South of Scotland

Music Sector

Report

2026

South of Scotland Enterprise

South of Scotland Music Sector Report

The **Music Sector** in the South of Scotland holds significant cultural and economic value.

SOSE, along with our partners, created a survey to gain valuable insights into the local music industry. This initiative is designed to deepen our knowledge and encourage further development within the sector.

The online survey was distributed through partner organisations and remained open for 10 weeks between June to August 2025.

This report presents the survey data and outlines key priorities derived from the findings to help facilitate the development of the music sector. It establishes a solid baseline for future surveys, enabling effective monitoring of industry trends.

South of Scotland

Music Sector

SOSE previously carried out research and mapped our Creative Economy which includes the music sector. The following gives our estimation of the sector in the South of Scotland.

261

Music Enterprises in the South of Scotland with the highest prominence in Dumfries and the surrounding area.

614

People working in the Music sector with **58%** of enterprises made up of freelance or self-employed people.

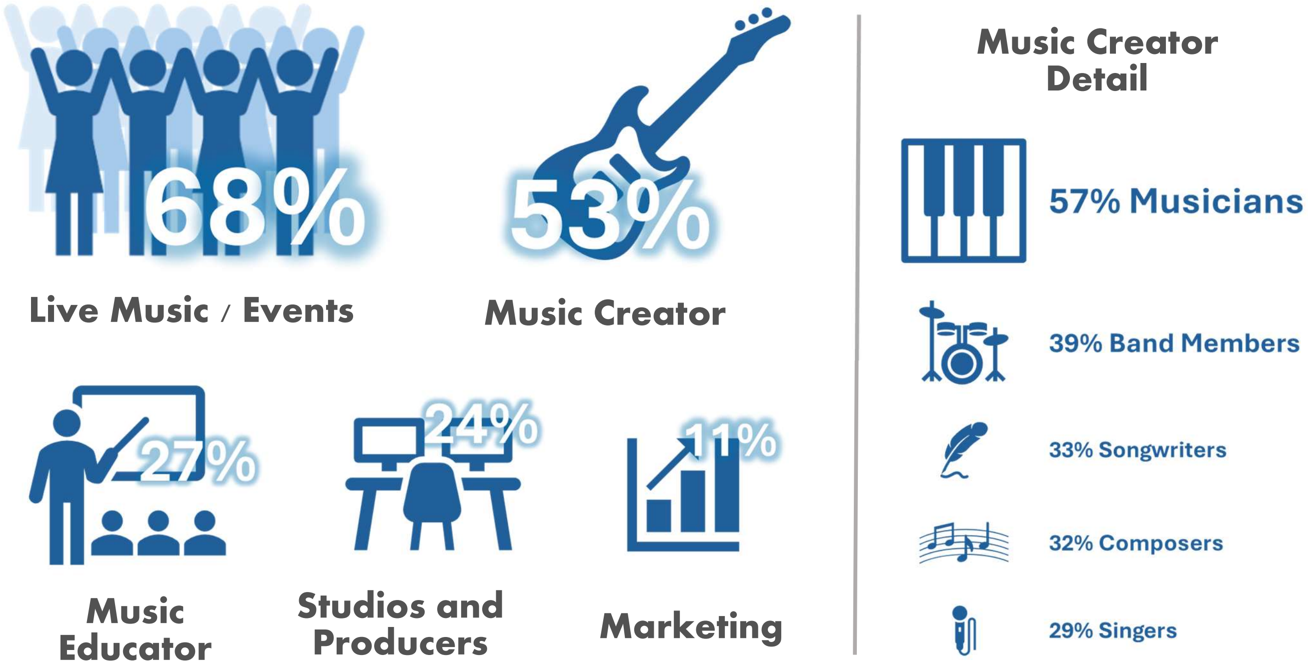
£8.4 Million

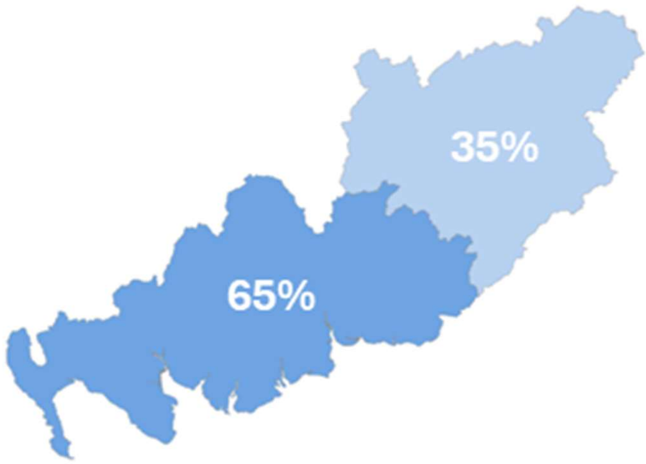
Turnover generated across the South of Scotland from the Music Sector.

