THE VALUE OF JAZZ IN BRITAIN II

A report commissioned by Jazz Services Ltd from
Mykaell Riley (University of Westminster)
and Dave Laing (University of Liverpool)

October 2010

Jazz Services Ltd
132 Southwark Street
London
SE1 0SW
Tel: 0207 928 9089
Email: education@jazzservices.org.uk
www.jazzservices.org.uk

THE VALUE OF JAZZ IN BRITAIN II

A report commissioned by Jazz Services Ltd from Mykaell Riley (University of Westminster) and Dave Laing (University of Liverpool).

October 2010

Contents

EXECUTIVE SUMMARY

Introduction

This report is the second in a series of mapping documents commissioned by Jazz Services Ltd. The first covered a 12 month period in 2004-2005 and is referred to in this report as 2005. The current report deals with jazz in Britain in the year 2008 and where possible data from that year is compared with similar data published in the earlier report. However, in two areas the current report provides greater detail than its predecessor. These are the subject matter of chapter 3 (Recording) and chapter 4 (Media).

The report is largely based on responses to questionnaires sent to jazz musicians, promoters and record companies. The report includes a number of quotations from individual musicians and promoters chosen from among those responses.

Summary Economic Data

The key financial data of this mapping exercise are given in Table 1.

TABLE 1 Summary Economic Data for the UK Jazz Sector 2005 and 2008 (£ millions)

Source of revenue	Revenue 2005	Revenue 2008
Ticket sales	22.50	24.75
Musicians' fees for 'free to enter' gigs	1.50	1.60
Public subsidy	4.15	4.50
Commercial sponsorship	0.60	0.75
CD and download sales and PPL fees	39.50	32.75
Compositions and music publishing	4.95	5.00
Education	12.07	14.10
Other	1.50	1.60
TOTAL	86.77	85.05

The table shows that the estimated annual turnover of the jazz sector of the UK music industry decreased slightly from £86.77m to £85.05m between 2005 and 2008. The fall in value was due entirely to the ongoing decline of CD sales, which affects all genres of music. There were (mostly small) increases in revenues in all other areas of jazz.

The value of admission charges to concerts, clubs and festivals has been grossed up from data provided by promoters who responded to a questionnaire. To this was added an estimate of fees paid to musicians at venues such as restaurants, hotels, pubs and 'free' festivals where there was no entrance charge.

The data for subsidy and sponsorship can be found in Chapter 1. Contributions from charitable foundations are included here in the 'public subsidy' figure. The figure for sales of recordings as CDs or downloads are based on the results of a questionnaire sent to jazz record labels, the retail value of sales published by the British Phonographic Industry (BPI), and performance rights payments distributed by Phonographic Performance Ltd (PPL). Details are given in Chapter 3.

The calculations for the amount paid to jazz musicians for compositions and music publishing rights are to be found in Chapter 2. The data to support the education figure can be found in Chapter 6. The 'Other' amount in Table 1 includes broadcasting fees, recording session fees and miscellaneous sources of income reported by musicians in response to the questionnaire sent to jazz performers registered with Jazz Services Ltd.

It should be noted that the period covered by the research for the most part preceded the 'credit crunch' and the consequent economic recession. The full impact of that event will be apparent in what is intended to be the next report of this kind. This will deal with the value of jazz in Britain in the year 2011.

The credit crunch and the collapse of the old structure of the music business could be an opportunity for musicians to build a new decentralised business model, connecting directly with punters.
Fusion/electric pianist, male aged 46-55, South West England

Live Music Sector (Chapter 1)
Chapter 1 surveys the live music sector in 2008, comparing it to 2005. There were at least 42,000 jazz performances in the UK in 2008, against an estimated 45,000 in 2005. These performances range from sessions in pubs and local jazz clubs to concert hall and international festival events. By 2008, the effects of the 2003 Licensing Act were being felt and the chapter considers the impact of the Act on jazz gigs. In that year, too, the growth in festivals evident in 2005 was still notable, with the full effect of the economic downturn yet to be felt. The chapter also shows how the income of musicians and promoters from admission charges is supplemented by public funding from arts councils and local authorities, and smaller amounts from arts charities and commercial sponsors.

Compositions and Music Publishing (Chapter 2)
There are a small, but growing, number of opportunities for jazz compositions to be commissioned by public bodies or festivals. However, such compositions earn little in royalties since airplay is still minimal in Britain and most recordings by British musicians sell in small numbers. Educational tutor books and CDs provide some income for those whose works are included.

Recordings (Chapter 3)
Because a new questionnaire was sent to specialist jazz labels, Chapter 3 of this report is able to present much more detailed information on this area than its predecessor. The data shows a thriving small-scale recording scene among British musicians, with widespread use of the internet to sell tracks and albums. Nevertheless, its turnover remains dwarfed by that of reissues and a small number of international hit albums by vocalists issued by major companies.

Media (Chapter 4)
Chapter 4 also contains greater detail in its analysis of media coverage of jazz than was possible in the 2005 report. It draws on extensive research into national print and broadcast media undertaken for this report and into BBC Radio 3's jazz programming undertaken separately for Jazz Services Ltd by Stuart Nicholson, Emma Kendon and Chris Hodgkins.

Audiences (Chapter 5)
Although no original audience research has been made for this report, Chapter 5 brings together arts council and regional jazz data to provide a picture of the jazz audience in Britain. Some of this recent research also analyses arts audiences in terms of their attitudes towards attendance at events.

Jazz Education (Chapter 6)
Since 2005, the numbers of jazz courses and jazz students in higher education has increased. Chapter 6 gives an overview of this development as well as detailing the increasing importance of teaching in the portfolio of work of jazz musicians as a whole.

Jazz Musicians in the UK (Chapter 7)
Based on the questionnaire results, Chapter 7 includes a profile of British musicians across a wide range of parameters. It provides demographic data on age, gender and ethnicity, as well as financial information on levels and sources of income.

Chapter 1 Live events and festivals

1.1 Audience sizes, venues, festivals and prices

This section summarises some of the main results of the questionnaire sent to promoters of jazz events, comparing the 2008 situation with that of three years earlier. Promoters were asked how many events (excluding festivals) they organised during the 12 month period. Table 2 shows that while the proportion of respondents promoting occasional gigs (less than one a month) was almost unchanged (35% in 2008 against 35% in 2005), there were fewer events organised by the remaining two-thirds of promoters. This is signalled by the significant increase in those organising one or two gigs a month, from 18% in 2005 to 32% in 2008, and the corresponding decrease in the proportion of promoters organising more than 20 gigs a year, culminating in the drop from 23% to 18% for those putting on one a week or more.

TABLE 2 Promoters: number of gigs promoted in 2005 and 2008 (% of promoters)

Number of gigs	2005	2008
1-10	37	35
11-20	18	32
21-30	10	7
31-40	5	5
41-50	7	6
50+	23	18

Promoters were also asked to state the average number of people attending the events they organised. In the first *Value of Jazz* report, we noted that 67% of promoters had audiences of 100 or less and in 2008, the proportion was broadly similar, at 70%. However, Table 3 shows that within the three sub-categories included, fewer promoters reported larger audiences of between 76 and 100 and a greater proportion reported slightly smaller numbers (51-75). With regard to larger average audiences, there was little difference between the 2005 and 2008 results. A slightly smaller proportion of promoters (10% against 13%) reported audiences of more than 200, but the difference is not statistically significant.

TABLE 3 Promoters: average audience size at their events (% of promoters)

Average size	2005	2008
Less than 50	22	22
51-75	23	33
76-100	22	15
101-150	14	10
151-200	6	10
Over 200	13	10

Respondents were next asked the average price of admission to their shows. The results are given in Table 4. In our previous report we pointed out that about half the promoters charged between £5 and £10 for full-price tickets. In 2008, there was a very similar result (49% against 51%). The only significant change occurred at the higher price level of £10 to £15, where greater numbers of promoters (22% against 15%) charged prices within this band.

TABLE 4 Price of admission to jazz promoters' events (% of promoters)

Admission charge	2005	2008
None	16	13
£5 or less	12	9
£5.01-7.50	25	23
£7.51-10.00	26	26
£10.01-15.00	15	22
Above £15.00	6	6

Respondents to the questionnaire were asked to state at which type of venue they promoted jazz events. Table 5 shows that, while the proportion of promoters presenting gigs at arts centres/ concert halls and theatres remained broadly the same between 2005 and 2008, there was a substantial fall in pub gigs (from 26% to 19%) and rise in jazz club promotions (from 15% to 22%) by the respondents. It is reasonable to presume that the latter was linked to the effects of the Licensing Act, which came fully into force in 2006 and made it more difficult and costly for smaller venues such as pubs to offer live music. A further contrast between 2008 and 2005 is the higher percentage of promoters reporting that they use 'Other' types of venue for their gigs. These less conventional settings for jazz include churches, libraries, holiday centres, museums and community centres.

