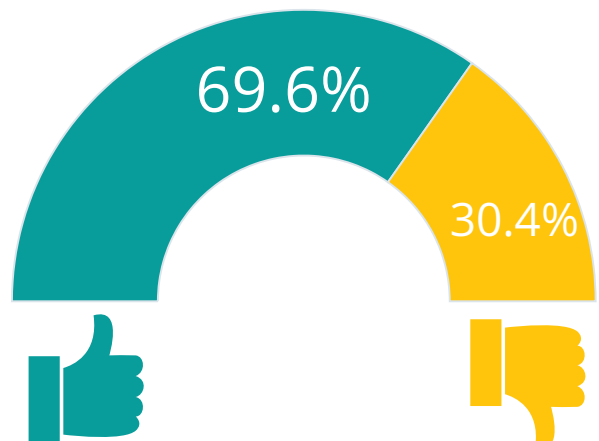
**Julio Mendivil**

Etnomusicólogo · Profesor titular de etnomusicología de la Universidad de Viena, Austria

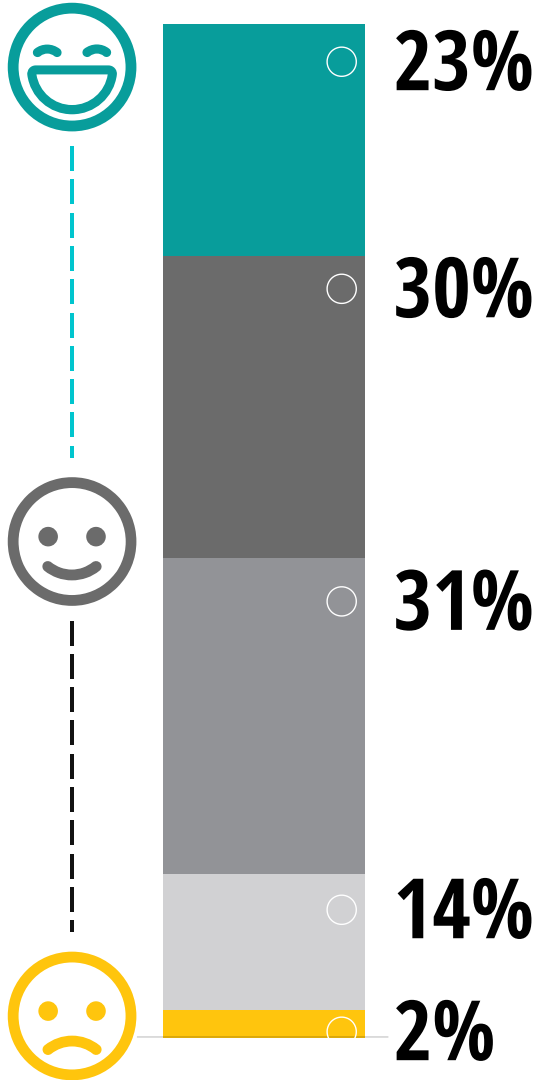
How are you concerned about the changes that may come as a consequence of the crisis?



Do you identify, in this crisis, opportunities for the development of your work?