Source: SOSE mapping of the Creative Economy

Survey Respondents

We asked respondents which areas would best describe their music sector role and skills, multiple choices could be selected.

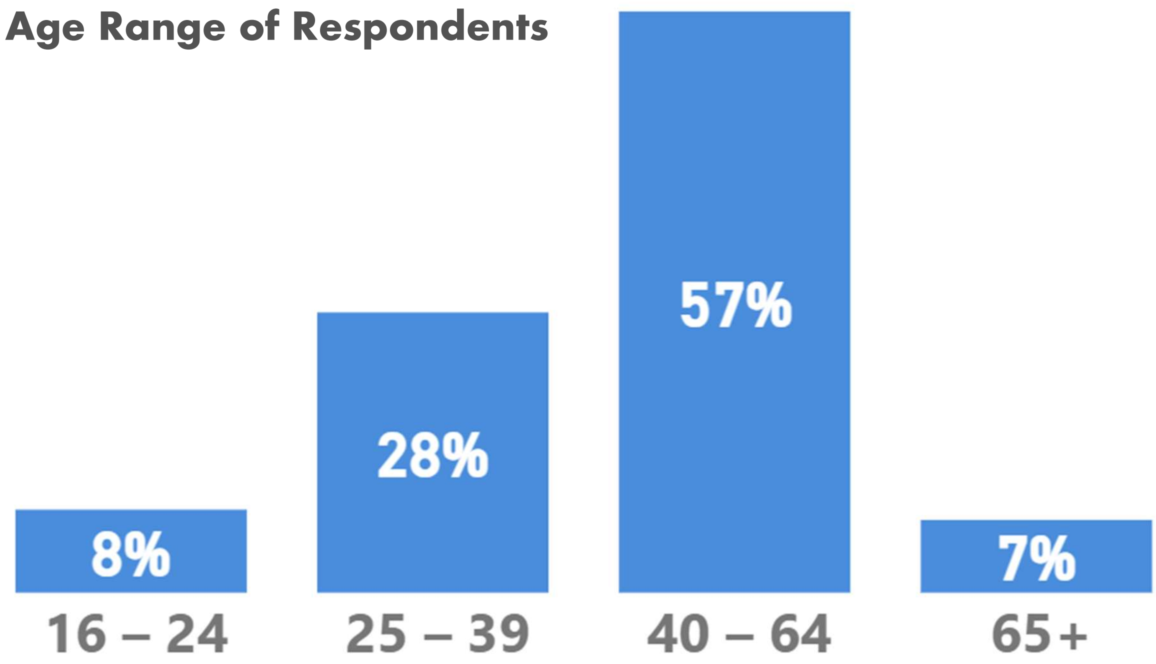




69% of respondents were sole traders or freelancers and **31%** were companies, charities, partnerships or other organisations.

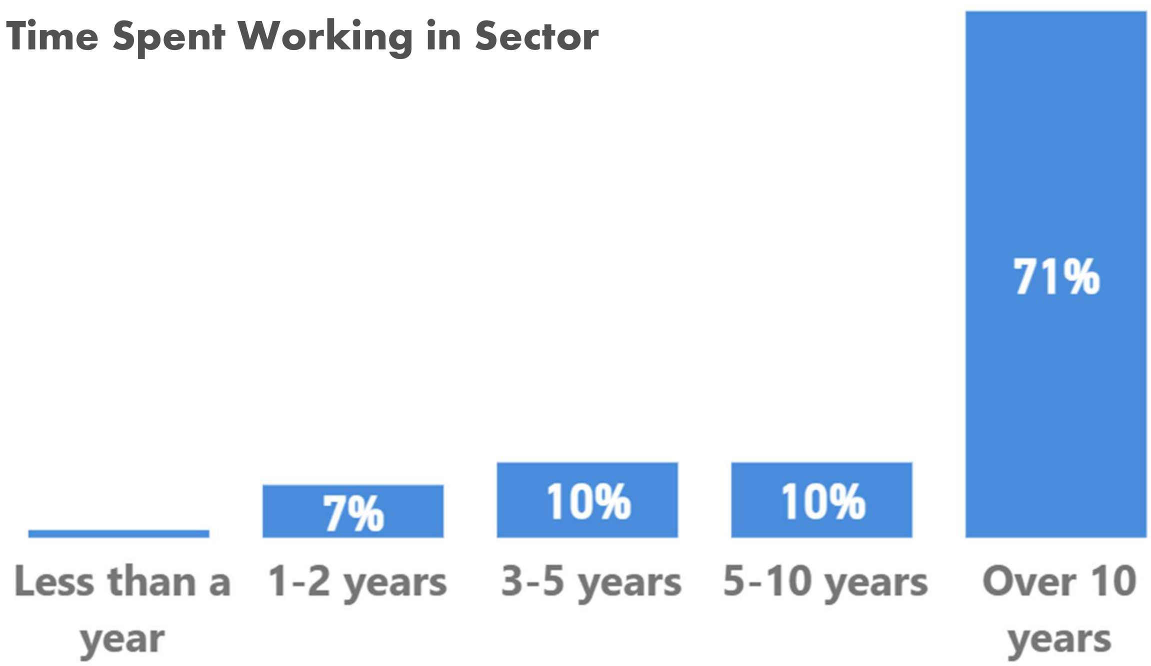
65 % of respondents were from Dumfries & Galloway and **35%** from the Scottish Borders.