Although traditional venues (clubs, hotels, pubs) seem to be disappearing, there is still a demand for jazz at wedding receptions, usually booked by the couple and rarely booked by any parent.
Traditional/ New Orleans saxophonist aged 46-55, South East England

We value contemporary jazz musicians hugely and seek to use them in all working contexts not just concerts.
Manager, local authority-owned open air theatre

TABLE 5 Types of venues used by promoters (% of promoters)

Venue	2005	2008
Pubs	26	19
Arts centres/concert halls	17	16
Jazz clubs	15	22
Theatres	12	10
Restaurants	10	6
Others	20	27

The number of events organised by promoters at each type of venue forms the basis of Table 6. These suggest a few striking changes between 2005 and 2008. As reported by our respondents, the amount of jazz performed in restaurants was much lower in

2008, when 71% of this type of venue offered less than 10 jazz gigs in 12 months, compared with only 27% in 2005. At the other end of the scale, only 11% of jazz club promoters responding to the questionnaire organised weekly events (over 50 a year) compared with 42% in the 2005 survey. However, the size of this decrease is not supported by evidence from listings magazines. This suggests a much smaller decline in weekly-held jazz nights. In pubs, the 2008 results show a move towards more monthly events (11-20) and away from occasional (1-10) and fortnightly (21-30) frequencies.

TABLE 6 Types of venue used by jazz promoters and annual numbers of gigs in 2008 and 2005 (% of each venue type, 2005 figures in brackets)

Venue type	1-10 gigs	11-20	21-30	31-40	41-50	50+
Pub	9 (24)	43 (10)	9 (17)	9 (5)	0 (7)	30 (37)
Restaurant	71 (27)	0 (27)	0 (7)	0 (0)	14 (13)	14 (27)
Theatre	42 (56)	33 (6)	17 (11)	8 (6)	0 (6)	0 (17)
Arts centre / concert hall	53 (50)	37 (35)	0 (4)	0 (8)	0 (0)	10 (4)
Jazz club	22 (25)	37 (8)	15 (0)	4 (8)	11 (17)	11 (42)
other	42 (47)	24 (23)	3 (17)	6 (0)	9 (3)	15 (10)

Table 7 suggests that the total attendances at jazz gigs and concerts may have fallen in the three years between 2005 and 2008. If the first three audience size categories are aggregated for each type of venue, the results show that in four venue types, the proportion of events with audiences of less than 100 increased. In the fifth (arts centres and concert halls), the percentage of promoters reporting average attendances of 100 or less was the same in each year. Only the Other category of venue showed a increase in the percentage of gigs with audiences of more than 100, and this increase was only 3% and within the margin of error.

TABLE 7 Types of venue and audience sizes in 2008 and 2005 (% of each venue type, 2005 figures in brackets)

Venue type	Under 50	51-75	76-100	101-150	151-200	200+
Pub	43 (35)	39 (15)	9 (28)	4(10)	0(5)	4 (7)
Restaurant	43 (33)	29 (40)	29 (7)	0 (7)	0 (0)	0 (13)
Theatre	17 (17)	17 (6)	33 (22)	8 (33)	0 (6)	25 (17)
Arts centre / concert hall	16 (15)	21 (35)	21 (8)	5 (19)	32 (12)	5 (11)
Jazz club	22 (22)	48 (35)	11 (30)	11 (9)	4 (4)	4 (0)
other	9 (6)	30 (16)	9 (29)	18 (10)	15 (7)	18 (32)

It has been said that ticket prices for jazz gigs have been historically low compared with many other arts events and there is some evidence from our questionnaire respondents that this issue is beginning to be addressed. According to our findings (Table 8), the proportion of jazz clubs charging less than £5 for entry fell from 29% in 2005 to only 8% in 2008 and the percentage pricing tickets above £7.50 grew in the three year period from 33% to 63%. In larger venues, too, the results show a move through the £10 barrier. The proportions of theatres, arts centres, concert halls and the 'Other' category of venues charging between £10 and £15 all increased between 2005 and 2008.

TABLE 8 Types of venue and average admission charge in 2008 and 2005 (% of each venue type, 2005 figures in brackets)

Venue type	Free	Under £5	£5.01-7.50	£7.51-10.00	£10.01-15.00	£15.00+
Pub	35 (35)	17 (15)	30 (20)	13 (15)	4 (13)	0 (2)
Restaurant	43 (25)	14 (13)	0 (19)	14 (25)	29 (12)	0 (6)
Theatre	0 (6)	0 (6)	8 (17)	50 (39)	25 (22)	17 (11)
Arts centre /concert hall	0 (4)	11 (8)	16 (27)	26 (42)	47 (19)	0 (0)
Jazz club	4 (4)	4 (25)	30 (38)	41 (29)	15 (4)	7 (0)
Other	12 (10)	9 (6)	29 (26)	18 (23)	24 (22)	9 (13)

Our survey of promoters paid particular attention to jazz festivals, which have been a major growth area in the past decade or so, along with all other types of music festivals and mixed arts festivals. The proportion of respondents to our questionnaire who had organised a festival in 2008 was 35%, almost the same as the 38% of promoters in our survey of 2005.

TABLE 9 Jazz festivals by audience size (% of festival promoters)

Audience size	2005	2008
Under 200	15	17
201-400	9	12
401-750	9	12
751-1000	5	10
1001-2000	18	22
Over 2000	44	27

Table 9 compares the shape of the festival sector in 2005 and 2008 in terms of attendances. It shows that fewer large festivals with attendances of over 2000 were promoted in 2008 by the respondents than were promoted by those who responded to the 2005 questionnaire. Conversely, small scale festivals (with audiences of up to 750) and medium-sized festivals (750 to 2000) were more strongly represented in 2008. Although there were some high-profile casualties in mid-decade, such as the Appleby and Dundee events (the latter after 25 years existence), the overall size of the sector in 2008 was broadly similar to that of 2005, when we estimated that about 200 jazz festivals were held in the UK, most of them small scale events.

I'm concerned that the regulations associated with public entertainment licensing have made it nearly impossible for some venues to continue staging music.
Swing pianist age 36-45, Eastern England

1.2 Size and structure of the live jazz sector

In our first report we described the structure of the live sector as being like a three tier pyramid of venues, with the base formed by several hundred, mostly small, pubs, hotels and restaurants which act as residencies where the same band plays regularly, sometimes opposite a visiting act. Using a similar methodology based on published lists in specialist magazines, we estimate that there are around 500 such residencies in the United Kingdom. This is about 10% fewer than in 2005, a small decrease that may well be due to difficulties caused by the 'red tape' and costs involved in securing a licence from the local authority under terms set by the 2003 Licensing Act. We note that in early 2010, the Department of Culture, Media and Sport recognised these difficulties by proposing the Act be amended to exempt venues with an audience capacity of 100 or less. As Table 3 above shows, this would include two-thirds (67%) of the venues used for jazz gigs by the respondents to our questionnaire. If the exemption were to occur, it should encourage greater numbers of venue owners and managers to make their premises available regularly for live music, including jazz.

The second tier of the pyramid is formed typically by jazz clubs that operate on a membership basis and restaurants and hotels with regular gigs featuring visiting or touring bands or singers. Many of the increasing range of jazz venues categorised as 'Other' in our research also belong here. In larger towns and cities the promoters at such venues may access funding from arts councils and local authorities: Table 10 below indicates that 15% of clubs receive between £4,000 and £7,000 of such subsidy. It should also be noted that jazz clubs are crucial to the growth of the British jazz scene. Research by Nicholson, Kendon and Hodgkins showed that 93% of the artists booked by a typical club (Wakefield Jazz) over a 20 month period (January 2007 to August 2008) were from the UK. Of the remainder, 5% were from the US and 3% from continental Europe.

Most jazz clubs have a relatively small audience – Table 7 showed that all but 8% of clubs have average attendances of 150 or less – but the smaller number of venues in the third tier at the top of the pyramid are characterised by their larger audience capacity. These are generally multi-arts venues such as theatres, arts centres and concert halls and it is notable that arts centres and concert halls were the venue category with the highest proportion of audiences between 150 and 200 in both 2005 and 2008, while a quarter of promotions in theatres attracted attendances of 200-plus.