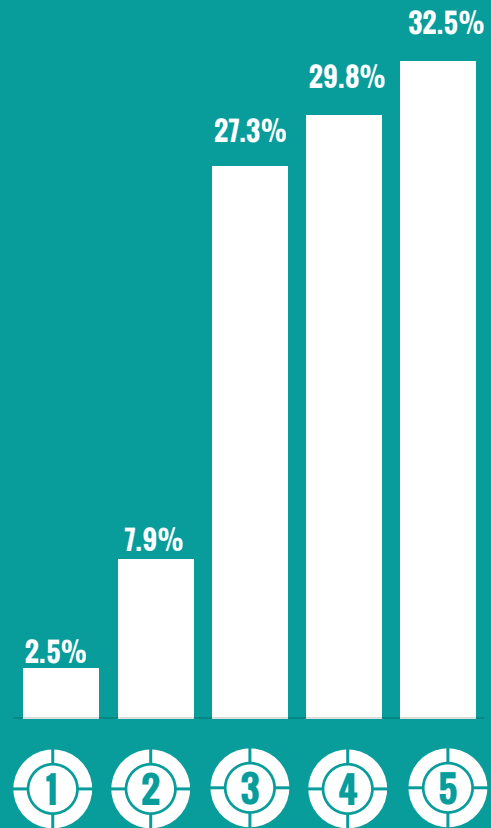


# In mood terms, how do you feel to face the challenges that the current situation for the sector present?



## Are you concerned about the changes that may come as a consequence of the crisis?

1 being the lowest and 5 the highest measure

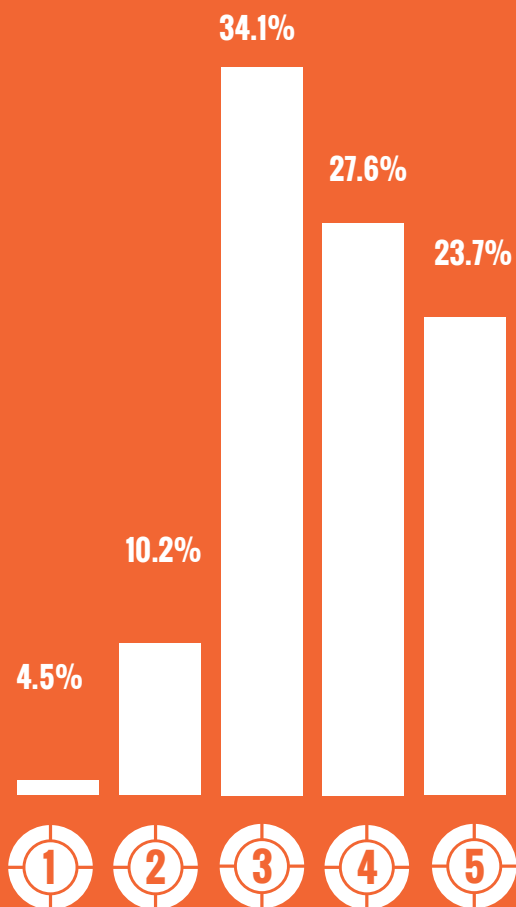


De todas las expresiones artísticas, la música ha sido, sin duda, la que más atributos pandémicos ha tenido en estos últimos tiempos. Sus propiedades curativas y estimulantes le han permitido introducirse últimamente en el territorio de nuestras emociones, estableciendo una sintomatología en la que predomina el recuerdo nostálgico de la necesidad inmediata de que la experiencia musical colectiva vuelva a acariciar nuestra piel, para beneficio del alma.

Eudald González Casanova  
 Festival Polisònic – Gandia / Director artístico  
 España

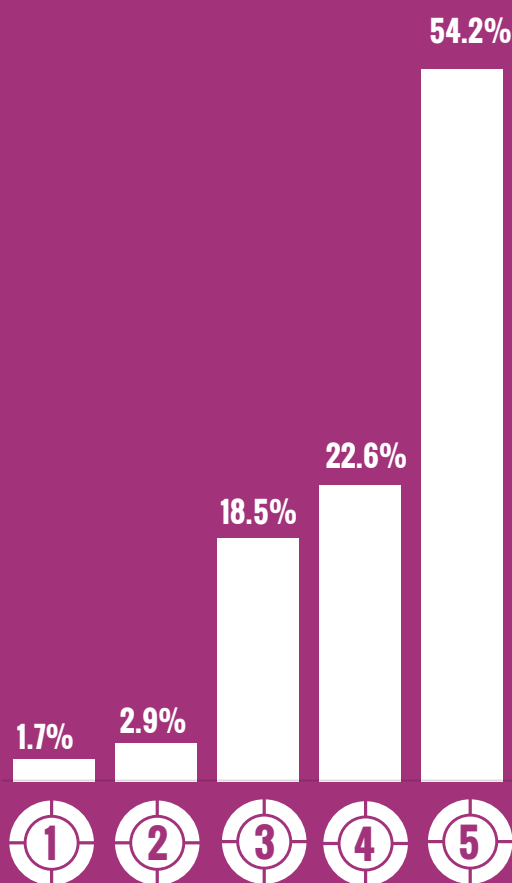
### How much do you incorporate initiatives related to sustainability in your projects and your organization?