Survey Respondents



The age range of respondents is broadly reflective of the working population in the South of Scotland which is 16-24: 24%, 25-39: 27%, 40-64: 55%, 65+: 6%.

Most respondents, **71%**, have worked in the music sector for more than 10 years. **18%** had been working in the sector for 5 years or less.



Enterprise Performance & Operations

Markets

We asked respondents which markets they currently operated in.

96%

Almost all respondents operated in Scotland.

51%

operated in the rest of the UK

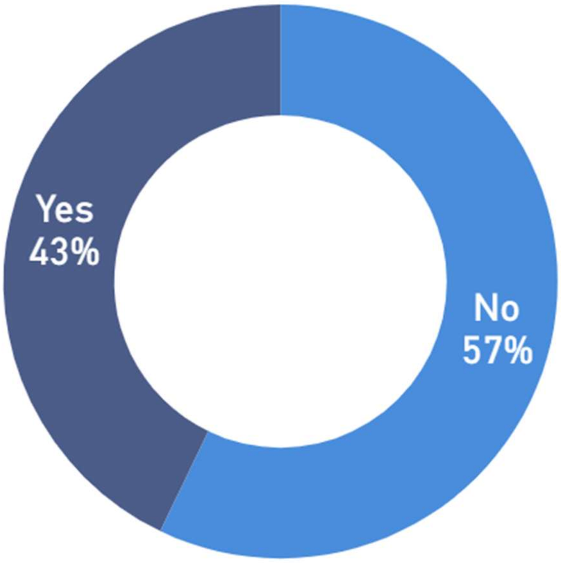
36%

operated in international markets.

Enterprise Performance & Operations

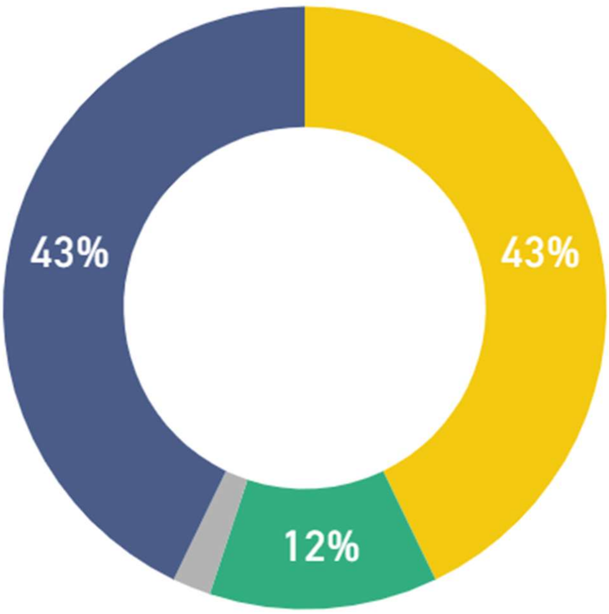
Income

We asked respondents if activity in the music sector was their primary source of income.



57% of respondents said their music industry career was not their primary source of income, with **43%** saying it was.

For those respondents whose income from music was not the primary source, we asked what percentage of their income came from their activity in the music sector.



Of the respondents whose music career was not their primary source of income, **43%** said that this accounted for less than **25%** of their income.