Festivals defined as events with a duration of between one day and two weeks and based at one or more stages, are not part of the pyramid as such. But these too have a hierarchy of size, as already discussed in the commentary on Table 9 above.

Taking into account the numbers and types of venues used for jazz performances and the frequency of gigs, we estimate that the number of jazz performances in the United Kingdom in 2008 was slightly fewer than the 45,000 estimated for 2005 in our first report.

The Licensing Act 2003 has been a disaster for small-scale events. Most restaurant work has finished and most jazzers are no longer able to work in venues that were previously licensed under the two in a bar rule.
Mainstream and bebop guitarist/pianist, aged 46-55, South East England

1.3 Subsidy and sponsorship

In 2005, 41% of promoters of gigs and concerts stated that they had received some sort of financial support during the previous 12 months. For 2008, the figure was 35% of those responding to the questionnaire. Table 10 shows what proportion of the promoters at each type of venue were subsidised by grants from public bodies or charitable trusts and/or by private sponsorship.

TABLE 10 Percentage of jazz promoters at each type of venue receiving public subsidy and/or private sponsorship 2005 and 2008

Venue type	2005	2008
Pub	35	39
Restaurant	31	14
Theatre	72	42
Arts centre/concert hall	50	56
Jazz club	26	31
Other	39	27
All promoters	41	35

Although the 2008 questionnaire results show small increases in the number of promoters receiving support who organise gigs in pubs, clubs and arts centres and concert halls, this was more than offset by the larger decreases in the proportion of promoters in restaurants, theatres and Other venues receiving any kind of financial assistance. Overall, the number of jazz promoters who stated that they get no outside support grew from 59% to 65%. What did not change between 2005 and 2008, however, was the fact that gigs at theatres and arts centres were the most likely to receive funding. This is closely linked to the fact that many concerts in such venues feature well established touring artists. One example from 2008 is the grant of £60,000 paid by Arts Council of England to the National Centre for Early Music in York to subsidise its first series of jazz events with such acts as the Toni Kofi Quartet and John Etheridge with John Williams.

The next table shows the amount of financial support received by promoters at the various types of venue.

TABLE 11 Amount of subsidy and/or sponsorship received by promoters at each type of venue in 2008 and 2005 (% of each venue type, 2005 figures in brackets)

Venue type	none	Under £500	£501-2000	£2001-4000	£4001-7000	Over £7000
Pub	61 (65)	13 (2)	4 (5)	9 (5)	4 (8)	9 (15)
Restaurant	86 (69)	14 (0)	0 (6)	0 (13)	0 (0)	0 (12)
Theatre	58 (28)	0 (6)	8 (28)	8 (11)	8 (6)	17 (22)
Arts centre / concert hall	44 (50)	11 (4)	6 (0)	11 (12)	11 (11)	17 (23)
Jazz club	69 (74)	4 (4)	4 (13)	4 (0)	15 (4)	4 (4)
Other	73 (61)	3 (6)	0 (13)	3 (7)	3 (3)	18 (10)

Those promoters receiving subsidy and/or sponsorship also provided information on the sources of such funding. Many received support from more than one source. The principal changes between 2005 and 2008 as shown in Table 12 were a decrease in the percentage of respondents receiving sponsorship from arts councils, commercial sources and the PRS Foundation. There was, however, a large increase in the proportion of respondents receiving support from 'other' sources.

TABLE 12 Promoters' financial support (% of promoters receiving support)

Source of support	2005	2008
Local authority	61	55
Arts council	71	47
PRS Foundation	29	12
Commercial sponsor	20	10
Other	10	30

Table 13 gives details of festival funding. The proportion of festival promoters responding to the questionnaire receiving no financial support increased between 2005 and 2008 from 32% to 42%. Of those in receipt of funding, the pattern followed that of venue promoters with decreases reported in the percentage of respondents funded from arts councils, the PRS Foundation and commercial sources. The only funding source not to show a sharp fall was the local authority sector.

TABLE 13 Festival promoters: sources of financial support (% of all festival promoters)

Source of support	2005	2008
Local authority	48	42
Arts council	37	21
PRS Foundation	18	5
Commercial sponsor	39	26
Other	23	8
None	32	42

Table 14 compares the amount of financial support for festivals in 2005 and 2008 reported by promoters responding to the questionnaire. It shows that a larger proportion of festivals received middle-range funding of between £2000 and £7000, but that a lower percentage of festivals were funded at higher levels.

TABLE 14 Festival funding by amount (% of promoters receiving funding)

Amount	2005	2008
Under £2000	19	18
£2000-4000	7	14
£4001-7000	12	27
£7001-10000	17	9
Over £10000	45	32

1.4 Arts Councils, local authorities and charitable trusts

As in 2005, by far the greatest amount of funding for jazz in 2008 came from public sector and 'third sector' (charities) bodies.

Arts Councils support for jazz is split between funding for promoters and development organisations, funding for specific events, mainly festivals, and support for performing organisations such as youth orchestras and permanent organisations such as the Grand Union Music Theatre and Tomorrow's Warriors.

In England, we estimate that total of all types of grants to jazz from Arts Council England and its regional offices were in the region of £2m. These grants ranged from over £300,000 paid to Serious to support the London Jazz Festival and the company's other promotions of jazz, world music and contemporary music, to amounts of £200 or £300 to local bands or clubs to assist in putting on a single show or a small series. In the Yorkshire and Humberside region, for example, ACE provided almost £100,000 for jazz, excluding the £60,000 paid to the York Early Music Centre mentioned above. This included £16,220 for Jazz Yorkshire, the regional organisation, subsidies for clubs ranging from £2,000 to £5,500 and grants to festivals ranging from £600 for the Scarborough Jazz Festival to £20,000 for the Hull International Jazz Festival. In turn, Jazz Yorkshire increased from six to 13 the number of funded local promoters.

Arts Council Wales and the Scottish Arts Council (SAC) had similar policies to support jazz, although the former chose to cut its grant to the Welsh Jazz Society by £50,000 in 2008. It, did, however, continue to fund the Brecon Festival to the tune of £125,000 and the Welsh Jazz Composers Orchestra.

In Scotland, policy changes at the SAC led to the demise of the Dundee Jazz Festival in 2008. Despite that the SAC spent some £400,000 on jazz, including significant grants to the Glasgow, Edinburgh and Aberdeen festivals, and over £50,000 to the Scottish National Jazz Orchestra. Also in the public sector, BBC Radio Scotland gave a £500 prize and gig opportunities for the winner of its Young Jazz Musician of the Year, while the Scottish Government awarded the Edinburgh International Jazz Festival over £43,000 out of its £6m three-year Edinburgh Festivals expo fund.

Arts Council England's data showed that in 2007/8 its general support for 743 organisations across the arts grew by 5% and 'other public subsidy' rose by 13%. While these figures are not exclusive to jazz organisations, they support the findings of our questionnaire research that local authority support had grown in importance for jazz promoters between 2005 and 2008.

Several bodies in the 'third sector' of the economy – charities and not-for-profit organisations - continued to support British jazz in 2008. Prominent among these were PRS Foundation, the Jerwood Foundation and the Musicians Benevolent Fund (MBF). In conjunction with Jazz Services, the PRS Foundation gave small awards of between £500 and £2,000 to 20 voluntary promoting bodies including jazz clubs and venues. The Jerwood Foundation continued its funding of the New Generation Jazz programme at the Cheltenham Jazz Festival and its co-funding with PRSF of the Take

Five artist development scheme, administered by Serious. Although the Jerwood Foundation does not publish the size of grants given to individual projects, we estimate that jazz received between 5% and 10% of the Foundation's £1.6m music budget. The MBF contribution was around £10,000. Much of this came from the two Peter Whittingham Jazz Awards used by their recipients to develop a multi-media website (the John Randall Quintet) and a concert programme in Belfast (Mark McKnight).

1.5 Business and private sponsorship

Arts & Business (A&B) is an advocacy organisation that collects data on commercial support for the arts sector as a whole. Its annual survey for 2007/8 found that such private investment in the arts had increased by 12% to a record level of £686.7 million. This represented 13% of the total income of the UK's cultural sector. The A&B survey also reported that giving by businesses had fallen by a quarter to be offset by a large rise in sponsorship by private individuals.

While it is not easy to specify by how much the jazz sector benefited from private sponsorship, our 2008 research did show that a smaller proportion of promoters reported having received such funding than in the 2005 survey. Among festival promoters, the numbers fell from 39% to 26% and among general promoters the decrease was from 20% to 10%. Nevertheless, a quarter of festivals received sponsorship and several major donors had continued their support annually since 2005 or earlier.