1 being the lowest and 5 the highest measure



### What value do you give to collaborative work within the independent music sector?

1 being the lowest and 5 the highest measure



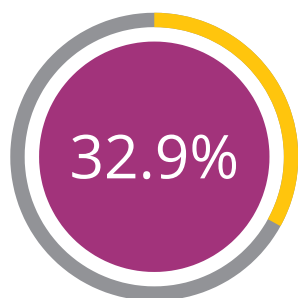
“ Ante la magnitud de la crisis que atraviesa la humanidad, los artistas nos vemos obligados a replantearnos desde lo más profundo el sentido de nuestro quehacer. El hecho de que en el corto y mediano plazo no podamos circular libremente, hace que aquellos que vivimos de girar, tengamos que renunciar a nuestras andanzas internacionales. Si bien esto presenta incontables dificultades, nos obliga a redireccionar nuestro oficio en pos de la comunidad local.

Creo que esto, a la larga, no sólo cambiará dónde y cómo hacemos lo que hacemos, sino también cambiará el qué hacemos, devolviéndonos algo de esa identidad particular de cada comunidad que hace décadas veníamos perdiendo a la vez que añorando. El principal poder de la música es crear lazos comunitarios, y eso, hoy más que nunca, es urgente. ”

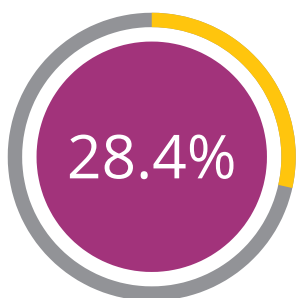
**Nano Stern**

Cantante, multi-instrumentista y compositor / Chile

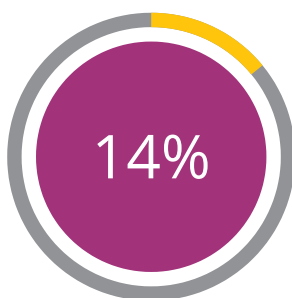
## What implies the increase in online content?



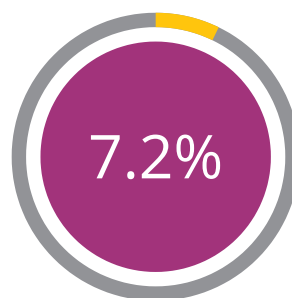
An opportunity



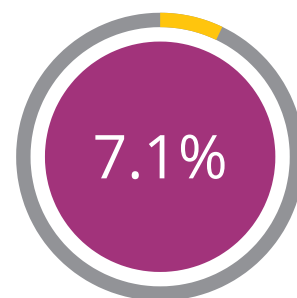
A stimulus to  
creativity



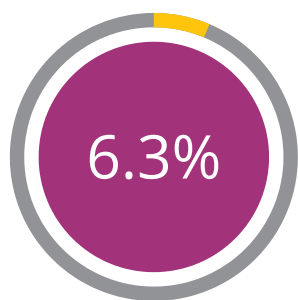
A limitation



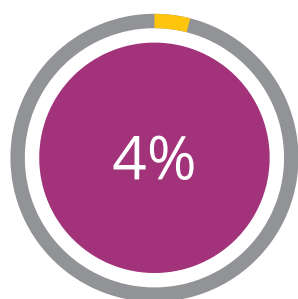
None of the above



Insecurity



Helplessness due to  
lack of  
understanding



A threat to my  
work

“ Ha sido muy difícil aceptar el confinamiento obligatorio pero necesario durante estos meses y la cancelación indefinida de los planes de trabajo. Es cierto que el artista aprovecha parte del tiempo de su estadía en casa para crear, estudiar y practicar, sin embargo, en la búsqueda de que su obra logre ser expuesta y le sea retribuida económicamente, se enfrenta a diversos retos. Recurrir a la difusión de su trabajo a través de plataformas digitales ha sido tal vez la opción más utilizada, implicando renunciar a la retroalimentación tan necesaria que se produce al hacerlo ante el público en vivo. A pesar de que lograr una transmisión de calidad no está al alcance de todos, podemos atestiguar que aún con recursos modestos, como la utilización de un teléfono móvil, la transmisión del trabajo artístico es totalmente necesaria para nuestra sociedad, dejando de manifiesto que no debemos renunciar por ningún motivo a nuestro quehacer cultural, y como creadores debemos expandir nuestros horizontes buscando nuevas rutas de comunicación. ”