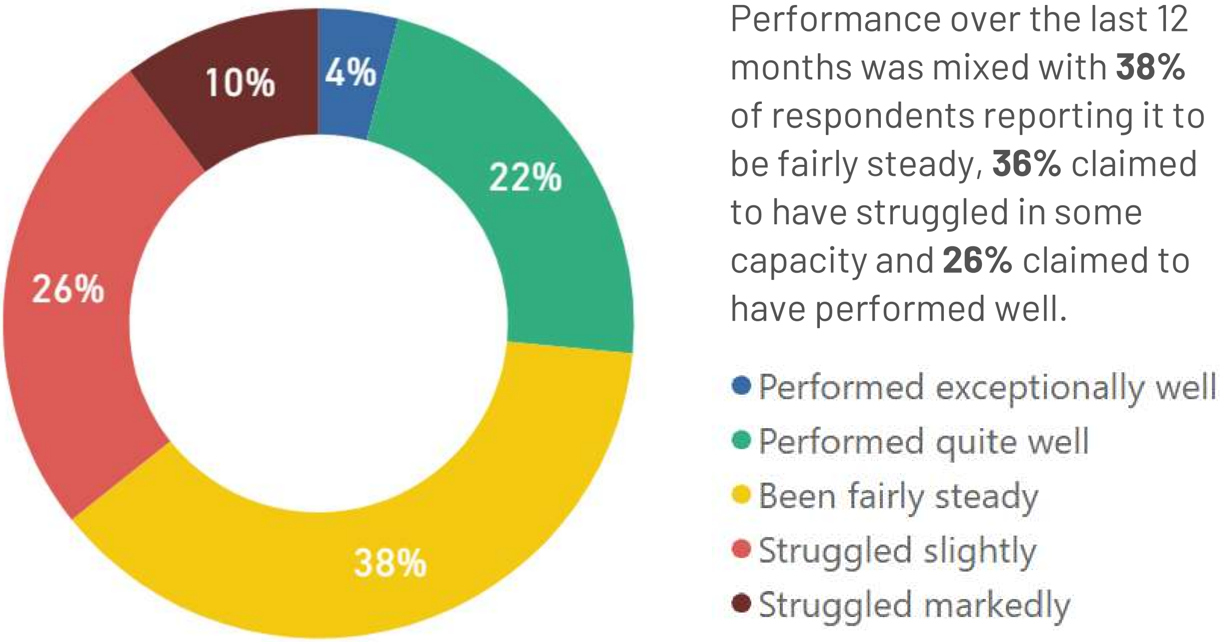
12% stated their music role made between **25%-50%** of their income, **2%** did not know.

- 0-24%
- 25-50%
- Don't know
- Primary Income

Enterprise Performance & Operations

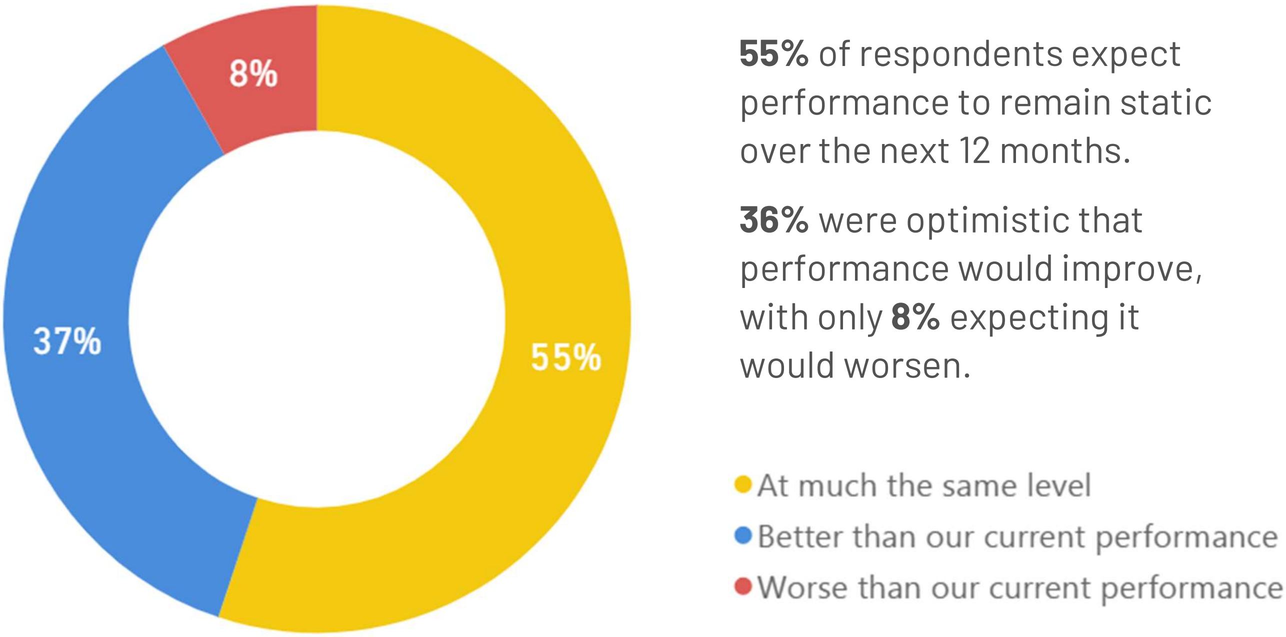
Performance

We asked overall, how has your enterprise performed in the last 12 months.