Another feature of commercial sponsorship was support for competitions. In 2008, the Worshipful Company of Musicians gave two prizes of £500 for jazz compositions by young musicians while Clement Pianos was a sponsor of the National Jazz Piano Competition held in Nottingham.

1.6 Financial data for the sector

Based on the questionnaire results and published information on funding, we have cautiously estimated the level of funding in 2008 to be £5.50m. Due mainly to increased support from public and private sources for the expanding festival sector, this was an increase of 16% over the 2005 figure of £4.75.

TABLE 15 Funding sources for live jazz events 2008 and 2005 (£ millions)

	2005	2008
UK arts councils	3.30	3.45
UK local authorities	0.60	0.75
Charitable foundations	0.25	0.30
Commercial sponsors	0.60	0.75
TOTAL	4.75	5.50

Chapter 2 Composition and music publishing

Composers in general earn income from their works when they are recorded, broadcast, sold in printed form or used in such areas as films, advertisements or computer games. According to those responding to the 2008 questionnaire sent to jazz musicians; 33% of musicians “work as composers” as well as performers compared with 40% in 2005. However, 41% of respondents also said they were members of the Performing Right Society (now renamed PRS for Music), which collects royalties for songwriters and composers. It is therefore safe to assume that this proportion of jazz musicians write their own material.

We have assumed that the amount of mechanical royalties paid for jazz compositions has fallen in line with the decrease in the general market for sound recordings, and that broadcast and public performance fees have increased in proportion to the growth in PRS for Music’s collections in these sectors between 2005 and 2008.

The 2005 report mentioned the use of jazz compositions in commercial media such as films, television dramas or documentaries and television advertisements. We have assumed the overall size of this market to be unchanged at £200,000, but, based on further research, we have added a small amount for the commissioning of longer pieces, such as suites, by arts councils, jazz festivals and other sources of subsidy. Such commissions have been an important part of the classical music economy for some years, and anecdotal evidence indicates that this is a growth area for jazz musician/composers. Some examples from 2008 are commissions for Guy Barker and Issie Barrett from BBC Radio 3 and the Voice of the North Jazz Orchestra respectively. In addition, the North West branch of Arts Council England provided funds for the Manchester Jazz Festival to commission new works, while the Scottish Arts Council awarded over £16,000 for four commissions by the country’s nation jazz and youth jazz orchestras and other bodies.

TABLE 16 Sources of income for jazz composers and their publishers, 2005 and 2008 (£ millions).

Source of income	2005	2008
Mechanical royalties (PRS for Music)	2.2	1.7
Broadcasting	0.6	0.7
Public performance (PRS for Music)	0.7	0.9
Commissions	0.2	0.25
Educational music products (retail)	1.2	1.4
Sheet music sales and hire	0.05	0.05
TOTAL	4.95	5.00

Chapter 3 Recording and distribution of sound and video recordings

In line with the 2005 report, the research for this report included the collection of both ‘macro’ and ‘micro’ data on the recorded jazz market. However, the latter information has been supplemented for 2008 by the application of a questionnaire to the record companies listed on the website of Jazz Services Ltd.

Macro sales of recorded music in the UK are measured by the British Phonographic Industry (BPI) and the Official Charts Company (OCC). BPI statistics have for some years shown ‘jazz’ (including crossover) as representing about 2% by value of all sales. In 2008, BPI says that jazz sales were 1.7% of the total compared with 2.1% in 2005. For 2008, this translates into a retail value of £26.3m, almost one third (32%) lower than the 2005 figure of £38.6m included in the first *Value of Jazz* report. The biggest-selling titles in the jazz category recognised by BPI and OCC are listed in Table 17.

TABLE 17 Top Ten Jazz albums in the UK in 2008 according to the Official Charts Company

Title	Record Company
Michael Bublé *Call Me Irresponsible*	Reprise
Amy Winehouse *Frank*	Island
Michael Bublé *It’s Time*	Reprise
Michael Bublé *Michael Buble*	Reprise
Michael Bublé *Sings Totally Blonde*	Metro
Peggy Lee *The Collection*	Red Box
Various *The Very Best of Smooth Jazz*	UCJ
Billie Holiday *The Collection*	Red Box
Ray Charles *The Collection*	Red Box
Nina Simone *The Very Best Of*	RCA/ UCJ

With one exception, the artists listed are American and the sole British contender (Amy Winehouse) is generally considered to be a pop singer, not a jazz artist.
As noted in the earlier report, very few British jazz musicians have recording contracts with the major international record companies or even the larger international independently-owned labels. Among these in 2008 were Stacey Kent, whose album *Breakfast on the Morning Tram* was released by Blue Note and distributed by EMI, while John Surman was contracted to the German label ECM.

In general, income from the sales of recordings accounts for only a few per cent of jazz musicians’ income. However, over half the musicians responding to our questionnaire (55%) said that in 2008 they had made recordings for sale to the public. No exactly comparable figure is available for 2005.These recordings were issued either by the musicians themselves as ‘own label’ albums and tracks sold as CDs at gigs or as downloads from the artist’s own website, or by one of the 50-plus UK-based specialist jazz labels. Those labels were sent a questionnaire about their activities in 2008, the results of which are summarised in the following Tables.

Because this questionnaire was an innovation for the *Value of Jazz* research, no comparable data is available for 2005.

The majority of labels (56%) had been founded since 1990 and less than 10% before 1970. Table 18 shows that over half of these labels released five or less albums in 2008, although one quarter issued ten or more, and 18% did not issue any new releases. However, almost half (42%) of labels reported that they had over 50 titles in their catalogue and only a quarter (27%) had less than ten.

TABLE 18 Number of releases by jazz labels in 2008 (% of all labels)

None	18
1-5	39
6-10	15
More than 10	27

In terms of the origin of recordings sold by jazz labels, almost half (42%) issued albums by the label's owner and two thirds (63%) released material by other British musicians. One third of labels responding to the questionnaire had recordings by foreign musicians in their catalogue and almost half (48%) were involved in reissues of older material.

Next, Table 19 indicates that 42% of the labels sold 1,000 units or less in 2008, with only about one quarter (27%) selling more than 10,000 units.

TABLE 19 Album units sold by each label in 2008 (% of all labels)

Less than 500	24
501 to 1000	18
1001 to 5000	12
5001 to 10000	15
More than 10000	27

These findings were mirrored by the reported turnover of jazz labels in 2008. Table 20 below shows that half of the labels responding to the survey had income of less than £10,000 and one-third reported turnover of less than £5,000. In terms of staffing, 40% of labels said they employed only part-time staff. Of the remainder, 43% said that they had two or more people working full-time. This is a further indication that for most musicians, and musician-run labels, CD and download sales are only a minor part of their overall professional activities.

TABLE 20 Turnover of each jazz label in 2008 (% of all labels)

Less than £5000	33
£5001 to £10000	17
£10001 to £50000	27
More than £50000	30

Labels were asked about the biggest-selling title in their catalogue. As the following Table shows, more than half the labels (54%) reported that sales of their best-seller were 500 units or less. Less than one-fifth of labels had a title that sold over 4,000 units in the twelve-month period.

TABLE 21 Unit sales of each label's best-selling title in 2008 (% of all labels)

Less than 100	15
101 to 500	39
501 to 1000	3
1001 to 2000	15
2001 to 4000	6
More than 4000	18

Table 22 shows where jazz labels sell their releases in the UK. While over 80 per cent of labels distribute through record stores, more than half of the labels state their CDs are sold at gigs, including almost all musician-owned labels that issue their owner's recordings.

TABLE 22 How jazz labels sell CDs 'offline' in the UK (% of all labels)

At gigs	54
In record shops through a distributor	84
In record shops supplied by the label	9
By mail order	63
Other	6

Table 23 below shows that traditional 'bricks and mortar' record shops are becoming less important for jazz labels. Only one-third (32%) said that more than half of sales came from shops, with 40% stating that less than one quarter came from this source.

TABLE 23 Proportion of each label's sales through record shops (% of all labels)

Less than 25%	40
26% to 50%	28
51% to 75%	19
More than 75%	13

One reason for this low proportion of record store sales is the fact that almost all jazz labels sold mail order CDs online. Almost 80% used their own website and almost one third use the specialist site jazzcds.