Adriana Cao Romero

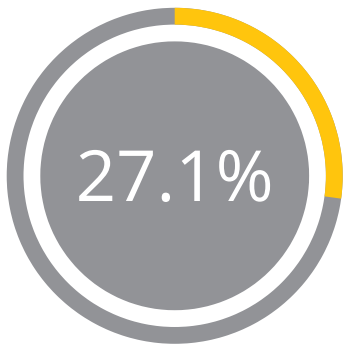
Representante del grupo musical Caña Dulce y Caña Brava / México

“ El día después de la pandemia, el diario del lunes de la pandemia no la tiene nadie, sigue siendo una incógnita. Esto va a demorarse en tomar impulso, en reconstruirse, ni hablar en materia económica. La actividad se irá reformulando en varios aspectos. Vivir de la música hoy día está siendo bien difícil, pero tenemos claro que hay q buscar las formas, herramientas, información...el ejercicio es conjunto, colectivo y en un diálogo constante. Por eso recabar datos es un modelo de acción valiosísimo para los tiempos que nos atraviesan, celebro esta instancia de escucha de EXIB con todo el sector. ”

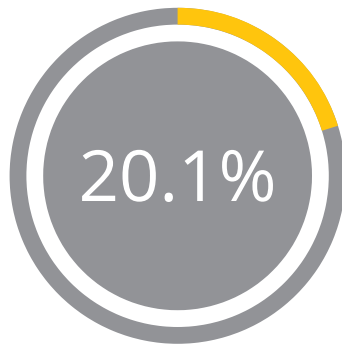
Paula Rivera

Gestora Cultural / Vicepresidenta del INAMU  
Argentina

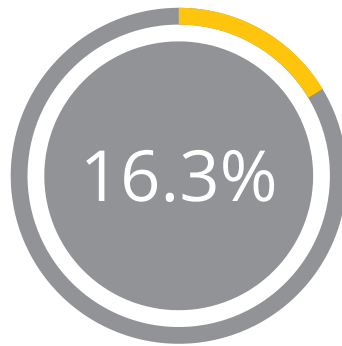
# What is your opinion about the increase of online concerts and live music sessions?



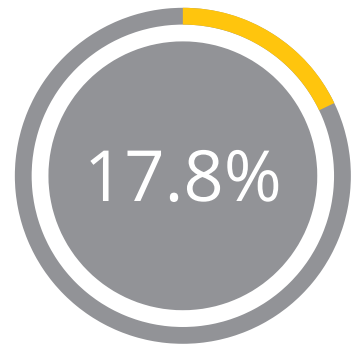
A limitation to receive income



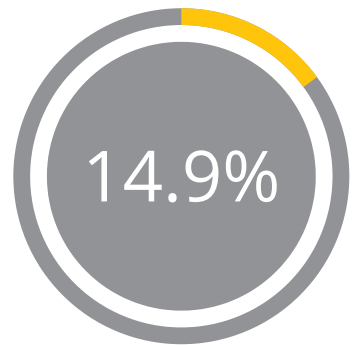
A possibility to reach a higher number of spectators



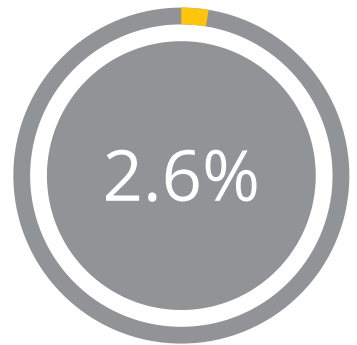
Increase in the diffusion of musical work



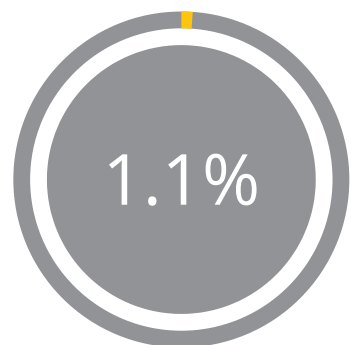
An alternative that undermines the quality of musical work



An opportunity for internationalization



None of the above



Others

“ Clearly, the pandemic is affecting musicians, and it’s those with the least resources or without the mindset to be their own marketing team who will be affected the most. But this is nothing new.