Performance over the last 12 months was mixed with **38%** of respondents reporting it to be fairly steady, **36%** claimed to have struggled in some capacity and **26%** claimed to have performed well.

And how they expected their enterprise to perform over the next 12 months.



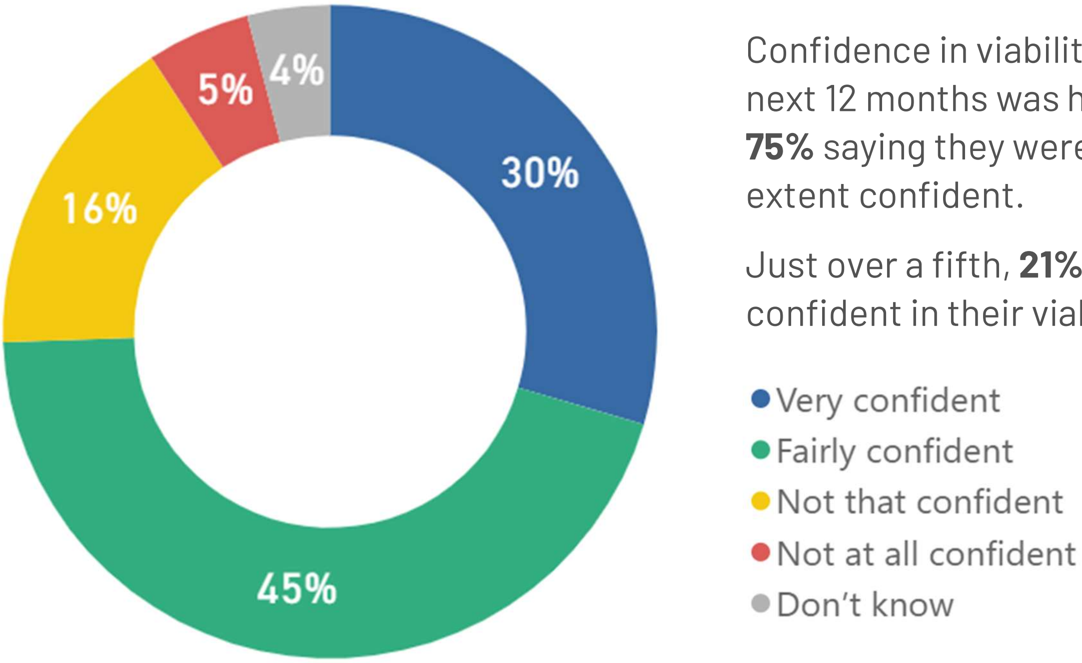
55% of respondents expect performance to remain static over the next 12 months.

36% were optimistic that performance would improve, with only **8%** expecting it would worsen.

Enterprise Performance & Operations

Confidence

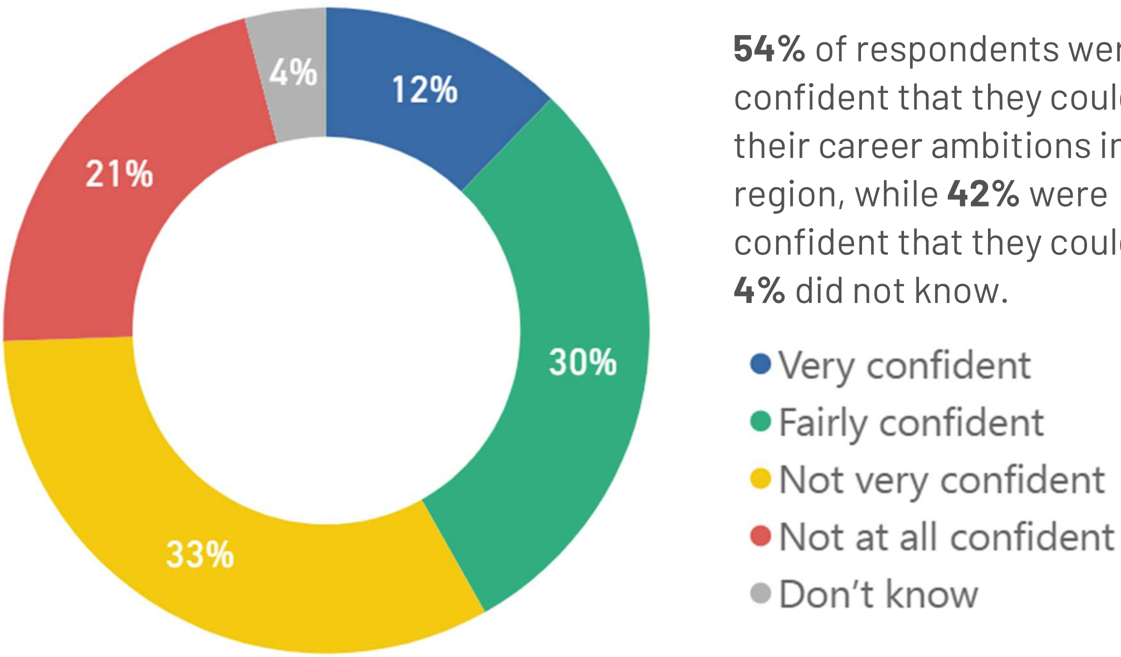
We asked how confident respondents were that their enterprise would be viable over the next 12 months.