TABLE 24 Online CD sales (% of all labels)

own website	78
jazzcds.co.uk	30
Other online music retailer (eg Amazon, HMV)	78
None	3

Most – 70 per cent – of jazz labels were also selling their releases online as downloads, almost all through iTunes, although one quarter could also sell directly from their own website, as shown in Table 25 below.

TABLE 25 Download sales in 2008 (% of all labels)

Own website	24
iTunes	63
other online retailer	27
no downloads available	30

In terms of the geographical spread of sales, about half (53%) of the jazz labels responding to the questionnaire stated that less than 10% of their sales came from outside the UK. A further 12% said their overseas sales were between 11% and 25% of the total and about a third (36%) stated that more than one quarter of sales were made to consumers overseas.

In the area of marketing and publicity, jazz labels in general were using digital media in 2008. All labels stated that they sent text messages and 72% that they sent e-mails to publicise new releases. However, only 18% uploaded videos of performances to one or more internet sites.

Finally, labels were asked if they received any subsidy for their activities. Just over half (57%) had no subsidy. As the Table below shows, many others had financial help from Jazz Services, arts councils or both.

TABLE 26 Sources of subsidy for jazz labels in 2008 (% of all labels)

Jazz Services	42
Arts councils	42
Other	3
No subsidy	57

Chapter 4 Broadcasting, print and online media

As part of this research, we surveyed the coverage of jazz in the mainstream print and broadcast media in November 2007 and January 2008. A detailed report of that research was published as *Jazz in the Media* and can be downloaded from the website of Jazz Services Ltd. As part of this chapter, we summarize the conclusions of that report.

4.1 Jazz in the print media

Among the 'broadsheet' newspapers, we found that classical music continues to have considerably more column inches and airtime than jazz, and even world music in some places had more coverage than jazz. With the exception of *The Guardian*, the daily papers gave classical music at least three times as many column inches than they gave to jazz. The gap was even wider in the Sunday papers, which gave a weekly average of 270 inches to classical against only 27 for jazz, a ratio of 10 to 1.

The broadsheets continued for the most part to be London-centric. Few papers employed reviewers from the regions and those that did - *The Guardian*, notably - usually did not use them for jazz performance. London-based critics covered only large regional festivals or major tours that commenced outside the capital. Otherwise, reference to non-London events was basically confined to previews within the listings sections.

Jazz is not the musical Cinderella that the media, through ignorance or disinterest, wishes it to be. The media have the power to create a miasma of indifference that limits the growth and acceptance of this wonderful music.
Trad to straight ahead drummer, male aged over 65, Northern Ireland.

4.2 Jazz on television and radio

In 2008, the only television channels likely to include jazz in their schedules were Channel 4, the digital station BBC 4 (which covered the 2007 Brecon Jazz Festival) and the satellite subscription station Sky Arts. In the first week of the 2007 London Jazz Festival, Sky Arts broadcast 450 minutes of jazz compared with 1250 minutes of classical music programming while BBC 4 actually gave more airtime to jazz – 225 minutes against 175 for classical. It should be noted, however, that both Sky Arts and BBC 4 repeat programmes soon after their first transmission. During this particular week, Channel 4 had no jazz programming.

BBC national radio's jazz output is confined to Radio 2 and Radio 3. The latter has become vigorous in recent years in sponsoring live events for which it can obtain broadcast rights, notably the London Jazz Festival. Nevertheless, Radio 3 remains at heart a classical music station. Separate research by Stuart Nicholson, Emma Kendon and Chris Hodgkins for Jazz Services Ltd has found that the share of airtime on Radio 3 for classical music is 88% as compared to jazz with 3%. The number of listeners to

jazz between the ages of 15 – 24 for four programmes on Radio 3 was 10,000 as compared to theJazz which cited 53,000, albeit under 15 years of age.
In 2008, both Radio 3 and Radio 2 had four regular jazz based strands and across these eight shows featured a mix of jazz styles both from the archives and new releases, along with a certain amount of live performance.

Radio 3 transmitted nearly six hours a week of regular jazz programming, although this could be augmented - as it was during the LJF period - with jazz sessions being placed in its *Performance On 3* and lunchtime concert slots. In addition, Radio 3's late-night show *Late Junction* had a very wide-ranging brief embracing jazz, world, new classical and electronica.

There was (and remains) bias towards London on BBC Radio 3 with the vast majority of broadcasts of jazz made in London or the USA. Between January 2007 and August 2008, 70.4% of Radio 3 jazz output consisting of performances at venues came from London, USA and Europe and only 29.6% from the UK nations and regions. There was little or no reciprocity between broadcasts featuring US musicians in the UK and broadcasting British musicians in the USA.

Radio 2, with a more modest 3.5 hours a week, tried to satisfy the more conventional jazz fan, with three of its regular shows, *Best of Jazz*, *Big Band Special* and *Malcolm Laycock* geared towards music from so-called classic periods. Only Courtney Pine's programme focused on contemporary music.

Outside of these two stations, jazz broadcasts were much more infrequent. Gilles Peterson's two hour weekly late night show on Radio 1, occasionally included a jazz track into its mix of hip hop, funk, soul and Latin music. But the BBC included Peterson's show in its own online guide to jazz programming across the radio network.

It is arguable that several other shows listed in this guide did not qualify as jazz programmes. Among these were Michael Parkinson's Sunday morning show on Radio 2, and, on 1Xtra, both *Deviation with Benji B* (an underground soul show) and *The Basement* (a more eclectic vintage music show) were claimed as jazz. On 6 Music *Stuart Maconie's Freak Zone*, another eclectic selection of music, is similarly defined.

In 2008, the jazz output of the BBC's local stations added up to 1120 minutes a week. This was divided up between eight stations: Hereford & Worcester (2hrs); Derby (2hrs); Leeds (2hrs); Norfolk (3hrs); Nottingham (2hrs); Scotland (2hrs); Stoke (2hrs) and Ulster (2hrs). Of the stations listed only the following monitored jazz performance in their own locality - Derby, Norfolk, Nottingham, Scotland and Ulster.

With the demise of Jazz FM in 2005, or rather its transformation into Smooth FM, no commercial national AM or FM station was geared towards jazz music. This was unlike the classical world, where Classic FM continued to thrive. Despite protests from the jazz community, in 2008, regulator Ofcom accepted a request from Guardian Media Group, Smooth FM’s owners, for the station to be released from its commitment to broadcast 45 hours of jazz per week. Smooth FM’s playlist was now dominated by 'easy listening' - mainstream pop drawn from the last 50 years. As such it was trying to fit into the Radio 2 mould but without any of that station's forays into non-mainstream music.

Our own research survey did not extend to new digital stations (DABs) but it should be mentioned that these included theJazz. After a positive start, a change of corporate strategy by its owner led to its closure at the end of March 2008. In September 2007 the audience for theJazz was 388,000 and the BBC Radio 3 jazz audience aged 15 and over in June 2007 was 291,000. In addition to its adult audience, theJazz had 53,000 people under the age of 15 listening in each week, giving a total weekly listenership for the station of 441,000. RAJAR listening figures for theJazz at time of its closure were 407,000.

While 15% of BBC Radio 3's audience was listening to jazz programmes, *theJazz* audience was equivalent to 20% of the total BBC Radio 3 audience figures and therefore greater than the Radio 3 jazz audience. Media commentators felt this was an indictment of the BBC's jazz policy when on a limited digital platform and without the obvious advantages unique to a public broadcaster, *theJazz* was able to produce such audience figures in a relatively short time span.

4.3 Specialist jazz labels and the media

The questionnaire sent to specialist jazz record labels asked them about their relationship with print and radio media. As might be expected, the labels reported the sector of the print media that reviewed most new releases to be specialist jazz magazines. As Table 27 below shows, albums from almost three-quarters of labels (72%) received one or more notices in these magazines. The performance of national and regional newspapers was less impressive. These reviewed albums issued by less than half the labels.

TABLE 27 Publications reviewing releases from jazz labels in 2008 (% of all labels)

Specialist jazz press	72
National press	48
Local or regional press	45
Other	30
No reviews	12

The specialist press was also the principal locus of advertising for jazz records, as the Table below shows. Very few labels could afford to use the national press, although almost half (45%) advertised their releases online.

TABLE 28 Advertising by specialist jazz labels in 2008 (% of all labels)

Specialist jazz press	60
National press	6
Online	45
Other	15
No advertising	18

The vast majority of jazz labels said that one or more of their tracks had been played on either or both national (81%) or local (72%) BBC stations in 2008. However, as Table 29 below shows, half also said they had received airplay on ‘commercial’ stations. Given the pop music orientation of almost all ILR stations, this seems a high figure, although it may possibly include community radio stations which are generally more receptive to non-mainstream music.