The major labels and dominant streaming platforms continue to undervalue their main asset: the artist. One silver lining could be that the disruption from the pandemic lessens the grip of the corporations and musicians are able to get a fairer percentage of streaming income – that inequality continues to be the biggest problem of the industry, more so than the pandemic.



Russell Slater

Editor of Sounds and Colours / UK



“Si algo podemos afirmar, luego de intentar comprender y “pilotear” la crisis impensada que provocó el COVID-19 en el ámbito de la música independiente en particular y de la cultura en general, es que no saldremos solos.

Desde los primeros días de la cuarentena, nos vimos afectados en nuestra actividad como toda la sociedad, solo que supimos que los conciertos y shows serían las últimas actividades en reactivarse, lo que nos generó mayor angustia, producto de la incertidumbre.

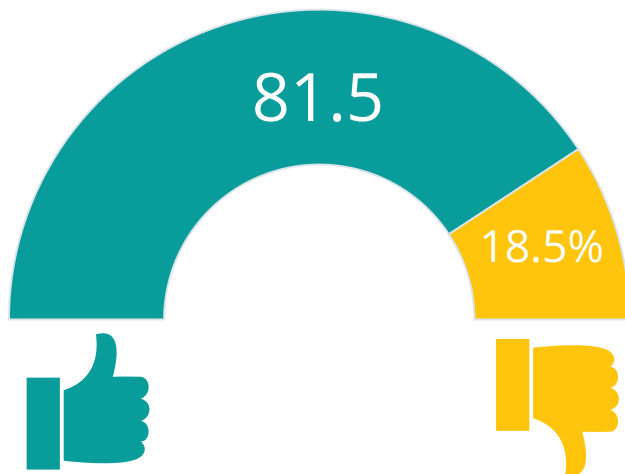
Por eso decidimos comenzar a reunirnos como un grupo de reflexión, de sostén, de acompañamiento y de trabajo, cada uno aportando y compartiendo sus saberes y herramientas. Es así que formamos ENRED, Encuentro Regional de Gestores Musicales, con conexión a Iberoamérica a través de EXIB MÚSICA. Nosotros creemos que la asociatividad, el conformar redes a partir de la colaboración, la solidaridad, la empatía y la creatividad, es el modo en que podremos ir encontrando una salida colectiva a la crisis. Tenemos muchas preguntas que hacernos y cambios que realizar en nuestros modelos de gestión y producción, en el mayor desafío que hayamos vivido como sector. Es posible que al fin nos encontremos forjando un modelo más humanizado.

El aporte de valor documental y estratégico de EXIB será una de las bases desde las cuales activar los procesos de transformación necesarios en nuestra nueva normalidad.”



ENRED - Encuentro Regional de Gestores Musicales

Productores, mánagers y gestores musicales independientes de Argentina, en colaboración con representantes de otros países de Iberoamérica.



In the light of social distance regulations that affect the work continuity for musicians, producers, technicians, and organizations in the sector, do you think that regulating the online content's monetization could be an income alternative for artists and promoters?



Vivemos um momento complexo no qual pela força da clausura foi demonstrada a centralidade que a música e as artes ocupam nas nossas vidas, porém o o nosso sector maioritariamente dependente das receitas provenientes dos espectáculos ao vivo revelou a sua imensa fragilidade.

As carências estruturais quer a nível da inexistência de um circuito organizado de salas de espectáculos, quer mesmo no que respeita à deficiência em termos de políticas culturais e de programação adequadas às músicas de raiz e às suas fusões e aprendizagens, bem como as parcas respostas por parte das entidades oficiais face aos danos causados pela pandemia no tecido cultural, adivinham tempos muito difíceis.