Confidence in viability over the next 12 months was high, with **75%** saying they were to some extent confident.

Just over a fifth, **21%** were not confident in their viability.

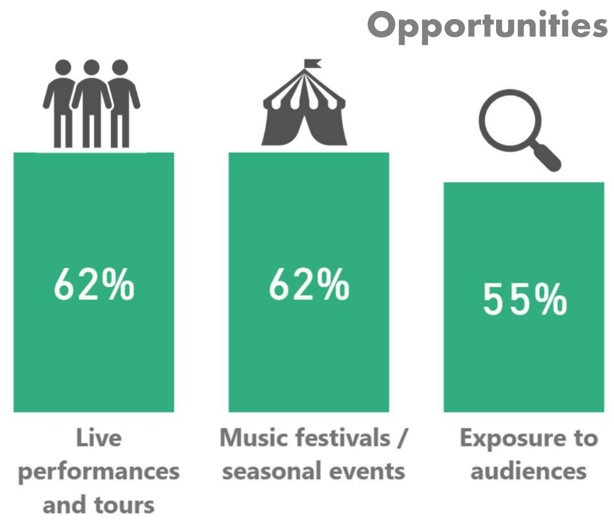
We asked how confident respondents were that they could fulfil their career ambitions in the South of Scotland.



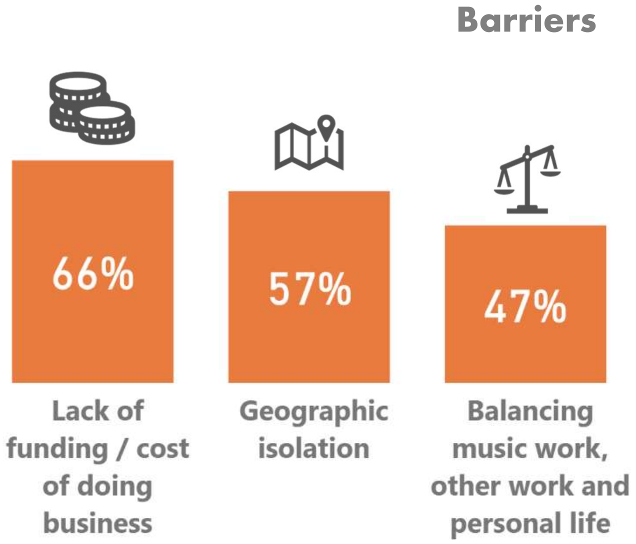
54% of respondents were not confident that they could fulfil their career ambitions in the region, while **42%** were confident that they could and **4%** did not know.

Opportunities, Barriers and Risks

Respondents were asked what the biggest opportunities, barriers and risks to their professional development were.

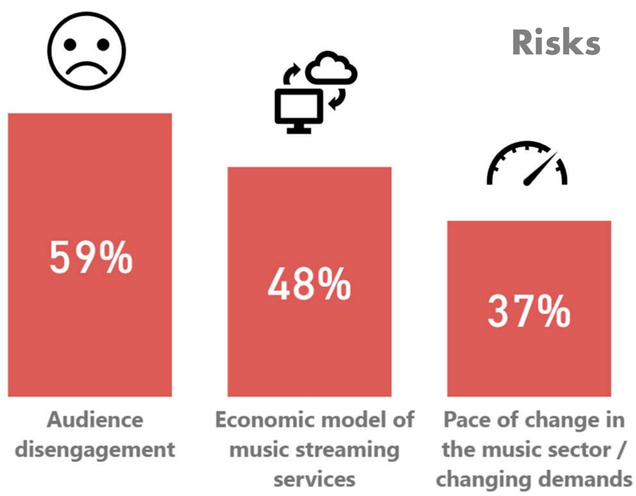


62% of respondents felt that **Live performances** and **tours** and **Music Festivals / seasonal events** offered the greatest opportunity for their development. Other responses included **collaboration**, regional investment, social media and marketing.