TABLE 29 Airplay for specialist jazz labels in 2008 (% of all labels)

BBC national radio	81
BBC local radio	72
Commercial radio	51
Jazz FM	9
Other (please state)	18
No airplay	3

The lack of broadcasts of live jazz compared to orchestral music, opera and ballet is disgraceful.
Trad, bop, post-bop saxophonist and flautist, male aged over 65, North West England

Chapter 5 The audience for jazz

Our own research brief and budget did not allow for original research on the jazz audience. This section therefore summarizes relevant national and regional surveys covering 2008 or adjacent years undertaken by various organisations.

5.1 Audience research

Arts Council England (in conjunction with the Department for Culture, Media and Sport), the Scottish Arts Council and the Arts Council of Wales all commissioned research into the size of the audience for different art forms in 2008-9.

The ACE/DCMS survey was the latest in a series called *Taking Part*, for which 29,000 adults in England were questioned about their attendance at arts events during the previous 12 months (see Martin et al 2010). The results for various music genres are shown in Table 30 below, compared with the results for 2005. In this Table 'other live music event' includes popular music from pop and rock to folk and world music.

TABLE 30 England 2008 and 2005: percentage of adults attending music performances in the previous 12 months

	2005	2008
Classical concert	8	8.1
Jazz performance	6	5.7
Opera or operetta	4	4.0
Other live music event	24	27.4
Stage musical	n/a	22.4

It should be noted that the figures for 2005 were rounded up to whole numbers, while those for 2008 are more precise. The 2008 data was also published showing the 'margin of error', which in the case of the 5.7% figures for jazz was plus or minus 0.5. From this, we can conclude that *Taking Part* found no change in the proportion of adults who had attended at least one jazz gig. The same was true of classical music and of opera, whose audience remained two-thirds the size of that for jazz. There was, however, a small increase in those going to popular music events and in 2008, 22.4% of adults had attended a musical, a category not included in the 2005 survey.

The Scottish research was also called *Taking Part*. It concluded that the audience for live jazz was made up of 5% of adults, unchanged from 2006 but slightly fewer than in 2004. Table 31 shows (as in England) that the jazz audience was slightly smaller than that for orchestral music but larger than the audience for opera.

TABLE 31 Scotland 2004, 2006 and 2008: percentage of adults attending music performances in the previous 12 months

	2004	2006	2008
Classical concert	3	7	6
Jazz performance	6	5	5
Opera or operetta	6	5	4
Other live music event	24	22	27
Stage musical	15	18	n/a

In Wales, the 2008 Beaufort Omnibus Survey found that 7% of adults had been to a jazz event, fewer than in any year since 1999. There was no difference between the percentages of men and women attending jazz concerts. Of the music genres listed, only opera had smaller audiences.

TABLE 32 Wales 2004, 2006 and 2008: percentage of adults attending music performances in the previous 12 months

	2004	2006	2008
Classical concert	11	11	11
Jazz performance	9	8	7
Opera or operetta	7	4	6
Other live music event	40	38	40
Folk/traditional/world	n/a	8	11

The Welsh research also included information on the age range and social class of the jazz audience. It showed that a higher proportion of social groups A and B (13%) had attended jazz concerts than that of the C1 group (9%), C2 (7%) or D and E (only 3%). The percentage of each age group that had heard live jazz in 2008 is shown in Table 33. While these results show that the jazz audience contained a higher proportion of the 45-64 group (9%), this was only slightly more than the 8% of the younger element of the population.

TABLE 33 Wales 2008: age range of the jazz audience (% of each age group)

16-24	25-34	35-44	45-64	65 +
8	8	5	9	4

There is also data on the age distribution of people attending jazz events throughout the UK. Table 34 shows the proportion of the jazz audience to be found in each age group from 15 years upwards, compared with the age distribution of the general population. The audience figures are drawn from the regular BMRB Target Group Index survey of arts audiences and participation.

TABLE 34 Age range of jazz audiences (15 and over) in the UK 2005 and 2008-9 (%)

	15-24	25-34	35-44	45-64	65 +
jazz audiences 2005	15	14	16	35	20
jazz audiences 2008-9	17	18	16	34	15
general population	16	16	18	30	20

The 2005 statistics show a significant bias towards the over 45s, with these constituting 55% of jazz audiences but only 50% of the general population. However, the 2008-9 results indicate a more youthful audience, with jazz listeners mirroring the general adult population, which is split almost equally between people aged between 15 and 44 and those aged 45 and upwards. In fact, the jazz audience had a greater share of young people aged between 15 and 34 (35%) than did the general population

(32%). Nevertheless, these figures are based on a small sample of the national population and the margin of error is relatively high. Also, as Chris Hodgkins (2009) has pointed out, the proportion of younger people in the jazz audience has fallen compared with the first Target survey made in 1986.

5.2 Audience development

While *Taking Part*'s headline figures tell us only the overall size and demographics of audiences, other research has focused on specific attitudes and characteristics of that audience.

Catherine Bunting et al have analysed the *Taking Part* data for England and concluded that, in terms of attending arts events, the adult population can be divided into three categories. These are those whose involvement is 'little if anything', those who attend 'now and then' and those who are 'enthusiastic' about the arts. In relation to music, 91% of the population fall into the 'little if anything' group, the 'now and then' group consists of 5% and the 'enthusiastic' group contains just 3% of the adult population.

According to this research, none of the largest group ('little if anything') attended classical music concerts and very few went to opera or jazz performances (2% and 3% respectively). However, about one quarter of this large group of adults had attended at least one popular music event and 11% stated they had been to more than three.

One striking feature of the 'now and then' category was that almost all (95%) its members had been to one or two classical music concerts and 38% to at least one opera performance. The attendance figure for jazz was 23% of people classed as 'now and then' and a quarter of this group had been to more than two jazz gigs. The number of the 'now and then' category who went to popular music shows was 33%, higher than for jazz but lower than for classical music and opera.

Classical music fans also dominated the music event attendance of the 'enthusiastic' group, 99% of whom had been to at least three classical concerts in the previous year. Jazz attendance among this group was 26%, with 14% going to at least three gigs. This was again fewer than the numbers going to either opera (37%) or popular music events (33%). The next table summarizes these numbers for jazz only.

TABLE 35 Frequency of attendance at jazz events in England by type of audience 2008 (% of each category)

Category of audience	% of all adults	no jazz events	1-2 jazz events	3+ jazz events
little if anything	91	96	3	1
now and then	5	78	17	6
enthusiastic	3	74	12	14

Whether or not we are persuaded by the division of the population into these three categories, the data on frequency of attendance enables us to calculate that of the 5.7% who had been to at least one jazz event in 2008, just over one quarter or 1.6% of the adult population constituted a core audience for jazz in England in that they had attended three or more gigs. This figure is exactly the same as that found in a 2003 survey by TGI and reported on page 23 of our previous report. At that time we estimated the size of this core audience to be about 500,000.

Those responsible for the analysis of Scottish audiences went even further in dividing the population into six ‘attitudinal segments’ in terms of their consumption of the arts. These were the Time Poor (21% of all those over 16), Prudent Participants (17%), Restricted (17%), Opting Out (14%), Free (17%) and Experienced Seekers (14%). Only one group, Free, typically young and from the ABC1 social groups, was specifically cited as having a higher than average interest in jazz.

A further piece of audience research was carried out early in 2009 for EMJAZZ, a consortium of five East Midlands promoters, by consultant Heather Maitland. She distributed questionnaires to audiences at 23 jazz gigs in the region and followed up by holding a series of focus groups. Maitland found that over 90% of audience members were local, living within a 30 minute drive of the venue. The majority were aged over 45 and almost half (45%) were women.

Heather Maitland also broke down the audiences into categories, but defined these both by the frequency of audience members’ attendance at live music events and their level of commitment to jazz. The next Table shows the six categories used by Maitland and the proportion of jazz audiences corresponding to each.

TABLE 36 The Jazz Audience in the East Midlands Jan-Feb 2009 (% of attendees)

Musical Omnivore	47
Jazz Focused Musical Omnivore	17
Jazz Avid	15
Jazz Occasional	9
Dipper	9
Rare Sighting	4

Nearly half of the audiences (47%) consisted of Musical Omnivores, defined by Maitland as those who ‘attend live music frequently but jazz is not their main interest’. The next largest group, at 17%, the Jazz Focused Musical Omnivores, were similar except that jazz is their main interest. Very similar in size were the Jazz Avids, defined as those who ‘attend live music frequently, mainly at jazz’. The other three audience categories corresponded closely to the Little if anything group identified by Bunting at al. Jazz Occasionals, Dippers and Rare Sightings were all infrequent or rare attenders at live music events, but the first attended jazz events more often than concerts of other genres.