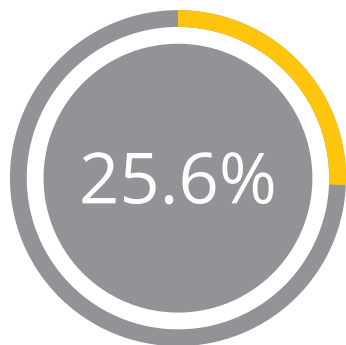
Invariavelmente as dificuldades sobrarão para os mesmos, serão os artistas e as suas estruturas técnicas e de produção que ao final do dia sentirão na pele a pressão de uma indústria extremamente debilitada. Há toda uma luta para começar de novo... Ânimo!



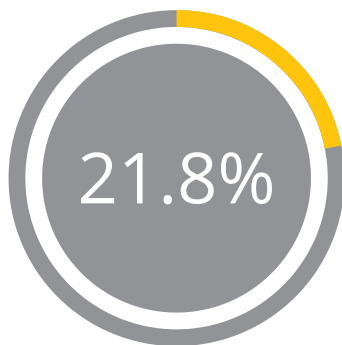
Ricardo Delgado

Agente/ Manager na Roots and Rhythms / Portugal

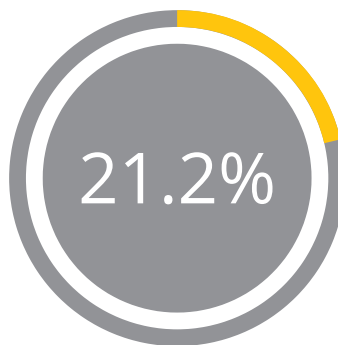
# Taking into consideration the continuous threats that popular and heritage music faces, in your opinion, what would be the most balanced way to safeguard its diversity within the independent music market?



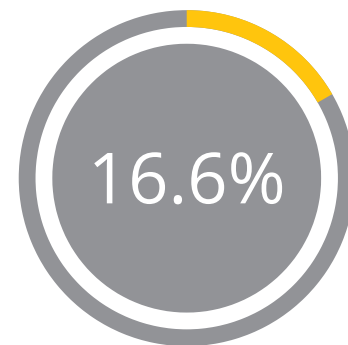
Strengthen the production network of the musical manifestations of traditional towns and communities.



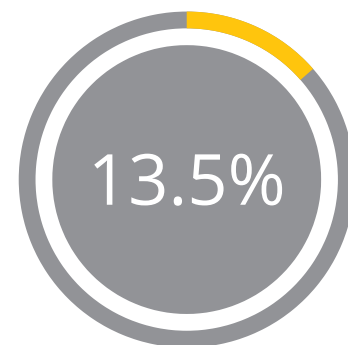
Rethink spaces for dialogue between tradition and the contemporary



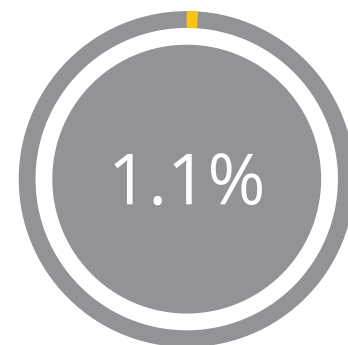
Provide opportunities at major events and festivals



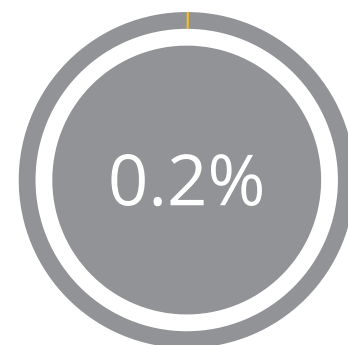
Produce spaces for reflection on the valuation of diversity.



Guarantee the existence of a category "traditional groups" in the various calls



None of the above



Other

“ A música invisível existe, é toda aquela que é produzida essencialmente para o próprio, mas que representa uma cultura, uma identidade, vários patrimónios. Existe em muitos lugares, depois torna-se mais coletiva, associativa, serve comunidades, mas é ainda invisível, a indústria não a vê. Representa-se em nichos, culturais e de públicos.

Quando uma pandemia coloca em causa, o estar com o outro e obriga a um distanciamento social. esta música quase desaparece, os danos são gigantescas, ela une comunidades, se elas não podem estar unidas, ela fragmenta-se.