66% of all respondents listed **lack of funding/cost of doing business**, as a significant barrier**.** This rose to **83%** for companies, charities, or other organisations.

Other responses included lack of **supporting infrastructure**, and **limited networking** opportunities.

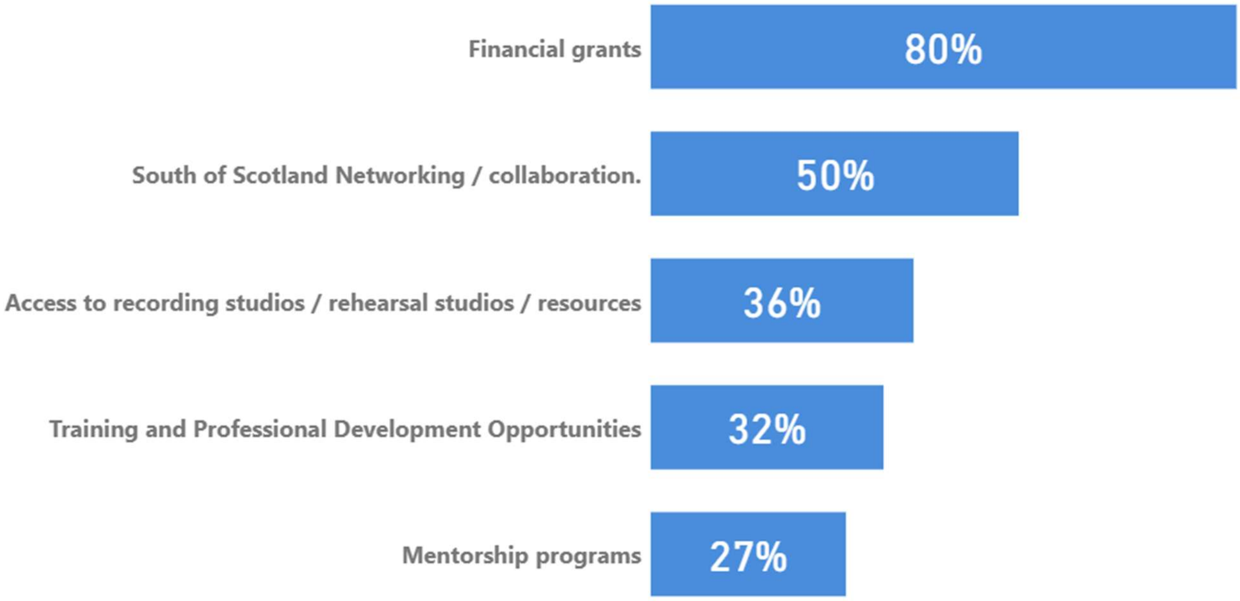


59% felt **audience disengagement** was their biggest risk.

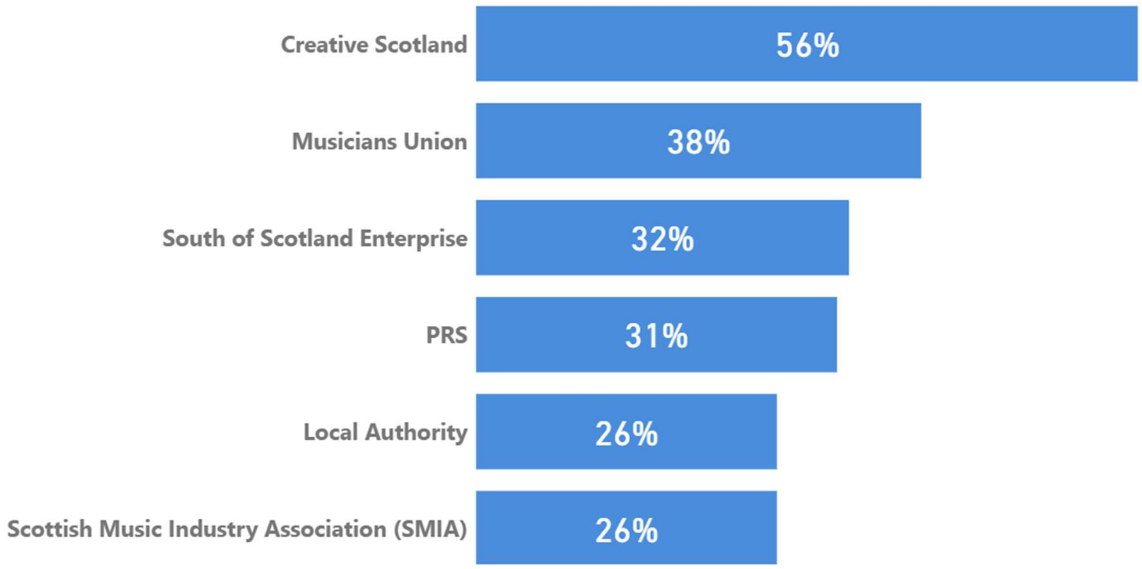
Other responses included **Artificial intelligence** which was deemed a risk by **30%** of respondents with only **7%** seeing it as an opportunity.