Chapter 6 Jazz education

In our earlier report we wrote that "teaching is an important component of the work and income of jazz musicians". This remained the case in 2008, when some 57% of musicians responding to our questionnaire did at least one form of teaching in 2008 compared with 58% in 2005. The Table below compares the situation in 2008 with that in 2005.

TABLE 37 Jazz musicians' education work (% of all musicians working as teachers)

Type of work	% in each type 2005	% in each type 2008	% with most teaching income from each type 2005	% with most teaching income from each type 2008
Private tuition	43.0	49.9	30.0	31.6
Schools	17.5	21.1	11.8	15.8
Peripatetic	14.3	16.9	10.5	14.3
Further ed	10.0	9.1	5.4	6.1
Higher ed	15.0	16.1	11.3	11.1
Outreach	6.5	6.6	3.0	3.6
Examining	4.8	5.0	1.4	1.7
other	10.0	10.0	6.4	6.4

With the exception of further education, there was a growth in the numbers involved in all types of instrumental teaching and assessment in 2008. Private tuition remained by far the most frequently mentioned form of teaching, with half of all teaching jazz musicians doing some work of this kind and almost one-third deriving the largest amount of their income from teaching pupils privately. There were smaller but significant increases in the numbers involved in schools and peripatetic work, while the proportion of musicians teaching in higher education and examining grew only slightly.

6.1 Higher education

The first ever British Jazz Expo at the annual International Association of Jazz Educators (IAJE) meeting took place in Toronto in January 2008. Here a strong contingent of undergraduate and postgraduate jazz musicians made a strong impression on North American jazz educationalists.

To some extent, the Toronto performance reflected the continuing growth in the presence of jazz in university and college music departments throughout the UK. To quote a recent survey of the state of British jazz by Stuart Nicholson:

One of the contributing factors to a revitalised National jazz scene can in part be ascribed to the success of jazz education programmes in universities, colleges and conservatories throughout the country. Today, the majority of contemporary jazz musicians under the age of thirty are likely to have been exposed to some form of jazz education, usually at conservatory level. The day of the autodidact is largely over, replaced by a new era of university educated jazz musicians, with the consequent raising of musical standards nationally. More and more young musicians are now finding a pathway into jazz that often follows the Associated Board's jazz curriculum of graded examinations culminating in a conservatory education. Today, all the London jazz conservatories are over subscribed annually, with some 200 students graduating nationally with jazz related degrees, a number that is set to rise as more music departments add jazz studies to their curriculum. (Nicholson 2009)

We estimate that in 2008 there were at least 600 undergraduates studying for a B Mus or BA hons degree, compared with the figure of 490 for 2004-5 quoted in our previous report. This increase of about 20% was due both to expanding numbers of students on existing courses and the introduction of new specialist jazz degree courses, such as those at the Royal Scottish Academy of Music and Drama, which launched in 2009.

6.2 Further and continuing education

In 2008, specialist jazz courses remained few and far between in the further education (FE) sector, although there continued to be scope for jazz education in the numerous popular music or music technology courses to be found in FE colleges, depending on the preferences of tutors and individual students. We estimate that in 2008 the overall spending on jazz in FE has remained at its 2005 level of £400,000, providing four full time equivalent posts and up to 14 visiting tutor posts. There was a greater amount of activity in continuing education. Evening and weekend courses in jazz at such institutions as Goldsmiths in London remained popular in 2008 and new initiatives included the jazz pathway programme at the University of Strathclyde. This was intended to prepare students to join the Strathclyde Youth Jazz Orchestra or the university's degree course in Applied Music.

6.3 Private instrumental teaching and external music examinations

Almost 30% of musicians responding to our questionnaire stated that they gave individual lessons on their instrument. The vital role of private tuition in the working lives of many jazz musicians in 2008 reflected a growing demand among both adults and young people to learn to play jazz. Linked to this was the involvement of such students in the music graded examinations system, which also provided some employment for a small number of musicians as examiners.

6.4 Residential and short courses and community initiatives

In our earlier report we concluded that the short course and residential school sector was thriving and in 2008 there was considerable evidence that, if anything, this sector had increased in size and scope. In 2005, we estimated that over 25 courses employed UK musicians as tutors and this number had grown by 2008. One important new initiative was the National Youth Jazz Collective (NYJC). Founded in 2007, the NYJC described itself as a 'centre of excellence, delivering coherent programmes of study'. These included regional workshops and a national summer school, as well as activities to prepare students for higher education courses. Huddersfield University was one of several venues for NYJC events. The NYJC is funded by the charity Youth Music.

We should include here the small but increasing provision of professional training, often funded through subsidy from arts councils and charitable trusts. The outstanding example of this is the Take Five project operated by Serious and funded by PRS for Music Foundation and the Jerwood Charitable Foundation. The scheme allows some eight young jazz musicians to discuss, explore and strengthen all aspects of their future careers.

6.5 Schools music teaching (classroom and peripatetic)

In our first report we quoted data to show that a very small number of classroom music teachers had any qualification in non-classical music as a whole, but there is evidence that this situation was improving by 2008. Opportunities for jazz in schools were also boosted by the higher priority given to music and the arts, especially in the primary sector. By 2008, the Widening Participation scheme for specialist instrumental tuition in England had been extended to considerable numbers of children at key stage 1 and key stage 2, providing extra work for both full-time school music teachers and freelance tutors, including jazz musicians (Hallam et al. 2007).

Local authorities' Schools Music Services remained an important feature of jazz teaching in schools. This was recognised in the diplomas for 'outstanding commitment to jazz education' given by Jazz Services Ltd to the music services of Devon and Southampton during 2008. Southampton was one of many music services to organise and fund a youth jazz orchestra. Wigan was unusual in having a schools wing band and youth big band in addition to its youth jazz orchestra.

TABLE 38 Annual spending on jazz education and training 2008 and 2005 (£ million)

Type of education or training	2005	2008
Higher	5.64	6.68
Further and continuing	0.82	0.85
Private tuition and exams	1.14	1.33
Residential and short courses	0.85	1.00
Schools and peripatetic	3.47	4.00
Youth Music	0.15	0.22
TOTAL	12.07	14.10

The standard of young musicians leaving college is of an unprecedented high. Teaching is where most will earn money to support their income from playing.
Contemporary/modern saxophonist/flautist, male aged 56-65, London

Chapter 7 Profile of the musicians

At the moment I make most of my income through gigging. It's a precarious living, to say the least, but a uniquely rewarding one. I play with a number of different bands and have travelled a lot in the past ten years, met many great people and been involved in some fantastic projects. Now's a great time to be a jazz musician; there are some excellent venues and labels in this country and societies run by dedicated and fanatical jazz lovers. The scene is vibrant – there have never been so many new bands and collectives.
Tom Cawley, pianist (*The Guardian* November 2008)

This chapter summarises the questionnaire data on British jazz musicians themselves. Table 39 shows that in 2008, compared with 2005, the proportion of the respondents living in London and South east England has fallen from over half (53%) to 45%. There were smaller increases in the numbers resident in other parts of the UK.

TABLE 39 Geographical locations of UK jazz musicians (% of total)

Region	2005	2008
London	33	30
SE England	20	15
SW England	12	13
Midlands	9	11
NE England	7	6
NW England	7	10
E England	4	7
Scotland	3	4
Wales	2	3
N Ireland	1	1
Other	2	-

Jazz UK magazine lists all the performances in the UK submitted to it. Analysis of one issue in 2008 showed that the highest number of venues for jazz was in the North of England, which had 37%. The number of venues listed for London was much lower, at 11.7%. However, the capital city has the highest number of venues with multiple jazz gigs each month, while many of those listed in *Jazz UK* may host only one or a handful of gigs a month.

TABLE 40 2008 Geographical distribution of UK jazz venues (% of all venues)

London	11.7
South of England	19.5
Central England and Wales	19.5
North of England	37.0
Scotland and Northern Ireland	12.5

Jazz continues to be a low wage sector, partly because of the relatively low price of tickets to jazz events. As we saw in Chapter 1, 70 per cent of promoters charged £10 or less in 2008, of whom 13 per cent charged no entrance fee.

The annual income reported by musicians for 2008 showed 80 per cent were paid less than the national average wage of about £25,000. This figure is almost the same as in 2005, although Table 41 shows in 2008 there was an increase in the proportion stating their earnings were above £35,000.