Mas as pessoas são resilientes e precisam umas das outras e esforços são feitos, triste que poucos os vejam, ou que não haja notícias sobre esses movimentos. Das filarmónicas aos ranchos folclóricos, às escolas de música locais, muitos foram os danos. A pandemia parece que colocou todos ao mesmo nível e que houve uma união contra um inimigo invisível, mas não é bem assim, toda esta música teve de se esforçar ainda mais para se manter à tona. É urgente ouvir, perceber que esta música é precisa.

É fundamental em muitos lugares

”

Tiago Pereira

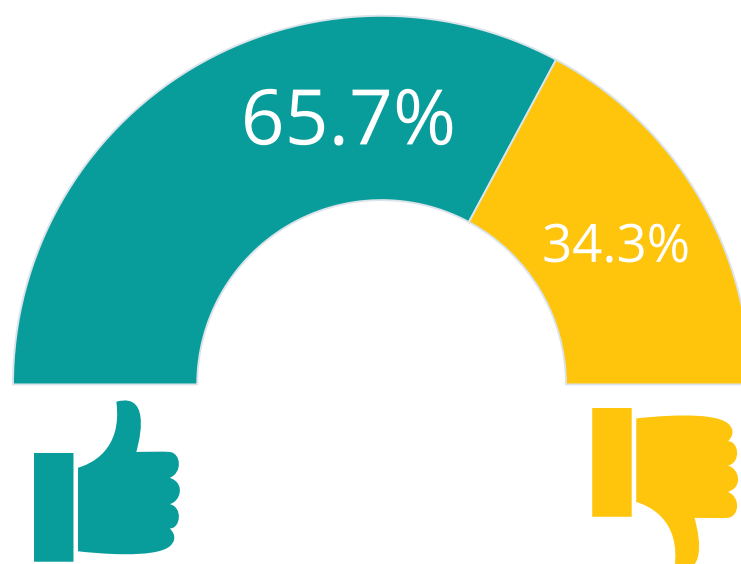
Coordenador do projecto a musica portuguesa a gostar dela própria / Portugal

“ Musicians are great improvisors, of course, and they’ve organised great concerts from lockdown of various sorts - mostly free, but some paid for. And it’s dangerous when everything is for free. The product loses its value. But after three months, I have had enough of online concerts. Music is a shared experience with the musicians in front of us and a community around. THIS is now the creative challenge - to make this happen in a fulfilling way with whatever the new health guidance is. I’m sure it’s possible, but it’s going to have to be an inventive partnership between musicians, venues and music presenters. We all want the scene back. We’ve just got to make it happen - and remind the world that music, like water, is one of life’s essentials ”

Simon B

Editor in Chief, Songlines magazine / UK

Faced with the measures that restrict the celebration of festivals, fairs, and other live events initiatives, do you consider that making 2020 online editions is a good alternative?