Support

Respondents were asked what support would most benefit their career development.



80% of respondents cited financial grants as the support that would most benefit their development. Networking / collaboration within the region was cited by a half, **50%** and over a third, **36%** required access to recording studios, rehearsal spaces and associated resources.



When asked which organisations they would approach for support, most respondents, **56%** identified Creative Scotland.

Business Gateway **24%**, Help Musicians **22%**, Music Venue Trust **19%** and music sector peers **18%** were also mentioned.

Direct Feedback

Direct feedback was also encouraged from respondents. This is a summary* of the many responses and comments received regarding the challenges of the music sector and related enterprises in the South of Scotland:

- **Funding and support challenges:** Access to funding is difficult, especially for grassroots projects that do not fit traditional charity models. There is a call for more bespoke funding approaches that reflect the needs of artists and audiences. Some key music projects have lost funding, threatening their sustainability.
- **Limited venues and event support**: There is a significant lack of suitable live music venues, especially for independent, experimental, and electronic music. This limits opportunities for musicians and audiences, with some venues and events receiving inconsistent support.
- **Transport and accessibility issues**: Poor transport links in the region hinder artist and audience mobility, limiting touring opportunities and access to events both locally and outside the region. Car dependency is a significant barrier.
- **Music education constraints:** Music education is limited and inconsistent due to minimal local authority support, affecting accessibility and equity. More efficient models and support for music educators could enhance the sector.
- **Economic viability concerns:** Rising costs of living, housing affordability, transport, and low payment rates make it difficult for music professionals to sustain businesses or careers in the region. Many musicians leave for larger cultural hubs.
- **Impact of external factors:** Brexit has negatively affected the ability to travel and perform internationally, and streaming services reduce musicians' income, making sustainable careers challenging.
- **Need for new opportunities and inclusivity**: There is a call for fresh, well-run events that are accessible to musicians of all ages, not just younger talent, and for better networking between venues and musicians to foster local engagement.
- **Role of local organisations:** Some local organisations have played important roles in supporting music but face funding and operational challenges. Greater support is needed to sustain and grow these assets.
- **Geographical and infrastructural considerations:** To encourage full-time music careers locally, suggestions include subsidising travel, improving internet and studio access, and addressing the geographical disadvantages faced by professionals living in the area.

*Summarised with the assistance of Microsoft CoPilot

Identified Priorities:

Based on the findings of this report and, discussion with the music sector advisory group created as part of this project, the following priorities have been identified to support the music sector in the South of Scotland.

1. **Networking and Collaboration** – a common theme across the whole of the South was limited networking and collaboration opportunities available. A collective approach by partners to address this would be welcome.

2. **Youth Engagement and Development** – the age range of respondents reflected the need to better engage young people. The advisory group noted that current efforts like incubator sessions in the Borders and artist development programmes in D&G are reaching some, but more targeted outreach and support for young musicians are needed.

3. **International Activity and Export** – 36% of respondents were performing or trading services internationally. There is significant benefit in understanding this area more to support growth and future collaboration opportunities.

4. **Recording Studios and Infrastructure –** lack of access and availability was highlighted by 36% of respondents as an issue. An audit of existing provision and identified support to enhance existing infrastructure would be a positive step in keeping more commercial activity in the region.

5. **Live Venues and Audience Development** - were seen as crucial including changing perceptions about the quality of local offerings and the potential impact on the night-time economy.

South of Scotland Music Sector Report

Partners involved in the development of this project.

- **Arts D&G**
- **Creative Scotland**
- **Dumfries and Galloway Council**
- **Dumfries Music Collective**
- **Live Borders**
- **Loreburn Hall**
- **Mac Arts**
- **Music Venue Trust**
- **Scottish Music Industry Association**
- **South of Scotland Enterprise**

SOUTH of SCOTLAND ENTERPRISE