TABLE 41 Musicians' annual earnings from music (% of musicians)

Annual earnings	2005	2008
Less than £5000	33.9	30.6
£5001-10000	18.9	21.3
£10001-15000	15.0	11.4
£15001-20000	11.0	9.9
£20001-25000	6.1	7.3
£25001-30000	6.3	5.8
£30001-35000	3.3	3.5
Above £35000	5.6	10.2

I think there is a good jazz scene in England. However, there is not enough money in the scene. 80 per cent of my gigs are jazz and 75% of my jazz gigs are poorly paid. It's a good job I love music!
Standards, swing contemporary drummer, male aged under 26, North West England

Table 42 below shows the sources of jazz musicians' income in 2008 and in 2005. The main change over the three year period is a shift in the two largest sources of income, away from performance fees to teaching. In 2005, live work provided almost half of jazz musicians' earnings (49.1%). By 2008, this had fallen by almost four percentage points to 45.3% while the proportion of average income from teaching had increased by almost the same amount, from 20.7% in 2005 to 24.2%. Among the other categories of work, there was little change between 2005 and 2008, although the 2008 respondents reported a lower average percentage of income from work outside music and slight increases in most of the smaller areas of musical income.

TABLE 42 Sources of musicians' income 2005 and 2008 (percentage of total income)

	2005	2008
Live performance	49.1	45.3
Broadcasting	1.2	1.3
Recordings	3.6	4.1
Composing and arranging	2.2	2.8
Teaching	20.7	24.2
royalties	3.1	3.7
Other music work	4.4	6.0
Non-music sources	15.7	12.6

The next Table breaks down the most important areas of work for jazz musicians. The questionnaire asked musicians to state their three main areas of live performance, in terms of both frequency of gigs and of level of payment. It is striking that there is almost no change in the 2008 results from those of three years earlier.

The venues mentioned most often in terms of the quantity of work were jazz clubs (mentioned by 70% of musicians for 2008 and 68% for 2005), pubs (mentioned by 66% and 65% respectively) and festivals (61% and 62%). The types of venues given most often as main sources of income in 2008 were hotels and restaurants (mentioned by 37% of respondents compared with 39% in 2005), jazz clubs (32% compared with 28%) and festivals and outdoor events (29% compared with 28%).

TABLE 43 UK jazz musicians. Main sources of live performance income

source of work	% of main work sources 2005	% of main work sources 2008	% of main income sources 2005	% of main income sources 2008
Ballrooms	4	4	3	4
Concert halls/ arts centres	13	14	14	14
Cruise ships	1	1	2	1
Festivals and outdoor	16	16	14	15
Holiday centres	2	1	1	1
Hotels and restaurants	15	15	20	19
Jazz clubs	17	18	14	16
Theatres	8	7	8	8
Pubs	16	17	12	12
Other	8	7	12	10

In the 2008 research, 17% of those returning the questionnaire were female, compared with 14% in 2005. Musicians were also asked to state their ethnic background. Table 42 shows that there in both 2005 and 2008, all but 12% of respondents described themselves as White British, and only about 5% were non-white.

TABLE 44 Ethnicity of UK jazz musicians

Ethnicity	2005	2008
White British	88	88
White other	7	7.5
All 'non-white'	5	4.5

Finally, the age profile of jazz musicians has remained heavily skewed towards the middle-aged and elderly. In the 2008 survey, 66% of respondents were aged 46 or more, four percentage points more than three years earlier. The proportion of musicians younger than 36 was only 12% compared with 14% in 2005. Even taking into account the greater likelihood of older people to return questionnaires, these results suggest that the profession as well as its audience may need an influx of younger adherents.

TABLE 45 Age range of UK jazz musicians

Age group	2005	2008
Under 26	3	2
26-35	11	10
36-45	24	19
46-55	22	25
56-65	22	22
Over 66	18	19

Your questionnaire missed an important opportunity to find out how jazz musicians think and feel, e.g. 'What are your feelings about playing jazz?' (tick one)

a) *I'm happy to be a jazz musician and I enjoy my life*
b) *I'm partly happy and partly frustrated*
c) *I'm mainly frustrated and have thought about giving up*
d) *I'm so fed up, I'd jump at the chance of another career*

Bebop/post-bebop double bass player, male aged 56-65, London

APPENDIX 1

Bibliography and published sources

ACW 2008 Omnibus Survey. Report on the Main Findings. 2009. Arts Council of Wales

Bunting, Catherine et al. 2008. *From Indifference to Enthusiasm. Patterns of arts attendance in England*. Arts Council of England.

Hallam, Susan, Andrea Creech, Lynne Rogers and Ioulia Papageorgi. 2007. *Local Authority Music Services Provision (2007) for Key Stages 1 and 2*. Institute of Education, University of London for Department of Education.

Hodgkins, Chris. 2009. *Problems Arising From Changing Demographics*. Jazz Services Ltd. Available at www.jazzservices.org.uk

Maitland, Heather. 2009. *Understanding Audiences for Jazz*. Derby, EmJazz. available at derby-jazz.co.uk

Martin, Vanessa et al. 2010. *Arts Engagement in England 2008/09. Findings from the* Taking Part *survey*. Arts Council of England.

Nicholson, Stuart. 2009. ‘A Short History of British Jazz’ in Britjazz Breaks Out, A Guide to British Jazz. Jazz Services Ltd.

Nicholson, Stuart, Emma Kendon and Chris Hodgkins. 2009. *The BBC – Public Sector Radio, Jazz Policy and Structure in the Digital Age*. Jazz Services Ltd. Available at www.jazzservices.org.uk

Taking Part in Scotland 2008. Full Report of Survey Findings. 2008. Scottish Arts Council.

APPENDIX 2

Acknowledgements

In compiling this report, the researchers received advice and assistance from many individuals and organisations. We would like to acknowledge in particular the assistance of the following:

Issie Barrett, National Youth Jazz Collective
Brian Blain, Jazz UK
Gary Crosby, Dune Music
John Cumming, Serious
Chris Hodgkins, Jazz Services Ltd
Jonathan Robinson - Music Tank
Will Page, Chief Economist, PRS for Music
Dale Perkins, Leeds College of Music
Nigel Slee, Jazz Yorkshire
Jason Toynbee, Open University
Geoff Wright, East Midlands Jazz

APPENDIX 3

Methodology

The researchers used a range of methods to compile this report. The principal methods were:

1. Postal Questionnaires

Three lengthy questionnaires were constructed with the assistance of Andrea Oskis of the University of Westminster.

The first of these was sent to over 2,000 musicians listed on the Jazz Services database. The response rate was about 28%. The second questionnaire was sent to UK based promoters listed on the Jazz Services Ltd database. The response rate was about 12%. Both questionnaires were almost identical to those which formed the basis of our earlier report, permitting direct comparisons between many aspects of the jazz scene in 2005 and 2008.

The third questionnaire was sent to a smaller number of jazz record companies, again listed in the Jazz Services Ltd database. Replies were received from 17% of companies.

2. Content analysis

This type of research was used mainly in two areas. Detailed surveys of jazz coverage in print publications and national radio and television networks form the basis of chapter 4. Content analysis was also used in examining listings in Jazz UK and other publications to estimate the amount of live jazz.

3. Interviews

A number of open-ended (unstructured) interviews were carried out with a wide range of individuals involved in the jazz industry in the UK.

4. Analysis of published reports and accounts

Annual reports of arts councils and information published by local authorities, various funding bodies and educational institutions were consulted to provide information on subsidy and sponsorship. Chapter 5 relies heavily on published results of market research surveys of audiences for the arts.

APPENDIX 4

The Researchers

Mykaell Riley is Head of Music Production in the School of Media, Art and Design at the University of Westminster. He is the founder of the Centre for Black Music Research – UK, which focuses on developing new research/music/educational projects for the BME community. As a musician and producer, he founded the Reggae Philharmonic Orchestra and has worked with Soul II Soul, Bjork, Sly and Robbie, Baaba Maal and many others.

Dave Laing is Visiting Research Fellow in the School of Music at the University of Liverpool and a visiting lecturer at City University, London. His previous research activities include projects for the Musicians Union, the European Music Office and the Welsh Music Foundation.

Mick Sawyer and Jan Euden carried out the primary research for the special report *Jazz in the Media*. This provided some of the data for chapter 4 of this edition of *The Value of Jazz in Britain*.

Robin Law of the University of Westminster was responsible for the initial analysis of the questionnaire results.