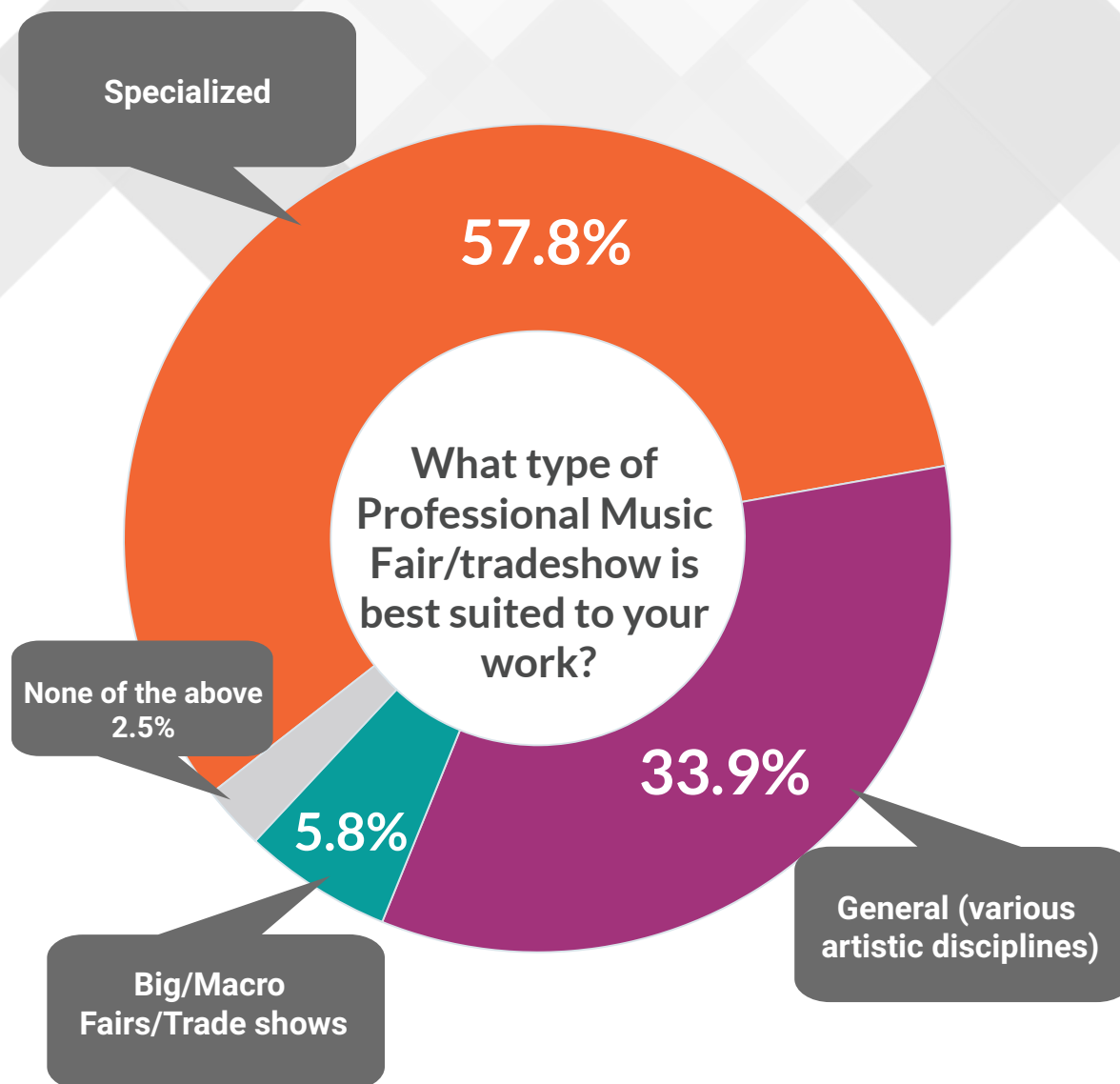


“ Em tempos de crise muitos vão chorar e alguns vão vender lenços. A palavra para quem é empreendedor é OPORTUNIDADE. E é assim que tento encarar tudo que na vida aparece, como uma oportunidade. A pandemia tem um lado sinistro, a morte está rondando mas por outro lado nos apresenta a valorização da vida. Vejo como numa corrida de F1 quando o safety car entra na pista e se faz necessário nova largada. O momento atual é esse, os pilotos mais preparados provavelmente continuaram tendo as chances, mas numa nova largada por algum momento os equipara aos novos artistas e os buscadores. Para quem almeja se reposicionar é uma chance de ouro nas mãos. Em vez de chorar vá agregar conteúdo, criar uma network mais sólida, aumentar sua presença na rede, fomentar novas parcerias.... Quem quer comprar um lenço? ”

Marcos Portinari

Brasilianos produções · Empresário, Produtor multimídia, Diretor artístico





“ Es un momento complicado para todos los que nos dedicamos al sector de la música. La avalancha de conciertos online y de contenidos virtuales que han llenado el confinamiento, si bien han sido un modo de expresión para un momento concreto, no pueden sustituir el directo porque es una experiencia única e irremplazable por una pantalla. Lo mismo sucede en relación a ferias y mercados, tan necesarios para nosotros, donde el encuentro físico es la mejor manera de relacionarnos. Es crucial que todos los agentes del sector defendamos la música en vivo, en general todas las artes escénicas, como nuestro más grande y valioso patrimonio ”

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We want to share these  
results with the music  
sector, aiming to provide  
data and insights to  
understand and find  
opportunities in the actual  
moments.

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